UNIVERSITY of West Georgia | Center for Business Excellence

Budget Overview Setup Instructions

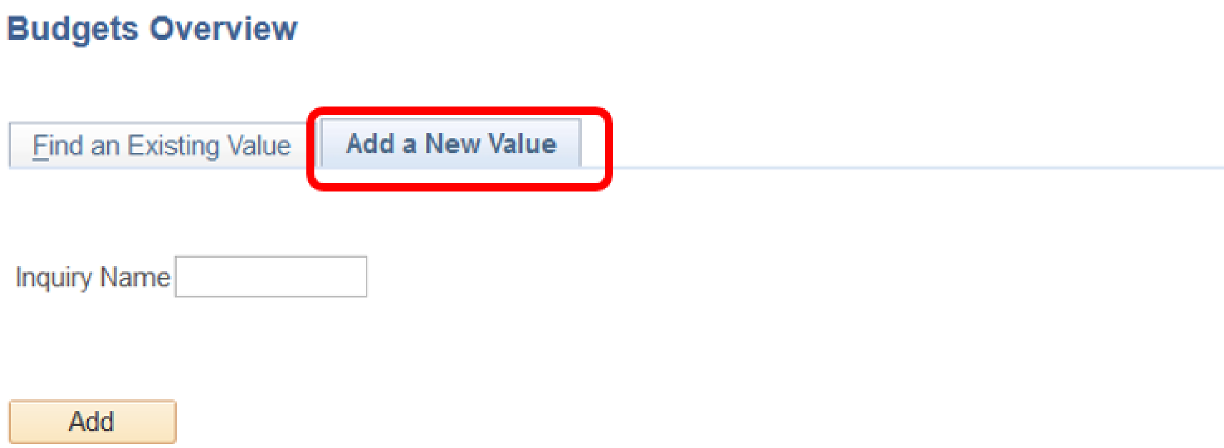
This report is used at a summary level. While you can drill down to some detailed transactions, it is most used to see the amount of funds available in a budget. You can also drill down to see the detailed transactions for your spending authority.

The following URL will take you to the PeopleSoft Financial system. You will log in using your PeopleSoft login and password.

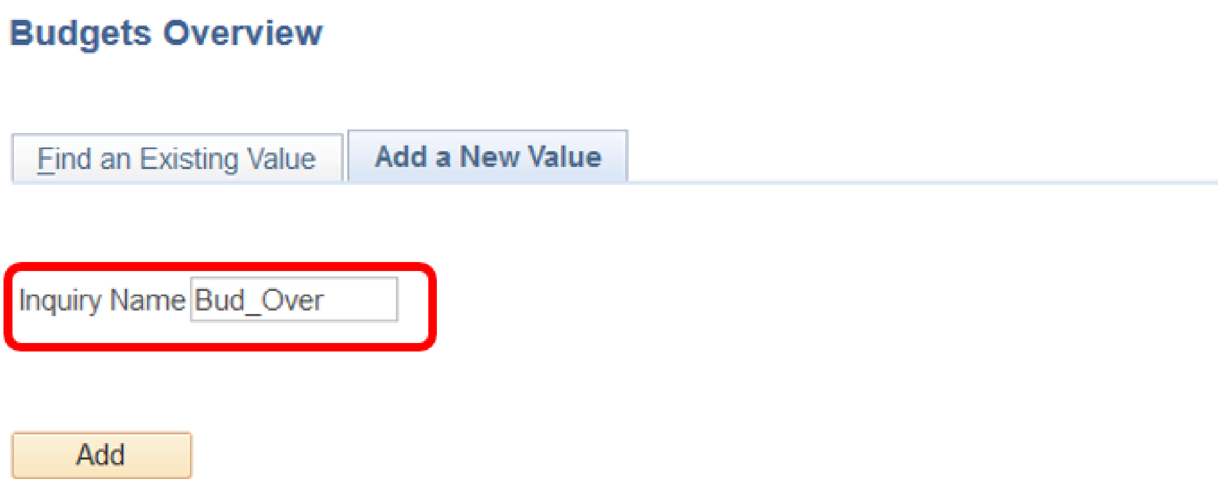
https://fprod.gafirst.usg.edu

1. Click on the **NavBar** (compass icon).
2. Click the **Navigator** icon.
3. Click **Commitment Control** from the menu listing.

