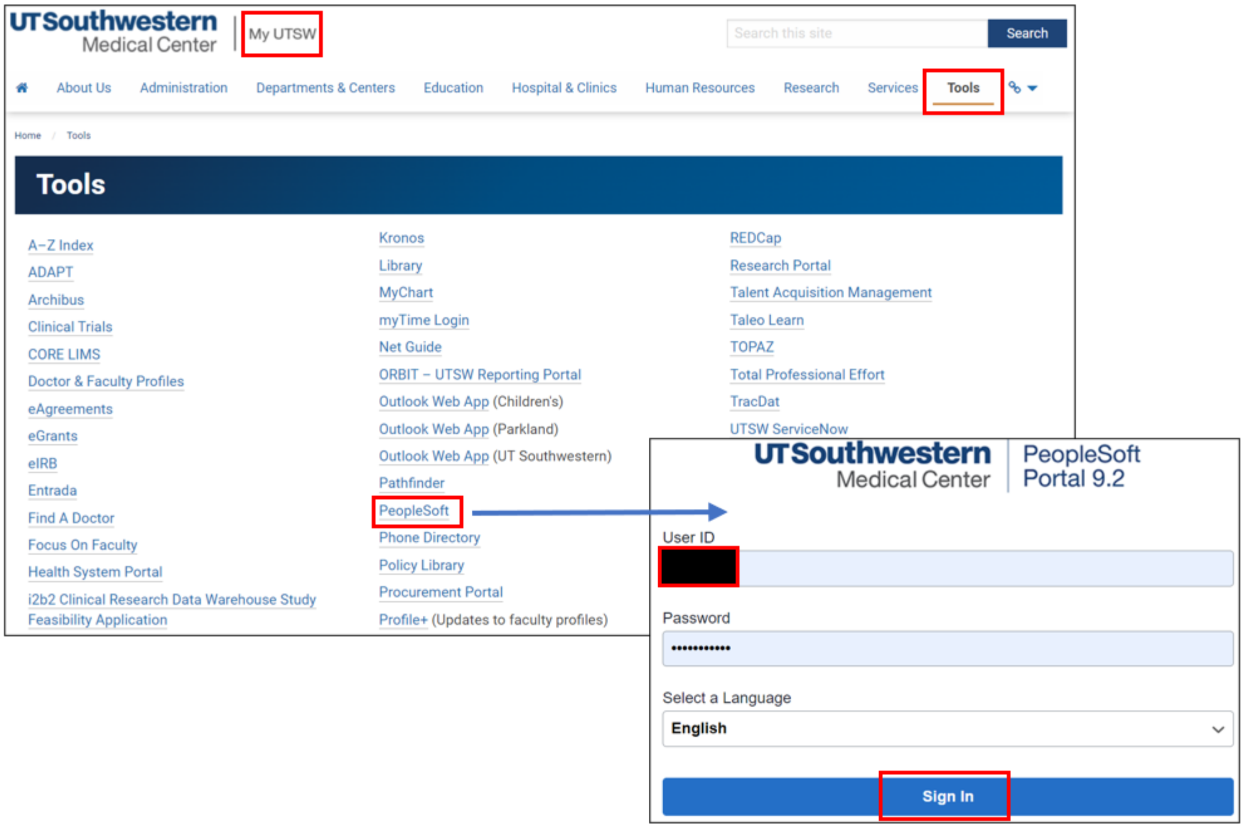
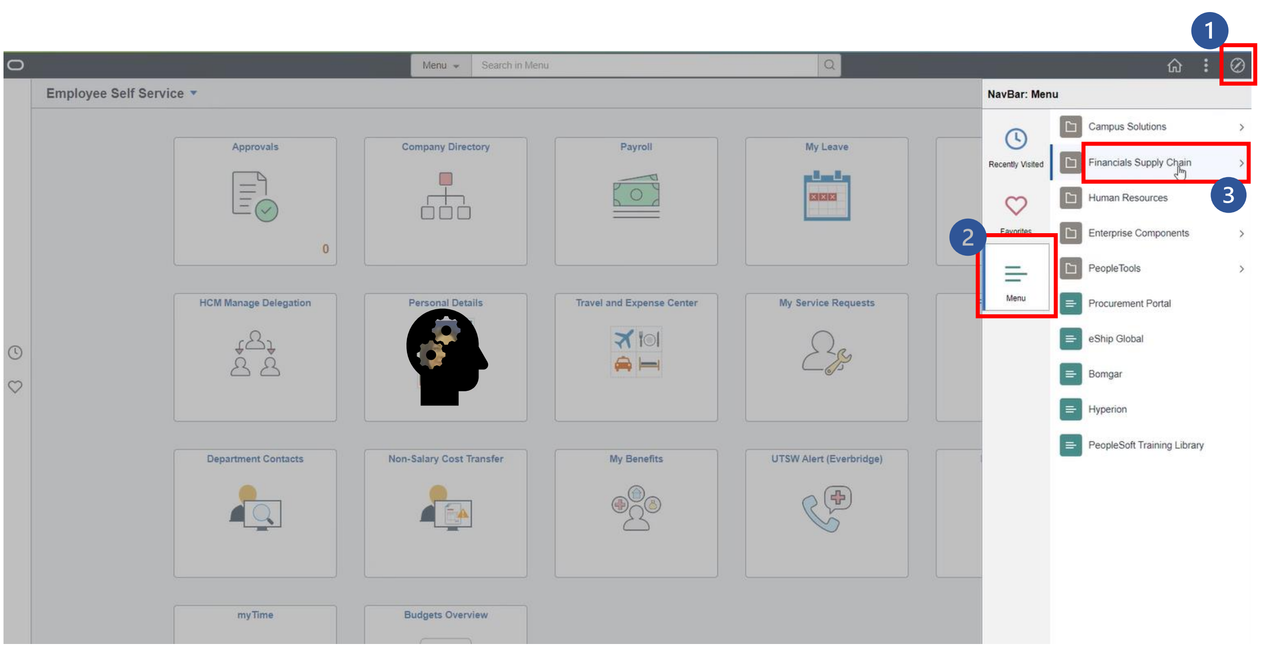
Q8. How do I look up my current award balance in PeopleSoft and view expenditures?

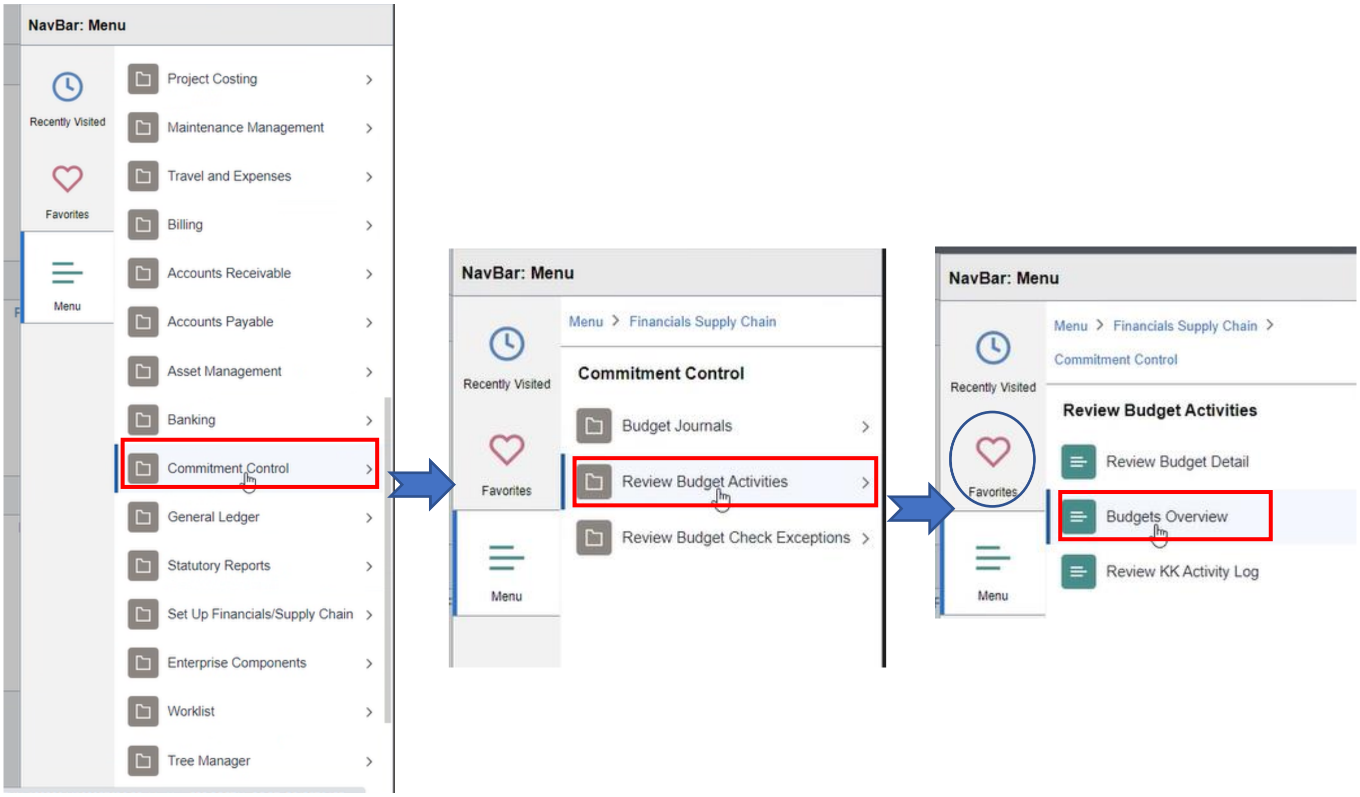
