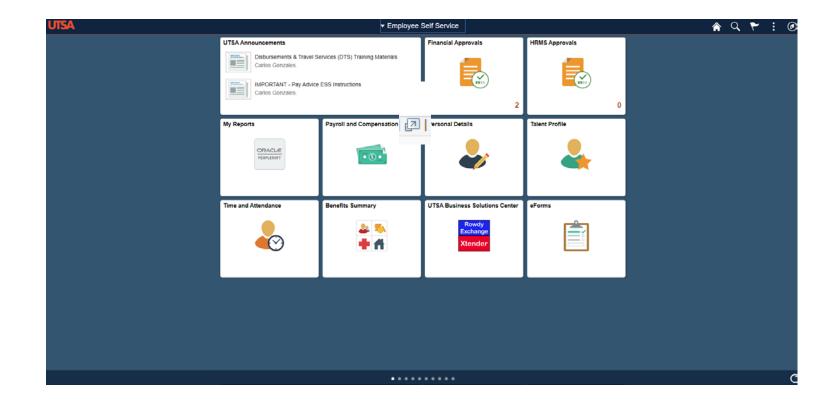
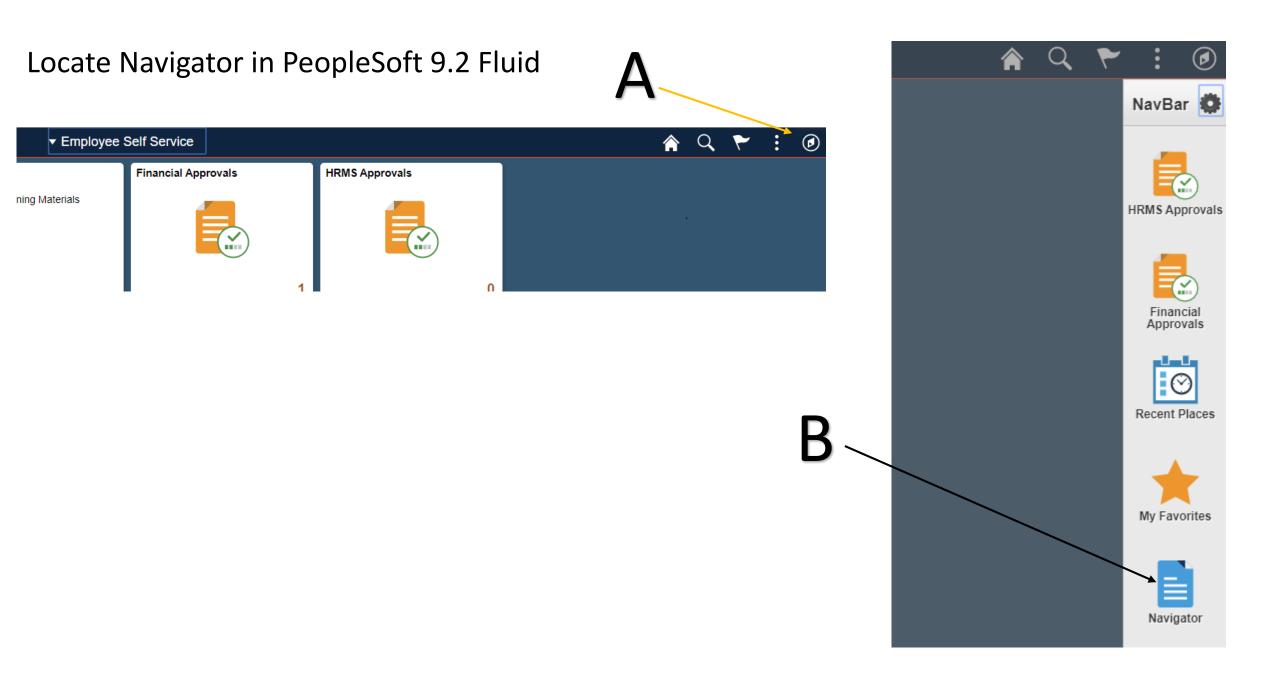
PeopleSoft 9.2 and Sponsored Projects How to View Project Budget & Balances





In the Navigator:

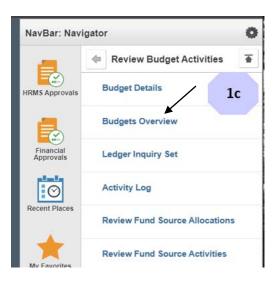
1a. Scroll to "Commitment Control"

