The UNIVERSITY of OKLAHOMA

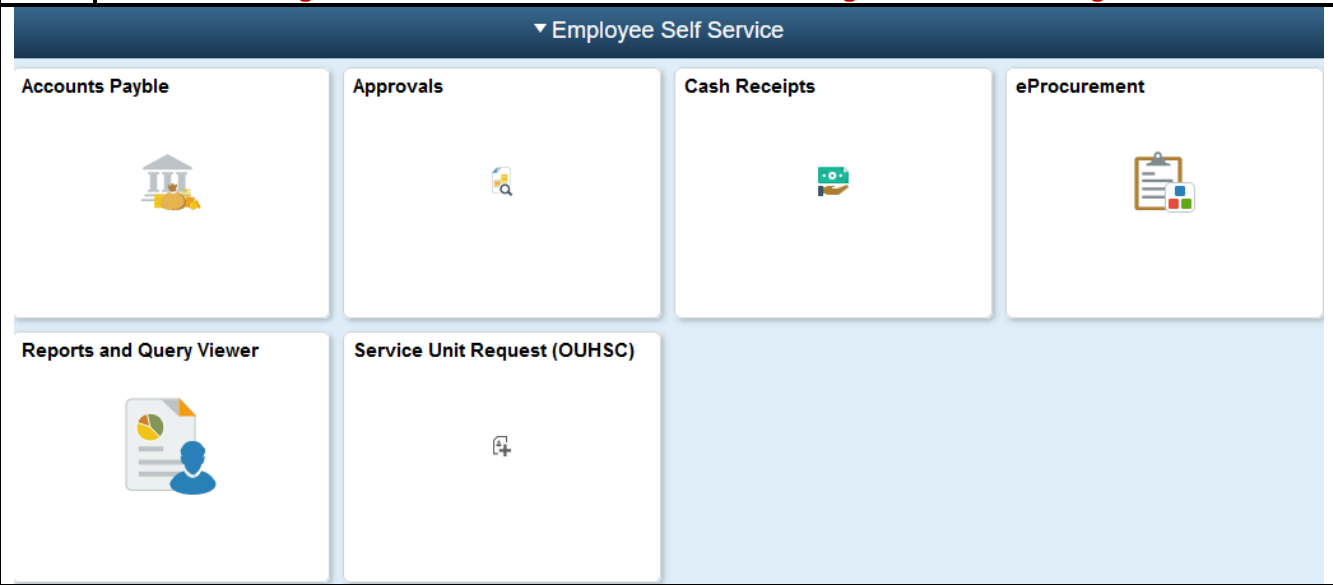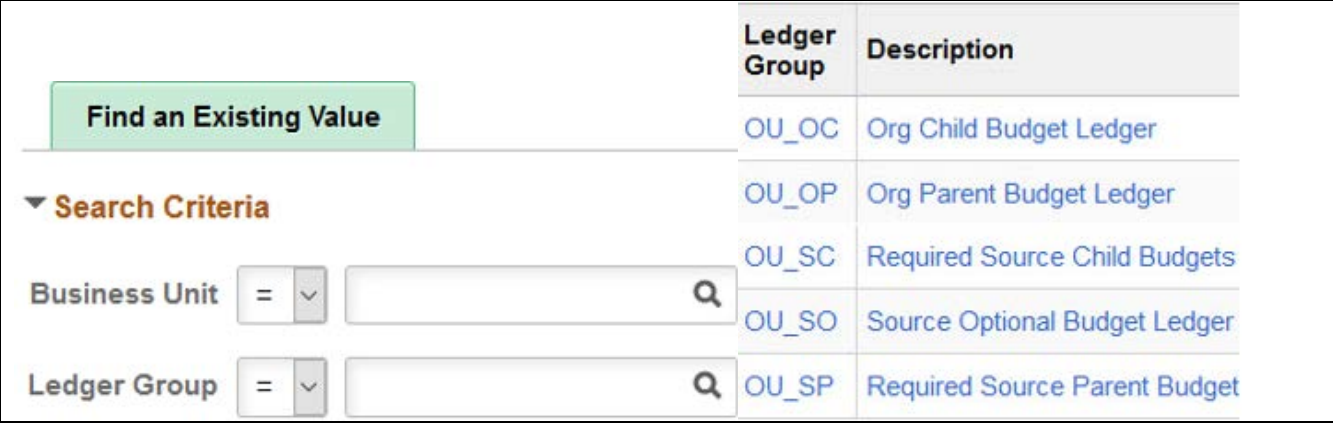| Step	Action
1	After logging into PeopleSoft Financials, you will access Budget Details via the Homescreen under **Reports and Query Viewer** and then click on **Budget Details**. You can also get to the screen via **Nav Bar > Navigator > Commitment Control > Review Budget Activities > Budget Details**

