



The UNIVERSITY *of* OKLAHOMA

Introduction to PeopleSoft



COMPASS

Core Mission Enterprise System Strategy

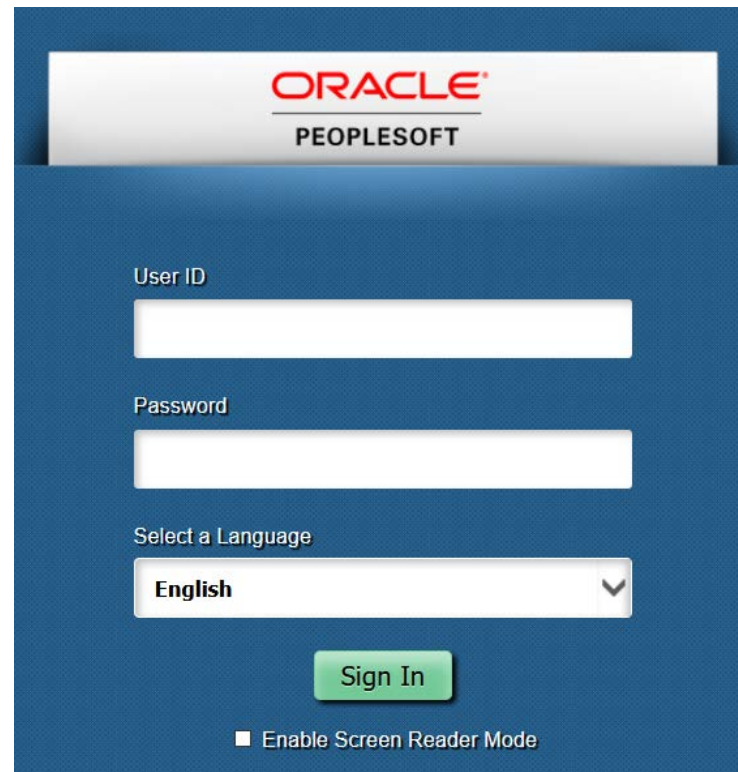


Topics

- ▶ Accessing PeopleSoft Financials 9.2
- ▶ Security View Access
- ▶ PeopleSoft Classes
- ▶ My Favorites
- ▶ Lookup Feature
- ▶ Search Options
- ▶ Chartfield Spread
- ▶ Commitment Control/Budget
- ▶ Inquiries
- ▶ Run Control and Report Manager
- ▶ Queries
- ▶ Websites

Accessing PeopleSoft Financials

- ▶ Jump-off page – <https://compass.ou.edu/>
- ▶ OUHSC Campus - Network ID and Password
- ▶ Norman Campus - 4x4 and Password



ORACLE
PEOPLESOFT

User ID

Password

Select a Language
English ▼

Sign In

Enable Screen Reader Mode



PeopleSoft Security

- ▶ PeopleSoft Security is determined by two factors.
 1. Roles – Inquiry, Entry, or Approver
 2. Organizations – which orgs are you responsible for?
- ▶ Users can only enter, approve, review data and run queries or reports for organizations that they have access to. Users cannot be an enterer and an approver at the same time.
- ▶ Once training is complete, your supervisor or an authorizing agent will need to fill out the PeopleSoft Financial security form in order for access to be granted. The online security form can be found on the Financial Services website.



PeopleSoft Classes

| Class | Class Description | Roles and Abilities |
|----------------------------|---|--|
| Introduction to PeopleSoft | <p>This training class is designed to present PeopleSoft Financials to the new user on campus.</p> <p>This class will help educate the participant about PeopleSoft and introduce the concepts and basic navigation. General information about Financials including budgetary control, chartfield spread information, queries, and how to find information on the Financial Services website will also be included.</p> | Run Queries, Review Budget Details |
| Cost Transfer | <p>Pre-Requisite: Introduction to PeopleSoft Financials</p> <p>This training class is designed to present information on how to enter a cost transfer for non-payroll transactions and payroll transactions as well as request budget revisions.</p> | Run Queries, Review Budget Details, Enter Cost Transfers, Request Budget Revisions |
| Approver | <p>The training classes for approval will be broken up by module.</p> <p>The training classes will go over the approval of Payments, Requisitions, Cost transfers, and Service Unit Requests.</p> | Run Queries, Review Budget Details, Approve Payment, Requisitions, Cost Transfers, and Service Unit Requests |










