

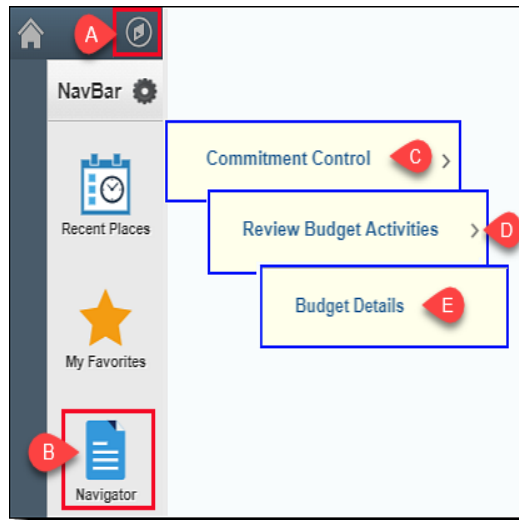
Budget Inquiry

See How Much You Have in Available Funds

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. Budget Inquiry does NOT show balances in accounts that have to do with HCM or Human Resources, such as payroll.

1. Log in to PeopleSoft Financials and navigate to **Budget Details** using the following steps:

- From the Homepage, click the **Navbar**.
- Click **Navigator**.
- Scroll down Navigator menu.
Select **Commitment Control**.
- Select **Review Budget Activities**.
- Select **Budget Details**.



2. On the **Budget Details page**, enter information in the appropriate **Chartfields**.

Note: For more search results, enter less information. For less (*more specific*) search results, enter data into more chartfields. See example.

Key chartfields to populate may include:

- **Ledger Group** = EXPENSE
- **Account**
- **Department**
- **Fund**
- **Program Code**
- **Resource**
- **Budget Period:** Fiscal year of budget(s)

3. Click **Search**.

A screenshot of the 'Budget Details' search form. The form is titled 'Budget Details' and has a search bar at the top. Below the search bar, there is a section for 'Search Criteria' with various chartfields. A red box highlights the chartfields: Business Unit (SDUSD), Ledger Group (EXPENSE), Account (begins with 4301), Department (begins with 0123), Fund Code (begins with 01000), Class Field (begins with), Program Code (begins with), Budget Reference (begins with), Affiliate (begins with), Fund Affiliate (begins with), Resource Affiliate (begins with), Resource (begins with 00000), Extended (begins with), PC Business Unit (begins with), Project (begins with), Activity (begins with), Source Type (begins with), Budget Period (begins with 2019), and Statistics Code (begins with). A callout box with a yellow background and a red border points to the chartfields with the text 'Fill in preferred chartfields.' At the bottom of the form, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

4. When a single budget is displayed on the **Budget Detail Overview** page, click **Search**.

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	0123	00000	00	4301	1000	1110	01000	0000	2019

Search

5. On the **Budget Detail** page, click **View Details**.

Budget Details

Personalize | Find | View All | First 1 of 1 Last

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	2019	View Details

6. The **Commitment Control Budget Details** page provides summarized and detailed information on ledger amounts, available budget, and budget exceptions. Key fields and definitions are listed below:

- **Display Chart** - Displays chart of budget activity. A bar chart displays ledger amount summaries when a budget exists and a pie chart displays when there is no budget.
- **Budget**- Total budgeted amount, including transfers.
- **Expense**- Total amount of expenses, or expenditures, for this budget.
- **Encumbrance**- Total amount of open purchase orders for this budget.
- **Pre-Encumbrance**- Total amount of open purchase requisitions for this budget.
- **Without Tolerance**- Total amount available for this budget.

Commitment Control Budget Details

Business Unit	Ledger Group	DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended	Budget Period
SDUSD	EXPENSE	0123	00000	00	4301	1000	1110	01000	0000	2019

Display Chart Previous Next Return to Inquiry Criteria

Ledger Amounts

Budget:	300.00 USD										Max Rows 100
Expense:	77.68 USD										Attributes
Encumbrance:	0.00 USD										Parent / Children
Pre-Encumbrance:	0.00 USD										Associated Budgets

Associate Revenue

Available Budget

Without Tolerance	222.32 USD	Percent (74.11%)	Forecasts
With Tolerance	USD	Percent (74.11%)	

Budget Exceptions

Exception Errors 0 Exception Warnings 1 Budget Exceptions

Return to Search Click Return to Search to go back to previous page when done.

Navigate to the PeopleSoft [site](#) for additional resources and training opportunities.

SDUSD > Staff Portal > Technical Support/ Help Desk > select PeopleSoft from the IT Resources drop down menu.