Budget Overview Inquiry

The Budget Overview Inquiry is a query whose results tell you how much was originally allocated into a given budget for the fiscal year; how much has already been expensed *(spent)*; how much is currently encumbered to purchase orders *(about to be spent)*; and how much is currently pre-encumbered to eProcurement requisitions *(about to become purchase orders)*.

You can adjust the criteria yourself and filter the query in order to display results for any of your budgets you want to see. This means you can run an inquiry for a single budget, or for as many budgets as you want, including all the budgets you have in your department.

Keep in mind that all Run Controls for this inquiry is ***permanent***, and will always be listed for use *(the criteria in the inquiry can be edited)*. Anytime you run a previously created inquiry, it will display fresh, updated information.

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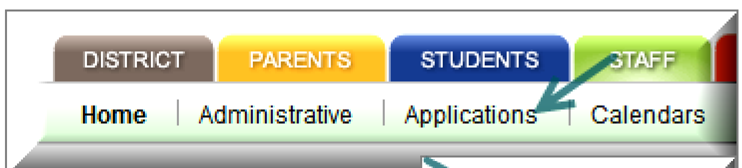
1. First, launch Microsoft Internet Explorer (do not use Firefox or other browsers) and go to **www.sandi.net**.

Click the **Staff** tab.

2. Click the **Applications** menu, and then click **PeopleSoft-Financial**.



3. Enter your User ID (your Employee Id number), your SDUSD password and click **Sign In.**

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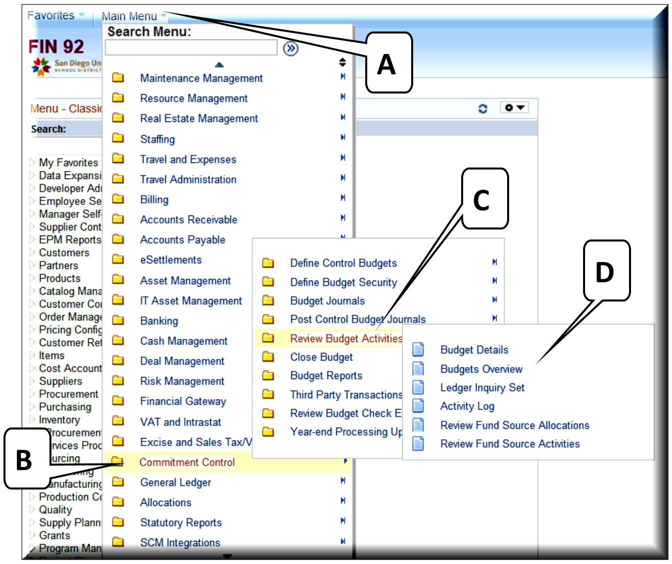
4. To access **Budgets Overview**, click:

