1. After logging in to PeopleSoft Financials, navigate to **Budgets Overview**:  
   *Commitment Control -> Review Budget Activities -> Budgets Overview*

2. Use the **Search** button to see a list of your saved search criteria.  
   If you have not previously saved a search criteria, click the **Add a New Value** tab.

3. To create an inquiry screen, enter any name that you would like to use as the **Inquiry Name**.  
   *Enter a valid value, e.g. "BUDGETY".*  
   Click the **Add** button.
4. Enter the desired information in the **Description** field. Enter a valid value, e.g. "BUDGET OVERVIEW".

5. Click in the **Ledger Group** field on the right side of the screen.

6. To see the budgeted amount, expenditures, and encumbrances for each expense category, use the CC_BUDUNIT Ledger Group. For more detail use the "CC_DETAIL" Ledger Group.

   **Note**: Expense accounts are grouped together at a "parent" level for budget checking. (For example, if a requisition is coded to expense account 540110, the requisition will pass budget check as long as there are sufficient funds in the 540000 parent account, which is the summation of all 54xxxx account budgets). To see the "parent" levels used for budget checking, select the CC_BUDPAR Ledger Group for this field.

7. Click in the **From Budget Period** field. When you click the **Form Budget Period** field, it will default to the current year and also populate the **To Budget Period** field. If another time period is needed, use the LOOK UP button for available time frames.

8. Click the **Budget Unit ChartField From Value** field in "ChartField Criteria" section.

9. Enter the 5-digit budget unit number that you want to review in the **ChartField From Value** field.

10. Click in the **ChartField To** field.

11. Enter the budget unit that you want to review into the **ChartField To** field.

12. Click the **Save** button.

13. Click the **Search** button.

14. The **Ledger Totals** section displays summary information.
15. The **Budget Overview Results** section displays budget encumbrances and expenses by account (or by parent grouping if you chose CC_BUDPAR Ledger Group). Click the scrollbar to move down.

16. To see the transaction detail that is included in one of the summary amounts, click on the amount in the Expense, Encumbrance, or Pre-Encumbrance columns.

17. Click on the **Magnifying Glass** icon for any line item on which you wish to view additional details.

18. Click the "OK" button to return to the budget summary screen.

19. Click the scrollbar to move to the left.

20. Click the "Return to Criteria" link if you want to search for another budget unit's information.

21. Click the **Home** button in the top right hand side of screen. This will return you to the Main Menu.