

How do I obtain a list of my project (non-sponsored) accounts?

Use 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.

If a preset inquiry has been set up for you, you should see an Inquiry name listed PLASTNAME (your last name).

Click on the PLASTNAME link to bring up the Budget Inquiry Criteria page.

(If there is not a pre-set inquiry, you can click on the Add a New Value tab to create an inquiry that mirrors the Budget Inquiry Criteria page below).

Budget Inquiry Criteria
Budget Overview

Inquiry: ADHOCPRJ Description: Project Inquiry

Budget Type

*Business Unit: CLKSN Ledger Group/Set: Ledger Inquiry Set Ledger Inquiry Set: PROJECTS

View Stat Code Budgets

Time Span

*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"/>	PRJ_GROUP	NE	ALL	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PRJ_REV_GP	NE	ALL	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
PIG	%	%	i	SUNII	Update/Add

Budget Status

- Open
- Closed
- Hold

Click on the circled Search button to get a list of all of your projects.

A page will be returned that includes two summary lines for each of your projects – one for revenue and one for expenditures. Projects do not have a budget, but rather spending authority is based upon the amount of associated revenues that have been received. Note that a transfer into the project is treated as if it is revenue. Expenditures may be made up to the amount of associated revenues for that project.

Budget Overview Results													
	Ledger Group	Fund	Dept	Dept Descr	P/G	Project Descr	Budget Period	Recognized Revenue	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget
1	PRJ_REV_GP	331	10600	Chemical & Biomolecular Eng	03009	Salary Recovery Prof Suni	ALL	15,046,480	0.000	0.000	0.000	0.000	0
2	PRJ_GROUP	331	10600	Chemical & Biomolecular Eng	03009	Salary Recovery Prof Suni	ALL	0.000	0.000	15,039,530	0.000	0.000	-15,039
3	PRJ_REV_GP	337	10600	Chemical & Biomolecular Eng	06777	BASF Project I Suni	ALL	30,000,000	0.000	0.000	0.000	0.000	0
4	PRJ_GROUP	337	10600	Chemical & Biomolecular Eng	06777	BASF Project I Suni	ALL	0.000	0.000	22,362,180	0.000	0.000	-22,362
5	PRJ_REV_GP	338	10600	Chemical & Biomolecular Eng	08144	IDCR Rebate I Suni	ALL	1,497,230	0.000	0.000	0.000	0.000	0
6	PRJ_GROUP	338	10600	Chemical & Biomolecular Eng	08144	IDCR Rebate I Suni	ALL	0.000	0.000	1,346,150	0.000	0.000	-1,346
7	PRJ_REV_GP	392	10600	Chemical & Biomolecular Eng	44118	CSEO Seed Grant Ian Suni	ALL	4,500,000	0.000	0.000	0.000	0.000	0
8	PRJ_GROUP	392	10600	Chemical & Biomolecular Eng	44118	CSEO Seed Grant Ian Suni	ALL	0.000	0.000	4,451,370	0.000	0.000	-4,451
9	PRJ_REV_GP	885	88500	CU Agency Funds	90507	Amer Inst Chem	ALL	21,565,840	0.000	0.000	0.000	0.000	0
10	PRJ_GROUP	885	88500	CU Agency Funds	90507	Amer Inst Chem	ALL	0.000	0.000	17,436,680	0.000	0.000	-17,436

The optimal way to view the list of projects is to have it sorted by project/grant number, with revenue appearing first, then the expenditure line. If your inquiry is in some other order, use the customize feature to set the sort order.

In addition, there are columns that may return that are not used by Clarkson in this view. These may be hidden as shown below.

Budget Overview Results

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

Column Order

- Show Budget Details (frozen)
- Ledger Group
- Fund
- Dept
- Dept Descr
- P/G
- Project Descr
- Budget Period
- Recognized Revenue
- Budget
- Expense
- Encumbrance
- Pre-Encumbrance
- Available Budget*
- Available Budget* (hidden)
- Uncollected Revenue (Rec-Coll)* (hidden)
- 0.000 (hidden)
- 0.000 (hidden)

Hidden
 Frozen

Sort Order

- P/G
- Ledger Group (desc)
- Dept
- Fund

Descending

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