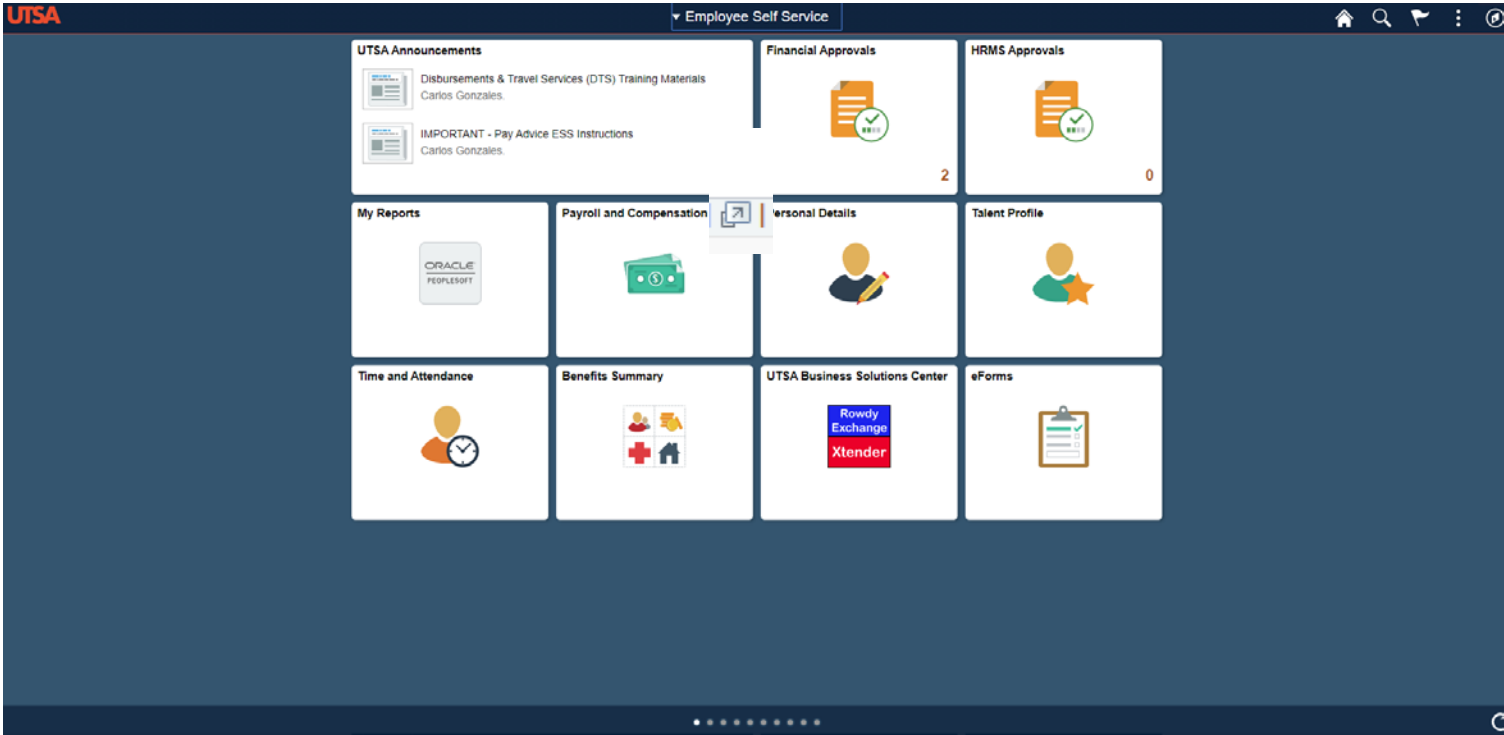


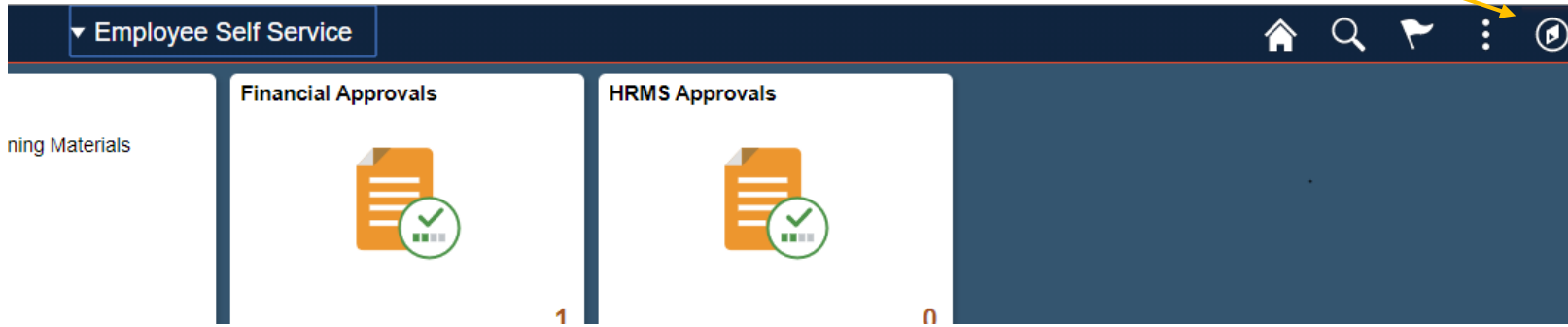
PeopleSoft 9.2 and Sponsored Projects

How to View Project Budget & Balances



Locate Navigator in PeopleSoft 9.2 Fluid

A



B

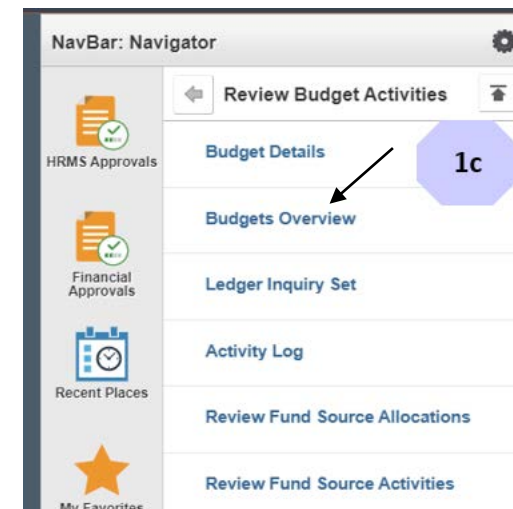
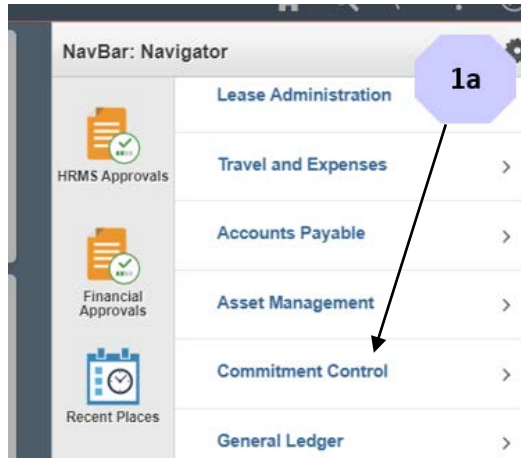


In the Navigator:

1a. Scroll to “Commitment Control”

1b. Scroll to “Review Budget Activities”

1c. Scroll to “Budgets Overview”



Set Up Budget Overview

2. "Add New Value"

Or 3A. Click "Add New Value" tab

3B. Enter an identifier

3C. Click on "Add"

Commitment Control

Budgets Overview

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

▼ Search Criteria

Inquiry Name: begins with

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

A blue callout box with the number '2' and the text 'Choose "Add a New Value"' has arrows pointing to the 'Add a New Value' tab and the 'Add' button.

Budgets Overview

Find an Existing Value | **Add a New Value**

Inquiry Name:

Add

Find an Existing Value | Add a New Value

3

- A. ADD A NEW VALUE
- B. ENTER A GENERIC IDENTIFIER IN THE 'BOX'
- C. ADD

Arrows point from the callout boxes to the 'Add a New Value' tab, the 'BUD-OVER' input field, and the 'Add' button.

