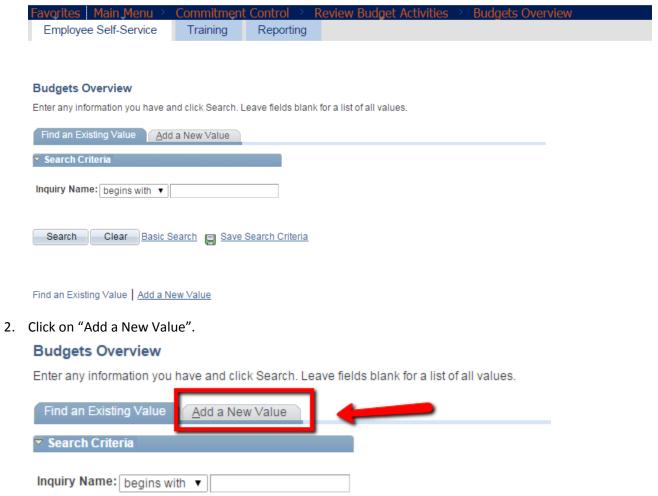# How to view your Available Budget for FY 2015

1. From the home page in PeopleSoft, navigate to Main Menu > Commitment Control > Review Budget Activities > Budget Overview. This will bring you to the following screen:

   Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

   Employee Self-Service   Training   Reporting

   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

2. Click on "Add a New Value".

   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
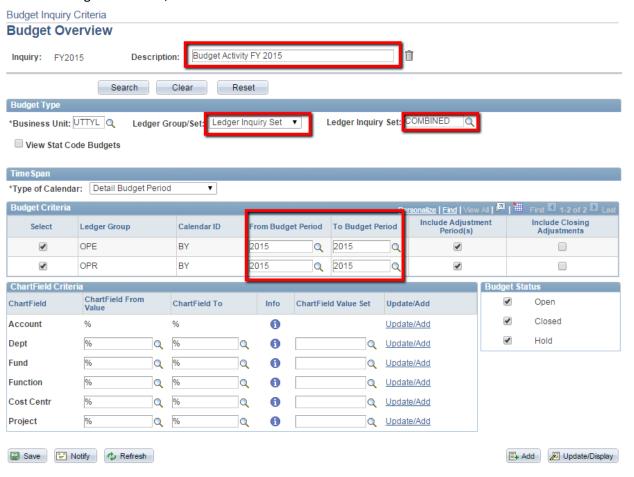
   Inquiry Name: begins with ▼ [   ]

3. This will create a search criteria that you can use over and over again to look at specific details. I would recommend naming this "FY2015". Click "Add" to proceed to the next screen.
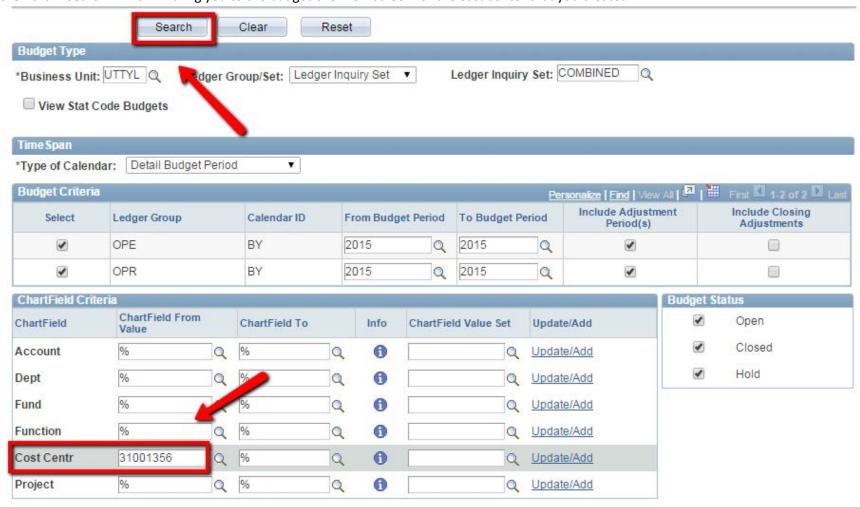
Budgets Overview

Find an Existing Value | Add a New Value

Inquiry Name: FY2015

Add

4. This will bring you to the Budget Inquiry Criteria screen. You will need to modify the following boxes to the following specifications. Once you have filled in the following information, click on "Save".

Budget Inquiry Criteria
Budget Overview

Inquiry: FY2015 Description: [Budget Activity FY 2015]

[Search] [Clear] [Reset]

Budget Type

*Business Unit: [UTTYL] Ledger Group/Set: [Ledger Inquiry Set ▾] Ledger Inquiry Set: [COMBINED]

☐ View Stat Code Budgets

Time Span

*Type of Calendar: [Detail Budget Period ▾]

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
☑	OPE	BY	2015	2015	☑	☐
☑	OPR	BY	2015	2015	☑	☐

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
Project	%	%	ℹ		Update/Add

Budget Status

☑ Open
☑ Closed
☑ Hold

[Save] [Notify] [Refresh]   [Add] [Update/Display]

5. Once you have finished this, you can now input your cost center to see your budget information. In the "Cost Centr" field, input your cost center and then click "Search". This will bring you to the budget overview screen for the cost center that you created.

