Budget Overview– Cost Center (Non-Grant)

1. Click the Add a New Value tab.
2. Enter an Inquiry Name, this could be any name.
3. Click the Add button.
4. Enter UTEP1 under Business Unit.
5. Select Ledger Inquiry Set under Ledger Group/Set.
6. Enter UTEP under Ledger Inquiry Set. (Press Enter)
7. Enter valid Cost Center under ChartField criteria.
8. Click Save button.
9. Click Search button at the top of the screen.

PeopleSoft Tips
- You can access saved inquiries by clicking on Find an Existing Value and entering the Inquiry Name.
- DO NOT include any blank spaces in the Inquiry Name.
- Under the Type of Calendar dropdown, select Detail Accounting Period to search for transactions by monthly periods.
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10. Click any hyperlink to drill down to budget account transaction lines.

- Budget hyperlink drills down to Budget Transaction Lines.
- Expense hyperlink drills down to Expense Transaction Lines.
- Encumbrance hyperlink drills down to Encumbrance Transaction Lines.

(i.e. Purchase Orders & Travel Authorizations)

PeopleSoft Tips

- Enter 9999 under Max Rows to retrieve the maximum number of transaction line items in the Activity Log.
- Use Cost Center table to identify Budget Account descriptions.
- Click on to view in Full Screen or to export to Excel.
- See available budget balances under Available Budget column.
11. Click the icon to drill down to transaction header page.
12. Click the icon to drill down to the source document.
13. Click Go to Source Entry to open document.
14. Search for your Line Number to view transaction details. (See PeopleSoft Tip)

**PeopleSoft Tips**
- Journal ID documents may contain additional transaction lines and other funding sources. Please note the line number you are viewing.
- Please use the arrows to navigate through the journal lines.
- The Reference and Journal Line Description columns provide additional information about the transaction lines.