

Run a Budget Inquiry

See How Much You Have in Available Funds

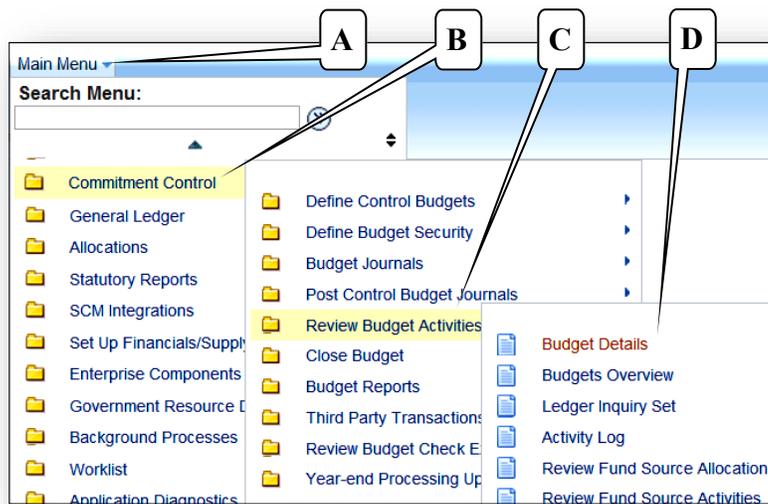
To view the balance in your budget accounts, you run a “Budget Inquiry”. This means you ask the PeopleSoft system to show you how much available money is in one or more of your site’s budget accounts.

This Job Aid shows you how to run a budget inquiry in those of your budget accounts that deal with purchasing goods, services, or paying for travel expenses. This budget inquiry does NOT show balances in accounts that have to do with HCM or Human Resources, such as payroll. To run this Budget Inquiry you must login to the PeopleSoft Financial environment; not the HCM environment.

1. After logging in to PeopleSoft Financials, follow this navigation:

Click:

- A. Main Menu
- B. Commitment Control
- C. Review Budget Activities
- D. Budget Details



2. Enter your budget code numbers into the **Chartfields**.

Keep in mind that the fewer fields you use, the broader and longer your inquiry results will be (*you'll see more budgets*).

The more fields you use, the fewer and more precise your inquiry results will be (*you'll see fewer budgets*).

The screenshot shows the 'Budget Details' search form. A callout bubble points to the 'Search Criteria' section, which contains various fields for filtering results, such as Business Unit, Ledger Group, Account, Department, Fund Code, etc. The 'Search' button is highlighted with a green arrow at the bottom left.

These are ChartFields

3. Click the yellow **Search** button in the lower left corner.

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4. A list of budget accounts might appear at the bottom of the screen based upon the Chart-Fields selected. If your search criteria was very specific to one budget, the details of that one budget will display instead of a list of budgets.

Source Type: begins with
 Budget Period: begins with
 Statistics Code: begins with

Search Clear Basic Search Save Search Criteria

Search Results
 View All First 1-32 of 32

Business Unit	Ledger Group	Account	Department	Fund Code	Class	Field	Program Code	Budget Reference	Affiliate	Fund Affiliate	Resource	Affiliate Resource	Extended PC	Business Unit	Project	Activity	Source Type	Budget Period	Statistics C
SDUSD	EXPENSE	4301	0061	01000	0000	2420	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	(blank)	2009	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	(blank)	2009	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	(blank)	2010	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	(blank)	2011	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	(blank)	2012	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	(blank)	2013	(blank)

5. Click on any one of the horizontal, linked account lines at the bottom of the screen to view available funds

6. Look towards the bottom-left of the next screen to view the **Available Budget** dollar amount.

Commitment Control Budget Details

Business Unit	Ledger Group	DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Exten
SDUSD	EXPENSE	0061	00000	00	4301	3140	0000	01000	00

Display Chart

Ledger Amounts

Budget: 300.00 USD
 Expense: 77.68 USD
 Encumbrance: 0.00 USD
 Pre-Encumbrance: 0.00 USD

Associate Revenue 0.00 USD

Available Budget 222.32 USD
 Without Tolerance 222.32 USD
 With Tolerance 222.32 USD

Budget Exceptions

Exception Errors 0 Exception Warnings 0 Budget Exceptions

Disregard "With Tolerance"

7. You can click the **Return to Search** button in the bottom left corner of this screen to get back to the previous page;

Return to Search Previous in List Next in List

Alternatively, you can logout or navigate to another page in PeopleSoft.

For more information about how to use the PeopleSoft software system in our school district, as well as to find training opportunities and support, go online to www.sandi.net and follow this clicking navigation:

Staff —> Technical Support & Resources —> PeopleSoft