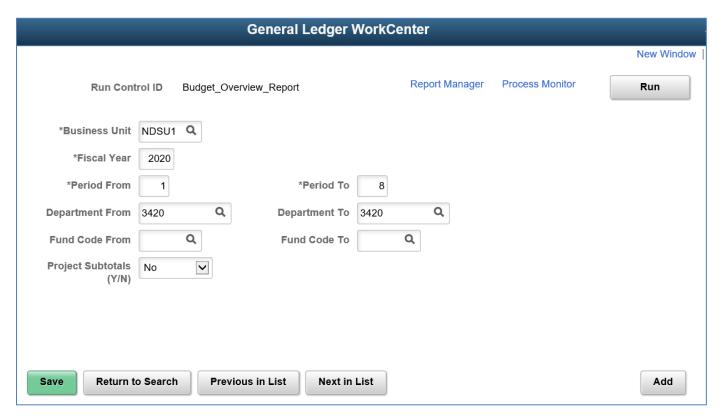
## **Budget Overview Report Job Aid**

The Budget Overview Report will return the same data as the online budget overview screen, except for local funds, it will return both revenue and expense information.

- 1. Sign in to PeopleSoft Financials.
- 2. Navigate to General Ledger WorkCenter > Reports/Queries > Reports/Processes > GL and Commitment Control Reports > Budget Overview Report.
- 3. Click the Add a New Value tab.
  - a. Enter a **Run Control ID** that is meaningful to you. Please remember no special characters or spaces can be used when creating a Run Control ID.
  - b. Click the Add button.
  - c. These steps will only need to be completed the first time. After a Run Control ID has been created the **Find an Existing Value** tab can be used instead.
- 4. Enter the Business Unit, Fiscal Year, and Period From/To Period.
- 5. Enter the **Department From/To Department**. When both the FROM and TO department fields are blank, then all departments are selected. If TO is blank, then all departments greater than and equal to the FROM department are used. When the FROM field is blank, then all departments less than and equal to the TO department are returned.
- 6. Enter the Fund Code From/To Fund Code to narrow down what is returned, if desired.
- 7. If applicable, select 'Yes' in the **Project Subtotals** field. Then complete the **Project ID From/To Project ID** fields.

## Sample Run Criteria



- 8. After clicking the **Run** button, click the **OK** button on the **Process Scheduler Request page**, which will close the Process Scheduler Request page.
  - Note that the type and format can be changed on the Process Scheduler Request page. The format options include PDF and XLS.
- 9. Click on the **Process Monitor hyperlink** on the run control page, and periodically refresh. When the Run Status is 'Success', and the Distribution Status is 'Posted', click the **Go back to Budget Overview Report hyperlink**.
- 10. Click on the **Report Manager hyperlink** on the run control page to view the report output.

## Sample Page of Returned Report

