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.

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

5. On the Budget Detail page, click 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.

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