

# Budgets Overview

The primary way to inquire is by using the **Budgets Overview** component, using the following path from the Main Menu:

*Commitment Control > Review Budget Activities > Budgets Overview*

The **Find an Existing Value** or **Add a New Value** page appears.

Click the Search button to see a list of pre-defined inquiries.

Select an inquiry for review

The **Budget Overview Inquiry** appears:

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

**Budget Inquiry Criteria**  
**Budget Overview**

Inquiry: ADHOC Description: Budget & Planning Operating Expense Bgt

Amount Criteria **Search** Clear Reset

**Budget Type**

\*Business Unit: CLKSN Ledger Group/Set: Ledger Group Ledger Group: ORG\_GROUP

View Stat Code Budgets  
 Display Chart

**TimeSpan**

\*Type of Calendar: Detail Budget Period

**Budget Criteria**

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	ORG_GROUP	BP	FY2011	FY2011	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**ChartField Criteria**

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i	OPERATING	Update/Add
Dept	60000	%	i		Update/Add
Bldg Code	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Program	%	%	i		Update/Add

**Budget Status**

- Open
- Closed
- Hold

Save Return to Search Previous in List Next in List Notify Refresh Add Update

Click on the **Search** button (highlighted above).

The results of your inquiry will display:

**Inquiry Results**

Business Unit: CLKSN  
 Ledger Group: ORG\_GROUP Organization Budgets  
 Type of Calendar: Detail Budget Period  
 Amounts in Base Currency: USD  
 Revenue Associated:

[Return to Criteria](#) Max Rows:  [Display Options](#)

Ledger Totals (13 Rows)		Net Transfers:	0.00
Budget:	9,600.00		
Expense:	6,765.84		
Encumbrance:	0.00		
Pre-Encumbrance:	0.00		
Budget Balance:	2,834.16		
Associate Revenue:	0.00		
Available Budget:	2,834.16		

Budget Overview Results											<a href="#">Customize</a>	<a href="#">Find</a>
		Ledger Group	Fund	Dept	Dept Descr	Account	Account Descr	Program	Bldg Code	Budget Period	Budget	Expense
1		ORG_GROUP	100	60000	Budget & Planning	2430	Supplies Office	250		FY2011	2,500,000	871,440
2		ORG_GROUP	100	60000	Budget & Planning	2510	Computer Software	250		FY2011	100,000	0,000
3		ORG_GROUP	100	60000	Budget & Planning	2520	Databases Reference Books	250		FY2011	1,300,000	1,272,000


This page shows a **Ledger Total** for all budgets that matched the information you selected on the criteria page. It is a summary view of your budget for the specified values.


Ledger Totals (13 Rows)		Net
Budget:	9,600.00	
Expense:	6,765.84	
Encumbrance:	0.00	
Pre-Encumbrance:	0.00	
Budget Balance:	2,834.16	
Associate Revenue:	0.00	
Available Budget:	2,834.16	

In the **Ledger Totals** section, you can view your **Budget, Expense, Pre-Encumbrance, Encumbrance, and Available Budget** Balances.

On the bottom half of the page, the **Budget Overview Results** will show each individual budget that is in the system that matches the criteria you specified on the previous page.

Budget Overview Results										Customize	Find	View All	First	1-13 of 13	Last
	Ledger Group	Fund	Dept	Dept Descr	Account	Account Descr	Program	Bldg Code	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance		
1	 ORG_GROUP	100	60000	Budget & Planning	2430	Supplies Office	250		FY2011	2,500,000	871,440	0,000	0,000		
2	 ORG_GROUP	100	60000	Budget & Planning	2510	Computer Software	250		FY2011	100,000	0,000	0,000	0,000		
3	 ORG_GROUP	100	60000	Budget & Planning	2520	Databases Reference Books	250		FY2011	1,300,000	1,272,000	0,000	0,000		
4	 ORG_GROUP	100	60000	Budget & Planning	2526	Entertainment	250		FY2011	0,000	8,400	0,000	0,000		
5	 ORG_GROUP	100	60000	Budget & Planning	2574	Magazines & Periodicals	250		FY2011	155,000	65,000	0,000	0,000		
6	 ORG_GROUP	100	60000	Budget & Planning	2586	Memberships	250		FY2011	60,000	60,000	0,000	0,000		

You may drill into these individual budget lines with the  button that is available to the left of each row.

Clicking the  button will take you back to the **Budget Details** page where you can drill into the values for each **Budget, Expense, Encumbrance** and **Pre-Encumbrance** amount.

### Budget Details

[Display Chart](#) 

**Ledger Amounts**

<b>Budget:</b>	1,300.00 USD		
<b>Expense:</b>	1,272.00 USD		
<b>Encumbrance:</b>	0.00 USD		
<b>Pre-Encumbrance:</b>	0.00 USD		


**Associate Revenue:** 0.00 USD


**Available Budget**


<b>Without Tolerance:</b>	28.00 	USD	<b>Percent:</b>	(2.15%) 
<b>With Tolerance:</b>	28.00 	USD	<b>Percent:</b>	(2.15%) 

**Budget Exceptions**

<b>Exception Errors:</b>	0	<b>Exception Warnings:</b>	0
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The Drill to Activity Log icon  will return all transactions making up the \$ total.

The drill to ledger icon  will return one month's total, which can then be drilled on to return just one month's transactions.




Click  to return to the *Budget Overview* page.

On the *Budget Overview* page, each of the amounts is a hyperlink.

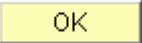
If you click the *Expense* amount of \$1,272.00 for example, you will be taken to the *Activity Log* page for that transaction(s).

Activity Log

Ledger: ORG\_EXP

Activity Log													
Customize   Find   View All   First   1-3 of 3   Last													
	Tran Line	Document Label	Document ID	Ref Bdgt?	Fund	Dept	Account	Program	Bldg Code	Budget Period	Year	Period	Foreign Ar
	2	Journal ID:	APV0226928	N	100	60000	2520	250		FY2011	2011	9	
	3	Journal ID:	APV0226928	N	100	60000	2520	250		FY2011	2011	9	
	4	Journal ID:	APV0226928	N	100	60000	2520	250		FY2011	2011	9	



Click  to return to the *Budget Overview* page.