A. Main Menu

B. Commitment Control

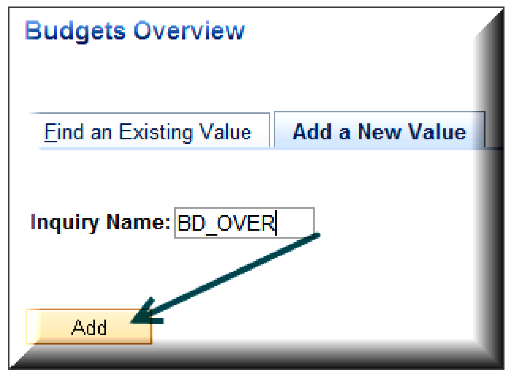
C. Review Budget Activities

D. Budgets Overview.

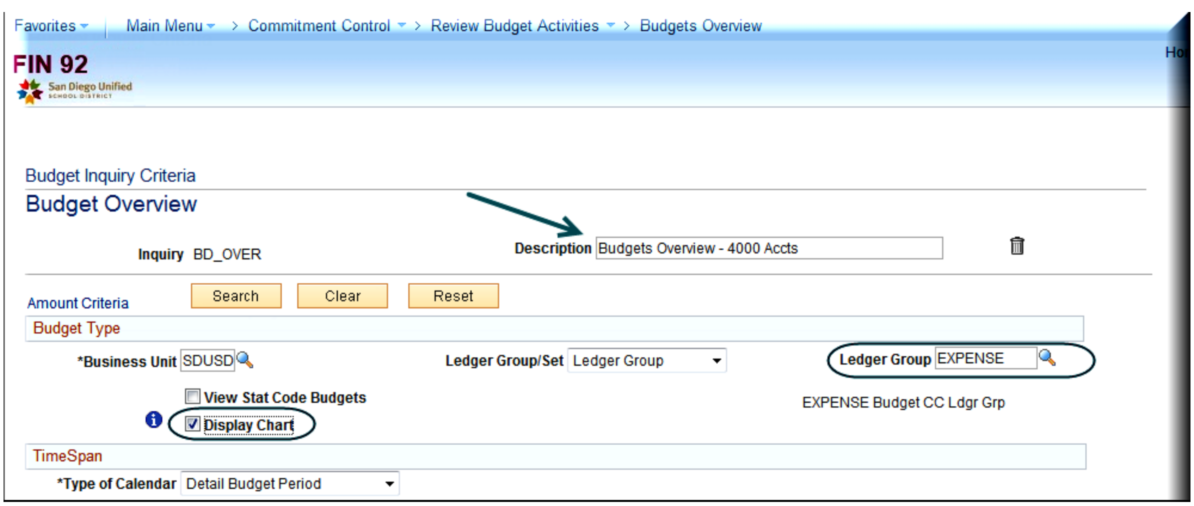


5. If this is your first time running this inquiry, *click the **Add a New Value** tab* and type a short name in the **Inquiry Name** textbox. Think of a name you will recognize for yourself in the future. Typically, people type an abbreviated name for the inquiry *(maximum 10 characters).*

Then, click the **Add** button.



6. Type a brief description for this inquiry, as shown in this example. *(One idea is to create multiple reports with different criteria in each one, and save them for future use)*.



7. Type **EXPENSE** into the **Ledger Group** field.

Click a checkmark into the **Display Chart** checkbox, if you would like to include a graphical representative chart in your inquiry.

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8. In the center of the screen, ensure that the current fiscal year is displayed in both the **From Budget Period** field and in the **To Budget Period** field.

9. Below the budget period fields, enter the budget codes into the **ChartFields** as desired.

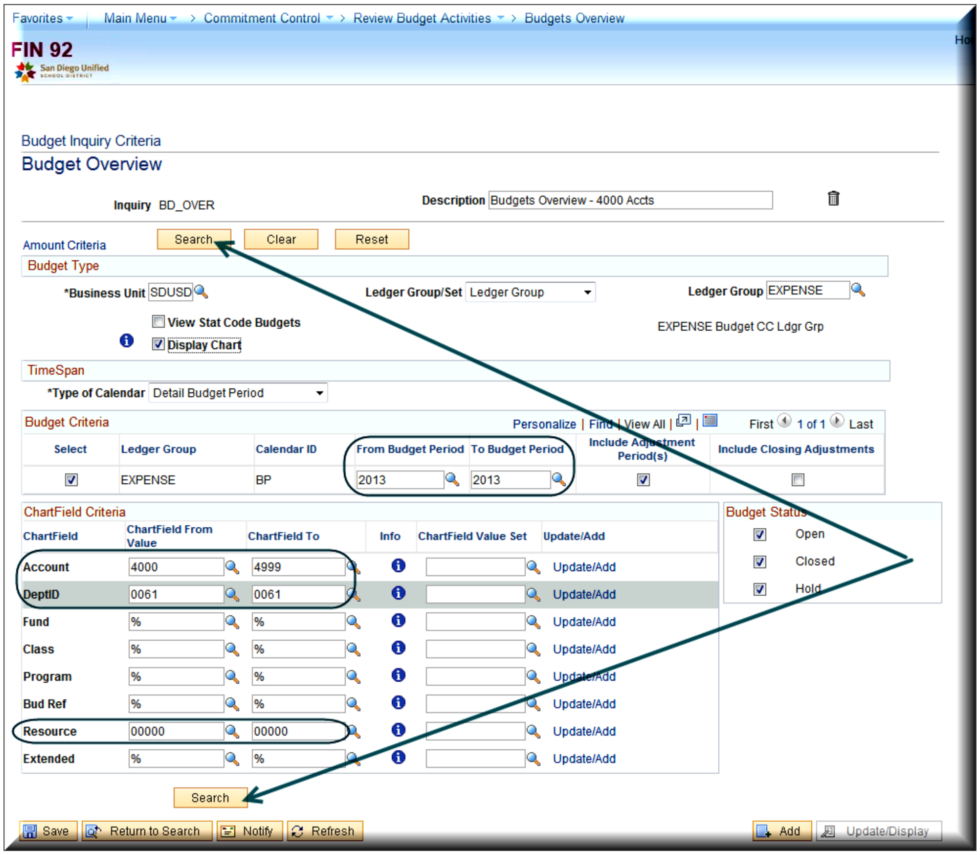
The more fields you fill in, the narrower and more focused your inquiry results will be. The fewer fields you use, the broader your results.