PeopleSoft Classes

| Class | Class Description | Roles and Abilities |
|----------------|---|---|
| Procure to Pay | <p>Pre-Requisite: Introduction to PeopleSoft Financials</p> <p>Procure to Pay training will review all the different methods in which goods and services are bought and paid for at OU. During this training users will become familiar with the ordering through OU Marketplace, the process for creating Requisitions, the process for Receiving on Purchase Orders, the process for creating OnDemands for refund payments, how to add or lookup a Supplier as well as the process for Regular Voucher or invoice payments. Users who successfully complete the training will be eligible for security access for Departmental AP Entry and Departmental Purchasing Entry.</p> | Run Queries, Review Budget Details, Review Suppliers, Enter Payments, Enter Requisitions, Receiving |
| Cash Receipts | <p>The Cash Receipts training class consists of a single panel that must be completed to provide the information required by the Bursar to post a receipt to the PeopleSoft Financial System.</p> <p>Participants will learn how to complete the panel, make corresponding deposits, and verify the deposit has been posted to the system. Tulsa employees will need to obtain permission from the Bursar Manager in order to gain access and/or attend training.</p> | Run Queries, Enter Cash Receipts, Run Cash Receipt Deposit Report |

PeopleSoft Home Screen

▼ OU Homepage

| | | | |
|--|---|--|--|
| Accounts Payable  | Approvals  | Cash Receipts  | Cost Transfer  |
| eProcurement  | P-Card  | Reports and Query Viewer  | Service Unit Request (OUHSC)  |

PeopleSoft Nav Bar

The image displays the PeopleSoft navigation bar interface. At the top, a dark blue header contains the text "OU Homepage" with a dropdown arrow, a home icon, a menu icon, and a refresh icon. A red arrow points to the refresh icon. Below the header is a grid of eight application tiles, each with a title and an icon:

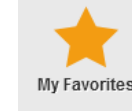
- Accounts Payable**: Icon of a building with a coin.
- Approvals**: Icon of a document with a magnifying glass.
- Cash Receipts**: Icon of a green bill.
- Cost Transfer**: Icon of a blue envelope.
- eProcurement**: Icon of a clipboard with a checklist.
- P-Card**: Icon of a blue card.
- Reports and Query Viewer**: Icon of a document with a pie chart and a person silhouette.
- Service Unit Request (OUHSC)**: Icon of a document with a plus sign.

On the right side, there is a vertical sidebar titled "NavBar" with a gear icon. It contains four items:

- Recent Places**: Icon of a calendar with a clock.
- My Favorites**: Icon of a yellow star.
- Navigator**: Icon of a blue document with horizontal lines.

My Favorites

- ▶ Navigate using the Nav Bar to the screen that you want to add to **My Favorites**.
- ▶ Click on the three dots in the upper right-hand corner of the screen.
- ▶ Click Add To Favorites > Add > OK



Add To Homepage

Add To NavBar

Add To Favorites

MultiChannel Console

My Preferences

Sign Out

Add To Favorites ×

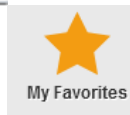
*Favorite Label

Budget Details Add

Added 'Budget Details' to Favorites

OK

- ▶ NavBar: My Favorites



Lookup and Search Feature

- ▶ PeopleSoft Financials allows the user to lookup values when either doing data entry or searches.
- ▶ Users can search for values by using the magnifying glass or by using the different search options in the dropdown box.
- ▶ Users will only see values for items in which you have departmental org security access to.