1. Access PeopleSoft by clicking the Tools tab from MyUTSW, then login with your UTSW credentials.



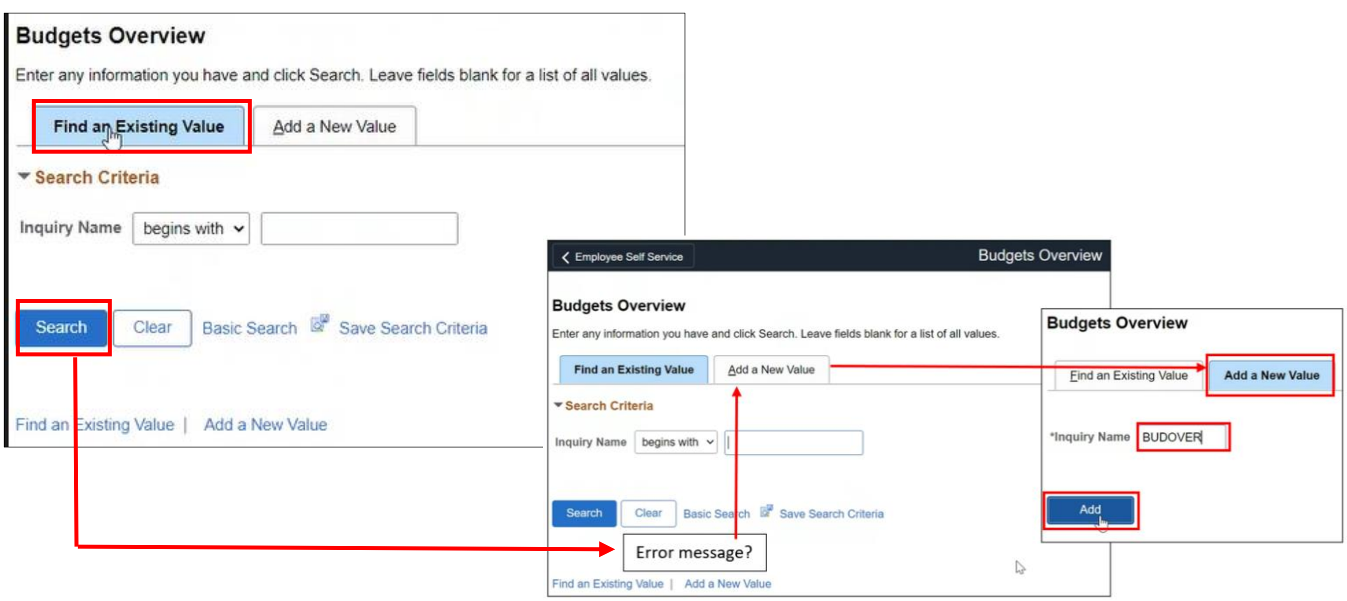
2. To locate current award balance and view expenditures in PeopleSoft, run the Budgets Overview Query for your project/activity by clicking the *navigation control panel* (**see 1**), select Menu (**see 2**), then Financials Supply Chain (**see 3**).



