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Planning a Budget

Setting Budget Targets:

Current Unrestricted (CUF) – 11001

Beginning in mid-March, CUF budget targets are allocated from the Budget Office to each Provost/VP, then to Deans/Directors. Finalized targets are entered into PeopleSoft and become available to individual departments early May. Targets are established based on budget account category and may not be moved between categories.

1. Discretionary
2. Student Wages
3. Revenue
4. Non-Discretionary **

*** In most cases, non-discretionary targets are not set by the budget office, but rather should be determined based on contract obligations, rate changes, etc.*

Designated Funds – 21xxx – 28xxx

Expense targets should be derived from a combination of year-end surplus/(deficit) and revenue estimates:

1. Forecast year-end surplus or deficit.
2. Add revenue estimate amount to determine an expense target
3. Enter both revenue and expense budgets into PeopleSoft budgeting.

Auxiliary Funds– 3xxxx

Auxiliary funds do not have pre-determined targets, however the Budget Office requires that expenses not exceed revenue and that revenue sharing agreements and reserve transfers be included as part of the budget plan.

1. Estimate revenues
2. Estimate operating expenses
3. Estimate revenue sharing agreement (budget to MISC prime account)
4. Estimate transfer to reserve (budget to MISC prime account)
5. Enter both revenue and expense budgets in PeopleSoft

Gift Funds – 46xxx – 48xxx

Expense targets should be derived from a combination of year-end surplus/(deficit) and revenue estimates:

1. Forecast year-end surplus or deficit.
2. Add revenue estimate amount to determine an expense target
3. Enter both revenue and expense budgets into PeopleSoft budgeting.

Note: Scholarship gift funds that are processed through the Financial Aid office are budgeted by the Budget Office, and are therefore not included as part of the budget planning cycle.

Endowment Income – 41xxx – 45xxx

The expendable amount in endowment income funds is determined by a twelve-quarter rolling market average of interest earned on the principal fund. Salary and benefits increases are estimated for the new-year and subtracted from the overall income amount, the remainder of which is available for budgeting.

1. Forecast Year-end Surplus / (Deficit)
2. Net surplus to zero, carry forward deficit
3. Review Income amount in PS Budgeting (Income has been reduced for any salary and benefits estimates)
4. Subtract estimated deficit from income and use as a base to budget expenses

Note: Endowed scholarship funds that are processed through the Financial Aid office are budgeted by the Budget Office, and are therefore not included as part of the budget planning cycle.

Note: Endowed chair funds are budgeted by the Provost's office and are therefore not included in the budget planning cycle.

Mid-year Budget Adjustments

Current Unrestricted (CUF) – 11001

Budget must remain within CUF, (i.e. budget cannot be transferred out of CUF into another fund) however, it can be moved between departments. Submit a Budget Transfer/Setup form to the budget office. Be sure the transfer balances the increase and decrease to CUF.

Note: It will be assumed that all budget transfers affect only the current fiscal year unless both the Provost/VP and Budget Office approve a permanent transfer.

Note: Transfers between discretionary prime accounts within a single department will not be processed.

All Other funds – 21xxx – 48xxx

Budget adjustments to designated funds must stay within the available cash plus estimated revenues. Please review the following prior to submitting a budget increase.

1. Start with Beginning Balance (available on a Balance Sheet report).
2. Add year-to-date revenue (available on a Balance Sheet report).
3. Add estimate of additional revenue.
 - a. Submit a budget increase for revenue if necessary
4. Subtract existing expense budget (available on a Budget Summary report).
 - a. The result is the total available for increase.

Note: All budget transfers must stay within the same fund number

Budgeting Student Wages

Changing Payroll Distribution Strings

If a new payroll distribution string is needed to pay student wages, either the payroll distribution string associated with an existing Position Control Number (PCN) can be changed or a new PCN must be requested. Each PCN can, but is not required to, have a unique payroll distribution string.

Requesting New Position Control Numbers:

If a new payroll distribution string is needed and it is not a replacement for an existing string please submit a “New/Change PCN Request” form, available at: www.scu.edu/finance/forms

1. “Title/Position name” is the job title/description for the position
2. Account, Fund, Department and Program are required. Activity and Class are optional.
3. Project/Grant is only required for Sponsored Project Office grants.

Changing existing Position Control Numbers:

By changing the payroll distribution string associated with an existing PCN, all students who are assigned to the PCN will be affected, and all future salary expenses will be charged to the new payroll distribution string. To change an existing PCN, please submit a “New/Change PCN Request” form, available at: www.scu.edu/finance/forms.

Please e-mail all completed forms to University Budget Office
Teddy Wirjadisastra: twirjadisastra@scu.edu

PeopleSoft Budgeting Overview

Vocabulary

PeopleSoft Terminology	Definition
Budget Center	Drives the budget process. For SCU the budget center is your Department ID.
Line Item Budgets	Expense budgets. This includes Discretionary and Non-Discretionary budget. Note: "Line-Item" <i>does not</i> refer to the account value used for budgeting.
Position Budgets	Salary Budgets. SCU plans to use PeopleSoft for Position Budgeting in the future, however the functionality has not yet been released.
Budget <u>Activity</u>	Refers to the process of entering budget amounts. Note: This <i>does not</i> refer to Activity code in your accounting distribution string.
Chartfield 1	Synonymous for Activity Code Note: Budget Inquiries will use Chartfield 1 in place of Activity Code

Page Definitions

Page Name	Definition
Work Item Details	Choose the department ID you want to work with Copy/Make multiple working versions of your budget Submit final budgets
Line Item Search	Select Public View Affects how your budget entry page will look
Line Item Details	Also available on Line Item Search Page. <u>ChartField Filters</u> Select columns to view (Account, Fund, Dept, etc...) Filter rows (e.g. view fund 11001 only) Filter account types (e.g. view only discretionary accounts) Enter budget amounts Add budget lines Remove budget lines

Select Line Item Budgets

Go to: [Line Item Search](#) [Line Item Details](#)

Business Unit: SCU General Ledger BU

Budgeting Model ID: 2005_STAGE1F

Budget Phase ID: STAGE 1

Budget Center: CMIN Campus Ministry

Ledger Name: 2005 Targets

Scenario: INITIAL

Version: Master Version 1

View Definitions

Public View: Preparer

Private View: [Create New Private View](#)

ChartField Values

Dimensions [Filter ChartField Values](#)

ChartFields	Dimension Level	Show Code	Show Description
Account		☒	☐
Fund Code		☒	☐
Department		☐	☐

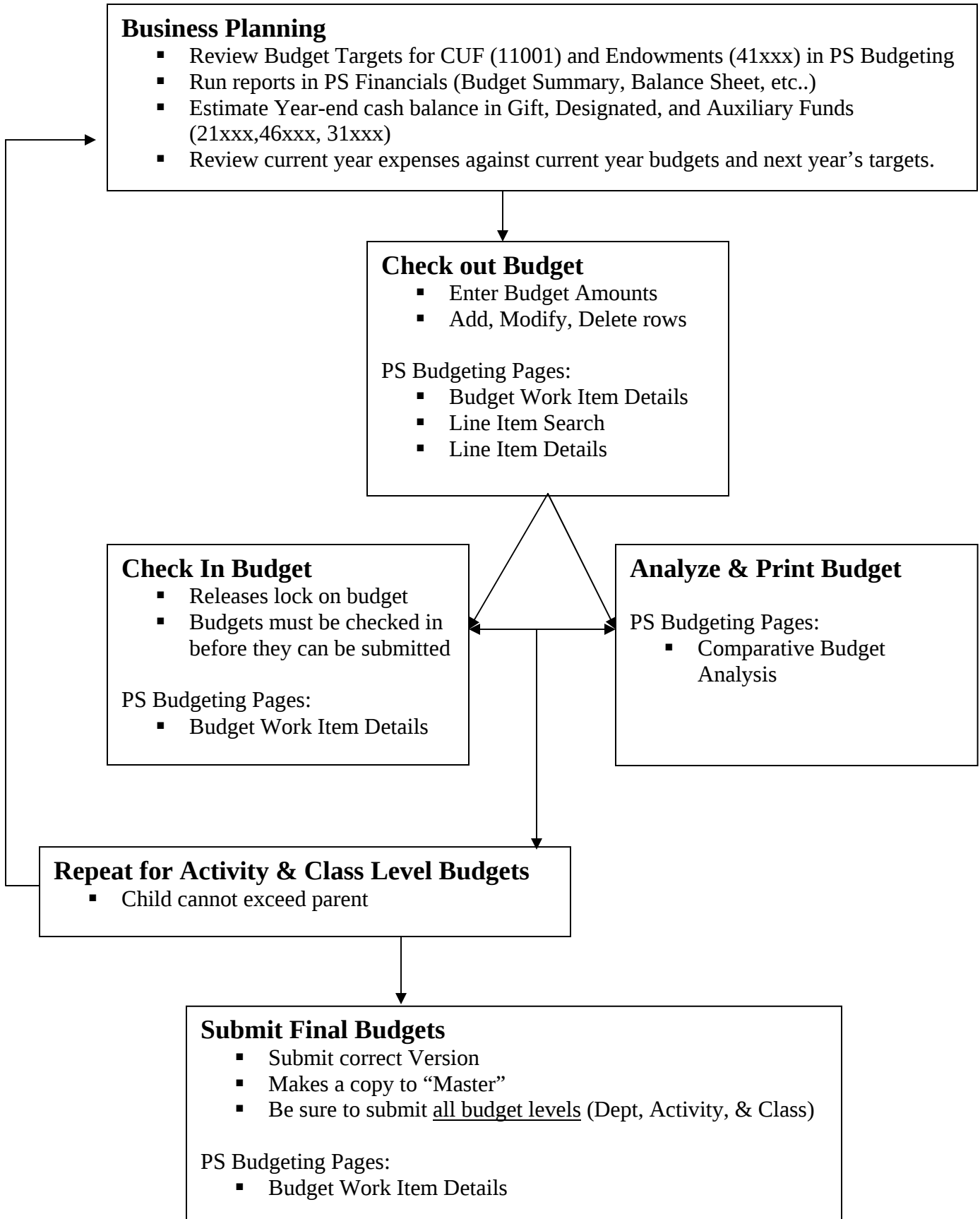
Return to: [Budget Work Item Details](#)

