BUD-20 View Budgets

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to view budget entries and budget balances in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers how to view budgets entries and budget balances in the NCFS which will enable you to review budget entries, budgetary control balances (certified and authorized), and budgetary control balances (funds-checking control budgets).

Review Budgetary Entries

To review budgetary entries in NCFS, please follow the steps below. There are 6 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

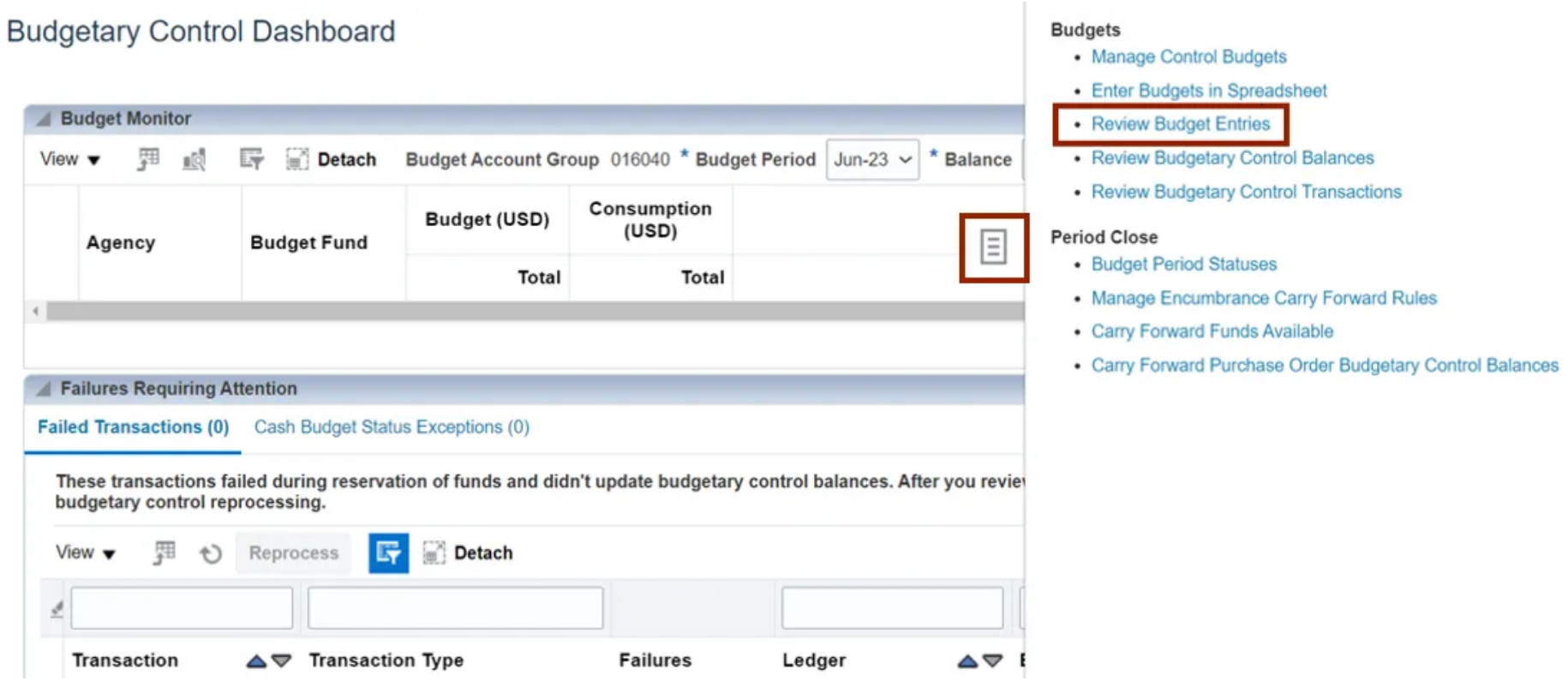
Step 2. On the **Home** page, click the **Budgetary Control** tab and then click the **Budgetary Control** app.

Image



Step 3. On the **Budgetary Control Dashboard**, click the **Tasks** icon and click **Review Budget Entries**.

Image



Step 4. On the **Review Budget Entries** page, select the applicable choices from the respective drop-down choice lists for the mandatory fields (marked with *) and click the **Search** button.

In this example we choose **NC Authorized** for ***Control Budget***, **Jul-22** for ***From Budget Period***, and ***To Budget Period***.

Click the appropriate **Budget Entry Name** link.

Note: To obtain the results for all the budgets, **Saved Search** should always be set to **All Budget Entries**.