4. Click **Review Budget Activities**.
5. Click **Budgets Overview**.
6. First time users of this report will need to set up an **Inquiry Name** that will be used each time you inquire on an account. Click on the **Add a New Value** tab.



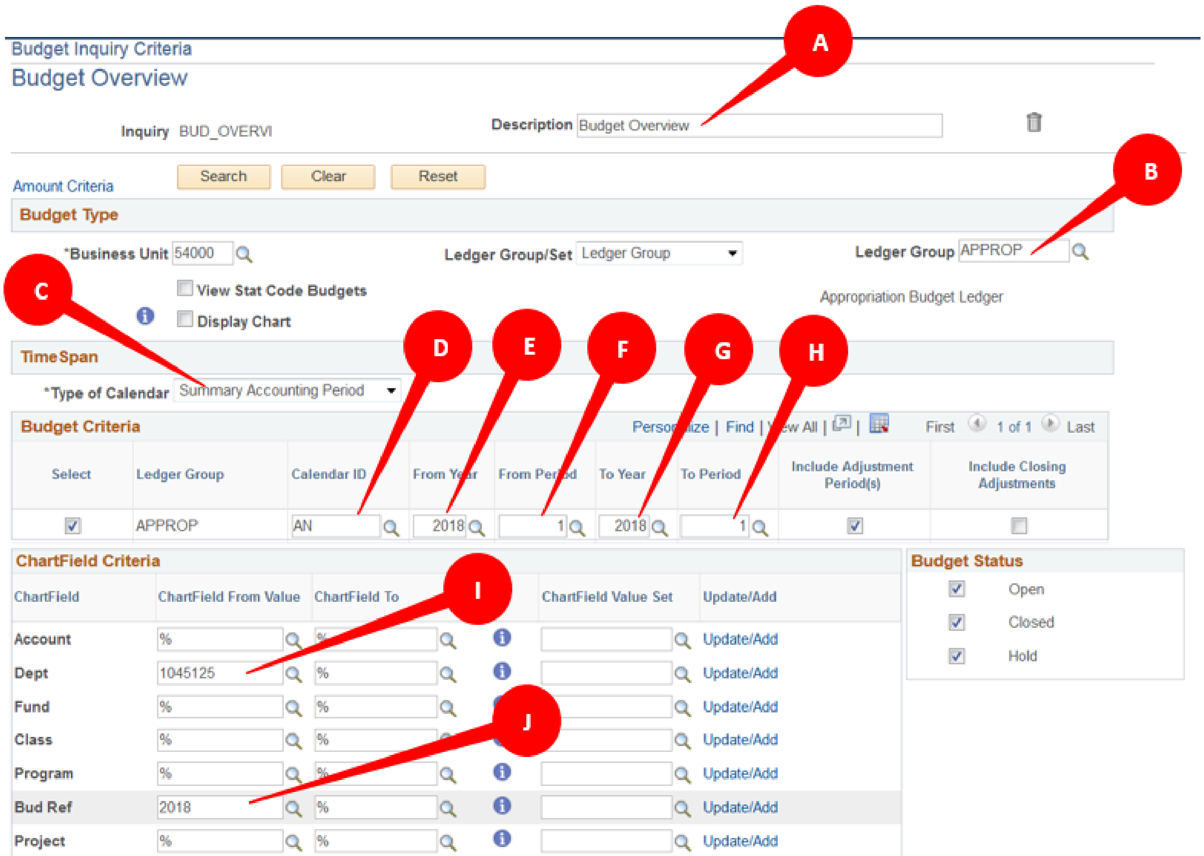
7. Type in a name for the inquiry, underscoring between words, as shown in the screenshot below. Click the **Add** button. For future inquiries, you will click on the **Find an Existing Value** tab to select the inquiry name and run the inquiry in the future. You will not need to create it again for future inquiries.



