

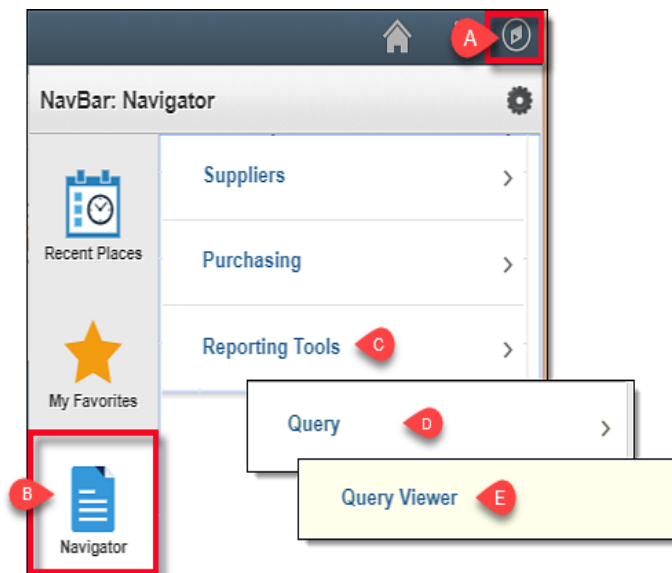
Remaining Amounts Budget Report

See How Much Money Remains In Site Budget Accounts

This job aid shows how to run a query (*report*) that will display the remaining amounts in your site budget accounts.

1. Log in to PeopleSoft Financials and navigate using the following steps:

- From the Homepage, click the **NavBar** icon.
- Click **Navigator**.
- Scroll down Navigator menu. Select **Reporting Tools**.
- Select **Query**.
- Select **Query Viewer**.



2. In the “begins with” field, type **SD_BD_REMAIN_BUDGET_AMT_EXP**. Click **Search**.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

3. On the Query page, select preferred format to display report results.

- HTML** will display results on the browser window with interactive export options.
- Excel** will display results in an Excel spreadsheet with full sort, edit, and/or saving options.

Click **Favorite** link for quick access in the future. When added, this report will appear on **Query Viewer** page.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
SD_BD_REMAIN_BUDGET_AMT_EXP	Remain Budget Bal Expense Ldgs	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Choose one

4. Fill information in the following fields:

- **Fund%:** Enter fund code for specific fund. To view all funds, enter a percentage sign, %.
- **Dept%:** Enter cost center number (4 digit).
- **Budget Period:** Enter fiscal year.
- **Resource From/To:** Enter details of preferred resource code(s). To view all resource codes enter "00000" in Resource From field , and "99999" in Resource To field.

5. Click **View Results**.

6. Report will display in selected format. Each row is a single budget account. **Remaining Budget Amounts** column (far right) displays remaining dollar amount per account.

Examples of report results in different formats (*from Step 3*) are shown below:

SD_BD_REMAIN_BUDGET_AMT_EXP - Remain Budget Bal Expense Ldgs

Fund % %
 Dept % 0123
 Budget Period 2018
 Resource From 00000
 Resource To 99999
 View Results

Download options.

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(89 kb\)](#)

View All

First 1-100 of 401 Last

	Budget Period	DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended	Remaining Budget Amt
1	2018	0123	00000	00	1192	1000	1110	01000	0000	-472.71
2	2018	0123	00000	00	3101	1000	1110	01000	0000	-68.22
3	2018	0123	00000	00	3301	1000	1110	01000	0000	-6.85
4	2018	0123	00000	00	3501	1000	1110	01000	0000	-0.24
5	2018	0123	00000	00	3601	1000	1110	01000	0000	-13.19
6	2018	0123	00000	00	4201	1000	1110	01000	0000	1000000.00

RESULTS IN HTML

RESULTS IN EXCEL

	Budget Period	DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended	Remaining Budget Amt
3	2018	0123	00000	00	1192	1000	1110	01000	0000	-472.71
4	2018	0123	00000	00	3101	1000	1110	01000	0000	-68.22
5	2018	0123	00000	00	3301	1000	1110	01000	0000	-6.85
6	2018	0123	00000	00	3501	1000	1110	01000	0000	-0.24
7	2018	0123	00000	00	3601	1000	1110	01000	0000	-13.19
8	2018	0123	00000	00	4201	1000	1110	01000	0000	11000.05

For questions about data on this report, contact the Financial Planning & Accountability Department at 619-725-7585.