Voucher

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

| | | | | |
|-------------------------------|-------------|---|----------------------|----------------------------------|
| Business Unit | = | ▼ | <input type="text"/> | <input type="button" value="Q"/> |
| Voucher ID | begins with | ▼ | <input type="text"/> | |
| Dept | begins with | ▼ | <input type="text"/> | <input type="button" value="Q"/> |
| Invoice Number | begins with | ▼ | <input type="text"/> | |
| Invoice Date | = | ▼ | <input type="text"/> | <input type="button" value="B"/> |
| Short Supplier Name | begins with | ▼ | <input type="text"/> | |
| Supplier ID | begins with | ▼ | <input type="text"/> | <input type="button" value="Q"/> |
| Supplier Name | begins with | ▼ | <input type="text"/> | |
| Entry Status | = | ▼ | <input type="text"/> | <input type="button" value="Q"/> |
| Budget Checking Header Status | = | ▼ | <input type="text"/> | <input type="button" value="Q"/> |
| Incomplete Voucher | = | ▼ | <input type="text"/> | <input type="button" value="Q"/> |

Case Sensitive



- begins with
- contains
- =
- not =
- <
- <=
- >
- >=
- between
- in

Maximum Rows and Sorting

- ▶ When using the search feature, you may reach the maximum number of rows that can display – the first 300 results.
- ▶ The user should narrow down the search results by entering more information into the search criteria.



Search Results

Only the first 300 results can be displayed.



- ▶ All search headings are sortable ascending to descending by double clicking on the field heading.

Search Results



| Business Unit | Voucher ID | Dept | Invoice Number | Gross Invoice Amount | Invoice Date | Short Supplier Name | Supplier ID | Supplier Name | Entry Status |
|---------------|------------|------|----------------|----------------------|--------------|---------------------|-------------|---------------|--------------|
|---------------|------------|------|----------------|----------------------|--------------|---------------------|-------------|---------------|--------------|

Add, Delete, Calendar, Save, New Window

- ▶ When adding rows during data entry, the user will put the number of lines needed in the box, click the plus icon, and the system will add that number of rows to the bottom of the entry screen.

Lines to add 

- ▶ When subtracting rows during data entry, the user will select the check mark box next to the rows that need to be subtracted, click the minus icon, and the system will subtract those rows.

4 

Lines to add  

- ▶ Every date field has a built in calendar. Click on the icon that has the #31 on it and the system will open up a calendar.



- ▶ To save any data entry screen, the user will click on the green Save icon.



- ▶ PeopleSoft allows users to work in multiple windows. To open a new window, click **New Window** located in the upper right-hand corner of the screen.

[New Window](#)



Chartfield Spread

- ▶ Business Unit
- ▶ Budget Date
- ▶ Account
- ▶ Fund
- ▶ Organization
- ▶ Function
- ▶ Entity
- ▶ Project/Grant
- ▶ Source
- ▶ Purpose



Chartfield Spread

BUSINESS UNIT

OUHSC – The University of Oklahoma Health Sciences Center

NORMN – The University of Oklahoma

BUDGET DATE

This field is used to identify the fiscal year in which a transaction is posted. The Budget year begins on July 1st and continues through the following June 30th. The system has been setup to recognize the date and apply the transaction to the correct budget year.

ACCOUNT

This field identifies the general ledger account that best describes each item in the transaction. The codes are found using the Chart of Accounts. These accounts include assets, liabilities, revenues, and expenses.

Example: Cash 111701 (Asset), Supp-Laboratory 600100 (Expense)



Chartfield Spread

FUND

This field represents the different checking accounts that we have on each campus and also identifies the type of source of fund for each transaction.

Examples include: EDGEN, SPNSR, MISCA

ORGANIZATION

This field is used to identify the ownership of the transaction and is commonly referred to as ORG.

Example: CAS01001

College Level – Arts & Sciences = CAS

Department Level – Deans Office = 01001

Within a College, a range of org numbers will be assigned to be used for organization and section identification.



Chartfield Spread

FUNCTION

This field is used to identify the purpose or function of a transaction.