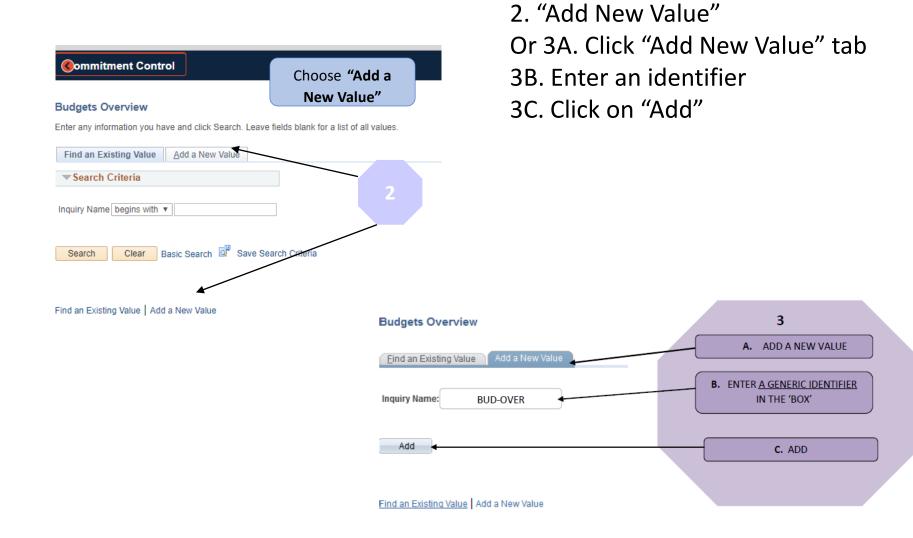
1b. Scroll to "Review Budget Activites"

1c. Scroll to "Budgets Overview"

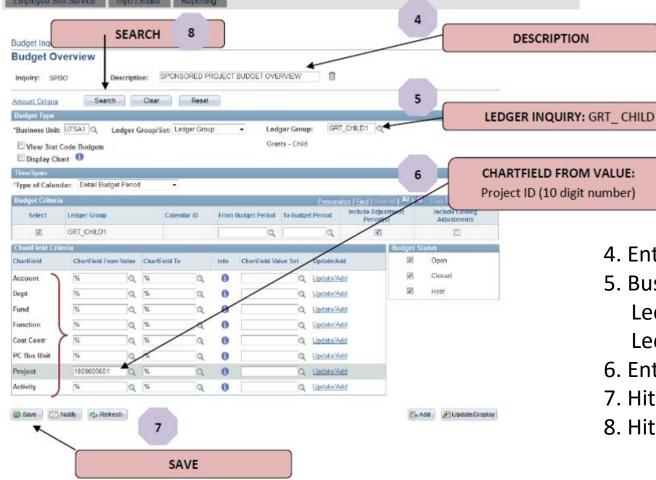








Set Up Budget Overview



- 4. Enter a description
- 5. Business Unit enter/choose "UTSA1"
 - Ledger Group/Set enter or choose "Ledger Group" Ledger Group enter or choose "GRT_CHILD1"
- 6. Enter Project ID in "Chartfield From Value"
- 7. Hit Save
- 8. Hit Search

Suggestion, when on the Budget Overview page, add to NavBar or Favorites to allow easier access next time.

Oudgets Ov	verview								B	lgets Overview	🏫 Q 🍸	1 0
Budget Inquin Budget Ove I Budget Type *Busines TimeSpan	y Criteria Inquiry PROJECT ID Search ss Unit UTSA1 Q View Stat Co			Reset	1	ion Look Up Proje Set Ledger Inquir			uiry Set CHILD Q		Add To Homepage Add To NavBar Add To Favorites My Preferences Sign Out	
"Type of Ca	alendar Detail Budget Pr	boire										
Budget Criter	ria					Person	alize Find	View All [🔁]	First () 1 of 1 () Last	9		
Select	Ledger Group		Calendar II	D	From Budg	get Period To Bud	get Period	Include Adjustment Period(s)	Include Closing Adjustments		Add To Favorites" or	
	GRT_CHILD1					Q	Q	2			ar" for easier access	
ChartField Cri	iteria								Budget Status		ar for easier access	
ChartField	ChartField From Valu	ue Cha	artField To		Info C	ChartField Value Set	t Update	Add	Open Open			🏫 🔍 🏲
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After logging into PS, click on your "My Favorites" and choose the option you added. In this example, I named my favorite "Budgets Overview"



After clicking on your favorites link, you should come to your look up page. Type in the 1) project ID you want to look up and then 2) click on the "Search" button to initiate look up.