3

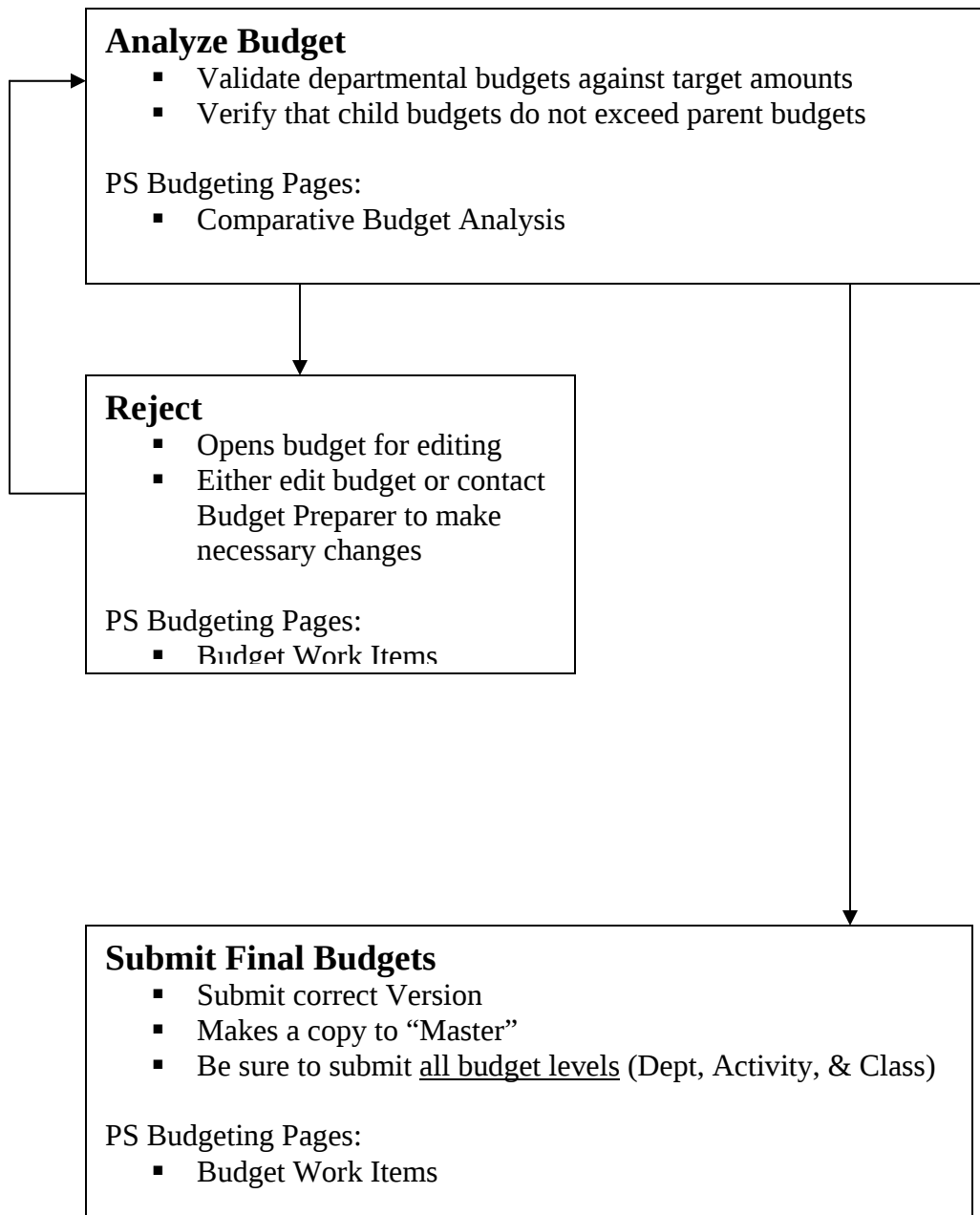
2

1

The Process – Budget Preparation Summarized



The Process – Budget Review & Approval Summarized



View Documentation (Additional Instructions)

Additional Budgeting Instructions and Tips will be posted in Guidelines and Documentations. To download this information, navigate to:

Budgeting Home > Budget Preparation > Prepare Budgets > Guidelines and Documentation

PeopleSoft®

Home

Menu

Search:

go

My Favorites

Budgeting

- Budgeting Home
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Budgeting User Preferences
- Application Diagnostics
- Reporting Tools
 - Change My Password
 - My Personalizations
 - My System Profile

Budgeting Home » Budget Preparation » Prepare Budgets

Prepare Budgets

Menu Options

Budget Work Item Details	Select a budget work item to copy, submit, and access pages to work on a budget activity. View the status of budget work items.
Budget Work Items	Access budget work items through a tree hierarchy. Select a budget work item to copy, submit, reject, and access pages to work on a budget activity. View the status of budget work items.
Combination Data Inquiry	Link to PeopleSoft General Ledger to view Combination Edit setup pages, ChartField Combination Data and Commitment Control budget definition.
Guidelines and Documentation	View or download budget guidelines, policies, and other budget documentation.

Getting Started with PeopleSoft Budgeting

Signing On

Web Address:

<http://budgets.scu.edu>

User ID and Password

Sign in using ALL CAPS

User ID: *Novell/Groupwise UserID (sometimes truncated to first 8 letters)*

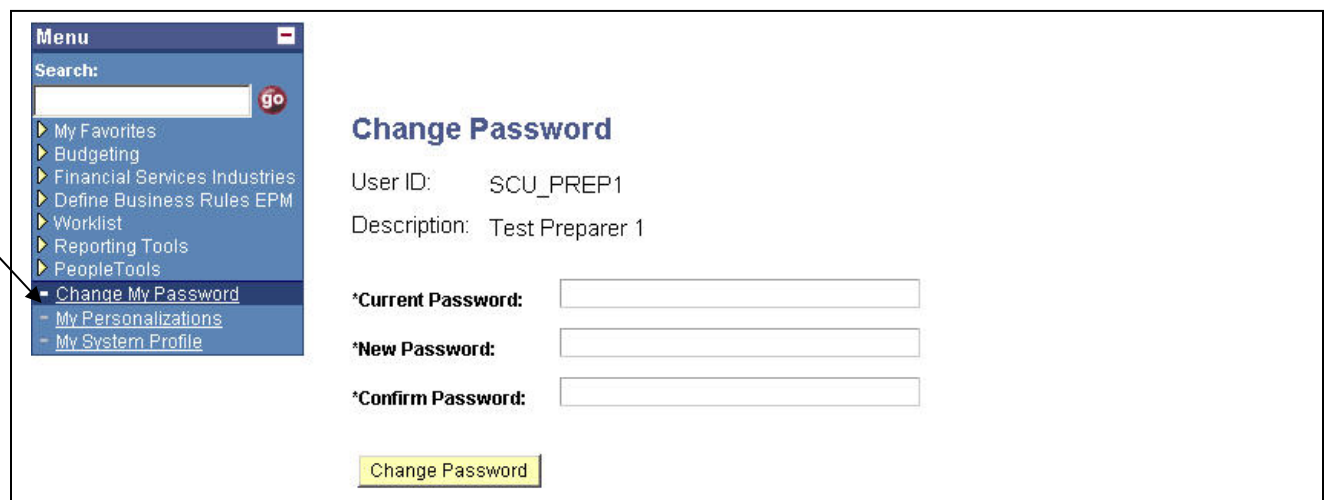
Password: *********



The screenshot shows the PeopleSoft8 login interface. At the top is the PeopleSoft8 logo. Below it, there is a 'Language:' section with links for English, Español, Français, Italiano, Deutsch, Français du Canada, 日本語, Português, Nederlands, 繁體中文, 简体中文, and Svenska. A mouse cursor is pointing at the 日本語 link. Below the language links are input fields for 'User ID:' and 'Password:', followed by a yellow 'Sign In' button. At the bottom, a red error message states 'User ID and Password are required.'

