The information contained herein is intended to be used solely by Rhode Island College and its employees.
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1 Login

STEP 1.) Open a web browser and enter the address (url): my.ric.edu

STEP 2.) The following page will display.

STEP 3.) Enter your User ID and Password and press the LOGIN button. Upon successful login you will see your main portal page. Please note that the links and tabs displayed will vary based on security. If you have tabs ( ) select the Staff/Admin tab.

STEP 4.) Click the Financial Systems link.
2 Use

Commitment Control regulates budgets for the college. The budget office has determined certain accounts to be controlled when used by a department for all financial transactions in the Peoplesoft Financials system. This document describes how to inquire on a department’s budget.

To use the budget inquiry pages, you must have security access to view a department’s budget. Budget inquiry allows you to:

- Confirm current status of your department budgets
- Determine if funds are available before requesting a budget transfer
- Verify that funds were moved after your requested budget transfer is complete
- View the budget of a specific account/fund

3 Budget Inquiry

Budget Inquiries can be done for a single control budget or for multiple departmental budgets by entering key chartfield values.

3.1 Budget Details page

To inquire about a specific control budget, use the Commitment Control Budget Details page.

Step 1.) > From the main menu on the left hand side of the page navigate to Commitment Control > Review Budget Activities > Budget Details
> CLICK ON Commitment Control

Step 2.) > CLICK ON Budget Details. Enter in search values on the Budget Details Search Page:
Selected search fields (chartfield values) will contain default values; if they do not enter values for: Business Unit = RICOL, Ledger Group = ORG, Budget Period = current budget year i.e. 2015, 2014, and select a department from the list using the lookup button next to the field. Optional: enter account and fund to minimize search results.

**Step 3.)** After you’ve entered your search criteria click on the **Search** button. One of the following will happen depending on how much search criteria you’ve entered:

- The page will display the budget details for the specific values you entered on the search page
- Multiple budgets will appear below in the search results section. Select the budget you are inquiring about
- A message that states “No Matching Values were found”  
  In this case, either no budget exists or the chart-field values are incorrect

**Step 4.)** To return to your search results click on the **Return to Search** button
3.2 Budgets Overview Page

The Budgets Overview inquiry page(s) provide a view of budget activity for one or multiple budgets.

Step 1.) From the main menu on the left hand side of the page navigate to Commitment Control > Review Budget Activities > Budgets Overview

> CLICK ON Commitment Control

Step 2.) > CLICK ON Budgets Overview. Select an existing inquiry name or add a new inquiry name by clicking the add a new value tab

**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

Inquiry Name: begins with

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Step 2a.) To add a new inquiry name; enter a meaningful inquiry name (EXAMPLE: budget inquiry for department 99999)
Step 2b.) When you click ADD the following page appears – you will need to enter in the circled fields to retrieve budget information (Note: % is wildcard):

- Ledger Group = ORG
- Update year
- Leave default value: Ledger Group
- Default value: Detail Budget Period
  (Optional: you can select the Detail Accounting Period calendar keeping in mind your results can differ)

Type in a description:

If you use the department lookup you will get a list of ALL valid departments; you can then search for a department by entering the dept# or description

Step 3.) After you’ve entered the circled values SAVE your inquiry

Step 4.) To see the budget results click on the SEARCH button located in the top section of this page

Step 5.) Below is the page that will show the search results
Ledger Totals
This group box displays the summarized totals for the criteria you set on the Budgets Overview - Inquiry Criteria page. The amount in parentheses in the group box header represents the total number of rows in the Budget Overview Results scroll area.

Chart
This chart displays budget results in a column chart format. To hide chart, click the arrow next to the word Chart.
Budget Overview Results
This grid displays the results of your selection criteria and your display options.

Click the Show Budget Details button to open the Budget Details page, where you view budget details for the ledger row.

Click the Show Budget Transaction Types button to access the Budget Transaction Types page. You can view the amount of the original budget, the total adjustment amount, the adjustment and original transfer amounts, the budget close amount, and any amount rolled over from a previous fiscal year.

Budget: Click the Budget link for a ledger row to access the Budget Journal page.

Expense, Encumbrance, & Pre-Encumbrance: Click any of these links to display the Activity Log page.
4 Possible Errors

- You do not have security to inquire a department's budget:

  An error has occurred that has stopped this transaction from continuing.

- For questions or further information, contact the budget office at extension x8438

- When clicking on budget-related links you receive an error:

  Your Peoplesoft security access does not allow access to the page. A request can be made by contacting the Peoplesoft Help Desk at extension x9873

5 Budget Reports

5.1 RIC Budget Status Report

  Step 1) From the main menu on the left hand side of the page navigate to RIC Custom Applications > RIC Commitment Control Menu > Budget Reports > RIC Budget Status Report
- CLICK ON RIC Custom Applications

- CLICK ON RIC Commitment Control Menu

- CLICK ON Budget Reports
CLICK ON RIC Budget Status Report

Step 2.) Search for an existing RUN CONTROL ID or add a new one:

Budget Status Report

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

Search by: Run Control ID begins with
- Case Sensitive

Search

Advanced Search

Find an Existing Value
Add a New Value
Step 3.) Enter in the required values for your report and then click on the RUN button > Business Unit = RICOL, Ledger Group = ORG, Budget Period = current budget year i.e. 2014, 2013, and select a department from the list. Optional: enter account and fund to minimize report (sample values below):

Step 4.) Select WEB/PDF as type/format and then click the OK button:

Step 5.) You will be brought back to the report values page that shows the Process Instance # of your report request in the top right hand corner. Click on the PROCESS MONITOR link:
Step 6.) You will see the process monitor page. Your report is complete when the run status reads Success/Posted - to update the status click on the REFRESH button. Once complete click on the DETAILS link:

Step 7.) You will see the Process Detail page. Click on the View Log/Trace link:

Step 8.) The link will bring you to the View Log/Trace page – to view your report click on the link that has the PDF file name and your report will open in a new window:
5.2 RIC Budget Status Detail

Step 1.) From the main menu on the left hand side of the page navigate to RIC Custom Applications > RIC Commitment Control Menu > Budget Reports > RIC Budget Status Details

➢ CLICK ON RIC Custom Applications

➢ CLICK ON RIC Commitment Control Menu

➢ CLICK ON Budget Reports
CLICK ON RIC Budget Status Details

You will see this page:
Step 2.) Click on a link to run a query which will open a new window. Each query link provides more budget detail. You will need to enter in values using prompts – enter in the values for your budget (sample values below) and then click on the VIEW RESULTS button:

The results will display on the same page:

Download results in: Excel, Text, CSV, Text file (1 kb)