

How to use Budgets Overview

1. Navigate to Budgets Overview using the path shown in the screen print below.
2. If this is the first time using Budgets Overview make sure you are on the 'Add a New Value' tab and enter an 'Inquiry Name' value that is meaningful to you. For our example, we will define a new inquiry named 'Example'.
3. You can 'Add a New Value' anytime. To see previous inquiries that you have created use the 'Find an Existing Value' tab.
4. Keep in mind that the inquiries you create are tied to your userid; only you can see them.
5. Click on the 'Add' button once you have entered the value for your new inquiry.

The screenshot shows the Oracle Budgets Overview interface. The breadcrumb navigation path at the top is highlighted with a red box: Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview. The Oracle logo is visible in the top left. The page title is "Budgets Overview". Below the title, there are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is highlighted with a red box. Below the tabs, there is a text input field labeled "Inquiry Name:" with the value "EXAMPLE" entered and a clear button (x). The "Add" button is highlighted with a red box.

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- After clicking the 'Add' button in step 5 above, the 'Budget Inquiry Criteria' screen will appear. Make sure that 'Ledger Group/Set' field is set to 'Ledger Group' and that 'Ledger Group' field is set to 'PROJ_GRT'.
- For the Budget Period set those to whatever fiscal year or years you would like to review. In this example we are looking at Budget Period 2018.
- For Chartfield Criteria enter whatever specific values you want to review. In this example data for department 311100, fund 11, project 0000000 will be extracted. The '%' sign is a wildcard symbol and indicates any values. If you enter values in the 'Chartfield From Value' column the system will know that you only want data for those specific values so there is no need to enter the same value in the 'Chartfield To' column, just leave the wildcards in those fields.
- Click 'Save' then 'Search' to extract the requested data.

Budget Inquiry Criteria

Budget Overview

Inquiry EXAMPLE

Description

Search

Clear

Reset

Amount Criteria

Budget Type

*Business Unit

Ledger Group/Set

Ledger Group

☐ View Stat Code Budgets

☐ Display Chart

Project/Grant Budget Ledger Gr

TimeSpan

*Type of Calendar

Budget Criteria

Personalize | Find | View All |

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	PROJ_GRT	FY	<input type="text" value="2018"/>	<input type="text" value="2018"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Dept	<input type="text" value="311100"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Fund	<input type="text" value="11"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Class	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Program	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Project	<input type="text" value="0000000"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>

Budget Status

☒ Open

☒ Closed

☒ Hold

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10. If you see the message in the screen print below appear for your inquiry it means that the 'Max Rows' value is set too low. In our example 'Max Rows' is set to 100. Increase the value in Max Rows to a larger number and click on the 'Search' Button.

Inquiry Results

Business Unit: PALMR
Ledger Group: PROJ_GRT Expenditure Budget Definition
Type of Calendar: Detail Budget Period
Amounts in Base Currency: USD
Revenue Associated: ☐

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

Ledger Totals (100 Rows)

Budget	2,380,441.00	Net Transfers	0.00
Expense	232,976.34		
Encumbrance			
Pre-Encumbrance			
Budget Balance			
Associate Revenue			
Available Budget			

Message

More rows are available. The number of rows retrieved exceeds the Maximum Row criteria. (18021,342)



The number of selected rows exceeds the Max Rows criteria. Modify your selection criteria or increase the Max Rows criteria.

[OK](#)

Budget Overview Results Personalize | Find | View All | | First 1-100 of 100 Last

		Ledger Group	Account	Fund	Dept	Program	Class	Project	Budget Period	Budget	Expense	Encumbrance
1		PROJ_GRT	111010	11	311100	49360	10	0000000	2018	134,366.000	0.000	
2		PROJ_GRT	111010	11	311100	49350	10	0000000	2018	136,309.000	0.000	

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11. The results from the inquiry will appear similar to that in the screen print below. Notice that in this inquiry that 137 rows of data were extracted and that only 100 are currently appearing. To see the other remaining rows you will need to navigate forward using the scroll buttons.
12. To download the data into EXCEL click on the  icon. To see all the columns of data click on the  icon. (see screen print on following page for example of columns available for viewing.)