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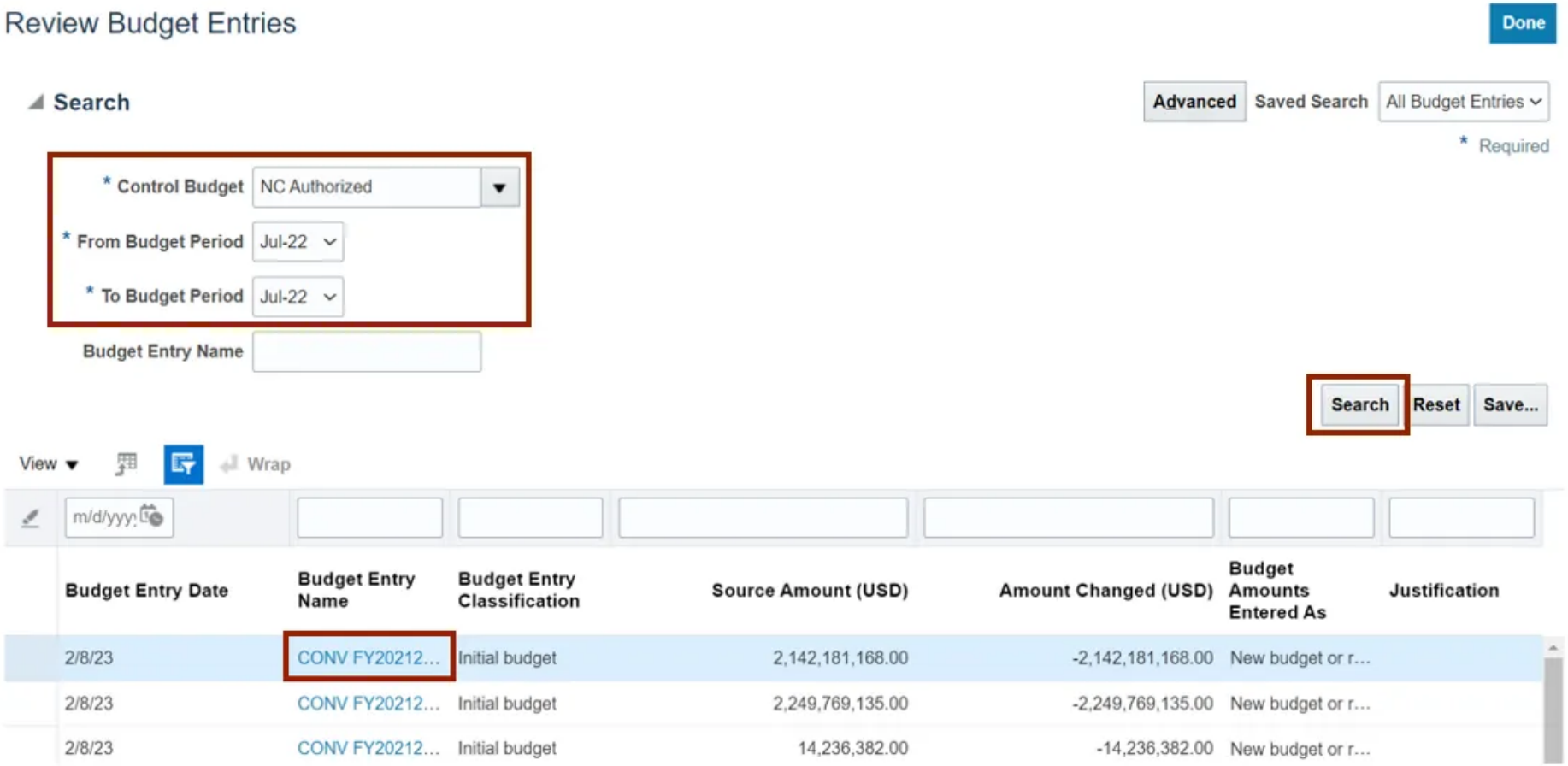
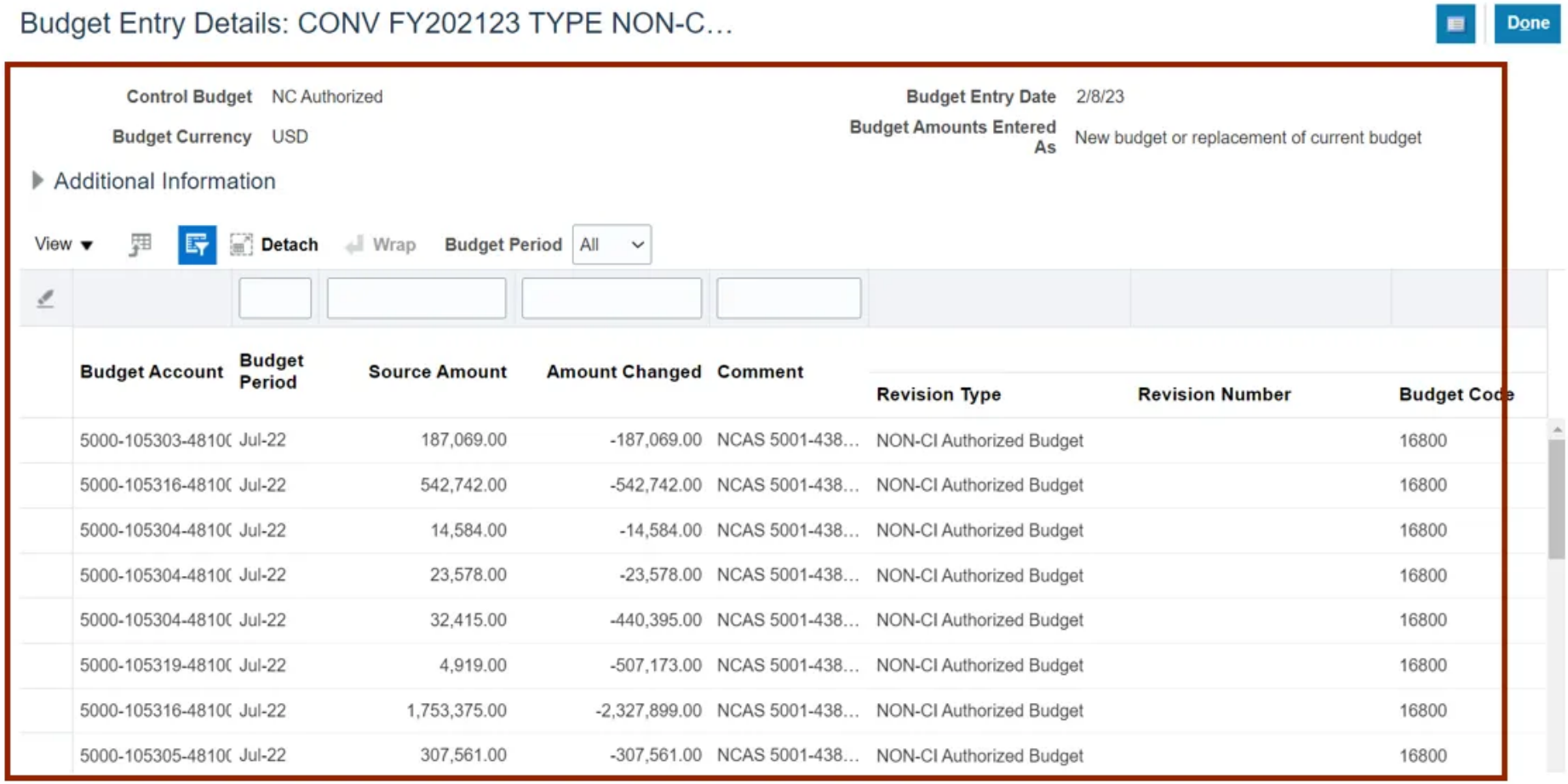