In this example, we are asking to display data on all budgets for

Accounts 4000 thru 4999,

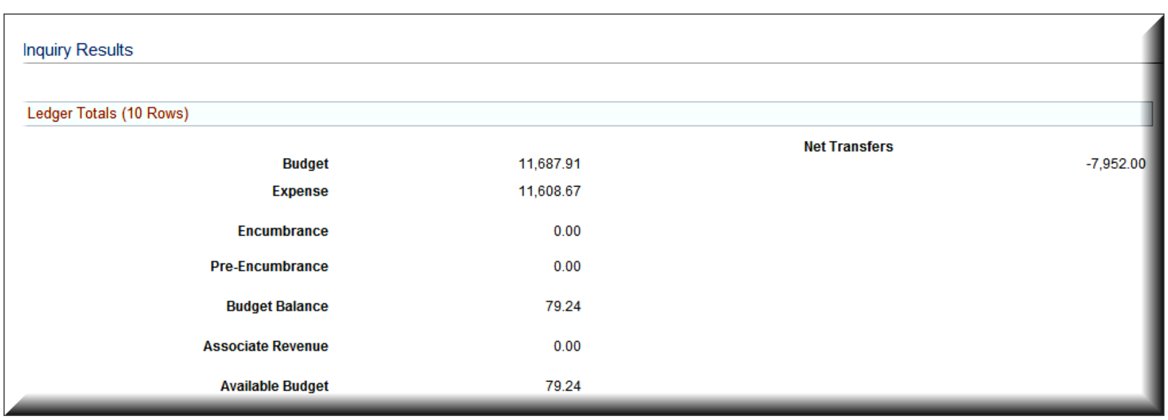
Department 0061 (cost center)

and Resources of 00000.