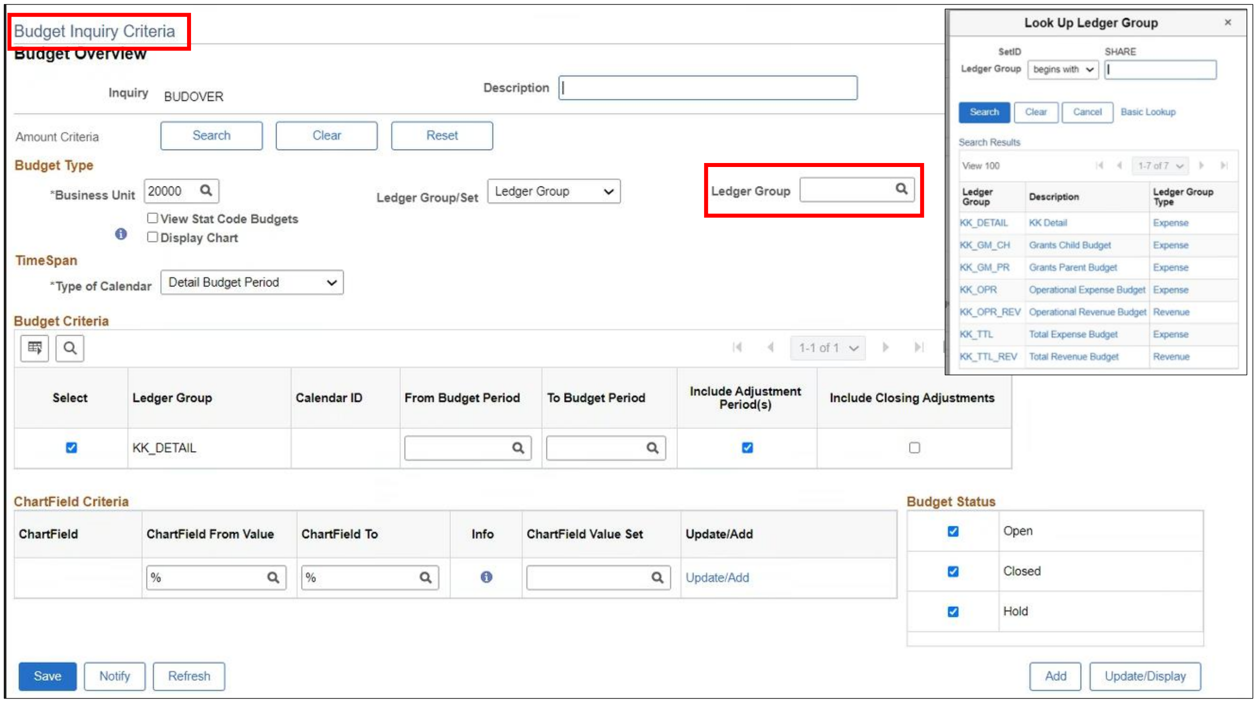
3. After clicking Financials Supply Chain, other menu options will appear. Select Commitment Control, Review Budget Activities, then Budgets Overview. Users may consider adding this path to their favorites for easier access in the future.