Examples: Instruction = 00111, 00211, 00311

Institutional Support = 00116, 00216

Research = 00012

ENTITY

This field is user-defined. Departments can assign a value to identify a **person** in their department.

This value is for reporting purposes. The minimum required entry is 00000.

- Particularly useful in tracking faculty/staff expenses and revenues across chartfield spreads.
- Can be used to track all spending for a particular employee/faculty member (such as travel, supplies, etc.)



Chartfield Spread

SOURCE

This field will be used to track transactional information for an Endowed Chair, Service Unit, Auxiliary Enterprise, Student Fees processed through the Bursar, or optional value as established by a college/department.

Source will be required when the following funds are used:

EDWCH – Endowed Chairs

EGFEE – Education Fees

SVCCT – Service Contracts

SUAUX – Service Unit/Auxiliary

Source can also be used as optional field for reporting purposes.



Chartfield Spread

PURPOSE

This field can be user defined to meet any additional reporting/tracking needs of the area.

It is an optional field intended to be used for events, line of service, etc. Requested values will be 2 leading alpha to identify what college/area the value is used by. The 2 alpha will be followed by 6 numeric values.

PROJECT

This field will be used to track: Sponsored Grants/Contracts, Capital Projects, Federal Loans

Will only be used when the following Funds are used:

SPNSR

CAPTL

FEDLN

If these funds are used, then a value will be **required** in the Project field.



Commitment Control and Budget Checking

- ▶ Budgetary Control Org - FUND, ORG, FUNCTION
 - ▶ Parent budgets with spending control at Fund-Org-Function level
 - ▶ Child budgets with tracking at Fund-Org-Function level
- ▶ Budgetary Control Required Source - FUND, ORG, FUNCTION, SOURCE
 - ▶ Parent budgets with spending control at Fund-Org-Function-Source level
 - ▶ Child budgets with tracking at Fund-Org-Function-Source level
- ▶ Budgetary Control Required Grant - FUND, ORG, FUNCTION, PROJECT
 - ▶ Parent budgets with spending control at Fund-Org-Function-Project level
 - ▶ Child budgets with tracking at Fund-Org-Function-Project level

The CFS will drive transactions to the correct budget type.

You cannot process payroll, buy goods, or pay for services unless you have budget available.



Budget Inquiry

- ▶ An inquiry retrieves a predefined set of information to be viewed within the PeopleSoft application. These are referred to as Inquiry panels. Users navigate to the Inquiry panels through the menu navigation of the Home Screen under Reports and Queries or via Nav Bar > Navigator > Commitment Control > Review Budget Activities > Budget Details

- ▶ Budget Inquiry – Non-Sponsor

Used to assist in determining the budget set and the amount of expenditures charged against it using Non-Sponsor Funds.

- ▶ Budget Inquiry – Sponsor

Used to assist in determining the budget set and the amount of expenditures charged against it using Sponsor Funds.

Budget Inquiry - Non-Sponsor Funds

▶ Business Unit

NORMN for Norman Campus

OUHSC for Health Sciences Campus

▶ Ledger Group

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit =

Ledger Group =

Search

Clear

Basic Search  Save Search Criteria

| Business Unit | Ledger Group | Description |
|---------------|--------------|-------------------------------|
| NORMN | OU_OC | Org Child Budget Ledger |
| NORMN | OU_OP | Org Parent Budget Ledger |
| NORMN | OU_SC | Required Source Child Budgets |
| NORMN | OU_SO | Source Optional Budget Ledger |
| NORMN | OU_SP | Required Source Parent Budget |

Budget Inquiry - Non-Sponsor Funds

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

| Business Unit | Ledger Group | Account | Fund | Org | Function | Entity | Budget Period |
|---------------|--------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| NORMN | OU_OP | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Search

Results

| Business Unit | Ledger Group | Account | Fund | Org | Function | Entity | Budget Period | View Details |
|---------------|--------------|---------|-------|----------|----------|--------|---------------|------------------------------|
| NORMN | OU_OP | EXPEND | EDGEN | ADN01001 | 00016 | 00000 | FY2020 | View Details |

