Inquiry Budget Overview for Commitment Control

Purpose: Use this as a guide how to run the Budget Overview Inquiry in ctcLink.

Audience: Finance staff.

⊘ You must have at least one of these local college managed security roles:

• ZD CC Budget Inquiry
• ZZ CC Budget Entry

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

💡 The **Budgets Overview** inquiry component provides a view of budget activity for one or multiple budgets, from the level of a ledger group or ledger inquiry set to the more detailed level of individual budgets. This component also enables further drill down to budget journal lines and source transaction lines.

Inquiry Budget Overview for Commitment Control

Navigation: Commitment Control > Review Budget Activities > Budget Overview

1. The **Budgets Overview** search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
   • NOTE: It is important to note that **Run Control IDs** cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., 020_CC_ORG (College, Process).

3. The **Budget Inquiry Criteria** entry page displays. This is where the filtering information is to create the Budget Overview snapshot.

4. In the **Budget Type** section:
   a. Enter or lookup the **Business Unit.**
   b. The system defaults to Ledger Group/Set = **Ledger Group.**
   c. Enter or lookup the **Ledger Group** -- e.g., The Ledger Group determines the level of information reported. i.e. *CC_SUM* reports at the summary (or roll-up). *CC_ORG* reports at the level used for budgeting.

5. In the **TimeSpan** section, select the **Type of Calendar**:
   • **Detail Accounting Period** - sorts the data by which period the expenditure was posted in the General Ledger (*From Year 20XX, From Period X, To Year 20XX, To Period X*).
   • **Detail Budget Period** - sorts the data by the annual Budget Period that was Budget Checked (*From 20XX and To 20XX*).
   • **Summary Accounting Period** - allows GL accounting period for fiscal year (*must select Calendar ID, then period is 1*).

6. Depending upon the type of calendar selection, enter the **Budget Criteria** information.
7. Enter **Chartfield Criteria** information. This section is the filtering portion of the snapshot.
8. Select the **Search** button.

> 💡 The **"%"** sign is considered a wildcard in various PeopleSoft pages and will pull all valid field values.

7. The **Inquiry Results** page displays. Note the **Max Rows** defaults to **100**. Optional to manually increase this number to account for large amounts of data and then select the Search button to re-populate results.

8. The Budget Overview Results lists individual ChartFields that meet the criteria on the inquiry page. Select the **Return to Criteria** links to return to inquiry page to add/edit entry data as needed.
9. Use the **scroll bar** to scroll over to review additional columns; Budget, Expense, Encumbrance, Pre-Encumbrance, Planned, Available Budget, and Percent Available.

Drill into Activity Logs

Within the Budget Overview Results, select the **blue** dollar amount hyperlink(s) to open the transaction **Activity Log** window.

Depending upon your security roles, use the additional **magnifying glass icon** to drill down and/or **footprints icon** to drill into Activity Log Inquiry.

Budget Details Icon

ℹ️ Drill into a specific row of data, select the **Details** icon to drill into the **Budget Detail**s. The Budget Details window displays. Optional to drill into details by selecting:

- The **green open book** icon to 'Drill to Ledger'.
- The **orange upright double arrows book** icon to 'Drill to Activity Log'.

Select **OK** button to close the window.

Budget Transaction Types Icon

> ℹ️ To drill into a specific row of data, select the Budget Transaction Types icon to open up the **Budget Transaction Types** window. Review data as needed. Select the **Return** button to close the window.

10. Select **Save** button to save the inquiry page for future use. Optional to delete the saved search criteria by selecting the **Delete** or **Trash Can icon.**
11. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to Inquiry Budget Overview for Commitment Control. This link will open in a new tab/window.