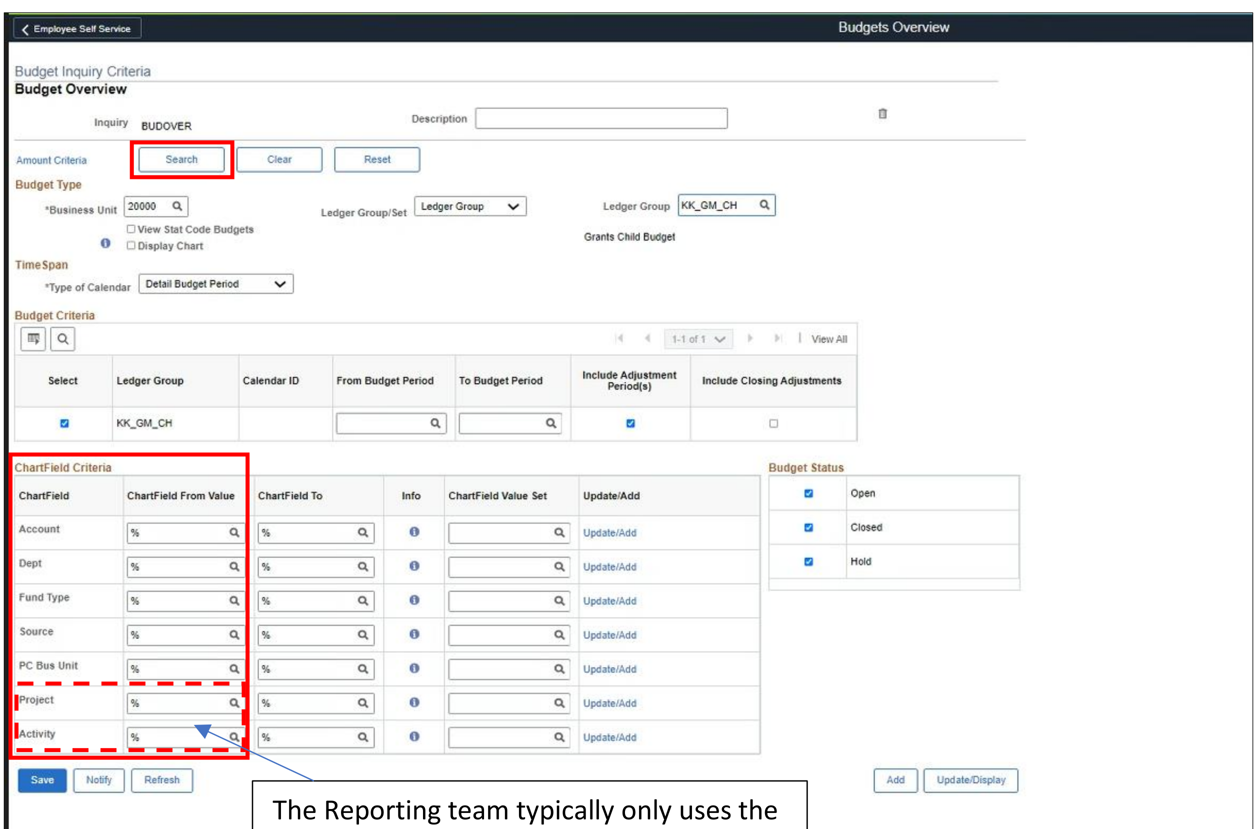


4. From the Budgets Overview screen, click the Find an Existing Value tab, then Search. Note: if you receive an error message indicating no values are found, this means you need to Add a New Value. Click the Add a New Value tab, enter the Inquiry Name (i.e., BUDOVER), then click Add.



