

Run a Budget Inquiry

See How Much You Have in Available Funds

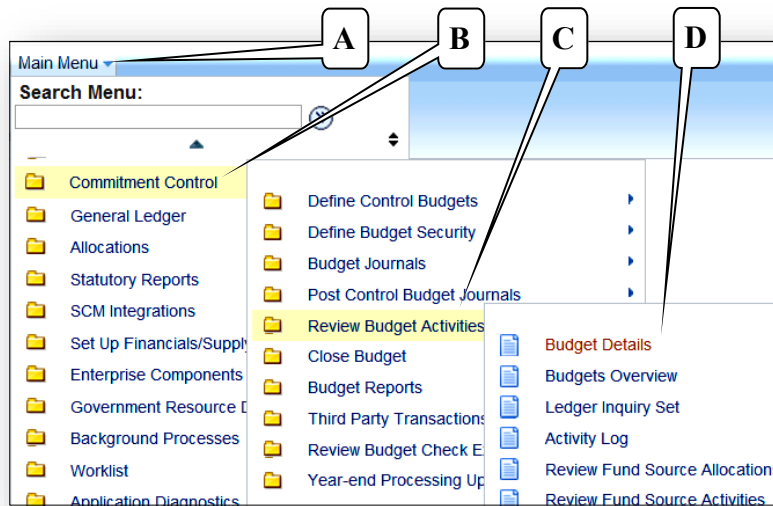
To view the balance in your budget accounts, you run a “Budget Inquiry”. This means you ask the PeopleSoft system to show you how much available money is in one or more of your site’s budget accounts.

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*).

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

A screenshot of the 'Budget Details' search form. It contains various fields for data entry, each with a 'begins with' dropdown and a magnifying glass icon. The fields include: Business Unit (SDUSD), Ledger Group (EXPENSE), Account (4301), Department (0061), Fund Code (01000), Class Field, Program Code, Budget Reference, Affiliate, Fund Affiliate, Resource Affiliate, Resource (00000), Extended, PC Business Unit, Project, Activity, Source Type, Budget Period, and Statistics Code. At the bottom, there is a yellow 'Search' button, a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

These are
ChartFields

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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

Each line represents a single budget. Click on any area along one horizontal line to display that budget's details.

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
SDUSD	EXPENSE	4301	0061	01000	0000	2420	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	2009	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	2009	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	2010	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	2011	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(blank)	(blank)	(blank)	2012	(blank)
SDUSD	EXPENSE	4301	0061	01000	0000	2700	00		(blank)	(blank)	(blank)	00000	0000	(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.

Disregard "With Tolerance"

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

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

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

Return to Search Previous in List Next in List

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