6. You should now be looking at the budget overview screen for the cost center that you specified. From here, you can see your overall available budget, recognized revenue, and your budget/expense for each individual line item.

Ledger Totals (6 Rows)

Budget:	80,476.00	Revenue Estimate:	0.00
Expense:	21,405.38	Recognized Revenue:	5.00
Encumbrance:	0.02	Available Budget:	-5.00
Pre-Encumbrance:	510.00	Collected Revenue:	0.00
Budget Balance:	58,560.60	Uncollected Revenue (Rec-Coll):	5.00
Associate Revenue:	0.00		
Available Budget:	58,560.60		

Budget Overview Results

Personalize | Find | View All | First 1-6 of 6 Last

		Ledger Group	Account▲	Fund	Dept▼	Cost Centr	Function	Project	Budget Period	Budget	Expense	Encumbrance
1		OPE	A1000	3115	122400	31001356	600		2015	44,452.000	13,500.000	0.000
2		OPE	A1200	3115	122400	31001356	600		2015	3,900.000	0.000	0.000
3		OPE	A3000	3115	122400	31001356	600		2015	15,699.000	4,211.530	0.000
4		OPE	A4000	3115	122400	31001356	600		2015	16,425.000	3,693.850	0.020
5		OPE	A7000	3115	122400	31001356	600		2015	0.000	0.000	0.000
6		OPR	TOTRV	3115	122400	31001356			2015	0.000	0.000	0.000

7. You can also scroll to the right if you want to see your encumbrances / available budget for each line item.

Encumbrance	Pre-Encumbrance	Available Budget*
0.000	0.000	30,952.000
0.000	0.000	3,900.000
0.000	0.000	11,487.470
0.020	510.000	12,221.130
0.000	0.000	0.000
0.000	0.000	0.000

8. Once you have finished, click on the "Return to Criteria Screen" on the bottom left hand corner to return to the previous page. This will take you back to the screen that you came to in Step #5. From here, you can change the cost center that you wish to view, click search, and it will bring you to the budget overview screen for that cost center.

9. To view this criteria in the future, follow the instructions in Step #1. This will bring you back to the original page. This time, you will click on search.
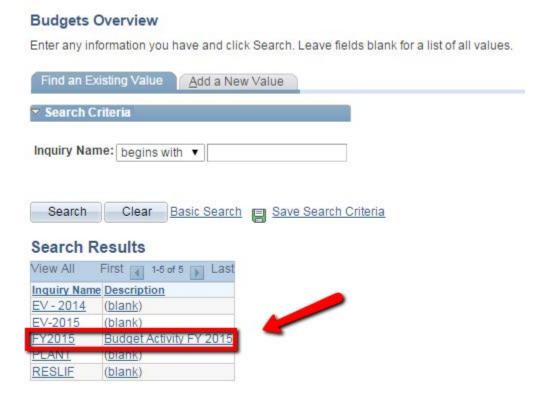
Budgets Overview

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

10. This will bring you to any saved criteria that you have created (Steps #2 and #3). From here, you would click on your FY2015 inquiry see your criteria that you have previously setup.

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

Search Results

View All   First ◄ 1-5 of 5 ► Last

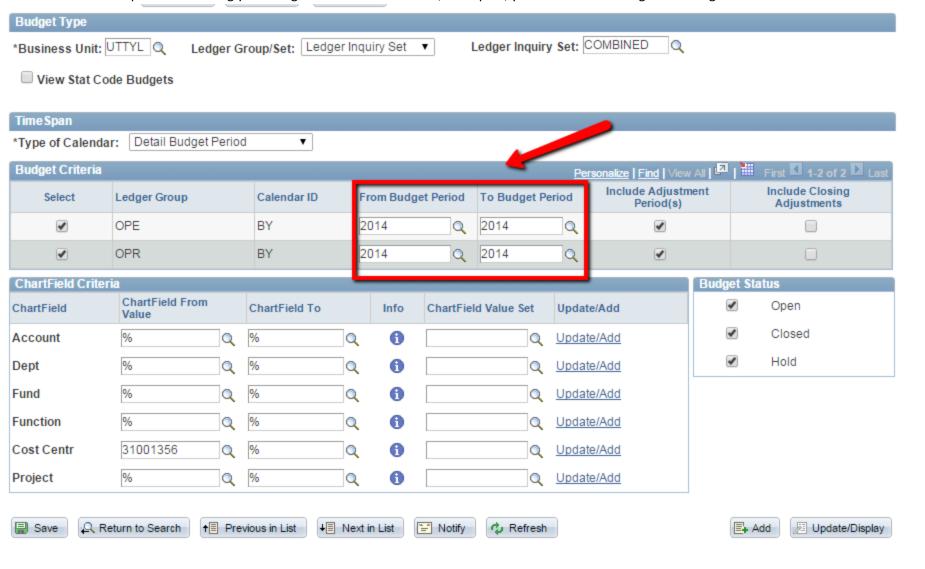| Inquiry Name	Description
EV - 2014	(blank)
EV-2015	(blank)
FY2015	Budget Activity FY 2015
PLANT	(blank)
RESLIF	(blank)