Budget Inquiry C	Criteria										
Budget Over	view										
Inq	uiry PROJECT ID			Descri	iption Look L	Jp Project ID Balanc	e		Û		
Amount Criteria	Search	Clear	Reset		Ledger	Activity Log Integrit	y Act Log	Internal Integrity			
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*Business l	Jnit UTSA1 Q Ledger Group/Set Ledger Group V Ledger								HILD1 Q		
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Time Span											
*Type of Caler	ndar Detail Budget Peri	od	*								
Budget Criteria						Personalize Find	View All 🔁 🔣	First 🕢 1 of	1 🕑 Las		
Select	Ledger Group		Calendar ID	From B	udget Period	To Budget Period	Include Adjustment Period(s)	Include Clo Adjustme			
	GRT_CHILD1				٩	٩	 ✓ 				
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Function	%	%	٩	0		Q Update	/Add				
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	Budget Over Inq Amount Criteria Budget Type *Business O *Time Span *Type of Caler Budget Criteria Select ChartField Crite ChartField Crite ChartField Crite ChartField Account Dept Fund Fund Function Cost Centr PC Bus Unit Project	Budget Type *Business Unit UTSA1 Q *Type of Calendar Detail Budget Peri Budget Criteria Select Ledger Group Image: ChartField Criteria Cost Centr % Poly % Poly % Cost Centr % Project 100000XXX	Budget Overview Inquiry PROJECT ID Amount Criteria Search Clear Budget Type *Business Unit UTSA1 Q View Stat Code Budget Display Chart Time Span *Type of Calendar Detail Budget Period Budget Criteria GRT_CHILD1 ChartField Criteria GRT_CHILD1 ChartField Criteria GRT_CHILD1 ChartField ChartField From Value Chart Account % Q % Pupt % Q % Fund % Q % Popt % Q % Popt % Q % Popt % Q % Project 100000XXX Q %	Budget Overview Inquiry PROJECT ID Amount Criteria Search Clear *Type of Calendar *Type of Calendar Detail Budget Period *Type of Calendar Detail Budget Period *Type of Calendar Calendar Calendar ID ChartField Criteria ChartField Criteria ChartField Criteria ChartField To Account % % Popt % % % % % % % % % % % % % % % % % % % % <	Budget Overview Inquiry PROJECT ID Descr Amount Criteria Search Clear Reset Budget Type *Business Unit UTSA1 Q Ledger Group Clear *Business Unit UTSA1 Q Ledger Group Ledger Group Cleandar ID *Type of Calendar [Detail Budget Period ▼ ▼ Budget Criteria Select Ledger Group Calendar ID From B ✓ GRT_CHILD1 □ □ ChartField Criteria □ Into Into Account % Q % Q ③ Pept % Q % Q ③ Fund % Q % Q ④ Project 100000XXX Q % Q ④	Budget Overview Inquiry PROJECT ID Description Look L Amount Criteria Budget Type *Business Unit UTSA1 Q Ledger Group/Set Ledge O'iew Stat Code Budgets Image: Type of Calendar Detail Budget Period ✓ Budget Criteria Select Ledger Group Calendar ID From Budget Period Budget Criteria Calendar ID From Budget Period ChartField Criteria Into ChartField To Into ChartField V Account %<	Budget Overview Inquiry PROJECT ID Description Look Up Project ID Balance Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Budget Type *Business Unit UTSA1 Q Ledger Group/Set Ledger Group ▼ Uview Stat Code Budgets ① Display Chart Time Span *Type of Calendar Detail Budget Period ▼ Personalize Find Select Ledger Group Calendar ID From Budget Period To Budget Period © GRT_CHILD1 Q Q ChartField Criteria ChartField From Value ChartField To Info ChartField ChartField From Value ChartField To Info ChartField Value Set Update Pertorion % Q % Q Q Update Fund % Q % Q Q Update Function % Q % Q Q Update Function % Q Q Q Q Q Project 100000XXX % Q Q Q Update	Budget Overview Inquiry PROJECT ID Description Look Up Project ID Balance Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Budget Type Ledger Group ✓ Ledger Ledger Group ✓ Ledger *Business Unit UTSA1 Ledger Group ✓ Ledger Group ✓ Ledger Grants - Chill *Business Unit UTSA1 Ledger Group ✓ Ledger Group ✓ Ledger Group ✓ Ledger *Business Unit UTSA1 Ledger Group ✓ Ledger Group ✓ Ledger Group ✓ Ledger Group ✓ *Type of Calendar Detail Budget Period ✓ Personalize Find View All (2) BR Incluée Adjuetment Period(e) Select Ledger Group Calendar ID From Budget Period Incluée Adjuetment Period(e) © GRT_CHILD1 © Q Update/Add Edger Group (Set Group	Budget Overview Inquiry PROJECT ID Description Look Up Project ID Balance Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity Budget Type ************************************		

When results are displayed, you can view available balances per budget category. If you click on the pop-out button, PS will drill out one step further (next slide).