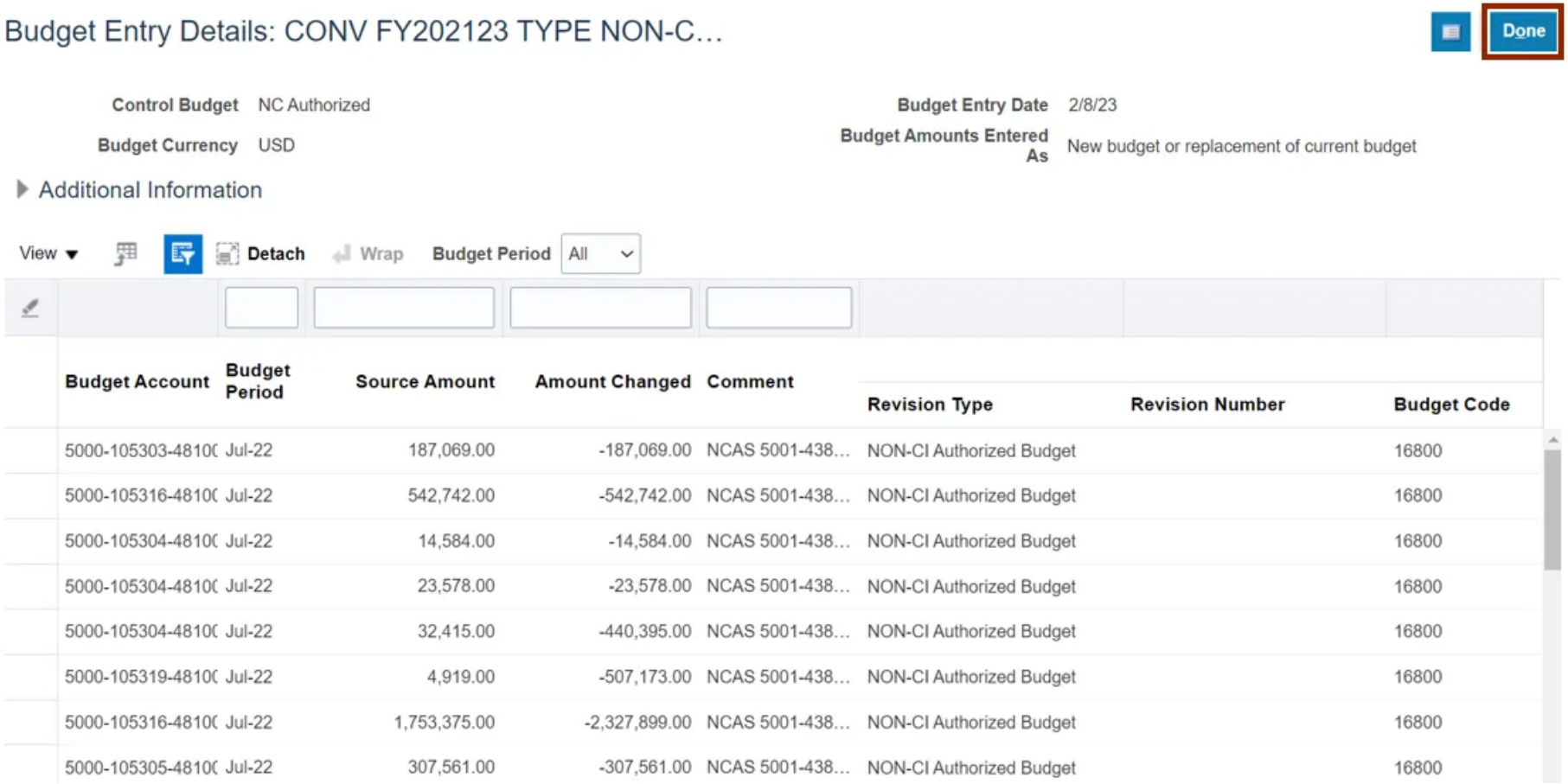
Step 5. On the **Budget Entry Details** page, review the budget entry details.

Image



Step 6. Click the **Done** button. This will redirect you to the **Review Budget Entries** page.

