# 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:

    a. From the Homepage, click the **Navbar**.

    b. Click **Navigator.**

    c. Scroll down Navigator menu. Select **Commitment Control**.

    d. Select **Review Budget Activities.**

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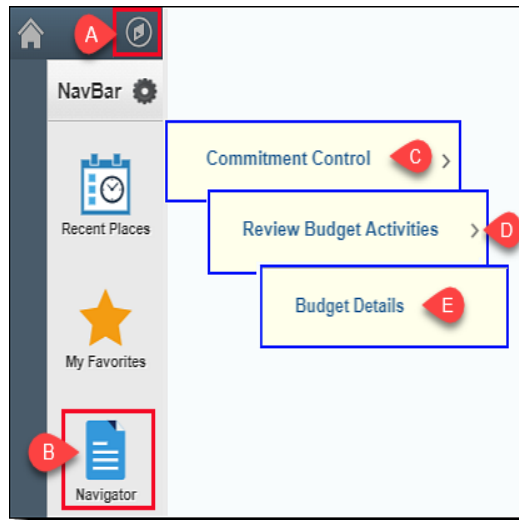
2. On the **Budget Details page**, enter information in the appropriate **Chartfields**.

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**.

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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 char 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

Max Rows 100

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

Associate Revenue

The **Without Tolerance** amount displays the total **amount available** for the selected budget.

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.

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