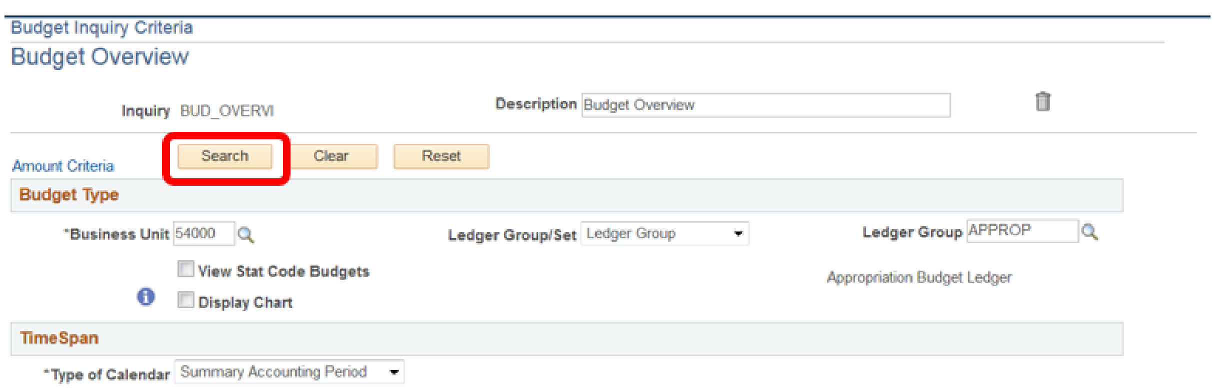
8. The screen for the Budget Overview will appear. Users will need to enter the following:
   a. Description: Enter **Budget Overview**
   b. In the Ledger Group select the appropriate **Ledger Group Description**.
      i. **APPROP** for non-personal services
      ii. **ORG** for personal services
      iii. **PROJ_GRT** for projects and grants
   c. Type of Calendar: **Summary Accounting Period**
   d. Calendar ID: **AN**
   e. From Year: **Current Budget Year**
   f. From Period: **1**
   g. To Year: **Current Budget Year**
   h. To Period: **1**

i. ChartField Criteria Dept: **Appropriate Department ID** (or grant ID for projects/grants)

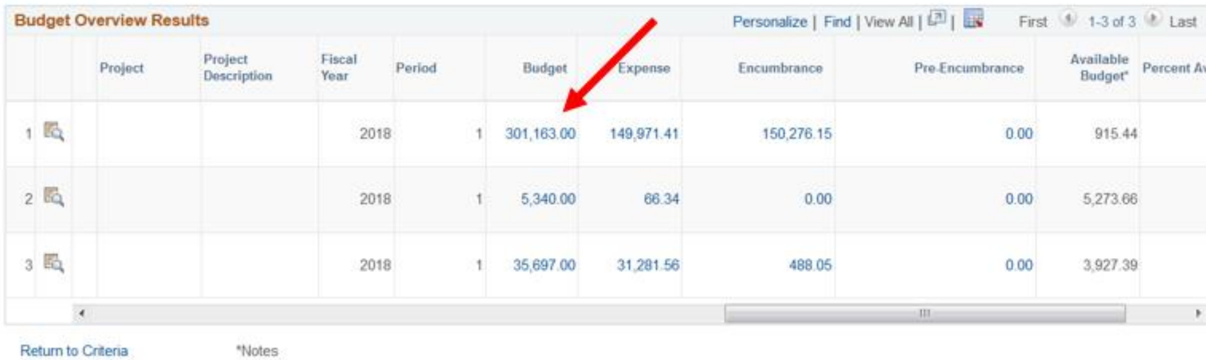
j. Chartfield Criteria Bud Ref: **Current Budget Year**



9. Click the **Search** button.



10. The next screen shows you the detail. From here you may look at the budget details that established the current spending authority. You can also see additional detail for any number that is underlined and in blue font. If you click on the **Budget** amount for an account and fund, the next screen will be a listing of the individual budget journals that together add up to the budget amount shown.