Image



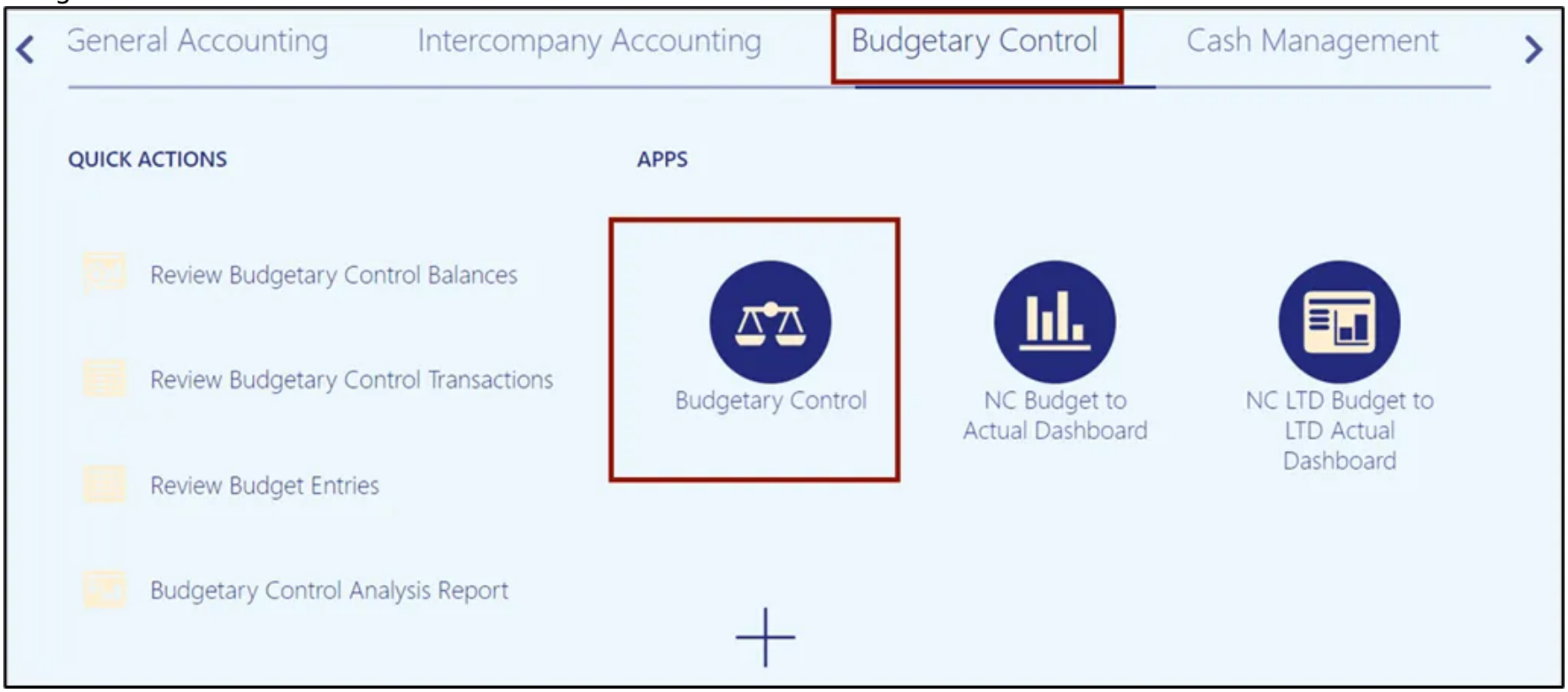
Review Budgetary Control Balances (Certified and Authorized)

To review budgetary control balances (Certified and Authorization) in NCFS, please follow the steps below. There are 10 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

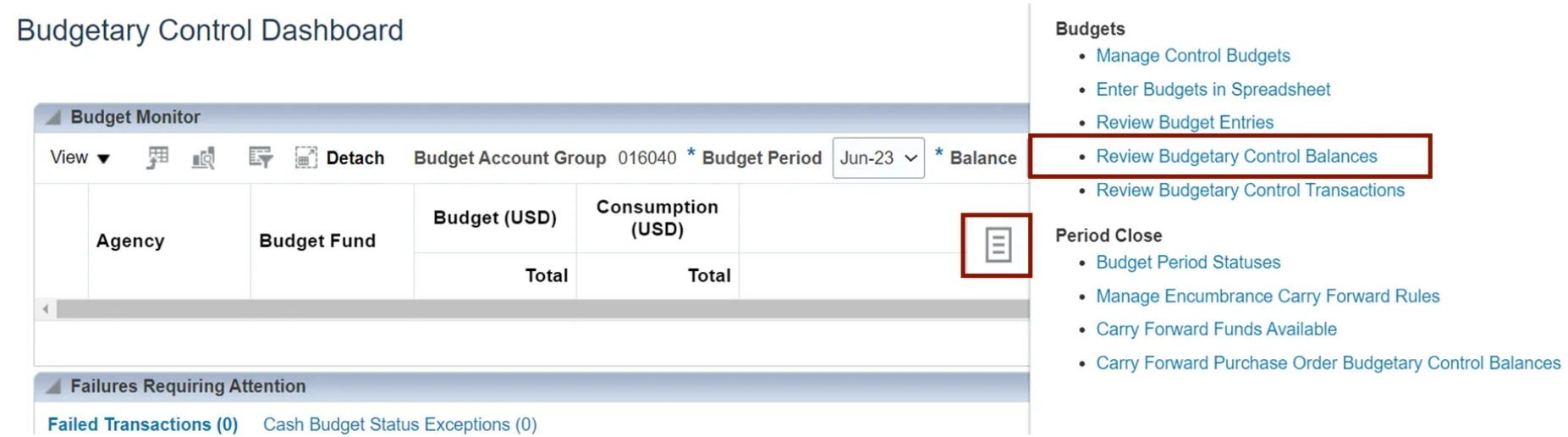
Step 2. On the **Home** page, click the **Budgetary Control** tab and then click the **Budgetary Control** app.

Image



Step 3. On the **Budgetary Control Dashboard** page, click the **Tasks** icon, and click **Review Budgetary Control Balances**.