SEARCH 8

DESCRIPTION 4

LEDGER INQUIRY: GRT_CHILD 5

CHARTFIELD FROM VALUE: Project ID (10 digit number) 6

SAVE 7

Budget Inquiry

Budget Overview

Inquiry: SPBO Description: SPONSORED PROJECT BUDGET OVERVIEW

Amount Criteria Search Clear Reset

Budget Type

*Business Unit: UTSA1 Ledger Group/Set: Ledger Group Ledger Group: GRT_CHILD1

View Stat Code Budgets Display Chart

Time Span

*Type of Calendar: Detail Budget Period

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Periods	Include Closing Adjustments
<input checked="" type="checkbox"/>	GRT_CHILD1				<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Cost Centr	%	%	i		Update/Add
PC Bus Unit	%	%	i		Update/Add
Project	1000000601	%	i		Update/Add
Activity	%	%	i		Update/Add

Save Notify Refresh Add Update/Display

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.

The screenshot shows the 'Budgets Overview' page with a context menu open in the top right corner. The menu options are: Add To Homepage, Add To NavBar, Add To Favorites, My Preferences, and Sign Out. A yellow octagon with the number '9' is positioned to the left of the menu, with an arrow pointing to the 'Add To Favorites' option.

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	GRT_CHILD1				<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Cost Centr	%	%	i		Update/Add
PC Bus Unit	%	%	i		Update/Add
Project	100000XXXX	%	i		Update/Add
Activity	%	%	i		Update/Add