Note: After signing-in for the first time, please change your password. Follow the steps below.

- Click **Change My Password**
- Enter your Current Password, then enter your new password and confirm.
- Click **Change Password**
- Please make note of your password, the budget office cannot retrieve your password for you, however the value can be reset.



The screenshot shows the 'Change Password' screen. On the left is a 'Menu' sidebar with a search bar and a 'go' button. The menu items include My Favorites, Budgeting, Financial Services Industries, Define Business Rules EPM, Worklist, Reporting Tools, PeopleTools, Change My Password (highlighted with a mouse cursor), My Personalizations, and My System Profile. The main content area is titled 'Change Password' and contains the following fields: 'User ID:' with the value 'SCU_PREP1', 'Description:' with the value 'Test Preparer 1', '*Current Password:', '*New Password:', and '*Confirm Password:'. Each of these three password fields has an input box. At the bottom is a yellow 'Change Password' button.

Budgeting Home

The screenshot shows the PeopleSoft Budgeting Home page. On the left is a 'Menu' sidebar with a search bar and a list of links. The main content area has a header 'Budgeting Home' and a title 'Budgeting Home Page - Test Reviewer'. Below this are three main sections: 'Budget Preparation', 'Budget Analysis', and 'My Profile'. Annotations with boxes and arrows point to specific areas: 'Prepare, Reject, Submit budgets' points to the 'Budget Preparation' section; 'Review & Analyze budgets' points to the 'Budget Analysis' section.

PeopleSoft®

Home | Add to Favorites

Menu

Search: **go**

- My Favorites
- Budgeting
 - Budgeting Home**
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Budgeting User Preferences
- Application Diagnostics
- Reporting Tools
 - Change My Password
 - My Personalizations
 - My System Profile

Budgeting Home

Budgeting Home Page - Test Reviewer

Budget Preparation
Perform budgeting work, including line-item budgeting, position budgeting, asset budgeting, mass adjustments, and budget allocations. View budgeting guidelines.

Budget Analysis
Perform analysis on prepared budgets. View, download, and run reports.

My Profile
Access options specific to users such as email and operator defaults.

Prepare, Reject, Submit budgets

Review & Analyze budgets

Budget Preparation in PeopleSoft

Work Item Details (Check Out Budget Center)

A budget must first be checked out, before it can be edited. Use the Budget Work Item Details page to check out budgets

Navigation

Budgeting Home > Budget Preparation > Prepare Budgets > Budget Work Item Details

PeopleSoft®

Home

Menu

Search: go

- My Favorites
- Budgeting
 - Budgeting Home**
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Budgeting User Preferences
- Application Diagnostics
- Reporting Tools
 - Change My Password
 - My Personalizations
 - My System Profile

Budgeting Home » Budget Preparation » Prepare Budgets

Prepare Budgets

Menu Options

- Budget Work Item Details**
Select a budget work item to copy, submit, and access pages to work on a budget activity. View the status of budget work items.
- Budget Work Items
Access budget work items through a tree hierarchy. Select a budget work item to copy, submit, reject, and access pages to work on a budget activity. View the status of budget work items.
- Combination Data Inquiry
Link to PeopleSoft General Ledger to view Combination Edit setup pages, ChartField Combination Data and Commitment Control budget definition.
- Guidelines and Documentation
View or download budget guidelines, policies, and other budget documentation.

Search for Model ID

Enter Role Name: **Preparer or Reviewer**

Click Search to get a list of valid Models

PeopleSoft®

Home | Add to Favorites

Budgeting Home » Budget Preparation » Prepare Budgets » Budget Work Item Details

[New Win](#)

Budget Work Item Details
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Role Name: begins with Preparer

Business Unit: begins with

Budgeting Model ID: begins with

Ledger Name: begins with

Search Clear Basic Search Save Search Criteria

Search Results

Select Budgeting Model ID

Model ID's identify budgeting levels. There is a complete set of Models for both Revenue & Expense. Click on the desired Model ID:

Budget Level	Description	Model ID
Department Level	Required budget level for all departments. Parent to lower levels. This level must be completed before all others.	2006_EXP0_DEPT 2006_REV0_DEPT
Activity Level	Optional level provides for more budget management options. This level must be completed before the class level.	2006_EXPB_ACT 2006_REVB_ACT
Class Level	Optional level provides for more budget management options. This level should be completed last.	2006_EXPC_CLS 2006_REVC_CLS

Search Clear Basic Search Save Search Criteria

Search Results

View All

First 1-8 of 8 Last

Role Name	Business Unit	Budgeting Model ID	Ledger Name
Preparer	SCU	2006_EXP0_DEPT	Proposed Budget - Dept Exp
Preparer	SCU	2006_EXPB_ACT	Proposed Budget - Activity Exp
Preparer	SCU	2006_EXPC_CLS	Proposed Budget - Class Exp
Preparer	SCU	2006_REV0_DEPT	Proposed Budget - Dept Rev
Preparer	SCU	2006_REVB_ACT	Proposed Budget - Activity Rev
Preparer	SCU	2006_REVC_CLS	Proposed Budget - Class Rev

Current Checkouts

Will show you which budget centers have been locked by you or other users.

1. Each user may only check out one budget center at a time
2. Once a budget center is checked out, it may not be edited by any other user.
3. An infinite number of “read-only” budget centers may be checked out at any time.

PeopleSoft.

[Budgeting Home](#) » [Budget Preparation](#) » [Prepare Budgets](#) » **Budget Work Item Details**

Budget Work Item Details

Role Name: Preparer
Business Unit: SCU General Ledger BU
Budgeting Model ID: 2005_STAGE1
Description:
Ledger Name: Proposed Budget

Use the dropdown menu to transfer directly to budget setup or to check in a budget that you previously checked out

See who has a budget center checked out

Current Checkouts

Select Check Out Option	Budget Center	Status	Status	Updated On
	Go CMIN	Checked out on 3/31/2004 01:10PM by SCU_REVIEWER	✓ Open	03/24/2004 10:59:20AM
	Go MISSCH	Read-Only version checked out on 3/31/2004 01:14PM	✓ Open	03/24/2004 10:59:20AM

To view or change a budget, select Budget Center. To copy a budget version, click Copy. To submit the completed budget for approval, click Submit.

Budget Work Item Details [Customize](#) | [Find](#) | [First](#) | [1-8 of 8](#) | [Last](#)

Budget Center	Description	Version	Status	Email	Scenario
CMIN	Campus Ministry	Base	✓ Open	Submit	Copy INITIAL
CMIN	Campus Ministry	1	✓ Open	Submit	Copy INITIAL
MISSCH	Mission Church	Base	✓ Open	Submit	Copy INITIAL

Select a Version (Budget Work Item Details)

Multiple working versions of your budget can be created. Select the current working version of your budget.

Note: The “Base” version is read only and cannot be edited. This provides you with a permanent starting point to return to at any point in the budget planning process. Most departments will only work with Version 1 during budget planning.

To view or change a budget, select Budget Center. To copy a budget version, click Copy. To submit the completed budget for approval, click Submit.

Budget Work Item Details							Customize	Find	First	1-8 of 8	Last
Budget Center	Description	Version	Status	Email		Scenario					
CMIN	Campus Ministry	Base	✓ Open		Submit	Copy INITIAL					
CMIN	Campus Ministry	1	✓ Open		Submit	Copy INITIAL					
MISSCH	Mission Church	Base	✓ Open		Submit	Copy INITIAL					
MISSCH	Mission Church	1	✓ Open		Submit	Copy INITIAL					
UJLACQ	University Library-Acquisition	Base	✓ Open		Submit	Copy INITIAL					

Checkout Budget (Budget Work Item Details)

From the Drop down menu, choose

- Check Out Budget
- Check Out Read-Only Budget

Ledger Name: Proposed Budget
Scenario: INITIAL
Status: Open
Version: 1 Edit Stage1 Expenses

To access the pages for a budget activity, select an Action from the drop-down box and click Go. If an activity is checked out, select an Action to check in an activity and click Go to return the budget data to the database.

