

Run a Budget Inquiry

See How Much You Have in Available Funds

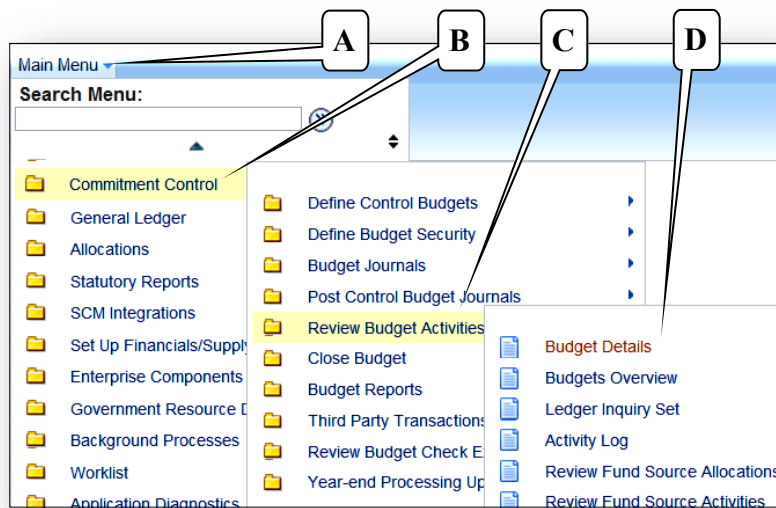
To view the balance in your budget accounts, you run a “Budget Inquiry”. This means you can view the available funds in one or more of your site’s budget accounts.

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 appropriate **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.

The screenshot shows the 'Budget Details' form. It has a search bar at the top. Below it, a list of 'Search Criteria' is displayed. Each criterion has a dropdown menu for the operator and a text box for the value. The criteria include: 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, and Statistics Code. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A callout points to the 'Search' button.

These are ChartFields

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4. When viewing a single budget, upon seeing this screen below click the yellow **Search** button. Then, click **View Details**.

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Department	Resource	Budget Reference	Account	Program Code	Class Field	Fund Code	Extended	Budget Period
SDUSD	EXPENSE	0003	00000	00	4301	1000	1110	01000	0000	2017

Search

Budget Details

Personalize | Find | View All | First

Business Unit	Ledger Group	Department	Resource	Budget Reference	Account	Program Code	Class Field	Fund Code	Extended	Budget Period	View Details
1 SDUSD	EXPENSE	0003	00000	00	4301	1000	1110	01000	0000	2017	View Details

Return to Search | [F2] Notify

5. 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:	Expense:	Encumbrance:	Pre-Encumbrance:
	300.00 USD	77.68 USD	0.00 USD	0.00 USD

Associate Revenue

	Amount	Unit	Percent	Value
Available Budget	222.32	USD	Percent	(74.11%)
Without Tolerance	222.32	USD	Percent	(74.11%)
With Tolerance	222.32	USD	Percent	(74.11%)

Budget Exceptions

Exception Errors	Exception Warnings	Budget Exceptions
0	0	

6. 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**