Find an Existing Value | Add a New Value

11. This will bring you back to the "Budget Inquiry Criteria" page as seen in Step #5. Please note that you can also create multiple searches and save them individually. This would require you to complete the previous steps and name each inquiry individually depending on your criteria.

How to see the roll forward amount for FY 2014

**For all cost centers that are eligible to have their balance's roll forward, you can find the amount by following the previous instructions with the minor changes mentioned below. If you are unsure if your cost center's balance will roll forward, please see the "Roll Forward Guidelines" table at the end of the document or contact the Budget Office for assistance. In order to see your current total balance for accounts that are eligible to roll forward, you will need to add together the "Total Available Budget" for both FY2014 and FY2015. **

This will be the same process as seeing your budget for FY2014. However, in Step #4, you will need to change the "Budget Period" to 2014.

Budget Type

*Business Unit: UTTYL 🔍   **Ledger Group/Set:** Ledger Inquiry Set ▼   **Ledger Inquiry Set:** COMBINED 🔍

☐ View Stat Code Budgets

Time Span

*Type of Calendar: Detail Budget Period ▼

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
☑	OPE	BY	2014 🔍	2014 🔍	☑	☐
☑	OPR	BY	2014 🔍	2014 🔍	☑	☐

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	% 🔍	% 🔍	ⓘ	🔍	Update/Add
Dept	% 🔍	% 🔍	ⓘ	🔍	Update/Add
Fund	% 🔍	% 🔍	ⓘ	🔍	Update/Add
Function	% 🔍	% 🔍	ⓘ	🔍	Update/Add
Cost Centr	31001356 🔍	% 🔍	ⓘ	🔍	Update/Add
Project	% 🔍	% 🔍	ⓘ	🔍	Update/Add

Budget Status

☑ Open
☑ Closed
☑ Hold

💾 Save   🔍 Return to Search   ⬆ Previous in List   ⬇ Next in List   📧 Notify   🔄 Refresh   ➕ Add   📄 Update/Display

1. Once you have completed this, click on "Search" to take you to the Budget Overview Screen. From here, you can see your "Available Budget" amount. This will be the amount that will be applied to FY 2015 once balance forwards are processed.

Ledger Totals (6 Rows)

Budget:	72,836.00	Revenue Estimate:	72,836.00
Expense:	34,399.74	Recognized Revenue:	72,836.00
Encumbrance:	0.00	Available Budget:	0.00
Pre-Encumbrance:	-510.00	Collected Revenue:	0.00
Budget Balance:	38,946.26	Uncollected Revenue (Rec-Coll):	72,836.00
Associate Revenue:	0.00		
Available Budget:	38,946.26		

Budget Overview Results   Personalize | Find | View All | 🗗 | 🔢   First ◀ 1-6 of 6 ▶ Last

	Ledger Group	Account▲	Fund	Dept▼	Cost Centr	Function	Project	Budget Period	Budget	Expense	Encumbrance
1	OPE	A1000	3115	122400	31001356	600		2014	38,000.000	15,241.430	0.000
2	OPE	A1200	3115	122400	31001356	600		2014	3,900.000	2,424.000	0.000
3	OPE	A3000	3115	122400	31001356	600		2014	15,699.000	5,312.970	0.000
4	OPE	A4000	3115	122400	31001356	600		2014	15,237.000	11,421.340	0.000
5	OPE	A7000	3115	122400	31001356	600		2014	0.000	0.000	0.000
6	OPR	RTRFS	3115	122400	31001356			2014	0.000	0.000	0.000

Roll Forward Guidelines

Fund Group	Cost Centers beginning with	Roll Forward?	Exceptions
E&G	2100xxx	No	RDF, Nursing Shortage, etc.
Service Centers	3200xxx	Yes	n/a
Designated	3100xxx	Yes	Tuition & Fee funded cost centers (i.e., Designated Tuition, Student Service Fee, Automated Services Fee, etc.)
Auxiliary	4xxxxxxx	Yes	Fee funded cost centers (i.e., Athletic Fee, Union Fee, etc.)
Gifts and Endowments	5xxxxxxx	Yes	Lindsey Funded cost centers
Loan	9200xxxx	Yes	n/a
Agency	8100xxxx	Yes	n/a