Budget Activities	
Activity	Budget Status
Line Item Budgeting	Budget is available

Return to: [Budget Work Item Details](#)

Select Check Out Option

Line Item Search (Defining Views)

On the Line Item Search page, select a view definition, chartfields values, and filter data.

Select View

Select the appropriate Public View from the dropdown menu. Select either Reviewer or Preparer.

Click “Line Items Details” Link

Select Line Item Budgets

Go to: Line Item Search [Line Item Details](#)

Business Unit: SCU General Ledger BU

Budgeting Model ID: 2006_EXP0_DEPT

Budget Phase ID: 2006_EXP_DEPT

Budget Center: ATHADM Athletics Administration

Ledger Name: Proposed Budget - Dept Exp Scenario: FINAL

Version: 1 Edit Department Expenses

View Definitions

Public View:

Private View: [Create New Private View](#)

ChartField Value

Dimensions [Filter ChartField Values](#)

ChartFields	Dimension Level	Show Code	Show Description
Account		☒	☐
Fund Code		☒	☐
Department		☒	☐

Return to: [Budget Work Item Details](#)

Line Item Details (Budget Preparation)

Customizing the View

Hide Amount Link - (One time setup)

The links in the amount column should not be used to make adjustments to your budget. As a one-time setup, please hide this column from view.

Click on the 'Customize' link

Version: 1 Edit Stage1 Expenses

ChartField Values

Line Item Toolbar

Actions Analysis

View Options Comparative Budget Analysis
Planning Target Budget Version Comparison
Add Budget Entry Budget Period Analysis
Validate ChartFields Hold All Hot Keys Help

Customize | Find | View All | First 1-10 of 10 Last

Account	Fund Code	Amount
BSTRVL	11001	15,100.00
CONTRS	11001	22,300.00
INTRVL	11001	750.00
MAIL	11001	400.00

Highlight the Amount column

Check the Hidden box

Click OK

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

Tab Amount Summary (frozen)
(column 2) (frozen)
Account (frozen)
Fund Code (frozen)
Amount (hidden)
(column 64)
Tab Periods
2005
Tab History
Current Budget

Hidden
Frozen

Sort Order

Descending

OK Cancel Restore Defaults Preview

View additional rows

To view the next set of 30 rows, use the left and right arrow buttons

To view the first/last set of 30 rows, use the “First” or “Last” link

To view all rows, click “View All”

Line Item Details

Go to: [Line Item Search](#) Line Item Details

Business Unit: SCU General Ledger BU
Budgeting Model ID: ACTIVITY
Budget Phase ID: Activity
Budget Center: ATHADM Athletics Administration
Ledger Name: 2004 Submit Activity Budget **Scenario:**
Version: 1 2004 Submit

▶ **ChartField Values**

▼ **Line Item Toolbar**

Actions	Analysis
View Options	Comparative Budget Analysis
Planning Target	Budget Version Comparison
Add Budget Entry	Budget Period Analysis
Validate ChartFields	Hot Keys Help
Hold All	

Change the number of rows in your view.

Customize | Find | View All | First 1-30 of 36 Last

Amount Summary	Periods	History	Account	Fund Code	Chartfield 1	Amount
----------------	---------	---------	---------	-----------	--------------	--------

Sort Columns

To sort data by a particular column; click on the desired column heading.

Version: 1 Edit Stage1 Expenses

▶ **ChartField Values**

▼ **Line Item Toolbar**

Actions	Analysis
View Options	Comparative Budget Analysis
Planning Target	Budget Version Comparison
Add Budget Entry	Budget Period Analysis
Validate ChartFields	Hot Keys Help
Hold All	

Click a column heading to sort data by that column.

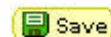
Customize | Find | View All | First 1-10 of 10 Last

Amount Summary	Periods	History	Account	Fund Code	Amount
✓			BSTRVL	11001	15,100.00
✓			CONTRS	11001	22,300.00
✓			INTRVL	11001	750.00
✓					

View Budget Totals

During budget preparation, totals can be verified at any time. Totals can be found at the bottom of the Line Items Details Page.

To update budget totals; click the yellow Save button in the lower left corner.



Totals				
Budget Plan Total	Target Budget	Current Budget	YTD Actuals	Prior Actuals
0.00	254,700.00	420,938.00	298,914.91	384,222.61

Save

ChartField Values (Show codes and/or descriptions)

To View/Hide Chartfields (e.g. Department, Fund, Account, etc...) open the ChartField Values section of the Line Items Details page.

Click to open options

Line Item Details

Go to: [Line Item Search](#) Line Item Details

Business Unit: SCU General Ledger BU

Budgeting Model ID: ACTIVITY

Budget Phase ID: Activity

Budget Center: ATHADM Athletics Administration

Ledger Name: 2004 Submit Activity Budget **Scenario:**

Version: 1 2004 Submit

ChartField Values

Line Item Toolbar

Actions	Analysis
View Options	Comparative Budget Analysis
Planning Target	Budget Version Comparison
Add Budget Entry	Budget Period Analysis
Validate ChartFields	Hot Keys Help
Hold All	

Amount Summary | Periods | History | Customize | Find | View All | First 1-30 of 36 Last

Account	Fund Code	Chartfield 1	Amount
---------	-----------	--------------	--------

To view a column, check the “Show Code” box.

To view a chartfield value’s description check the “Show Description” Box.

ChartFields	Dimension Level	Show Code	Show Description
Account		☒	☐
Fund Code		☒	☒
Department		☐	☐
Chartfield 1		☒	☐

Refresh Dimensions

Note: Each time you Refresh Dimensions, the Chartfield Values box will close. Click on the carrot at the left to open the box again.

Filter ChartField Values (Limit rows by Fund, Activity code, etc...)

To Filter ChartField values, click the Filter ChartField Values Tab

Enter the filter value (e.g. Fund 11001)

Click Refresh Dimensions

ChartFields	From	To	Budget Category
Account			
Fund Code	11001	11001	
Department			
Chartfield 1			

Refresh Dimensions

Budget Category - Select Operating or Salary & Benefits (for Student Wages)

Select an Account Category from the drop down menu under Budget Category.

Click Refresh Dimensions

ChartFields	From	To	Budget Category
Account			
Fund Code	11001	11001	
Department			
Chartfield 1			

Refresh Dimensions

Operating Expenses
Other Expenses
REVENUE BUDGETS
Salary & Benefits
Transfer

Note: Each time you Refresh Dimensions, the Chartfield Values box will close. Click on the carrot at the left to open the box again.

Show all available columns

To show all available columns click the yellow “show all columns” button next to the history tabs.

Note: Each time you Refresh Dimensions (see step 1 – Customizing your View) you will need to click the “show all columns” button again.

Version: 1 Edit Stage1 Expenses

ChartField Values

Line Item Toolbar

Actions	Analysis
View Options	Comparative Budget Analysis
Planning Target	Budget Version Comparison
Add Budget Entry	Budget Period Analysis
Validate ChartFields	Hot Keys Help

Hold All

Customize | Find | View All | First 1-10 of 10 Last

Amount Summary Periods History 

Account	Fund Code	Amount
✓ BSTRVL	11001	15,100.00
✓ CONTRS	11001	22,300.00
✓ INTRVL	11001	750.00
✓		

Entering Budget Amounts

To enter a budget amount; click in the cell for the desired accounting distribution string in the new fiscal year column. Enter the desired amount.

Line Item Toolbar

Actions	Analysis
View Options	Comparative Budget Analysis
Planning Target	Budget Version Comparison
Add Budget Entry	Budget Period Analysis
Validate ChartFields	Hot Keys Help

Hold All

Customize | Find | View All | First 1-10 of 10 Last



Account	Fund Code	Amount	2004	2004 Target Budget	2003 Budget	2002 Budget
✓ BSTRVL	11001	0.00	0.00	4,500.00	4,500.00	1,700.00
✓ CONTRS	11001	0.00	0.00	1,500.00	1,500.00	3,500.00
✓ MAIL	11001	0.00	0.00	2,000.00	2,000.00	4,000.00
✓ MISC	11001	0.00	0.00	3,849.00	4,200.00	851.00

Click to enter budget amounts.

Adding New Budget Lines

To add a line not already in your budget, click “Add Budget Entry”. Be sure your filters do not exclude existing budget lines. PeopleSoft will not allow you to enter duplicate distribution strings.