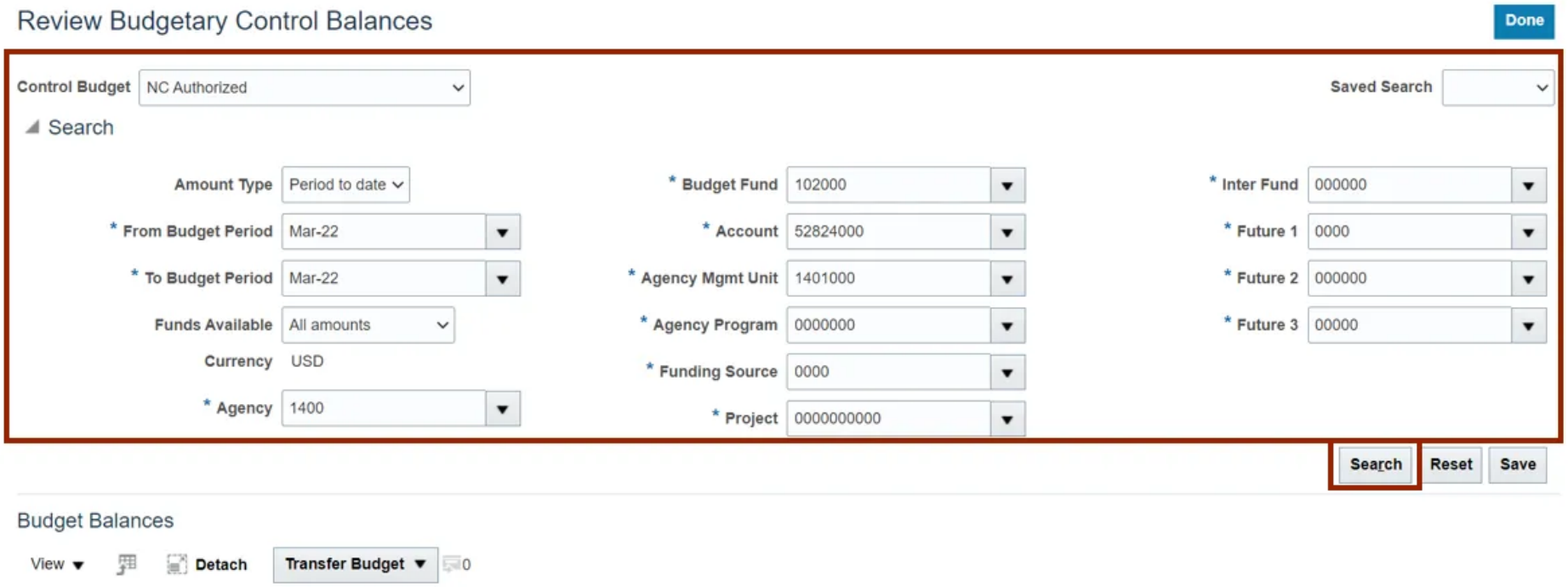
Image



Step 4. On the **Review Budgetary Control Balances** page, select the applicable choices from the respective drop-down choice lists for the mandatory fields (marked with *) and click the **Search** button.

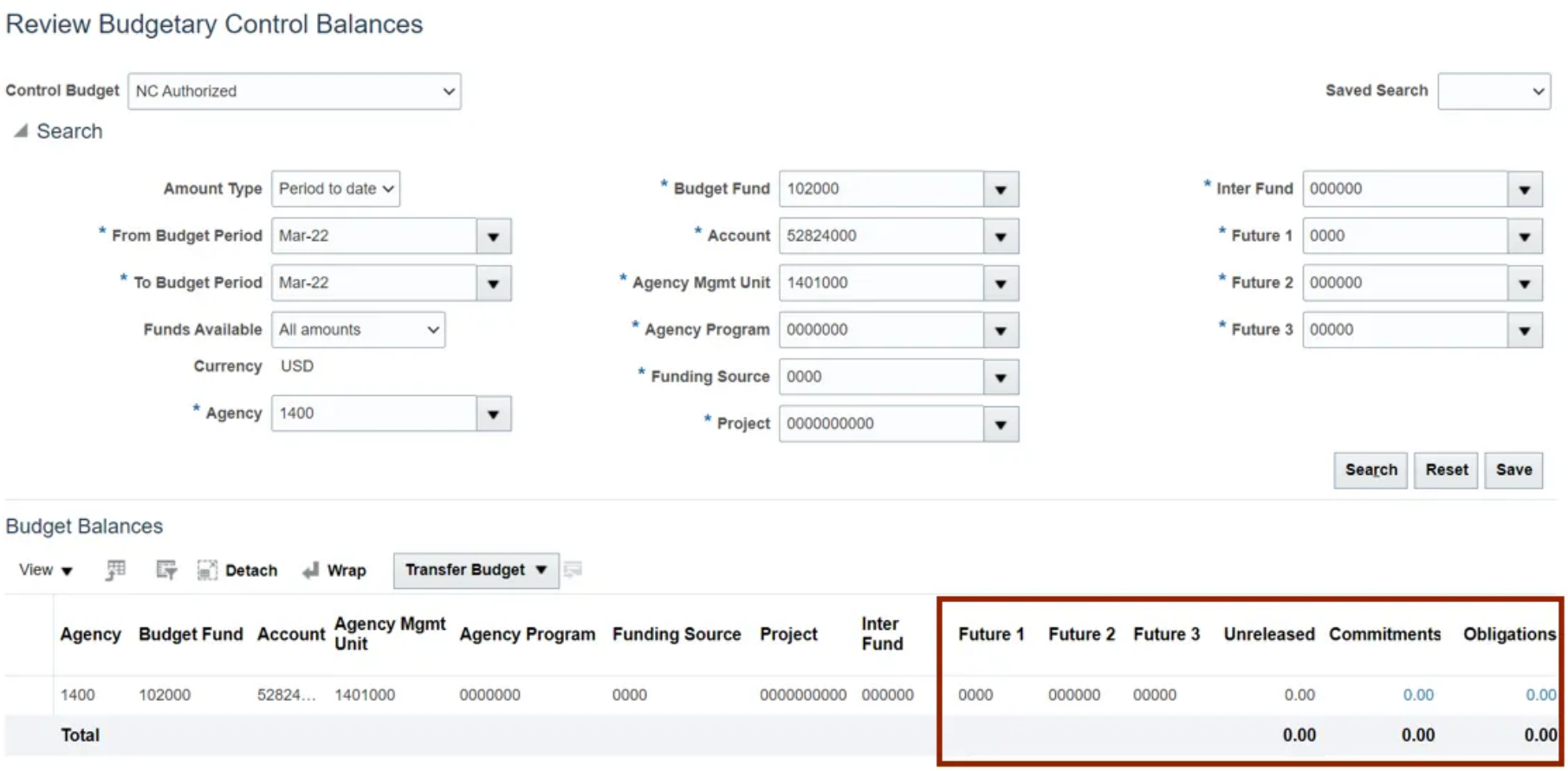
In this example, we choose **NC Authorized** for ***Control Budget***, **Period to date** for ***Amount Type*** (You also have an option to query for Year to date), **Mar-22** for ***From Budget Period*** and ***To Budget Period***, **1400** for ***Agency***, **102000** for ***Budget Fund***, **52824000** for ***Account***, **1401000** for ***Agency Management Unit***.