	▼ Employee Self Service

Accounts Payble	Approvals	Cash Receipts	eProcurement

Reports and Query Viewer	Service Unit Request (OUHSC)

	The Business Unit will be defaulted based on campus. OUHSC – OU Health Sciences Center NORMN – The University of Oklahoma
2	Click on magnifying class in the **Ledger Group** field to choose your ledger group. The ledger group is used for budgeting at a parent level and/or a child level for non-sponsor and sponsor funds. If you would like to see the overall budget, you will choose the Org Parent Ledger group. If you want to see if the budget was broken down into separate budgeting accounts, you will choose the Child Budget Ledger group.

Find an Existing Value

▼ Search Criteria

Business Unit = [ ]

Ledger Group = [ ]

Ledger Group	Description
OU_OC	Org Child Budget Ledger
OU_OP	Org Parent Budget Ledger
OU_SC	Required Source Child Budgets
OU_SO	Source Optional Budget Ledger
OU_SP	Required Source Parent Budget

Step	Action
3	Once you choose your **Business Unit** and **Ledger group**, you will click **Search**. Search will take you to the Budget Detail Overview screen.

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Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Account	Fund	Org	Function	Entity	Budget Period	
NORMN	OU_OP	🔍	🔍	🔍	🔍	🔍	🔍	

<div align="right">Search</div>

4	On this screen, you can enter criteria in the field for which you want to see budget data. The **Org** field will only show you departments for which you have access to. The budget period will always start with **FY**. For example, we are in FY2020 for our current fiscal year and starting July 1st, 2020 we will be in FY2021. After putting in your criteria and hitting the **Search** button, the budget details will appear for your selected criteria. Click **View Details** to see the Commitment Control Budget Details information.

Business Unit	Ledger Group	Account	Fund	Org	Function	Entity	Budget Period	View Details
NORMN	OU_OP	EXPEND	EDGEN	ADN01001	00016	00000	FY2020	View Details

5	The Commitment Control Budget Details screens shows up-to-date budget information. The Budget amount shows the total amount of budget that was budgeted for that fiscal year. The Expense shows the total amount of expenditures that have been recorded against the Chartfield spread so far. Click on **Drill to Activity icon** to show what items have been expensed. The Encumbrance amount shows the total amount of purchase orders that are outstanding and that are encumbering money against the Chartfield spread. You can click on the **Drill to Activity Log icon** to show any outstanding Purchase Orders. The Pre-Encumbrance amount show the total amount of requisitions that are outstanding and that are pre-encumbering money against the Chartfield spread. You can click on the **Drill to Activity Log icon** to show any outstanding requisitions. The Available Budget is the amount of budget you have left for this Chartfield spread that fiscal year.

Commitment Control Budget Details

Business Unit	Ledger Group	Account	Fund	Org	Function	Entity	Budget Period
NORMN	OU_OP	EXPEND	EDGEN	ADN01001	00016	00000	FY2020

Display Chart ⓘ   Previous   Next   Return to Inquiry Criteria

Ledger Amounts

Max Rows [100]

Attributes
Parent / Children
Associated Budgets

Budget:	225,000.00 USD	📗	🔶
Expense:	600.00 USD	📗	🔶
Encumbrance:	0.00 USD	📗	🔶
Pre-Encumbrance:	0.00 USD	📗	🔶

Associate Revenue   0.00   USD

Available Budget

Without Tolerance	224,400.00	USD		Percent	(99.73%)	Forecasts
With Tolerance	224,400.00	USD		Percent	(99.73%)	

Budget Exceptions

Exception Errors   0   Exception Warnings   0   Budget Exceptions

Return to Search   Notify