10. Select the **Search** button at either the top or bottom of the screen to run the inquiry.

11. Ledger Totals are immediately displayed on the left.



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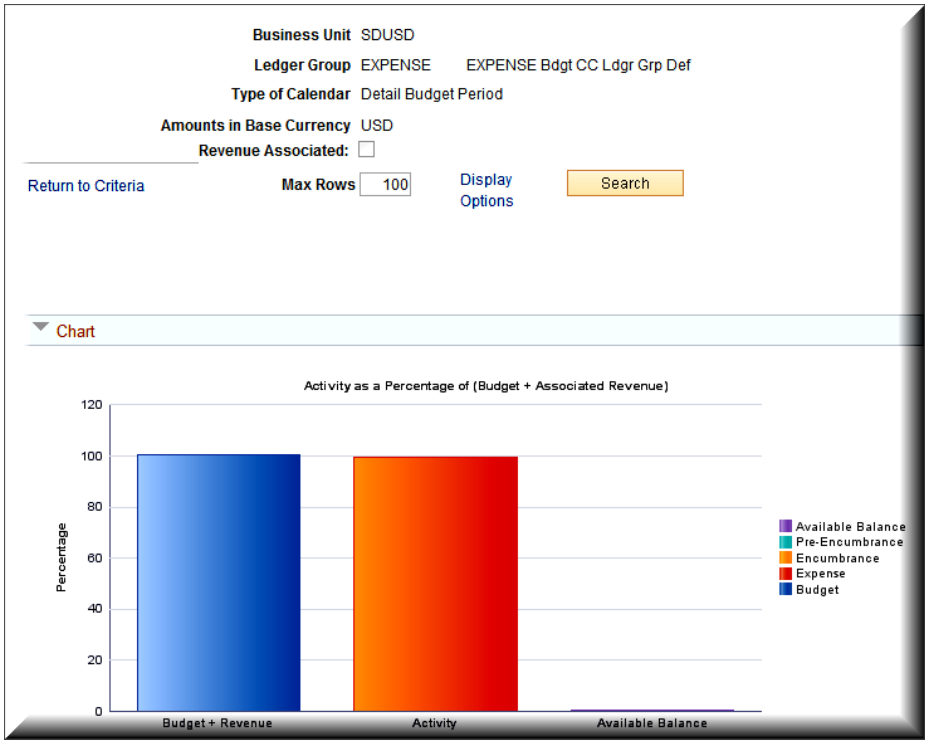
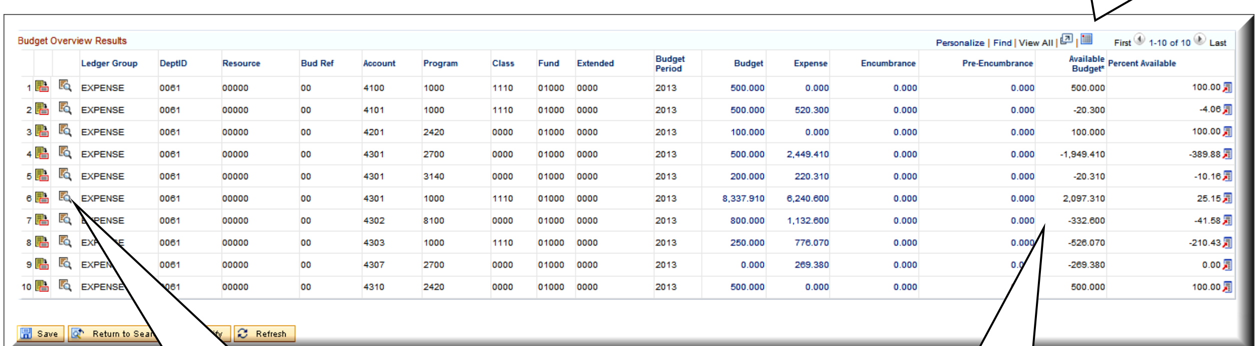
12. Scroll to the right of the page to see the graphical representation of the data.



13. Scroll to the left *(and down further)* to view the individual accounts.

The grid icon will download results into an Excel spread-



Budget Overview Results

Personalize | Find | View All | First 1-10 of 10 Last

	Ledger Group	DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1	EXPENSE	0061	00000	00	4100	1000	1110	01000	0000	2013	500.000	0.000	0.000	0.000	500.000	100.00
2	EXPENSE	0061	00000	00	4101	1000	1110	01000	0000	2013	500.000	520.300	0.000	0.000	-20.300	-4.06
3	EXPENSE	0061	00000	00	4201	2420	0000	01000	0000	2013	100.000	0.000	0.000	0.000	100.000	100.00
4	EXPENSE	0061	00000	00	4301	2700	0000	01000	0000	2013	500.000	2,449.410	0.000	0.000	-1,949.410	-389.88
5	EXPENSE	0061	00000	00	4301	3140	0000	01000	0000	2013	200.000	220.310	0.000	0.000	-20.310	-10.16
6	EXPENSE	0061	00000	00	4301	1000	1110	01000	0000	2013	8,337.910	6,240.600	0.000	0.000	2,097.310	25.15
7	EXPENSE	0061	00000	00	4302	8100	0000	01000	0000	2013	800.000	1,132.600	0.000	0.000	-332.600	-41.58
8	[illegible]	0061	00000	00	4303	1000	1110	01000	0000	2013	250.000	776.070	0.000	0.000	-526.070	-210.43
9	[illegible]	0061	00000	00	4307	2700	0000	01000	0000	2013	0.000	269.380	0.000	[illegible]	-269.380	0.00
10	EXPENSE	[illegible]	00000	00	4310	2420	0000	01000	0000	2013	500.000	0.000	0.000	[illegible]	500.000	100.00

Save | Return to Search | Refresh

Click a linked icon to view Budget Details or Budget Transaction Types .

Click a linked dollar amount to view its details.

14. When you're finished with this inquiry, you can save it *(Save button is at the bottom of the screen),* or simply navigate elsewhere.