Image



Step 5. Under the **Budget Balances** section, the budgetary control balances are displayed.

Image



Step 6. Reorder or adjust the columns to view the remaining details of the budget. Click **Total Budget** link. The Budget Entry details are displayed.

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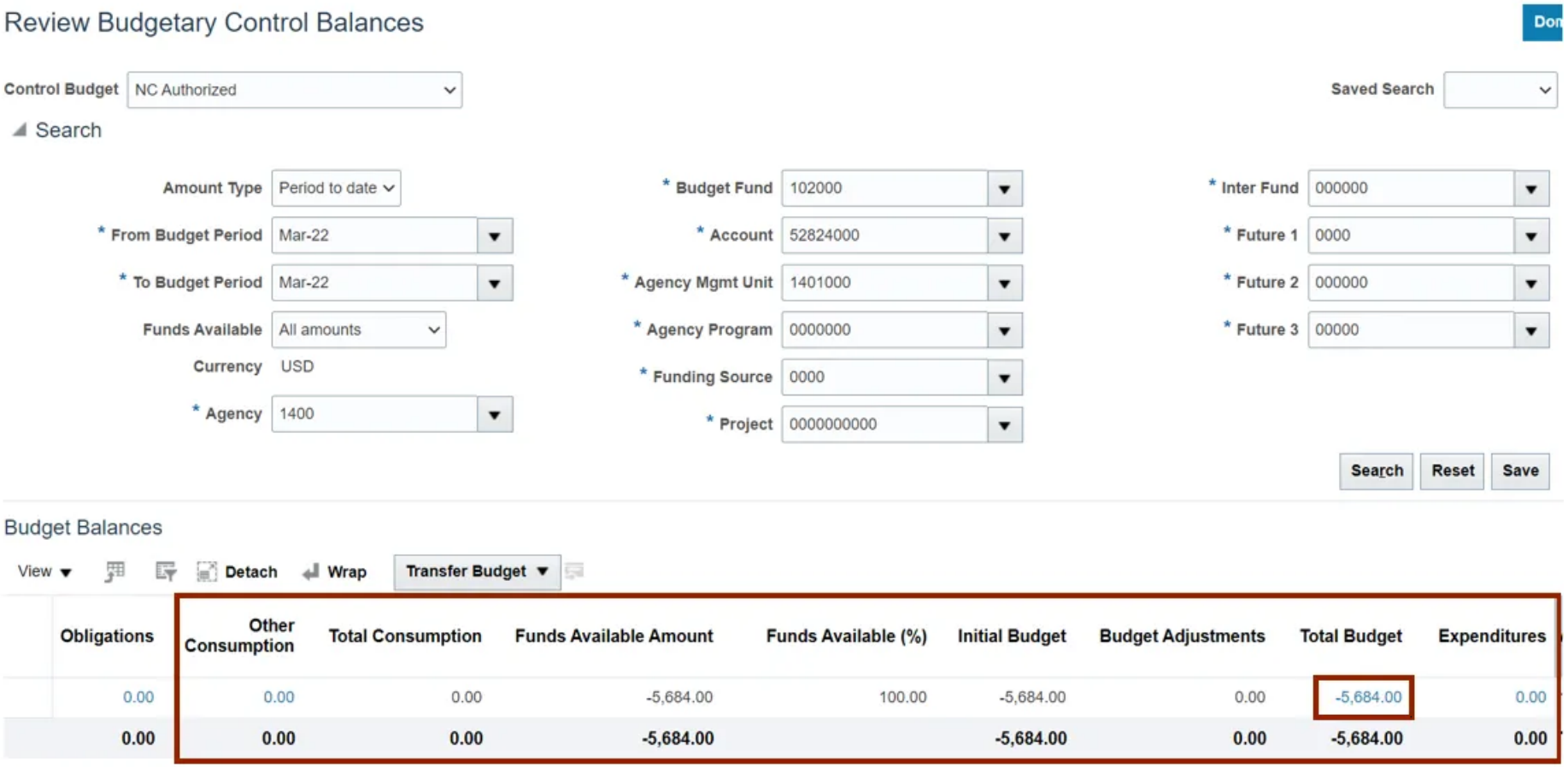
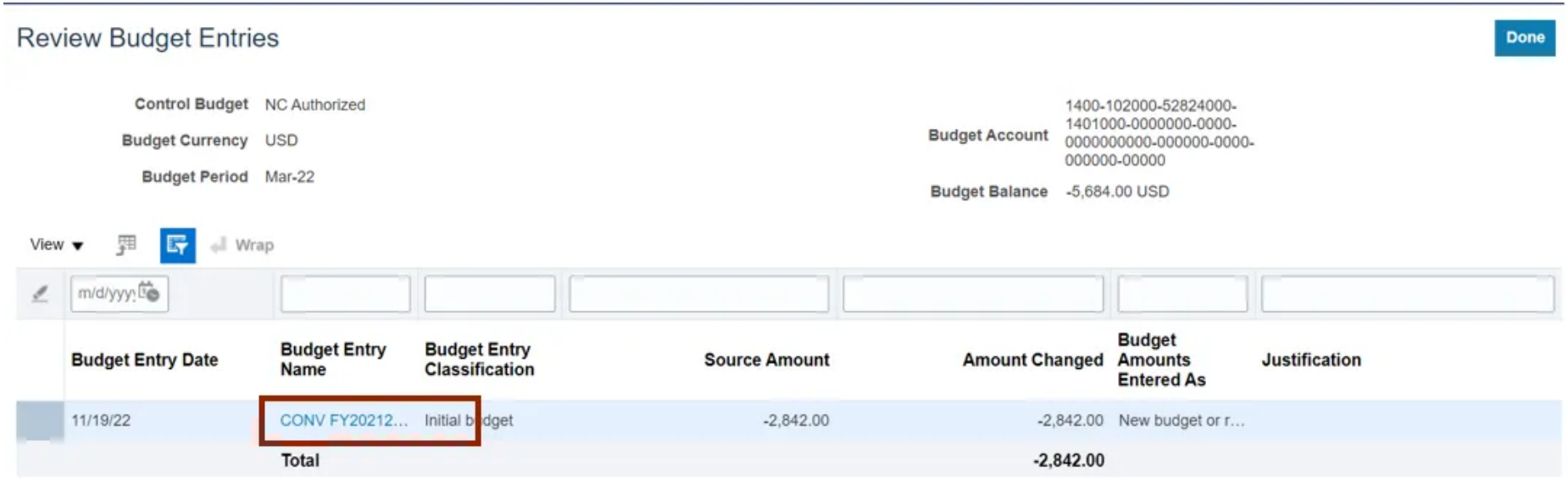