Go to: [Line Item Search](#) Line Item Details

Business Unit: SCU General Ledger BU
Budgeting Model ID: ACTIVITY
Budget Phase ID: Activity
Budget Center: ATHADM Athletics Administration
Ledger Name: 2004 Submit Activity Budget **Scenario:**
Version: 1 2004 Submit

ChartField Values

Line Item Toolbar

Actions	Analysis
View Options	Comparative Budget Analysis
Planning Target	Budget Version Comparison
Add Budget Entry	Budget Period Analysis
Validate ChartFields	Hot Keys Help

Click to add new distributions strings.

Customize | Find | View All | First 1-22 of 22 Last

Account	Fund Code	Department	Chartfield 1	Amount	2004	2003 Budget
☒ STFSAL	11001	Current Unrestricted Fund	FNDRS	0.00	0.00	160,187.00
☒ GMTRVL	11001	Current Unrestricted Fund	NCAA	0.00	0.00	30,000.00

Enter the desired accounting distribution string

Line Item Details

Add Line Item

Business Unit: SCU General Ledger BU
Budgeting Model ID: ACTIVITY

ChartFields Customize | Find | View All | First 1-5 of 5 Last

Account	Fund Code	Department	Chartfield 1		
SUPPLY	11001	ATHADM	FNDRS	+	-
		ATHADM		+	-
		ATHADM		+	-
		ATHADM		+	-
		ATHADM		+	-

OK Cancel Apply

To add multiple rows, click the yellow plus sign  
A prompt will appear – enter the number of rows to add.

Explorer User Prompt

Script Prompt:

Enter number of rows to add:

3

OK Cancel

Click the yellow OK button in the lower left corner

OK

Removing Budget Lines

Once added, budget lines cannot be removed from your view. Set the amount to zero to “eliminate” the effect on your budget. Zero budget lines will not be imported as part of your new fiscal year budget.

Modify Existing Budget Lines

To change an accounting distribution string, click on the green check box. Enter the desired ChartField values.

Go to: [Line Item Search](#) Line Item Details

Business Unit: SCU General Ledger BU
Budgeting Model ID: ACTIVITY
Budget Phase ID: Activity
Budget Center: ATHADM Athletics Administration
Ledger Name: 2004 Submit Activity Budget **Scenario:**
Version: 1 2004 Submit

▶ ChartField Values

▼ Line Item Toolbar

Actions Analysis

[Comparative Budget Analysis](#)
[Budget Version Comparison](#)
[Budget Period Analysis](#)
[Hot Keys Help](#)

Click to modify existing distribution strings.

fields Hold All

Account	Fund Code	Chartfield 1	Amount	2004	2003 Budget
☒ STFSAL	11001	Current Unrestricted Fund FNDRS	0.00	0.00	160,187.00
☒ GMTRVL	11001	Current Unrestricted Fund NCAA	0.00	0.00	30,000.00

Line Item Details

Modify ChartFields

Business Unit: SCU General Ledger BU
Budgeting Model ID: 2005_STAGE1

ChartFields Information				
ChartFields	ChartField Value	Description	To Value	Description
Account	BSTRVL	Business Travel Pool	BSTRVL	Business Travel Pool
Fund Code	11001	Current Unrestricted Fund	11001	Current Unrestricted Fund
Department	CMIN	Campus Ministry	CMIN	Campus Ministry

OK Cancel Apply

Be Aware: The newly modified chartfields will retain the original history amounts. This may be misleading when reviewing Year-to-date actuals, Prior year actuals, and Current Budget.

Adding Notes

Notes can be used to make special comments regarding a budget line. They can be for your own reference, or they can be intended to notify the Budget Office of a special circumstance.

To enter a note: Click the note ICON on the desired row.

Customize Find View All First 1-10 of 10 Last			
Amount Summary Periods History			
	Account	Fund Code	Amount
☒	BSTRVL	11001	0.00
☒	CONTRS	11001	0.00
☒	MAIL	11001	0.00

- Private Notes: Can be entered for your own reference.
- Public Notes: Will be accessed by the budget office. Use these note to communicate special instructions/explanations to the budget office.

Line Item Notes

Go to: [Line Item Search](#) [Line Item Details](#)

ChartFields

Enter Notes

☒ Public Note
☐ Private Note

Append Note to Log

Notes Log

Find | View All First 1 of 1 Last

User ID:

☐ Public Note
☐ Private Note

Date Time Stamp:

Save

Check In Budget

Check in Budget Center

Budgets must be checked in before they can be submitted. Go to the Current Checkouts section of the Budget Work Item Details page to check in your budget.

Navigation

Budgeting Home > Budget Preparation > Prepare Budgets > Budget Work Item Details

The screenshot displays the PeopleSoft web interface for budgeting. On the left is a 'Menu' sidebar with a search bar and a list of links under 'Budgeting', including 'Budgeting Home', 'Budget Work Item Details', 'Budget Work Items', 'Comparative Budget Analysis', 'Budget Version Comparison', 'Budget Period Analysis', 'Budgeting User Preferences', 'Application Diagnostics', and 'Reporting Tools'. The main content area is titled 'Prepare Budgets' and shows a breadcrumb trail: 'Budgeting Home » Budget Preparation » Prepare Budgets'. Below this is a 'Menu Options' section with four links: 'Budget Work Item Details' (circled in red), 'Budget Work Items', 'Combination Data Inquiry', and 'Guidelines and Documentation'. Each link has a corresponding description of its function.

PeopleSoft® [Home](#)

Menu

Search: [go](#)

- ▶ My Favorites
- ▼ Budgeting
 - [Budgeting Home](#)
 - [Budget Work Item Details](#)
 - [Budget Work Items](#)
 - [Comparative Budget Analysis](#)
 - [Budget Version Comparison](#)
 - [Budget Period Analysis](#)
 - [Budgeting User Preferences](#)
- ▶ Application Diagnostics
- ▶ Reporting Tools
 - [Change My Password](#)
 - [My Personalizations](#)
 - [My System Profile](#)

[Budgeting Home](#) » [Budget Preparation](#) » **Prepare Budgets**

Prepare Budgets

Menu Options

- [Budget Work Item Details](#)
Select a budget work item to copy, submit, and access pages to work on a budget activity. View the status of budget work items.
- [Budget Work Items](#)
Access budget work items through a tree hierarchy. Select a budget work item to copy, submit, reject, and access pages to work on a budget activity. View the status of budget work items.
- [Combination Data Inquiry](#)
Link to PeopleSoft General Ledger to view Combination Edit setup pages, ChartField Combination Data and Commitment Control budget definition.
- [Guidelines and Documentation](#)
View or download budget guidelines, policies, and other budget documentation.

Select Option

Check in Budget from the drop down menu.
Click "GO"

Budget Work Item Details

Role Name: Preparer

Business Unit: SCU General Ledger BU

Budgeting Model ID: 2004_DEPARTMENT

Description:

Ledger Name: 2004 Submit

Current Checkouts

Checkouts

Checkout Details

Select Check Out Option	Budget Center	Version	Activity	
Check In Budget Transfer to Activity	Go ATHADM	Athletics Administration	1	Line Item Budgeting

Budget Center. To copy a budget version, click Copy. To submit the

Budget Work Item Details

Customize | Find |

First 1-46 of 46 Last

Budget Center	Description	Version	Status	Email	Scenario
ATHADM	Athletics Administration	Base	✓ Open		Submit Copy FINAL
ATHADM	Athletics Administration	1	✓ Open		Submit Copy FINAL

Budget Analysis (Inquiries)

Comparative Budget Analysis

Comparative Budget Analysis allows you to view the changes you've made to your budget and review budgets submitted by others. Budget analysis is very flexible and allows you to view your budget in several different ways.

Navigation

Budgeting Home > Budget Analysis > Analysis > Comparative Budget Analysis

PeopleSoft.

Home | Add to Favorites

Menu

Search: go

- My Favorites
- Budgeting
 - Budgeting Home**
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Budgeting User Preferences
- Application Diagnostics
- Reporting Tools
 - Change My Password
 - My Personalizations
 - My System Profile

Budgeting Home » Budget Analysis » Analysis

Analysis

Menu Options

- Comparative Budget Analysis** Analyze and download budget data for a budget version based on selected parameters.
- Budget Version Comparison Analyze and download budget data across budget versions based on selected parameters.
- Budget Period Analysis Analyze and download budget data across budget periods for a budget version based on selected parameters.

OR...

