

Budget Overview- Transfers

Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Budgets Overview

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 Criteria

Inquiry Name: begins with

1

Search

Clear

Basic Search

With the **Find an Existing Value** tab selected:

1. Click on the **Search** button to pull up saved inquiries.
2. Select the inquiry that allows you to view Cost Centers.
3. Enter Cost Center and click **Search** at the top.

Search Results

View All First 1-3 of 3 Last

Inquiry Name	Description
BUDGET_CST	Checking Balance for Cost Centers
BUDGET_GRT	(blank)
CAP PROJEC	(blank)

ChartField Criteria					
ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	% <input type="text"/>	% <input type="text"/>		<input type="text"/>	Update/Add
Dept	% <input type="text"/>	% <input type="text"/>		<input type="text"/>	Update/Add
Fund	% <input type="text"/>	% <input type="text"/>		<input type="text"/>	Update/Add
Function	% <input type="text"/>	% <input type="text"/>		<input type="text"/>	Update/Add
Cost Centr	12341234 <input type="text"/>	% <input type="text"/>		<input type="text"/>	Update/Add
Project	% <input type="text"/>	% <input type="text"/>		<input type="text"/>	Update/Add

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PeopleSoft Tip



- Budget Overview set up is the same as before.

Budget Overview- Transfers

Inquiry Results

Business Unit: UTEP1
 Type of Calendar: Detail Budget Period
 Amounts in Base Currency: USD
 Revenue Associated:

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

Ledger Totals (1 Rows)

Budget Overview Results [Personalize](#) | [Find](#) | [View All](#)

		Ledger Group	Account	Fund	Dept	Cost Centr	Function	Project	Budget Period	Budget
1										1,000,000.00
2										45,000.00
3										0.000
4		OPE	A4000	2100	301500	12341234	700		2015	100,000.00

[Return to Criteria](#) [*Notes](#)

4. To view **Budget Transfers and Budget Journals** click on the amount hyperlink under the **Budget** column.

5. Look for the respective Document ID and click on the magnifying glass to drill down..

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Activity Log

Ledger: OPE_BUD

Activity Log [Personalize](#) | [Find](#) | [View All](#)

	Tran Line	Document Label	Document ID	Year	Period	Foreign Amount	Foreign Currency	Monetary Amount	Base Currency	Budget Entry Type	Auto Generated Parent Ln	Tran ID
	1386	Journal ID:	FY15BUDORG	2015	1	5,650.00	USD	5,650.00	USD	Original	N	0000332033
	1385	Journal ID:	FY15BUDORG	2015	1	19,000.00	USD	19,000.00	USD	Original	N	0000332033
	1384	Journal ID:	FY15BUDORG	2015	1	74,785.00	USD	74,785.00	USD	Original	N	0000332033
	261	Journal ID:	POBFADJUST	2015	6	1,513.00	USD	1,513.00	USD	Original	N	0000780602
	13	Journal ID:	0000024415	2015	1	0.00	USD	0.00	USD	Adjustment	N	0000307955

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PeopleSoft Tip



•What is the difference between a budget journal and a budget transfer?

- Budget Journal** is the initial creation of budget (beginning of Fiscal Year), any budget adjustments, and any balance forward posting.
- Budget Transfer** is for actual transfer of existing budget from one cost center to another or transfers between budgetary accounts with the same cost center (i.e. from A9000 to A4000).

Budget Overview- Transfers

Budget Journal Line Drill Down

Transaction Line Identifiers

Business Unit: UTEP1 Journal ID: POBFADJUST  Date: 02/03/2015
Line: 261

Additional Source Information

Date Posted: 02/03/2015
Budget Header Status: Posted
Journal Line Description: Operating Expenses

Transaction Line Details

Account Fund Code De

7 Budget Header **8** Budget Lines Budget

Unit: UTEP1 Journal
Ledger Group: OPE
Control ChartField: Fund C
Budget Header Status: Posted
Budget Entry Type: Original


Parent Budget Options

Generate Parent Budget(s)
 Use Default Entry Event
Parent Budget Entry Type:

Rate Type: CRRNT
Exchange Rate: 1.00000000 
Cur Effdt: 09/01/2014
Budget Type: Expense

[Attachments \(0\)](#)

Long Description:

Corrections to Balance Forwards to account for PO roll forwards. Not including PO roll forwards that has multiple Cost Centers. Source documentation on file in budget office transfer files. 

Alternate Description

 Save  Return to Search

6. On the **Budget Journal Drill Down** screen, Click on the **source icon** next to Journal ID to drill down the details of the transfer.
7. Window will open to **Budget Header**, this tab provides the description of the Journal.
8. Click on **Budget Lines** tab to view the cost centers or budgetary accounts transfer came from/sent to and

PeopleSoft Tip



•If you are having problems opening the last screen make sure you allow pop-ups in your browser.

[Budget Header](#) | [Budget Lines](#) | [Budget Errors](#)