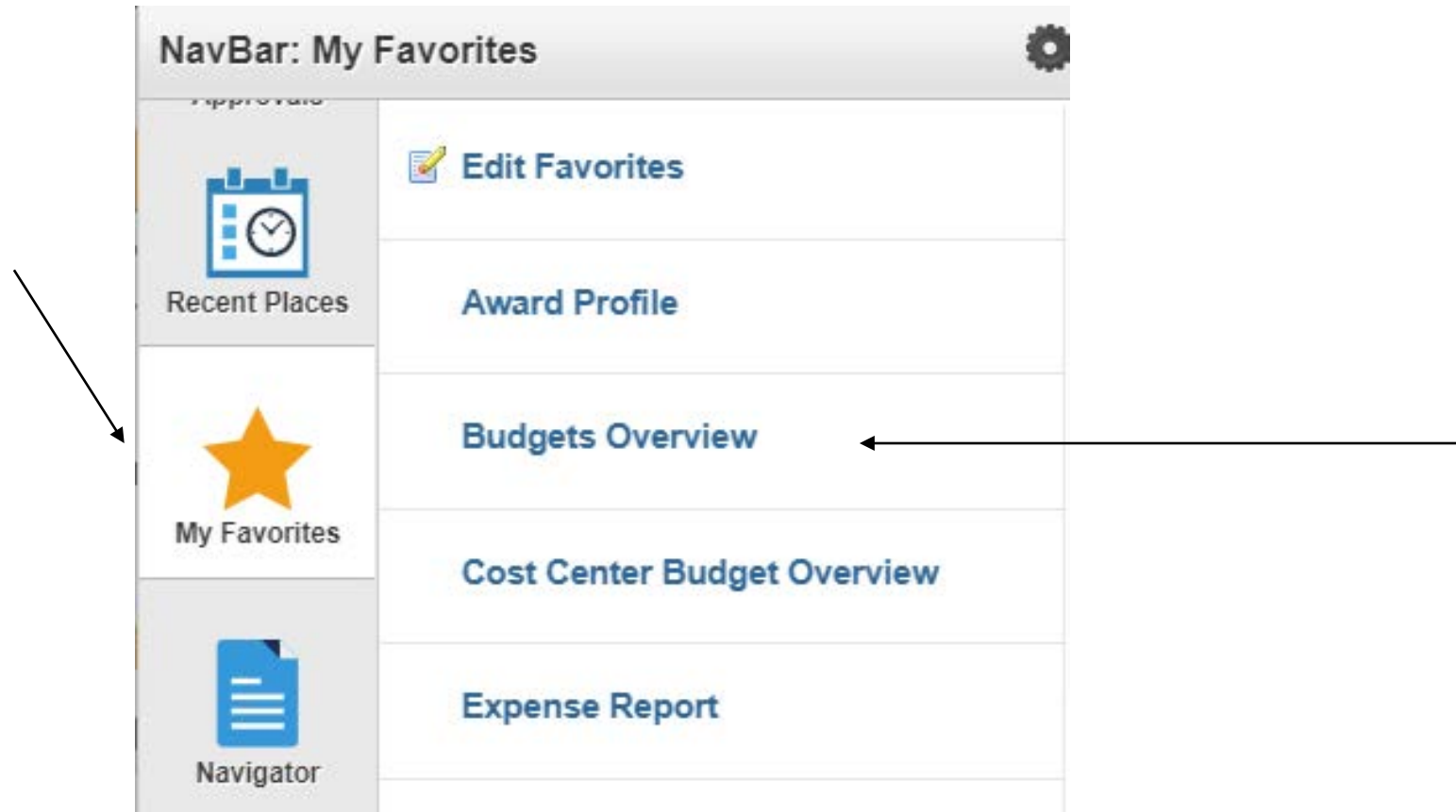
Budget Status

- Open
- Closed
- Hold

Suggestion: "Add To Favorites" or "Add To NavBar" for easier access

The screenshot shows a mobile navigation bar (NavBar) with several icons. At the bottom of the list is the 'Budgets Overview' icon, which is highlighted with a blue arrow pointing from the suggestion box.

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 Criteria Budget Overview

2

Inquiry PROJECT ID Description Look Up Project ID Balance

Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity

Budget Type

*Business Unit UTSA1 Ledger Group/Set Ledger Group Ledger Group GRT_CHILD1

View Stat Code Budgets
 Display Chart

Grants - Child

Time Span

*Type of Calendar Detail Budget Period

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"/>	GRT_CHILD1				<input checked="" type="checkbox"/>	<input type="checkbox"/>


ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Cost Centr	%	%	i		Update/Add
PC Bus Unit	%	%	i		Update/Add
Project	100000XXX	%	i		Update/Add
Activity	%	%	i		Update/Add

Budget Status

- Open
- Closed
- Hold

1

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).

Inquiry Results

Business Unit UTSA1
 Ledger Group GRT_CHILD1
 Type of Calendar Detail Budget Period
 Amounts in Base Currency USD
 Revenue Associated:

[Return to Criteria](#)

Max Rows

Display Options

Ledger Totals (7 Rows)

Budget	150,000.00	Net Transfers	0.00
Expense	119,213.81		
Encumbrance	20,829.48		
Pre-Encumbrance	0.00		
Budget Balance	9,956.71		
Associate Revenue	0.00		
Available Budget	9,956.71		

pop-out

Budget Overview Results

Personalize | Find | View All |  |  First 1-7 of 7 Last






	Account	Account Description	Fund	Dept	Function	Project	Cost Center	Budget	Expense	Encumbrance	Available Budget*	Perc Avail
1	G4010	L4 Salaries	5100	CTR034	200	1000002870		39,406.00	23,333.29	4,666.66	11,406.05	
2	G4020	L4 Fringe Benefits	5100	CTR034	200	1000002870		10,571.00	41.71	0.00	10,529.29	
3	G4050	L4 Equipment Capital	5100	CTR034	200	1000002870		5,001.29	0.00	0.00	5,001.29	
4	G4090	L4 Other Direct Costs	5100	CTR034	200	1000002870		40,547.00	48,139.35	16,162.82	-23,755.17	
5	G4140	L4 Scholarships & Fellowships	5100	CTR034	200	1000002870		0.00	5,163.00	0.00	-5,163.00	
6	G4150	L4 Tuition & Fees (Stud Supp)	5100	CTR034	200	1000002870		9,415.00	8,414.90	0.00	1,000.10	
7	G4180	L4 F&A	5100	CTR034	200	1000002870		45,059.71	34,121.56	0.00	10,938.15	




[Return to Criteria](#) *Notes








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.

Budget Overview Inquiry

Budget Overview Results Personalize | Find | View All |  First  1-7 of 7  Last Help

	Account▲	Account Description▲	Fund	Dept	Function	Project	Cost Center	Budget	Expense	Encumbrance	Available Budget*	Percent Available	
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	
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	

[Return](#)