From the Line Item Details page, select Comparative Budget Analysis

Go to: [Line Item Search](#) Line Item Details

Business Unit: SCU General Ledger BU

Budgeting Model ID: ACTIVITY

Budget Phase ID: Activity

Budget Center: ATHADM Athletics Administration

Ledger Name: 2004 Submit Activity Budget Scenario:

Version: 1 2004 Submit

ChartField Values

Line Item Toolbar

Actions

- [View Options](#)
- [Add Budget Entry](#)
- [Validate ChartFields](#)
- [Hold All](#)
- Analysis**
 - Comparative Budget Analysis**
 - Budget Version Comparison
 - Budget Period Analysis
 - Hot Keys Help

Customize | Find | View All | First 1-22 of 22 Last

Account	Fund Code	Current Unrestricted Fund	Chartfield 1	Amount	2004	2003 Budget
STFSAL	11001	Current Unrestricted Fund	FNDRS	0.00	0.00	160,187.00
GMTRVL	11001	Current Unrestricted Fund	NCAA	0.00	0.00	30,000.00

Enter Selection Criteria

Comparative Budget Analysis

Select Budget Criteria

*Role Name: Preparer Select: Reviewer or Preparer

*Business Unit: SCU Select Model ID

*Budgeting Model ID: 2004_DEPARTMENT General Ledger BU

*Ledger Name: 2004 Submit Budget Center may be a single department or a reviewer's area. (ie - B ATHLETIC)

*Budget Center: BIOL Select Current working version

*Version: Version 1

☐ Statistical Analysis

Comparison Criteria

*View By: Account Make desired selections

Optional View By:

Chartfield Display Option: Display Code and Description

ChartField Filters

Description	Value
Account	
Fund Code	11001
Department	

Filter search if necessary

Budget Category Filters

Select	Budget Category	Description
☒	DISCRET	Discretionary

Run Analysis

Click the yellow Run button in the lower left hand corner

Budget Category Filters

Select	Budget Category	Description
☐	ALLOCT	Allocation Accounts
☐	DISCRT	Discretionary Accounts
☐	NONDIS	NonDiscret Accounts
☐	REVNUE	Revenue
☐	SALBEN	Salary & Benefits
☐	TNSFER	Transfer Xlate

Run

Return to: [Line Item Details](#)

Working with Budget Inquiries

The Comparative Budget Analysis is a very powerful tool.

Use the dropdown menus to change your view

Drag and drop columns and rows to view the data differently

Return to Selection Criteria to filter the data

Experiment!

Click Refresh to update screen after making changes.

Change views using the drop down menu

Click Selection Criteria to return to ChartField filters

Comparative Budget Analysis

Role Name: Preparer Budgeting Model ID: 2004_DEPARTMENT Budget Center: DEVEL

*View By: Account Optional View By: Refresh Return to: Selection Criteria

Preview Excel

Rows To Scroll: 2 Rows per Page: 10 1-10 of 10

Business Unit: SCU Ledger Name: 2004 Submit Amount

Budget Center: DEVEL Version ID: 1 Amount Variance >= : 0

Base Name: Current Year Budget Budget Period: Total % Variance >= : 0%

Currency: USD

	Proposed Budget by Account	Historical Data by Account
BSTRVL Business Travel Pool	\$48,694.00	\$0.00
CONTRS Contracted Services Pool	\$21,425.00	\$0.00
MAIL Postage/Mailing Pool	\$35,775.00	\$0.00
MISC Miscellaneous Expense Pool	\$38,856.00	\$0.00

Prior to printing budget, select the maximum number of rows per page.

Printing Budgets

Preview: Allows you to view a printable version of your budget setup

Excel: Allows you to download the data to Excel. You may Save and/or Print the Excel file.

Comparative Budget Analysis

Role Name: Preparer Budgeting Model ID: ACTIVITY Budget Center: ATHADM

*View By: Account Optional View By: [Refresh](#) Return to: [Selection Criteria](#)

Preview Excel

Rows To Scroll: 2 Rows per page: 10

Business Unit : SCU	Ledger Name : 2004 Submit Activity Budget	E	Amount
Budget Center : ATHADM	Version ID : 1	Amount Variance >= : 0	
Base Name : Current Year Budget	Budget Period : Total	% Variance >= : 0%	
		Currency :	USD

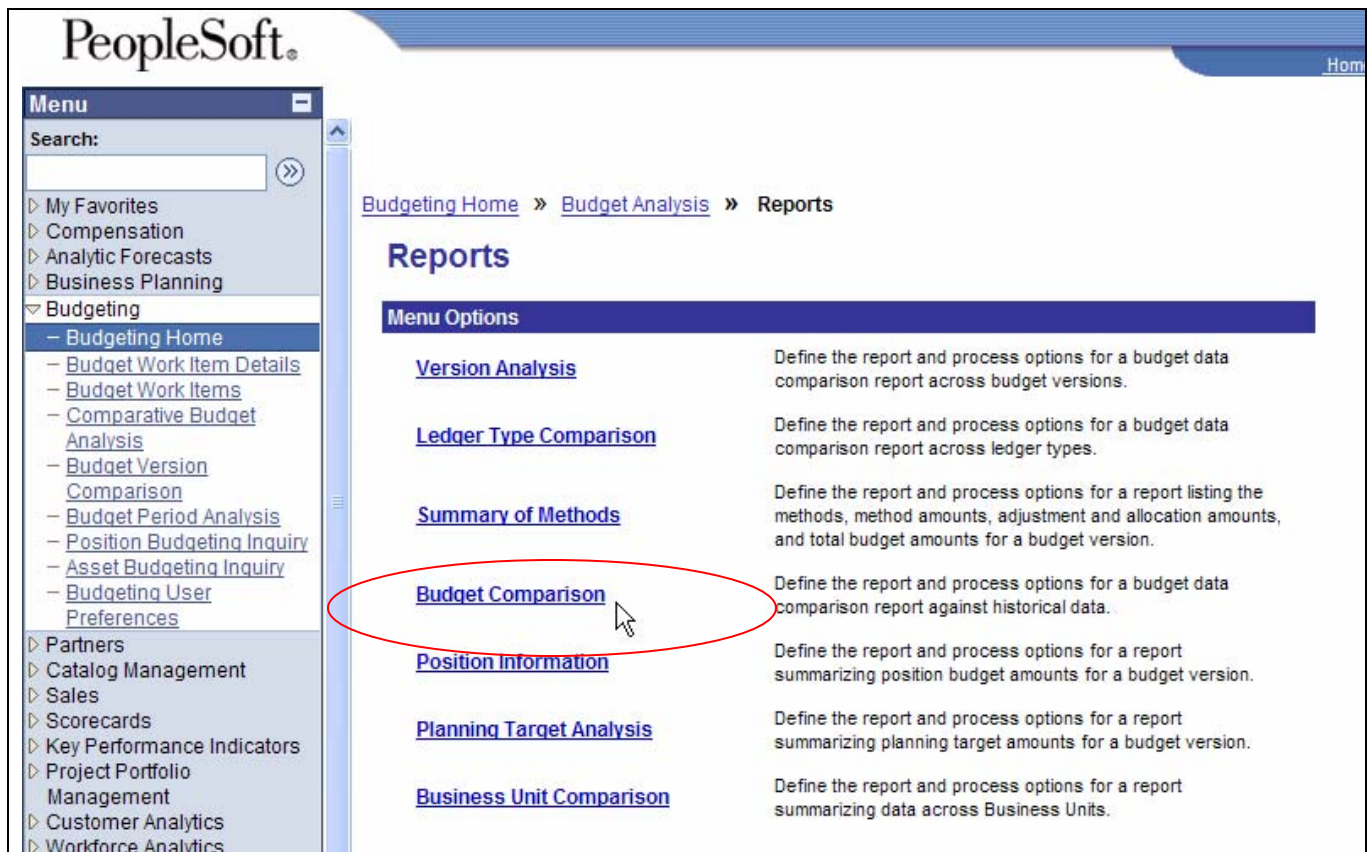
Budget Analysis (Reports)

Budget Comparison

The Budget Comparison is a printable report that allows you to view the changes you've made to your budget and compare to targets. Budget Reports are less flexible than the Analysis (see above), but also slightly easier to use.

Navigation

Budgeting Home > Budget Analysis > Reports > Budget Comparison



Select an Existing Run Control

Run controls memorize your report request parameters, and allow you to run reports without having to re-enter all the data every time. To select a run control:

1. To select an existing Run Control:
 - Click the Search Button
 - Click the link for the desired Run Control
2. If no Run Control Exists, add a new value.
 - Click the “Add a New Value” Tab
 - Name your Run Control (Run controls cannot contain spaces)
 - Click “Add”

Menu

Search:

- ▷ My Favorites
- ▷ Compensation
- ▷ Analytic Forecasts
- ▷ Business Planning
- ▼ Budgeting
 - Budgeting Home
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Position Budgeting Inquiry
 - Asset Budgeting Inquiry
 - Budgeting User Preferences
- ▷ Partners
- ▷ Catalog Management

[Budgeting Home](#) » [Budget Analysis](#) » [Reports](#) » **Budget Comparison**

Budget Comparison

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

[Add a New Value](#)

Search by: Run Control ID begins with

☐ Case Sensitive

[Search](#)

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter Parameters

In order to compare proposed budget to budget targets fill out the report request as follows making changes to the Role Name, Budgeting Model ID, and Budget Center as necessary.