Budget Inquiry - Non-Sponsor Funds

Commitment Control Budget Details

| Business Unit | Ledger Group | Account | Fund | Org | Function | Entity | Budget Period |
|---------------|--------------|---------|-------|----------|----------|--------|---------------|
| NORMN | OU_OP | EXPEND | EDGEN | ADN01001 | 00016 | 00000 | FY2020 |

Display Chart 

[Previous](#)

[Next](#)

[Return to Inquiry Criteria](#)

Ledger Amounts

Drill to Activity Log

Max Rows

| | | | | |
|------------------|------------|-----|---|---|
| Budget: | 225,000.00 | USD |  |  |
| Expense: | 600.00 | USD |  |  |
| Encumbrance: | 0.00 | USD |  |  |
| Pre-Encumbrance: | 0.00 | USD |  |  |

[Attributes](#)

[Parent / Children](#)

[Associated Budgets](#)


Associate Revenue

0.00 USD

Available Budget

Without Tolerance

224,400.00  USD

Percent (99.73%)  [Forecasts](#)

With Tolerance

224,400.00  USD

Percent (99.73%) 

Budget Exceptions

Exception Errors 0

Exception Warnings 0

[Budget Exceptions](#)

[Return to Search](#)

[Notify](#)

- ▶ **Budget** – The total amount of budget that was budgeted for that fiscal year.
- ▶ **Expense** – The total amount of expenditures that have been recorded against the Chartfield Spread.
- ▶ **Encumbrance** – The total amount of money still outstanding on a purchase order(s).
- ▶ **Pre-Encumbrance** – The total amount of money still outstanding on a requisition(s).

Budget Inquiry - Sponsor Funds

▶ Business Unit

NORMN for Norman Campus

OUHSC for Health Sciences Campus

▶ Ledger Group

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit =

Ledger Group =

Search

Clear

Basic Search



Save Search Criteria

| Business Unit | Ledger Group | Description |
|---------------|--------------|----------------------------|
| NORMN | OU_PC | SPNSR Child Budget Ledger |
| NORMN | OU_PP | SPNSR Parent Budget Ledger |



Budget Inquiry - Sponsor Funds

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

| Business Unit | Ledger Group | Account | Fund | Org | Function | Entity | Project | Budget Period |
|---------------|--------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| NORMN | OU_PP | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Search

Results

| Business Unit | Ledger Group | Account | Fund | Org | Function | Entity | Project | Budget Period | View Details |
|---------------|--------------|---------|-------|----------|----------|--------|----------|---------------|------------------------------|
| NORMN | OU_PP | EXPEND | SPNSR | AGS09001 | 00016 | 00000 | 10531670 | | View Details |

Budget Inquiry - Sponsor Funds

Commitment Control Budget Details

| Business Unit | Ledger Group | Account | Fund | Org | Function | Entity | Project |
|---------------|--------------|---------|-------|----------|----------|--------|----------|
| NORMN | OU_PP | EXPEND | SPNSR | AGS09001 | 00016 | 00000 | 10531670 |

[Display Chart](#) [Previous](#) [Next](#) [Return to Inquiry Criteria](#)

Ledger Amounts

Drill to Activity Log

| | | | | |
|------------------|------------|-----|--|--|
| Budget: | 320,000.00 | USD | | |
| Expense: | 260.00 | USD | | |
| Encumbrance: | 0.00 | USD | | |
| Pre-Encumbrance: | 0.00 | USD | | |

| | | | | |
|-------------------------|------------|-----|---------|----------|
| Associate Revenue | 0.00 | USD | | |
| Available Budget | | | | |
| Without Tolerance | 319,740.00 | USD | Percent | (99.92%) |
| With Tolerance | 319,740.00 | USD | Percent | (99.92%) |

| | | | | |
|--------------------------|---|--------------------|---|-------------------|
| Budget Exceptions | | | | |
| Exception Errors | 0 | Exception Warnings | 0 | Budget Exceptions |

[Return to Search](#) [Notify](#)

- ▶ **Budget** – The total amount of budget that was budgeted for the project.
- ▶ **Expense** – The total amount of expenditures that have been recorded against the project.
- ▶ **Encumbrance** – The total amount of money still outstanding on a purchase order(s).
- ▶ **Pre-Encumbrance** – The total amount of money still outstanding on a requisition(s).

