

Budget Overview Changes Again FY2016! (revised)

The **first time** you try to access Budget Overview in FY2016, you will need to take a different approach. The necessity to perform these actions was not identified until July 1, 2015.

1. When you first access the Budget Overview screen you will notice the Budget Period fields are still showing 2015.

Budget Inquiry Criteria
Budget Overview

Inquiry BUDOVRWAPP Description

Amount Criteria

Budget Type

*Business Unit Ledger Group/Set Ledger Group

View Stat Code Budgets
 Display Chart

TimeSpan

*Type of Calendar

Budget Criteria Personalize | Find | View All | | First 1 of 1 Last

| Select | Ledger Group | Calendar ID | From Budget Period | To Budget Period | Include Adjustment Period(s) | Include Closing Adjustments |
|-------------------------------------|--------------|-------------|-----------------------------------|-----------------------------------|-------------------------------------|-----------------------------|
| <input checked="" type="checkbox"/> | APPROP | YE | <input type="text" value="2015"/> | <input type="text" value="2015"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

ChartField Criteria

| ChartField | ChartField From Value | ChartField To | Info | ChartField Value Set | Update/Add |
|------------|--------------------------------------|--------------------------------|-------------------------------------|----------------------|---|
| Account | <input type="text" value="%"/> | <input type="text" value="%"/> | <input type="button" value="Info"/> | <input type="text"/> | <input type="button" value="Update/Add"/> |
| Dept | <input type="text" value="1045201"/> | <input type="text" value="%"/> | <input type="button" value="Info"/> | <input type="text"/> | <input type="button" value="Update/Add"/> |
| Fund | <input type="text" value="%"/> | <input type="text" value="%"/> | <input type="button" value="Info"/> | <input type="text"/> | <input type="button" value="Update/Add"/> |
| Class | <input type="text" value="%"/> | <input type="text" value="%"/> | <input type="button" value="Info"/> | <input type="text"/> | <input type="button" value="Update/Add"/> |

Budget Status

- Open
- Closed
- Hold

2. Change both Budget Period boxes to 2016 and complete the “new” Budget Reference field on the bottom with 2016.

If you have two rows like below, uncheck the top row with a blank “Calendar ID” field. Leave only the second row checked.

Budget Criteria Personalize | Find | View All | | First 1-2 of 2 Last

| Select | Ledger Group | Calendar ID | From Budget Period | To Budget Period | Include Adjustment Period(s) | Include Closing Adjustments |
|-------------------------------------|--------------|-------------|-----------------------------------|-----------------------------------|-------------------------------------|-----------------------------|
| <input checked="" type="checkbox"/> | APPROP | | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | APPROP | YE | <input type="text" value="2016"/> | <input type="text" value="2016"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

3. Save the form.

Budget Inquiry Criteria
Budget Overview

Inquiry BUDOVRWAPP Description

Amount Criteria Search Clear Reset

Budget Type

*Business Unit 54000 Ledger Group/Set Ledger Group Ledger

View Stat Code Budgets
 Display Chart

TimeSpan

*Type of Calendar Detail Budget Period

Budget Criteria Personalize Find View All

| Select | Ledger Group | Calendar ID | From Budget Period | To Budget Period | Include Adjustment Period(s) | In |
|-------------------------------------|--------------|-------------|--------------------|------------------|-------------------------------------|----|
| <input checked="" type="checkbox"/> | APPROP | YE | 2016 | 2016 | <input checked="" type="checkbox"/> | |

ChartField Criteria

| ChartField | ChartField From Value | ChartField To | Info | ChartField Value Set | Update/Add |
|------------|-----------------------|---------------|------|----------------------|------------|
| Account | % | % | i | | Update/Add |
| Dept | 1045201 | % | i | | Update/Add |
| Fund | % | % | i | | Update/Add |
| Class | % | % | i | | Update/Add |
| Program | % | % | i | | Update/Add |
| Bud Ref | 2016 | % | i | | Update/Add |

Save Return to Search Notify Refresh

3A. Next change the “Type of Calendar” found under the section title “Time Span” to “Detail Accounting Period.”

Budget Inquiry Criteria
Budget Overview

Inquiry 2016REF Description To review 2016 budgets

Amount Criteria Search Clear Reset

Budget Type

*Business Unit 54000 Ledger Group/Set Ledger Group Ledger Group APPROP

View Stat Code Budgets
 Display Chart

TimeSpan

*Type of Calendar Detail Accounting Period

Budget Criteria Personalize Find View All

| Select | Ledger Group | Detail Calendar | From Year | From Period | To Year | To Period | Include Adjustment Period(s) | Include Missing Adjustments |
|-------------------------------------|--------------|-----------------|-----------|-------------|---------|-----------|-------------------------------------|-----------------------------|
| <input checked="" type="checkbox"/> | APPROP | 02 | 2016 | 1 | 2016 | 12 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

3B. In the section below it titled “Budget Criteria” change the fields to:

- Detail Calendar = 02
- From Year = 2016
- From Period = 1
- To Year = 2016
- To Period = 12

3C. **Save** the form again.

4. Next click on “Return to Search.” If you try to skip this step and view the screen you will receive a message that says “No Data Found.”

4A. You need to perform this process for each ledger separately: APPROP, ORG, DETAIL, PROJ_GRT, and REVEST.

5. You need to completely log out of PeopleSoft and start over.

6. When you access the Budget Overview screen again you will need to change the Ledger Group (pick anything). The page should refresh itself.

7. Complete the fields you need to search. Be sure you complete the new “Bud Ref” box. If you leave this blank, it will return every year data is available for this set of choices.