Step 7. On the **Review Budget Entries** page, click **Budget Entry Name** link.

Image



Step 8. On the **Budget Entry Details** page, under **Additional Information** section, review the budget entry details. Click the **Done** button which will redirect you to **Review Budget Entries** page.

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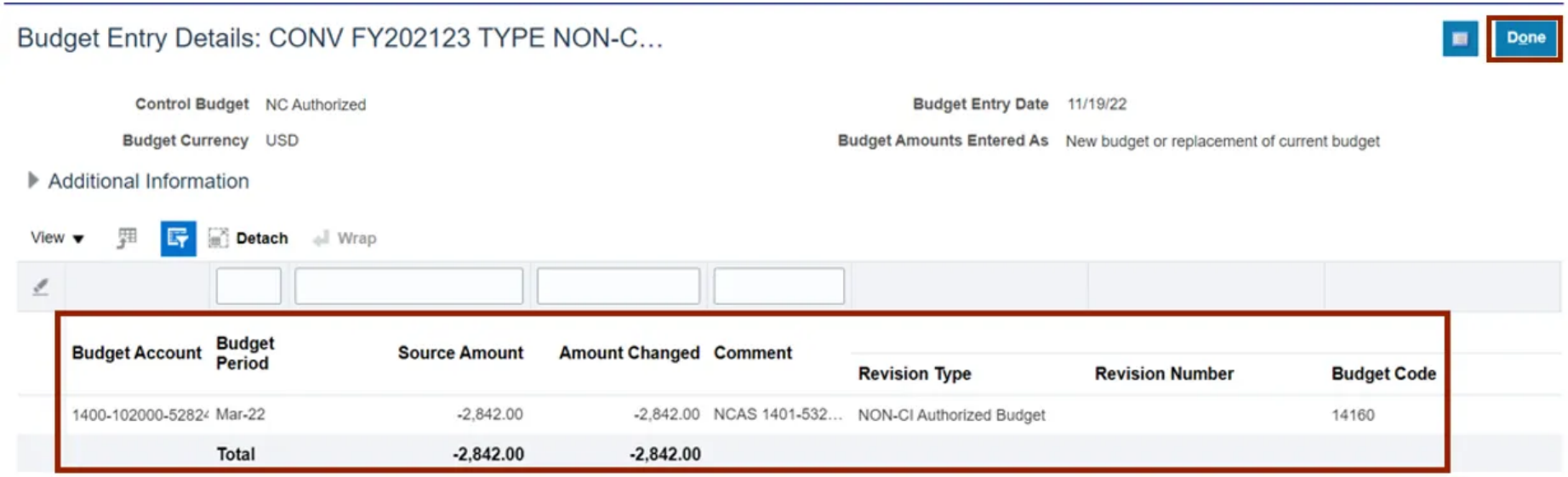
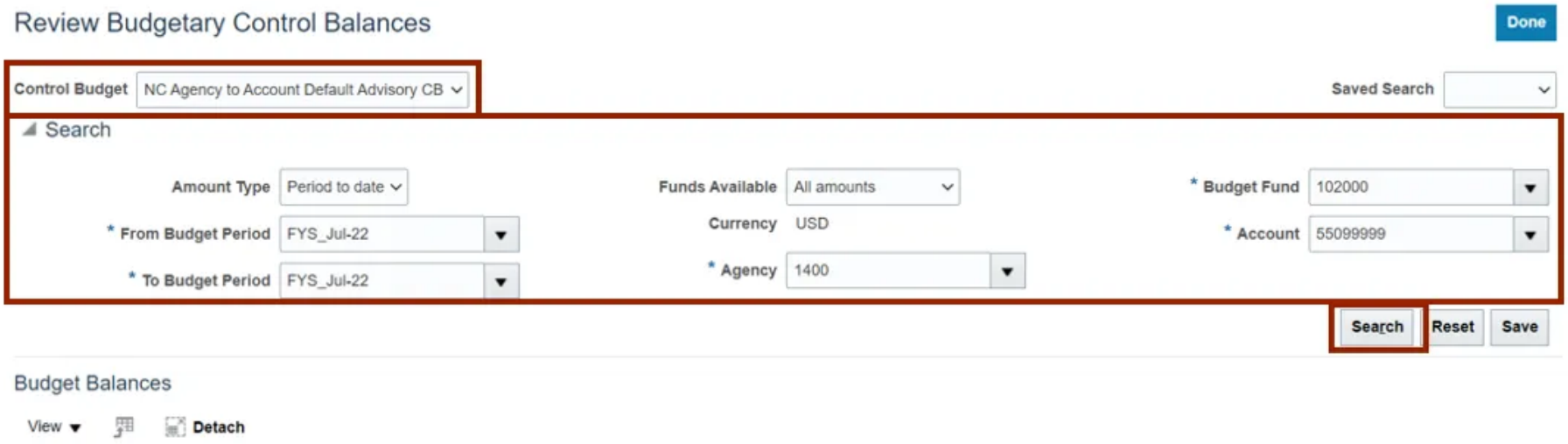