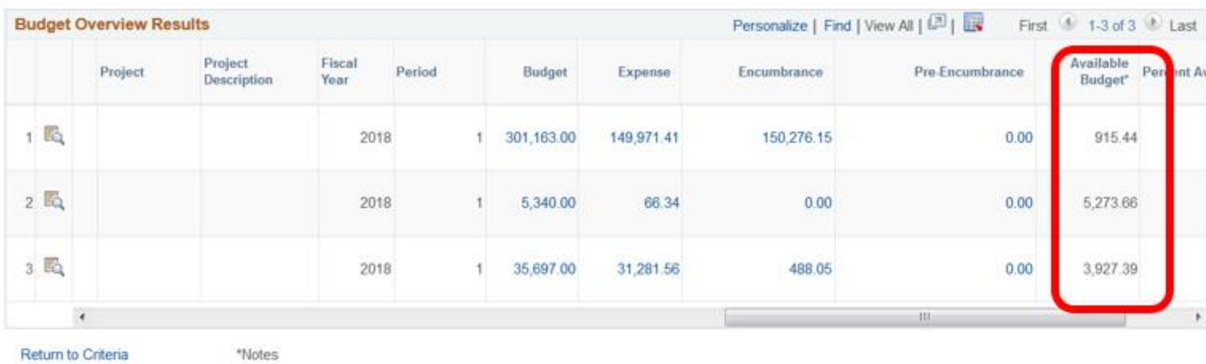
Budget Overview Results

Personalize | Find | View All | First 1-3 of 3 Last

		Project	Project Description	Fiscal Year	Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Av
1				2018	1	301,163.00	149,971.41	150,276.15	0.00	915.44	
2				2018	1	5,340.00	66.34	0.00	0.00	5,273.66	
3				2018	1	35,697.00	31,281.56	488.05	0.00	3,927.39	

Return to Criteria *Notes

11. This screen will also show the **Available Budget** for the particular chartstring.



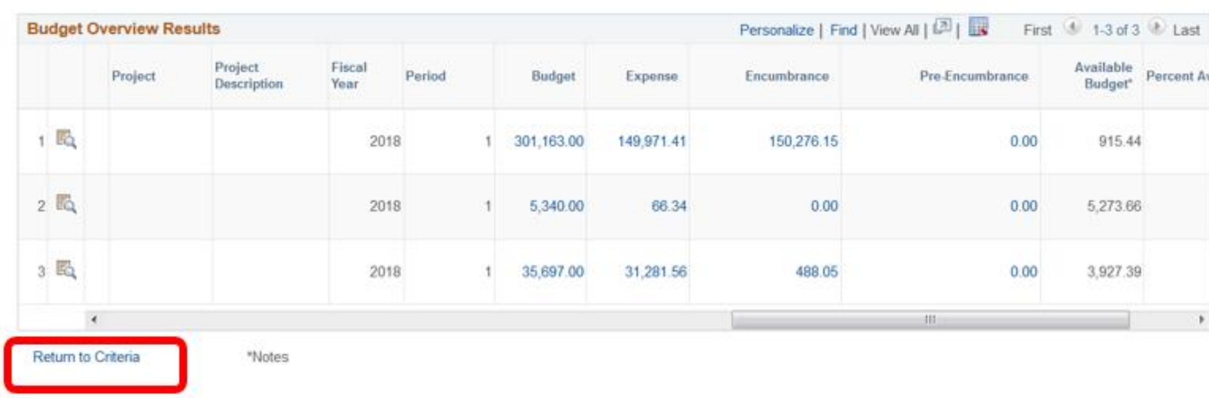
Budget Overview Results

Personalize | Find | View All | First 1-3 of 3 Last

		Project	Project Description	Fiscal Year	Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Av
1				2018	1	301,163.00	149,971.41	150,276.15	0.00	915.44	
2				2018	1	5,340.00	66.34	0.00	0.00	5,273.66	
3				2018	1	35,697.00	31,281.56	488.05	0.00	3,927.39	

Return to Criteria *Notes

12. Click **Return to Criteria** to return to the main Budget Overview page to change any of the inquiry parameters.



Budget Overview Results

Personalize | Find | View All | First 1-3 of 3 Last

		Project	Project Description	Fiscal Year	Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Av
1				2018	1	301,163.00	149,971.41	150,276.15	0.00	915.44	
2				2018	1	5,340.00	66.34	0.00	0.00	5,273.66	
3				2018	1	35,697.00	31,281.56	488.05	0.00	3,927.39	

Return to Criteria *Notes