The University of New Orleans
PeopleSoft 9.0: Budget Overview
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**Login**

1. Open a web browser.
2. Turn off all pop up blockers. Refer to: [http://pstrain.uno.edu/docs/psHowTo.cfm#financials](http://pstrain.uno.edu/docs/psHowTo.cfm#financials)
3. Type the **Peoplesoft URL address** into the browser address field and press `<Enter>`: [https://finserv.uno.edu/finprd/signon.html](https://finserv.uno.edu/finprd/signon.html) or select the browser from your list of favorites if you saved it to your list. *The PeopleSoft Sign in page appears as shown below.*
4. Type the assigned User ID and Password. **Note:** The Financials password is the same as your user name and password used to login to your computer, email and WebSTAR account. If you have problems accessing Financials contact the Helpdesk at (504) 280-HELP (4357).
5. Click Sign In
Review Budget Details

Budget inquiry will allow users who have security to view budgets to:

- Confirm status of departments budgets
- Determine if funds are available before requesting budget transfers
- Verify if funds were moved

Navigation: Commitment Control > Review Budget Activities > Budget Details

1. Click on Budget Details.
2. Enter the desired information on the Budget Details search page:
   - Business Unit: Default to UNOLF (Required)
   - Choose one of the following Ledger Groups: (Required)
     - ORG (General Fund Budget)
     - Ledger Group: ORG2
     - Ledger Group: PRG Grant
   - Department-You can select a department by using the lookup button next to the field.
   - Program:
   - Project:
   - Budget Period: Select the budget period you desire to view.

3. Click the **Search** button.
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4. Based on your search criteria the following may occur:
   - The page will display the details for the specified values.
   - Multiple budgets will appear in the Search Results requiring a selection.
   - A message will appear “No match Values were found” meaning no budget exist or the search criteria entered are incorrect.

5. Select the desired account by clicking on the account hyperlink.

6. View Commitment Control Budget Details Page

<table>
<thead>
<tr>
<th>Ledger Amount Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget</strong></td>
<td>Total budgeted amount, including transfers</td>
</tr>
<tr>
<td><strong>Expense</strong></td>
<td>Total amount of expenses, or expenditures, for this budget</td>
</tr>
<tr>
<td><strong>Encumbrance</strong></td>
<td>Total amount of encumbrances (open purchase requisitions) for this budget</td>
</tr>
<tr>
<td><strong>Pre-Encumbrance</strong></td>
<td>Total amount of pre-encumbrances (open purchase requisitions) for this budget</td>
</tr>
<tr>
<td><strong>Budget Balance</strong></td>
<td>Budget Amount minus encumbrances, pre-encumbrances and expenses (Remaining Balance.) You define the ledgers included to be included</td>
</tr>
</tbody>
</table>
7. To view a chart of the budget select the **Display Chart** button.

8. To view the activity log of what make up the expenses click the activity log icon.

9. View results
10. Select the Drill down icon to view the actual transaction.
11. Select the source entry icon to view the payables voucher Line drill down.

12. Select Go to Source Entry.

The budgets overview page will allow you to view budget activities.

1. Click the budgets overview link.

2. Select an existing inquiry name or add a new inquiry name by clicking the Add a New Value tab.

Adding an inquiry name

2a) Enter a meaningful inquiry name. (Example: BUDGETINQUIRY)
3. Enter values in the following fields:
   - Description
   - Ledger Group: ORG- Organizational Budget Ledger
     ORG 2- Org Budget- Gen Fund
     PROJ GRT- Project/Grant Budget Ledger
   - Budget Period: The budget period will default to current period to select previous
     periods select the look up prompt.
   - Ledger Group: ORG- Organizational Budget Ledger
     ORG 2- Org Budget- Gen Fund
     PROJ GRT- Project/Grant Budget Ledger
   - Account Chartfield from and to value
   - Dept: Chartfield from and to Value (Example. 1300001000) If you do not know your
     department number select the magnifying glass next to the Dept field and key your
     Department name in the Description field.

Note: When building your search criteria use the look up button when available next to
any field. Refer to basic Navigation Document page 19.
http://pstrain.uno.edu/docs/psHowTo.cfm#financials

4. Click the Search button to view results.
5. The Budget overview page displays the budget overview results.
6. Select the desired budget account.

Note: You may also select the Expense amount to view activity logs.
7. Click the [show details] button to open the budget details page for the row.

8. Click the [show budget Activity Log] button to access Transactions Types page.
9. Select the Drill down icon to view the actual transaction.
10. Select the source entry icon to view the payables voucher Line drill down.

![Payables Voucher Line Drill Down](image)

11. Select Go to Source Entry

![Go to Source Entry](image)