Step 9. To view the control budget of **NC Agency to Account Default Advisory CB.** Select the applicable choices from the respective drop-down choice lists for the mandatory fields (marked with *) and click the **Search** button.

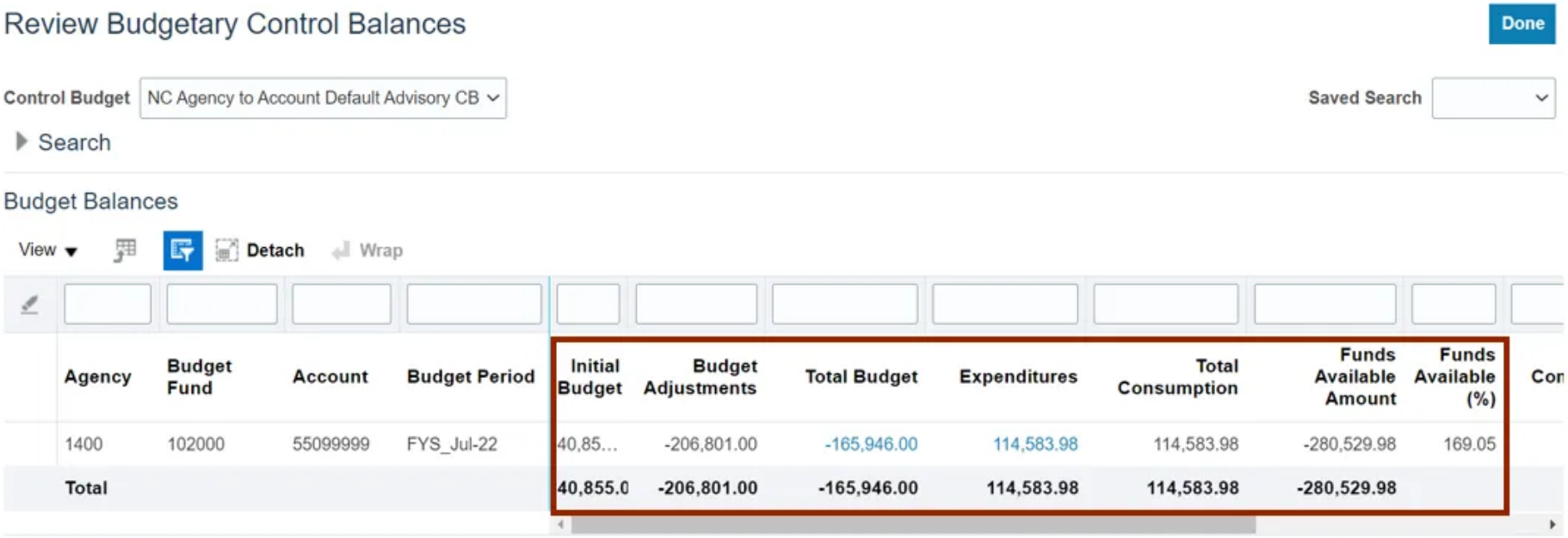
In this example, we choose **NC Agency to Account Default Advisory CB** for ***Control Budget***, **FYS_Jul-22** for ***From Budget Period*** and ***To Budget Period***, **1400** for ***Agency***, **102000** for ***Budget Fund***, **55099999** for ***Account***.

Image



Step 10. Under the **Budget Balances** section, the budgetary control balances are displayed.

Image



Wrap-Up

View Budgets using the steps above, for any budget entries and budget control balances for appropriations, certified, authorized, LTD, and NC Agency to Account Default Advisory CB budgets of certified and authorization and funds checking control budgets.

Additional Resources

- Web-Based Training (WBT)
  - BU001: Budget Inquiry

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