Click the Run button to initiate the Report

Click the Report Manager link to navigate to Report Results

PeopleSoft® Home

Menu Search: >>

- My Favorites
- Compensation
- Analytic Forecasts
- Business Planning
- Budgeting
 - Budgeting Home
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Position Budgeting Inquiry
 - Asset Budgeting Inquiry
 - Budgeting User Preferences
- Partners
- Catalog Management
- Sales
- Scorecards
- Key Performance Indicators
- Project Portfolio Management
- Customer Analytics
- Workforce Analytics

Budgeting Home » Budget Analysis » Reports » Budget Comparison

Budget Comparison

User ID: KEISELEN
Run Control ID: RPT1

[Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameters

Process Frequency

☐ Don't Run
☐ Process Once
☒ Always Process

Request Number: 1
*Description: Budget Report

Selection Criteria

*Role Name: Reviewer
*Business Unit: SCU General Ledger BU
*Budgeting Model ID: 2006_EXP0_DEPT
*Ledger Name: Proposed Budget - Dept Exp
*Analysis Base: Target Budget - Dept Exp
*Budget Center: B_ARTSCI Arts & Science
Level: Summary
*Version: Base

Report Options

*View by: Fund Code

Filter by Chartfields:

ChartFields	From Value	To Value
Account:		
Fund Code:		
Department:		

Viewing Report Results

Click the “Budget Comparison – Total Year” link to view report results. Results may be printed or saved to you hard drive.

The screenshot shows the PeopleSoft Budgeting interface. On the left is a 'Menu' with a search bar and a list of navigation options. The main area displays the 'Budget Comparison' report results. A red circle highlights the 'Budget Comparison - Total Year' report in the 'Report List' table.

Menu

Search:

- My Favorites
- Compensation
- Analytic Forecasts
- Business Planning
- Budgeting
 - Budgeting Home
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Position Budgeting Inquiry
 - Asset Budgeting Inquiry
 - Budget Version Comparison
 - Budget Period Analysis
 - Position Budgeting Inquiry
 - Asset Budgeting Inquiry
 - Budgeting User Preferences
- Partners
- Catalog Management
- Sales
- Scorecards
- Key Performance Indicators
- Project Portfolio Management
- Customer Analytics
- Workforce Analytics
- Financial Services Industries
- Global Consolidations
- ABM Analysis
- ABM Setup Definitions
- Activity-Based Budgeting
- Future Warehouse

Budgeting Home » Budget Analysis » Reports » Budget Comparison

Explorer List Administration Archives

View Reports For

User ID: Type: Last: Days

Status: Folder: Instance: to:

Report List [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-10 of 10](#) | [Last](#)

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
☐	957	1068	Budget Comparison - Total Year	06/02/2005 11:10:44AM	Acrobat (*.pdf)	Posted	Details
☐	956	1067	Budget Planning Report	06/02/2005 11:10:44AM	Acrobat (*.pdf)	Posted	Details
☐	955	1065	Version Analysis Report	06/02/2005 10:59:53AM	Acrobat (*.pdf)	Posted	Details
☐	954	1064	Budget Planning Report	06/02/2005 10:59:53AM	Acrobat (*.pdf)	Posted	Details
☐	953	1062	Summary of Methods and Amounts	06/02/2005 10:08:50AM	Acrobat (*.pdf)	Posted	Details
☐	952	1061	Budget Planning Report	06/02/2005 10:08:50AM	Acrobat (*.pdf)	Posted	Details
☐	951	1059	Budget Comparsion - Total Year	06/02/2005 10:04:33AM	Acrobat (*.pdf)	Posted	Details
☐	950	1058	Budget Planning Report	06/02/2005 10:04:33AM	Acrobat (*.pdf)	Posted	Details
☐	949	1056	Budget Comparsion - Total Year	06/02/2005 10:01:14AM	Acrobat (*.pdf)	Posted	Details
☐	948	1055	Budget Planning Report	06/02/2005 10:01:14AM	Acrobat (*.pdf)	Posted	Details

☒ [Select All](#) ☐ [Deselect All](#)

Click the delete button to delete the selected report(s)

Finalizing PeopleSoft Budgets

Submit Budgets

Navigation

Budgeting Home > Budget Preparation > Prepare Budget > Budget Work Item Details

Select Model ID

A budget version must be submitted for each Model ID. If you do not use the optional Activity and Class level budgets and therefore did not use a particular Model, please submit the Base Version. Submitting all Models is the only way to indicate to your Reviewer that you have completed your entire budget setup.

[Search](#)
[Clear](#)
[Basic Search](#)

[Save Search Criteria](#)

Search Results

View All First 1-6 of 6 Last

Role Name	Business Unit	Budgeting Model ID	Ledger Name
Preparer	SCU	2004 ACTIVITY	2004 Submit Budget
Preparer	SCU	2004 CLASS	2004 Submit
Preparer	SCU	2004 DEPARTMENT	2004 Submit
Preparer	SCU	2004 REV ACT	2004 Submit Budget
Preparer	SCU	2004 REV CLS	2004 Submit
Preparer	SCU	2004 REV DPT	2004 Submit Budget

Submit Budget

Click the yellow submit button to the right of the completed budget center. Be sure to submit the correct Version. In most cases this will be **Version 1**.

Budget Work Item Details Customize Find  First 1-46 of 46 Last

Budget Center	Description	Version	Status	Email	Scenario
ATHADM	Athletics Administration	Base	✓ Open		Submit Copy
ATHADM	Athletics Administration	1	✓ Open		Submit Copy

The submitted version is copied and a new read-only **Master** version is created. Once submitted, changes can no longer be made to this budget center. If changes need to be made, please contact your Reviewer to request that they reject your submission. Once approved by the budget office, this version will become your new fiscal year budget.

Reviewing & Approving Budgets

Review Budgets

In order to determine whether to Accept or Reject a budget submission, begin with budget analysis. As a reviewer you are responsible for confirming the following items.

1. CUF budgets equal target amount by account category
 - Student Wages
 - Discretionary
 - Financial Aid
 - Non-Discretionary
2. Endowment Income target is not exceeded, and that any projected current year deficit has been accounted for.
3. All other fund budgets meet your management objectives

Note: Please refer to the '[Budget Analysis](#)' section of this manual for instructions.

Rejecting & Accepting Budgets

Navigation

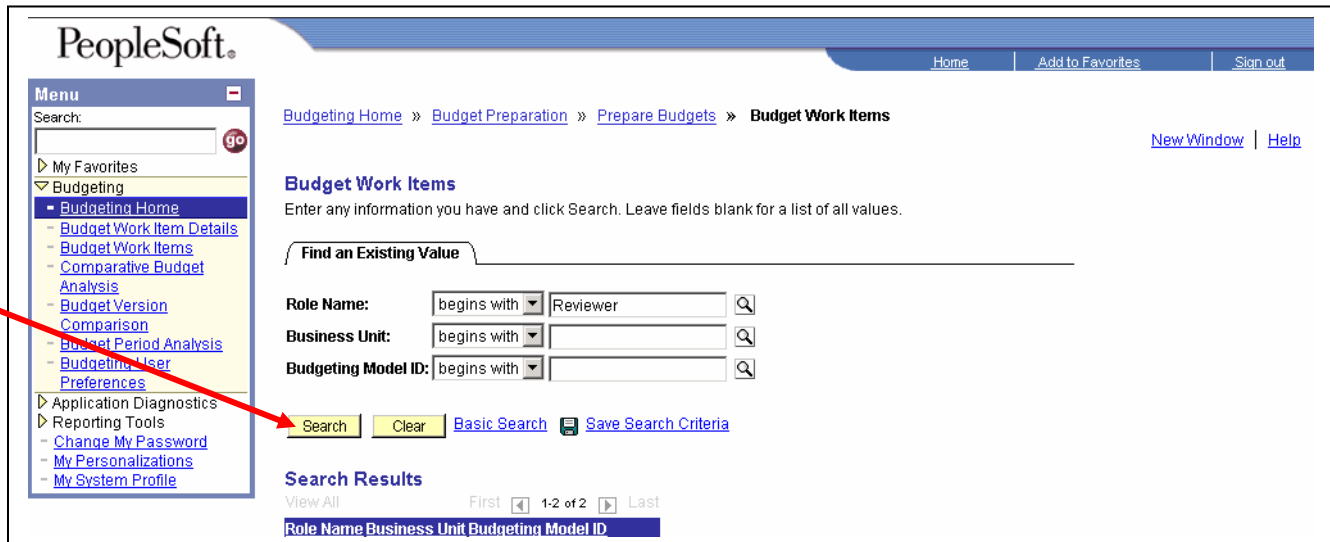
Budgeting Home > Budget Preparation > Prepare Budgets > Budget Work Items