Run Control ID

- ▶ A Run Control ID is a unique name used to identify which inputs on a page are saved and used to run a report or process.
- ▶ A Run Control ID is case sensitive, can be up to 30 characters in length, and can contain underlines and dashes. It cannot contain spaces.
- ▶ The same Run Control ID can be used for different reports or processes.
- ▶ To add a Run Control ID. Click on “Add a New Value”, Type in the Run Control ID name, Click “Add”.
- ▶ This newly created Run Control ID will be saved and can be used when running other reports. There is no need to create a new Run Control ID for the different reports in PeopleSoft.

The screenshot displays the 'Run Control ID' management interface. On the left, the 'Add a New Value' button is highlighted with a red arrow. Below it, the 'Search Criteria' section shows 'Search by: Run Control ID' with a dropdown menu and a text input field. The 'Case Sensitive' checkbox is unchecked. At the bottom, there are 'Search' and 'Advanced Search' buttons. On the right, the search results view shows the 'Add a New Value' button, a search input field containing 'Run Control ID REPORT', and an 'Add' button. Red arrows indicate the flow: from the 'Add a New Value' button on the left to the search input field on the right, and then to the 'Add' button on the right.

Process Monitor

- ▶ The Process Monitor allows you to review the status of any scheduled or running process. To access the Process Monitor, use the Reports and Query Viewer tile or Click on Nav Bar > Navigator > People Tools > Process Scheduler > Process Monitor; although, most screens will have the Process Monitor available via hyperlink for easy use.
- ▶ Your User ID will be defaulted. However, you can leave this field blank to view all processes that you are authorized to view.
- ▶ When the Run Status shows **Success** and Distribution Status shows **Posted**, it means that the Report is ready to viewed in the Report Manager or the Process ran to complete status. Click the Refresh button at any time to Refresh the screen.

The screenshot displays the 'Process Monitor' interface. At the top, there are two tabs: 'Process List' (active) and 'Server List'. Below the tabs is a section titled 'View Process Request For' containing several filters: 'User ID' (with a red box around the input field), 'Type' (dropdown), 'Last' (dropdown), '1' (input), 'Days' (dropdown), 'Refresh' (button with a red arrow pointing to it), 'Server' (dropdown), 'Name' (input with search icon), 'Instance From' (input), 'Instance To' (input), 'Report Manager' (link), 'Run Status' (dropdown), 'Distribution Status' (dropdown), and a checked 'Save On Refresh' checkbox.

Below the filters is a 'Process List' section with a search icon and a table. The table has columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. A red arrow points to the 'Run Status' column, and another red arrow points to the 'Distribution Status' column. The table contains one row of data.

| Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|------|--------------|--------------|------|--------------------------|------------|---------------------|-------------------------|
| <input type="checkbox"/> | 201450 | | SQR Report | OUSURRPT | | 05/25/2020 9:11:22AM PDT | Success | Posted | Details |

Report Manager

- ▶ The Report Manager will be used to view reports ran in PeopleSoft. To access the Report Manager, use the Reports and Query Viewer tile or Click on Nav Bar > Navigator > Reporting Tools > Report Manager; although, most screens will have the Report Manager available via hyperlink for easy use.
- ▶ The Report Manager page will open the List tab by default. Click on the Administration tab. Your User ID will be defaulted. The report you most recently generated should appear at the top of the Report List. Users can click on the hyperlinked report in the Description field.

