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.

The Business Unit will be defaulted based on campus.

OUHSC – OU Health Sciences Center
NORMN – The University of Oklahoma

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.

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

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.