The screenshot shows the PeopleSoft web interface. On the left is a 'Menu' sidebar with a search bar and a list of links. The 'Budgeting' section is expanded, and 'Budget Work Items' is highlighted with a red circle. The main content area is titled 'Prepare Budgets' and contains a 'Menu Options' section with three links and their descriptions:

- [Budget Work Item Details](#): Select a budget work item to copy, submit, and access pages to work on a budget activity. View the status of budget work items.
- [Budget Work Items](#): Access budget work items through a tree hierarchy. Select a budget work item to copy, submit, reject, and access pages to work on a budget activity. View the status of budget work items.
- [Combination Data Inquiry](#): Link to PeopleSoft General Ledger to view Combination Edit setup pages, ChartField Combination Data and Commitment Control budget definition.
- [Guidelines and Documentation](#): View or download budget guidelines, policies, and other budget documentation.

Select Model ID

Using the Reviewer Role, click the search button to retrieve a list of Model ID. Every department must submit one budget version for each Model ID. If you do not use the optional Activity and Class level budgets and therefore did not use a particular Model, please submit the Base Version. Submitting all Models is the only way to indicate to the Budget Office that you have completed your entire budget setup.



PeopleSoft.

Home | Add to Favorites | Sign out

Menu

Search: go

- My Favorites
- Budgeting
 - Budgeting Home**
 - Budget Work Item Details
 - Budget Work Items
 - Comparative Budget Analysis
 - Budget Version Comparison
 - Budget Period Analysis
 - Budgeting User Preferences
- Application Diagnostics
- Reporting Tools
 - Change My Password
 - My Personalizations
 - My System Profile

Budgeting Home » Budget Preparation » Prepare Budgets » Budget Work Items

[New Window](#) | [Help](#)

Budget Work Items

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Role Name:

Business Unit:

Budgeting Model ID:

[Basic Search](#)

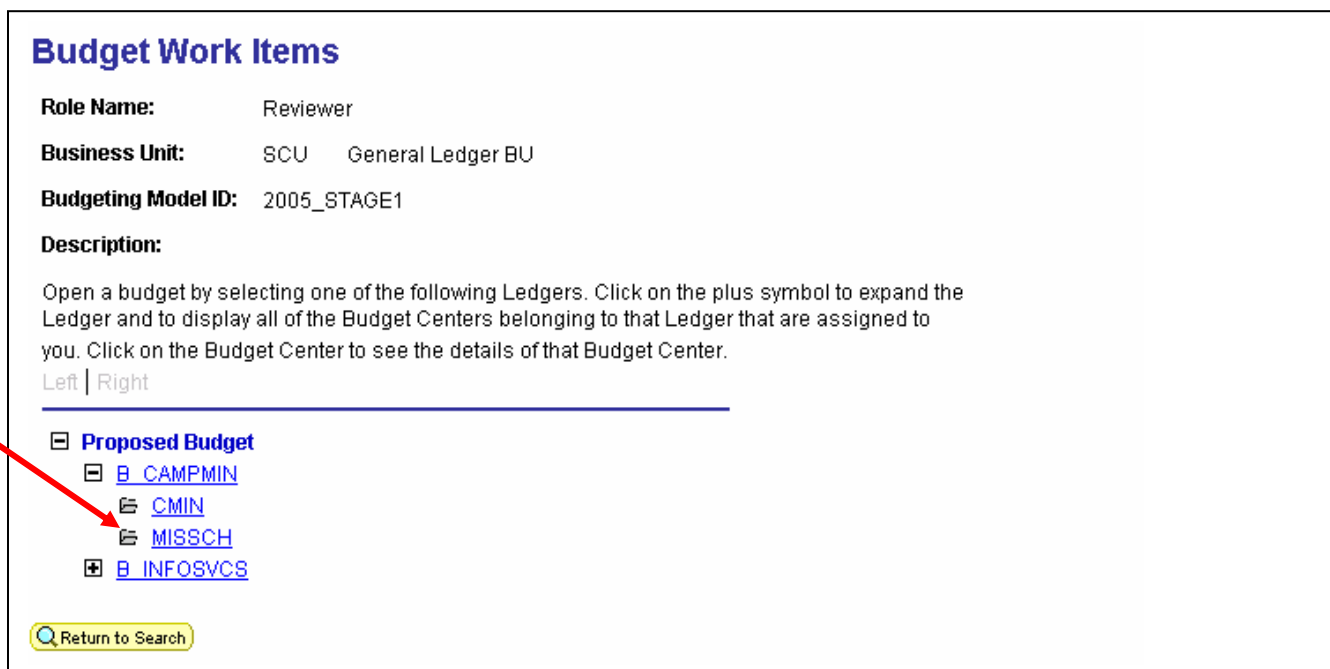
Search Results

View All First 1-2 of 2 Last

Role Name	Business Unit	Budgeting Model ID
-----------	---------------	--------------------

Select Department or Area

Use the folders to select the department or area you wish to Reject or Submit.



Budget Work Items

Role Name: Reviewer

Business Unit: SCU General Ledger BU

Budgeting Model ID: 2005_STAGE1

Description:

Open a budget by selecting one of the following Ledgers. Click on the plus symbol to expand the Ledger and to display all of the Budget Centers belonging to that Ledger that are assigned to you. Click on the Budget Center to see the details of that Budget Center.

Left | Right

- ☒ **Proposed Budget**
 - ☒ [B_CAMPMIN](#)
 - ☒ [CMIN](#)
 - ☒ [MISSCH](#)
 - ☒ [B_INFOSVCS](#)

Rejecting Budgets

Rejecting a budget will release it to the Preparer for revisions. Click the Reject Button.

Open a budget by selecting one of the following Ledgers. Click on the plus symbol to expand the Ledger and to display all of the Budget Centers belonging to that Ledger that are assigned to you. Click on the Budget Center to see the details of that Budget Center.

Left | Right

Proposed Budget

- ☐ [B_PRESIDENT](#)
- ☐ [B_CAMPMIN](#)
 - ☐ [CMIN](#)
 - ☐ [MISSCH](#)
- ☒ [B_UCOMM](#)
- ☒ [B_PROVOST](#)
- ☒ [B_UFO](#)

Budget Items					
		Customize Find		First 1-3 of 3 Last	
Budget Center	Description	Status	Email	Version Name	Date Submitted
B_CAMPMIN	Campus Ministry	Not Ready	Reject		
CMIN	Campus Ministry	Submitted	Reject	Version One	04/01/2004 11:04:59AM
MISSCH	Mission Church	Open	Reject		

Accepting Budgets

To accept a budget, click on the link to the budget center you would like to accept.

Open a budget by selecting one of the following Ledgers. Click on the plus symbol to expand the Ledger and to display all of the Budget Centers belonging to that Ledger that are assigned to you. Click on the Budget Center to see the details of that Budget Center.

Left | Right

Proposed Budget

- ☐ [B_PRESIDENT](#)
- ☐ [B_CAMPMIN](#)
 - ☐ [CMIN](#)
 - ☐ [MISSCH](#)
- ☒ [B_UCOMM](#)
- ☒ [B_PROVOST](#)
- ☒ [B_UFO](#)

Budget Items					
		Customize Find		First 1-3 of 3 Last	
Budget Center	Description	Status	Email	Version Name	Date Submitted
B_CAMPMIN	Campus Ministry	Not Ready	Reject		
CMIN	Campus Ministry	Submitted	Reject	Version One	04/01/2004 11:04:59AM
MISSCH	Mission Church	Open	Reject		

Then click the Submit button for the appropriate version (Master).

PeopleSoft®

Home | Worklist | MultiChannel Console

[Budgeting Home](#) » [Budget Preparation](#) » [Prepare Budgets](#) » **Budget Work Items**

Budget Work Items

Budget Work Item Versions

Business Unit: SCU General Ledger BU
Budgeting Model ID: GRRR_STG2B
Budget Center: B_CAMPMIN Campus Ministry
Ledger Name: Proposed Budget
Scenario: FINAL
Status: Open

Budget Work Item Version Summary	
Version	
Base Base Version	Submit
Master Master Version	Submit Copy

Return to: [Budget Work Items](#)