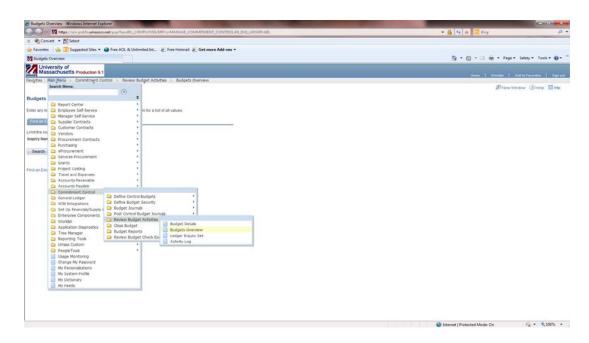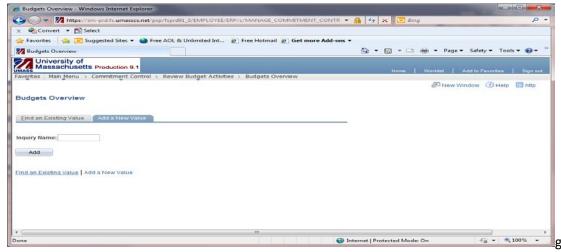1. Log into FIN Production Environment http://www.uml.edu/admin/empac/

2. Navigate to:

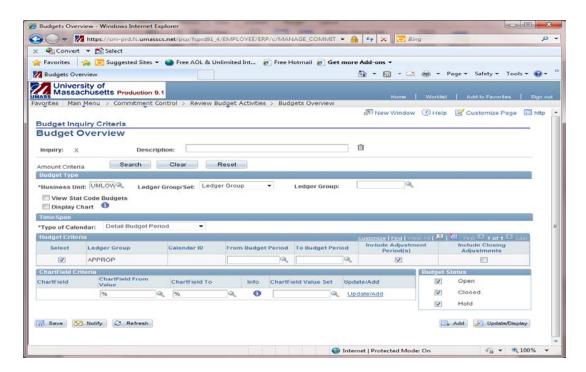   Main Menu →Commitment Control →Review Budget Activity →Budgets Overview

3. Click the **Add a New Value** tab and enter a name for the inquiry. (i.e. Math_Oper, or Math_Discr). Something that identifies the type of Budget being tracked.

4. The Criteria page will appear.

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Enter the following information, or use the dropdown buttons located to the right of each field to lookup chart field information (*where available*).

- ***Description:***

  Provide a long description of the type of inquiry, something that will connect with the type of budget the inquiry will be used for (i.e. Art Operating Budget, or Art Discretionary Budget).

- ***Business Unit:*** UMLOW

- ***Ledger Group / Set:*** Ledger Group

- ***Ledger Group:*** Populate this field with one of the following; depending upon the type of budget you're inquiring on.

  > ***Approp*** (all Non-Project Budgets)

  > ***Proj_GRT*** (all Non-Sponsored Project Budgets)

- ***View Stat Code Budgets** – This field should be left unchecked*
- ***Display Chart** – This field should be left unchecked*
- ***Type of Calendar** – This filed should remain "Detail Budget Period"*

- ***Budget Criteria –***
  - The *"Select"* field should be checked

    The ***"From Budget Period"*** and ***"To Budget Period"*** fields are used to define the period of time the inquiry is to be run against. Noting, initially these fields automatically populate with the current fiscal year. These fields would only be populated when inquiring on an Appropriation Budget. The "PROJ_GRT" Ledger crosses budget years; therefore these fields would remain blank.

    Noting, this field can be changed, depending on what fiscal year(s) you want to see.

- ***Include Adjustment Period(s)*** Should remain checked
- ***Include Closing Adjustments –*** *This field should remain unchecked*
- ***Budget Status:*** All Options (Open, Closed, and Hold) should remain checked

ChartField Criteria

This area is where you define the criteria for your search, based on the type of budget (*Appropriation vs. Non-Sponsored Project Budgets*) you're inquiring on.