q												
		Busin	ess Unit	UTSA1								
		Ledge	r Group	GRT_CHIL	D1							
		Type of C	alendar	Detail Budg	get Period							
		Amounts in Base C										
		Reve	nue Ass	ociated:								
Ret	urn to Criteria	м	ax Rows	100	Display Options	Search						
Lee	Iger Totals	(7 Rows)										
			Budget			150,000.00		N	et Transfers		0.00	
			Expense			119,213.81						
		Encu	mbrance			20,829.48						
		Pre-Encu				0.00						-pop-
			Balance			9,956.71						
		Budget	Balance			9,956.71						
		Associate	Revenue			0.00						
		Associate Available				0.00 9,956.71						
2	tast Overvi	Available						Personalize Fin	d View All 2	Eiret (4) 1.1	of7	
Bu		Available ew Results Account	e Budget		Function	9,956.71	Cost		d View All 🔁 Expense		7 of 7 🕑 Last Available Perc	
	Account	Available ew Results Account Description*	e Budget	Dept	Function	9,956.71 Project		Budget	Expense	Encumbrance	Available Perc Budget* Avai	
		Available ew Results Account	e Budget		Function 200	9,956.71	Cost				Available Perc	
1	Account	Available ew Results Account Description*	e Budget	Dept		9,956.71 Project	Cost	Budget	Expense	Encumbrance	Available Perc Budget* Avai	
1	Account▲ G4010	Available ew Results Account Description - L4 Salaries L4 Fringe	Fund 5100	Dept CTR034	200	9,956.71 Project 1000002870	Cost	Budget 39,406.00	Expense 23,333.29	Encumbrance 4,666.66	Available Budget* Avai 11,406.05	
1 2 3	Account▲ G4010 G4020	Available ew Results Account Description* L4 Salaries L4 Fringe Benefits L4 Equipment	Fund 5100	Dept CTR034 CTR034	200	9,956.71	Cost	Budget 39,406.00 10,571.00	Expense 23,333.29 41.71	Encumbrance 4,666.66 0.00	Available Budget* Perc Avai 11,406.05 10,529.29	
1 2 3 4	Account - G4010 G4020 G4050	Available www.Results Account Description* L4 Salaries L4 Equipment Capital L4 Other Direct	Fund 5100 5100	Dept CTR034 CTR034 CTR034	200 200 200	9,956.71 Project 1000002870 1000002870 1000002870	Cost	Budget 39,406.00 10,571.00 5,001.29	Expense 23,333.29 41.71 0.00	Encumbrance 4,666.66 0.00 0.00	Available Budget* Perc Available 11,406.05 10,529.29 5,001.29 5,001.29	
1 2 3 4 5	Account → G4010 G4020 G4050 G4090	Available ew Results Account Description A L4 Salaries L4 Fringe Benefits L4 Equipment Capital L4 Other Direct Costs L4 Scholarships	Fund 5100 5100 5100 5100	Dept CTR034 CTR034 CTR034 CTR034 CTR034	200 200 200 200 200	9,956.71 Project 1000002870 1000002870 1000002870	Cost	Budget 39,406.00 10,571.00 5,001.29 40,547.00	Expense 23,333.29 41.71 0.00 48,139.35	Encumbrance 4,666.66 0.00 0.00 16,162.82	Available Budget* Perc Available 11,406.05 10,529.29 5,001.29 -23,755.17	

After clicking pop-out, this is an example of the view.

Please note, you can create a personalized view of the columns you would like to include in your view (such as this one). Just choose "Personalize" and follow the steps to add/remove and order columns.

Z	' 🗓 😯 🖏								-			
Bug	dget Overvie	w Results							Personalize	Find View All	First 🕢 1-7	7 of 7 🕟 Las
	Account	Account Description -	Fund	Dept	Function	Project	Cost Center	Budget	Expense	Encumbrance	Available Perc Budget* Avai	
1	G4010	L4 Salaries	5100	CTR034	200	1000002870		39,406.00	23,333.29	4,666.66	11,406.05	28.94 🗾
2	G4020	L4 Fringe Benefits	5100	CTR034	200	1000002870		10,571.00	41.71	0.00	10,529.29	99.61 🗾
3	G4050	L4 Equipment Capital	5100	CTR034	200	1000002870		5,001.29	0.00	0.00	5,001.29	100.00 🗾
4	G4090	L4 Other Direct Costs	5100	CTR034	200	1000002870		40,547.00	48,139.35	16,162.82	-23,755.17	-58.59 🗾
5	G4140	L4 Scholarships & Fellowships	5100	CTR034	200	1000002870		0.00	5,163.00	0.00	-5,163.00	0.00 屓
6	G4150	L4 Tuition & Fees (Stud Supp)	5100	CTR034	200	1000002870		9,415.00	8,414.90	0.00	1,000.10	10.62 🗾
7	G4180	L4 F&A	5100	CTR034	200	1000002870		45,059.71	34,121.56	0.00	10,938.15	24.27 戻

Return