Inquiry Results

Business Unit

PALMR

Ledger Group

PROJ_GRT

Expenditure Budget Definition

Type of Calendar

Detail Budget Period

Amounts in Base Currency

USD

Revenue Associated:

Return to Criteria

Max Rows

5100

Display Options

Search

Ledger Totals (137 Rows)

Budget	2,602,864.00	Net Transfers	0.00
Expense	247,444.37		
Encumbrance	3,109.84		
Pre-Encumbrance	0.00		
Budget Balance	2,352,309.79		
Associate Revenue	0.00		
Available Budget	2,352,309.79		

Budget Overview Results

Personalize | Find | View 100 | |

First 1-100 of 137 Last

		Ledger Group	Account	Fund	Dept	Program	Class	Project	Budget Period	Budget	Expense	Encumbrance
1	<div><div></div><div></div></div>	PROJ_GRT	111010	11	311100	49350	10	0000000	2018	136,309.000	0.000	
2	<div><div></div><div></div></div>	PROJ_GRT	111010	11	311100	49360	10	0000000	2018	134,366.000	0.000	
3	<div><div></div><div></div></div>	PROJ_GRT	121010	11	311100	60100	10	0000000	2018	174,825.000	46,870.530	
4	<div><div></div><div></div></div>	PROJ_GRT	123210	11	311100	60920	10	0000000	2018	43,207.000	0.000	

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13. To see the detail behind a highlighted value click on that particular value.

Budget Overview Inquiry															
Budget Overview Results															
		Ledger Group	Account	Fund	Dept	Program	Class	Project	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent
1		PROJ_GRT	111010	11	311100	49350	10	0000000	2018	136,309.000	0.000	0.000	0.000	136,309.000	
2		PROJ_GRT	111010	11	311100	49360	10	0000000	2018	134,366.000	0.000	0.000	0.000	134,366.000	
3		PROJ_GRT	121010	11	311100	60100	10	0000000	2018	174,825.000	46,870.530	0.000	0.000	127,954.470	
4		PROJ_GRT	123210	11	311100	60920	10	0000000	2018	43,207.000	0.000	0.000	0.000	43,207.000	
5		PROJ_GRT	123410	11	311100	61900	10	0000000	2018	118,997.000	9,916.360	0.000	0.000	109,080.640	
6		PROJ_GRT	123510	11	311100	61950	10	0000000	2018	144,703.000	0.000	0.000	0.000	144,703.000	
7		PROJ_GRT	130010	11	311100	49300	10	0000000	2018	250,000.000	37,087.320	0.000	0.000	212,912.680	
8		PROJ_GRT	140010	11	311100	60100	10	0000000	2018	4,718.000	0.000	0.000	0.000	4,718.000	
9		PROJ_GRT	140010	11	311100	60900	10	0000000	2018	1,668.000	0.000	0.000	0.000	1,668.000	
10		PROJ_GRT	140010	11	311100	61900	10	0000000	2018	163,087.000	46,250.580	0.000	0.000	116,836.420	
11		PROJ_GRT	140010	11	311100	61950	10	0000000	2018	20,204.000	1,998.540	0.000	0.000	18,205.460	
12		PROJ_GRT	140010	11	311100	61900	19P13	0000000	2018	694.000	693.410	0.000	0.000	0.590	
13		PROJ_GRT	211010	11	311100	60100	10	0000000	2018	76,933.000	6,629.550	0.000	0.000	70,303.450	
14		PROJ_GRT	212110	11	311100	60910	10	0000000	2018	75,184.000	6,569.310	0.000	0.000	68,614.690	
15		PROJ_GRT	212210	11	311100	60910	10	0000000	2018	317,250.000	26,194.280	0.000	0.000	291,055.720	
<div>Return</div>															
<div>< ></div>															