# **Budgets Overview Quick Guide**

### Location:



## **Operating Cost Centers:**

**Choose an Inquiry Name** This can be anything that will help you remember what the search is for. (Example is 'FY21 20-21' because it's used for searching for budget in fiscal year 2021).

Then click Add a New Value to create a search page.

Budgets Overview
nter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value
Search Criteria
nquiry Name begins with V FY21 20-21
Search Clear Basic Search 🖾 Save Search Criteria
ind an Existing Value   Add a New Value

Set up the Budgets Overview page as follows:

Business Unit = DAL01 Ledger Group/Set = Ledger Inquiry Set Ledger Inquiry Set = INQUIRY Type of Calendar = Detail Budget Period Budget Criteria = Check OEA and ORA Budget Period = 2020-21(Current fiscal year) Cost Center = type a cost center in the ChartField value blank

After all of these criteria have been filled in, click 'Search' (top left of page).

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After clicking search, the Budgets Overview Results will put up for your cost center. The items highlighted below are main areas to review.

Budget: The amount of money budgeted in the cost center for the specific year.

**Expense:** The amount of expenses that have already been spent from the cost center.

**Encumbrance:** The amount set aside for salary, benefits, and PO expenses that will be spent in the future.

**Pre-Encumbrance:** The amount of set aside salary and benefits for vacant positions that will be spent in the future.

**Available Budget (Expenses):** The total amount of budget left after taking into account expense and encumbrances.

Revenue Estimate: The amount of revenue budgeted in the cost center for the specific year.

Recognized Revenue: The amount of revenue that has been received so far.

**Available Budget(Revenue):** The amount of revenue that is left to be brought in or the amount of revenue that is yet to be budgeted. If the amount is positive, more revenue needs to be received to match the Revenue Estimate. If the amount is negative, they need to budget the revenue that was received(also see training for Budget Journals).

The Budget Overview Results (below the ledger totals) is a summary by account of the money budgeted, spent and encumbered for the year. If you want to drill down by account, you can click on the blue numbers, and it will drill down by transaction amount.

**Max Rows:** When you drill down by account, sometimes there are more lines than 100, if you want to see all the rows, change this number from 100 to 1000 or more depending on the number of lines.

**Personalize:** Click on the icon to change what column titles show up on the Budget Overview Results below. You can add descriptions for the columns or hide certain columns that are unhelpful for you. You can also freeze columns or sort them by a specific category.

Budg	et Overview Results
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Do	ownload Budget Overview Results Table to Excel

**Return to Criteria:** If you are done reviewing this cost center's information, you can click return to criteria to take you back to the Budgets Overview search page and enter a new cost center.

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#### **Project Cost Centers:**

**Choose an Inquiry Name** This can be anything that will help you remember what the search is for. (Example is 'PED' because it's used for searching the PED ledger).

Then click Add a New Value to create a search page.

Set up the Budgets Overview page as follows:

Business Unit = DAL01 Ledger Group/Set = Ledger Group Ledger Inquiry Set = PED Type of Calendar = Detail Budget Period Budget Criteria = Check PED Cost Center = type a cost center in the ChartField value blank

After all of these criteria have been filled in, click 'Search'(top left of page).

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## Plant Cost Centers:

**Choose an Inquiry Name** This can be anything that will help you remember what the search is for. (Example is 'PEA' because it's used for searching the PEA ledger).

Then click Add a New Value to create a search page.

Set up the Budgets Overview page as follows:

Business Unit = DAL01 Ledger Group/Set = Ledger Group Ledger Inquiry Set = PEA Type of Calendar = Detail Budget Period Budget Criteria = Check PEA Cost Center = type a cost center in the ChartField value blank

After all of these criteria have been filled in, click 'Search'(top left of page).

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