Noting, the more refined your criteria included in your inquiry, the more refined the results will be. If your inquiry is for a specific budget, enter as much of the PeopleSoft chart field that is known *(Dept.ID, Fund #, and Project Number)*. If aspects of the chart field are unknown, or if the desired result is to find all budgets related to a specific Fund, Dept. ID, or Project Number, the wildcard symbol (%) would be used in place of one of these fields. Use of the wildcard will initiated a search of all possible combinations based on other criteria included in your inquiry. Noting, the less specific the criteria, the longer it will take to retrieve the information, it's recommended that one of the fields (Fund Number, Dept ID, or Project Number) is filled in.

ChartField Criteria continued

Fill in the following fields as noted:

  - ***Account:*** This field should be left blank

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- o **_Dept:_** Enter the range of Dept ID's to be included in the inquiry under the "ChartField From Value" and the "ChartField To" fields.

  If the inquiry is only for one Dept. ID, simply enter that Dept ID in the "ChartField From Value" field, and leave the "*ChartField To*" field as "%"

- o **_Oper Unit:_** This field should be left blank

- o **_Fund:_** Enter the range of Fund #'s to be included in the inquiry under the "ChartField From Value" and the "ChartField To" fields.

  If the inquiry is only for one Fund #, simply enter that Fund in the "ChartField From Value" field, and leave the "*ChartField To*" field as "%"
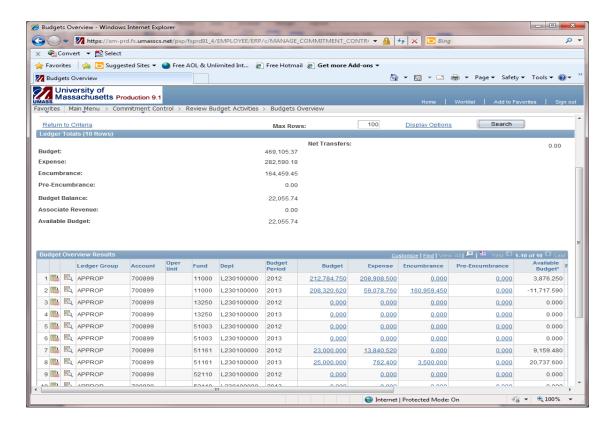
- o **_Project:_** This field should be filled if the inquiry is under the Ledger Group "PROJ_GRT". Entry the range of Project #'s to be included in the inquiry under the "ChartField From Value" and "ChartField To" fields.

  If the inquiry is only for one Project #, simply enter that Project # under the "ChartField From Value" field, and leave the "*ChartField To*" field as "%"

  Noting, if you aren't sure of the Project # and have the Dept. ID and/or Fund # the Project # field can remain as a wildcard symbol (%). The search will render all Projects that fall under the specified criteria in the search (i.e. Dept ID Fund Combination).

5. Click Save

6. Click **"Search"** Located at closer to the top of the page – Inquiry results will be displayed

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Note – If there are too many rows of information to fit on the screen, a message box will appear stating "*More Rows are available….*" Click "Ok" and the criteria screen will appear.

The Max Row field (*located upper middle of the screen*) should be changed to 99999 to ensure that all available rows of information are captured in the inquiry results.

Click "Search" again to rerun the inquiry.

Ledger Totals – The budget information located at the upper part of the screen is a summary of all aspects of the budget (Budget, Expenses, Encumbrances, Pre-Encumbrances, and Associated Revenue).

Budget Overview Results – The budget information located at the lower part of the screen, this is a summary of just the budgets, similar to the Ledger Totals, without the Associated Revenue amounts.

7. **Update / Change Inquiry criteria** – Click the "*Return to Criteria*" Link located at the bottom of the screen.

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8. Accessing Inquiries in the future

   Navigate to: Main Menu →Commitment Control →Review Budget Activity →Budgets Overview

9. Click the *"Search"* button to view all inquiries you've created.

10. Click on the inquiry you want to use

   <u>***Note***</u>: The Budget Overview Inquiry Search screen can be set as one of your "Favorites" making it easier to access in the future. Once on the appropriate screen, simply selecting the "*Add to Favorites*" Link located at the top right of this page. Label it something that relates to Inquiry.

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