The screenshot shows the 'Administration' tab selected in the Report Manager interface. The 'View Reports For' section includes a 'User ID' field with a red border, a 'Type' dropdown menu, a 'Last' dropdown menu, a '1' input field, a 'Days' dropdown menu, and a 'Refresh' button. Below this, there are 'Status', 'Folder', 'Instance', and 'to' fields.

Report List

The screenshot shows a table with one row of report data. A red arrow points to the 'Description' field, which contains a blue hyperlink 'SUR Report'.

| Select | Report ID | Prce Instance | Description | Request Date/Time | Format | Status | Details |
|--------------------------|-----------|---------------|----------------------------|----------------------|-----------------|--------|-------------------------|
| <input type="checkbox"/> | 32115 | 201450 | SUR Report | 05/25/2020 9:11:24AM | Acrobat (*.pdf) | Posted | Details |



Query Viewer

- ▶ Queries are used to retrieve information out of PeopleSoft. Queries can be ran to the screen to be viewed and/or they can be ran to excel.
- ▶ There are many public queries to choose from. Access to queries is granted once Introduction to PeopleSoft is completed and the security form has been turned in.
- ▶ Queries can be found under Reports and Query Viewer tile or Nav Bar > Navigator > Reporting Tools > Query > Query Viewer.
- ▶ A list of the most Frequently Used Queries can be found on the Financial Services website.
- ▶ Queries ran by users will only retrieve financial information based on their organizational security access.
- ▶ Queries can be simple or complex; they may be used one time or repeatedly, as necessary.
- ▶ Be sure your internet browser is not blocking pop-up windows.

Query Example - OU_BUD_ORG

In Query Viewer, you can search for the OU_BUD_ORG query simply by typing in the query name, then click **Search**.

The OU_BUD_ORG query is used to review budget information including budget by fiscal year, pre-encumbrance and encumbrance amounts as well as remaining balances.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By

Query Name

begins with

OU_BUD_ORG

Search

Advanced Search

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel |
|------------|--------------------|--------|--------|----------------------|-----------------------|
| OU_BUD_ORG | Org Budget Inquiry | Public | BUDGET | HTML | Excel |

Query Example - OU_BUD_ORG

- ▶ By having prompts on queries, each end user can run the query based on their own specific needs.
- ▶ On the OU_BUD_ORG query, each field must be filled in or PeopleSoft will not bring back any results.
- ▶ When a user wants to see all data that they have organizational access to, they will use the 0 (zero) to Z functionality. The below example, will give the end user budget information for the NORMN Business Unit, for all organizations the end users has access to, as well as all fiscal years.

OU_BUD_ORG - Org Budget Inquiry

Business Unit

From Fund

To Fund

From Org

To Org

From Function

To Function

From Budget Period

To Budget Period

Adding Favorite Queries

- ▶ Search for the query you would like to add to your list of favorites in Query Viewer.
- ▶ Once the query is found in the Search Results, simply click [Favorite](#) to add to your Query list. The next time you come into Query Viewer, this query will show up under **My Favorite Queries**.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By

Query Name

begins with

OU_BUD_ORG

Search

[Advanced Search](#)

Search Results

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Add to Favorites |
|------------|--------------------|--------|--------|-------------|--------------|--------------------------|
| OU_BUD_ORG | Org Budget Inquiry | Public | BUDGET | HTML | Excel | Favorite |

My Favorite Queries

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Remove |
|------------|--------------------|--------|--------|-------------|--------------|--------|
| OU_BUD_ORG | Org Budget Inquiry | Public | BUDGET | HTML | Excel | — |



Website

- ▶ Who to Contact and Staff Listing
- ▶ Training Materials including Job Aids and Videos
- ▶ Forms and Tools
- ▶ Frequently Asked Questions
- ▶ Policies and Procedures



The UNIVERSITY of OKLAHOMA

Questions?

Please visit us at

Norman Campus

<http://www.ou.edu/financialservices>

OUHSC Campus

<https://financialservices.ouhsc.edu/>



COMPASS

Core Mission Enterprise System Strategy