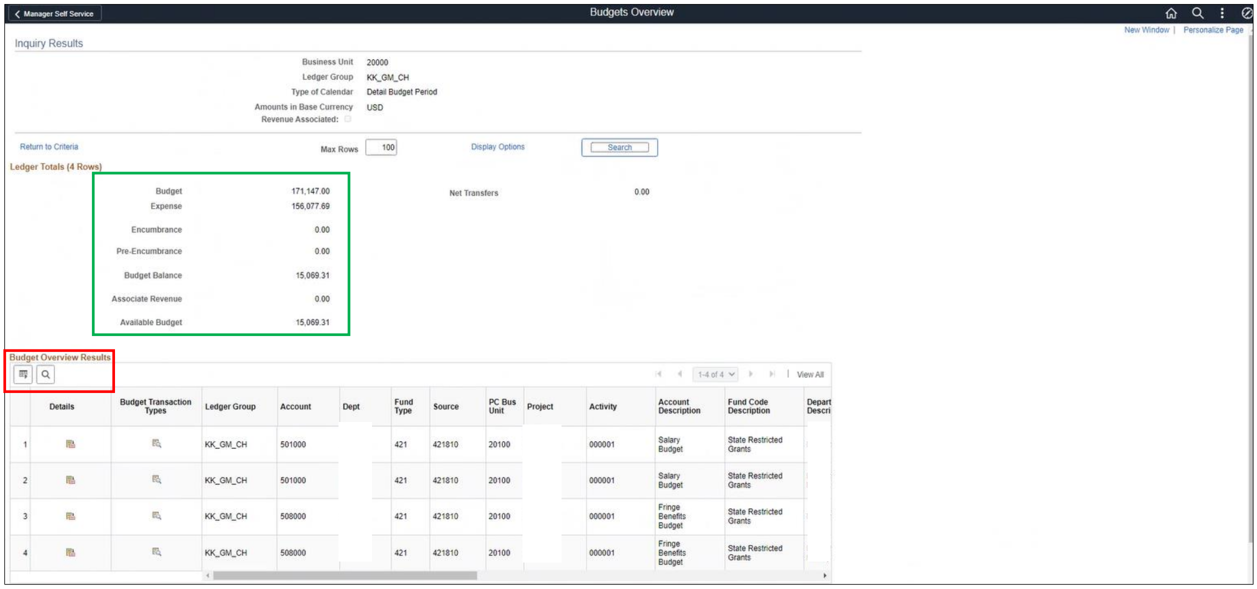
5. The Budget Inquiry Criteria screen allows users to search for awards using a variety of criteria (ex: search by Project ID, or Activity ID). You may also choose the Ledger Group search option to distinguish between parent, child, and other ledger groups. Once you have input your chartfield criteria, select Search at the top of the page to run the Budgets Overview query.



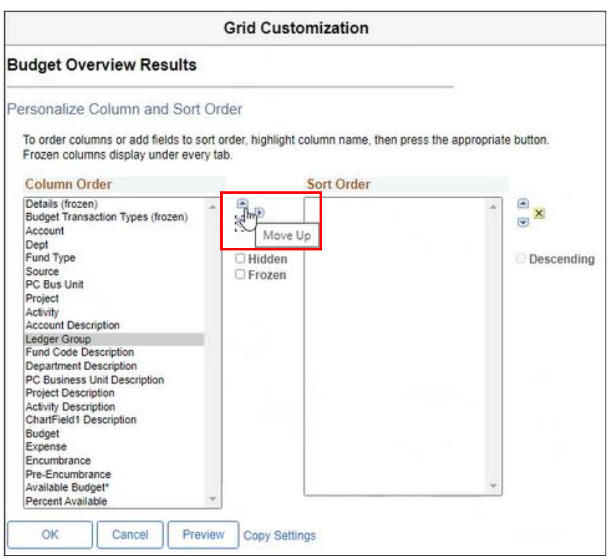


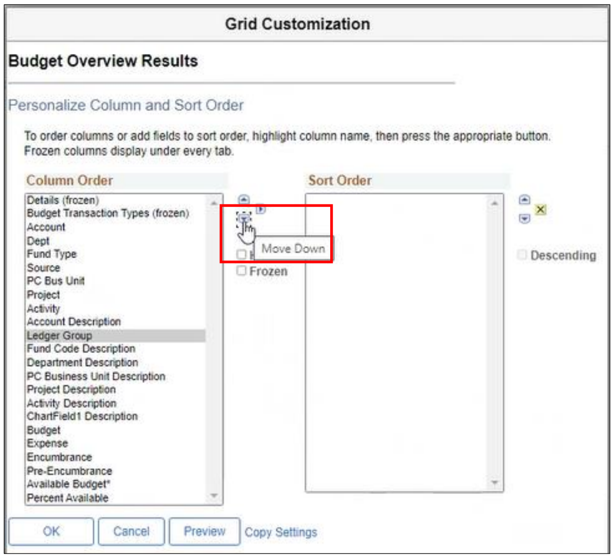
The Reporting team typically only uses the Project and Activity fields.

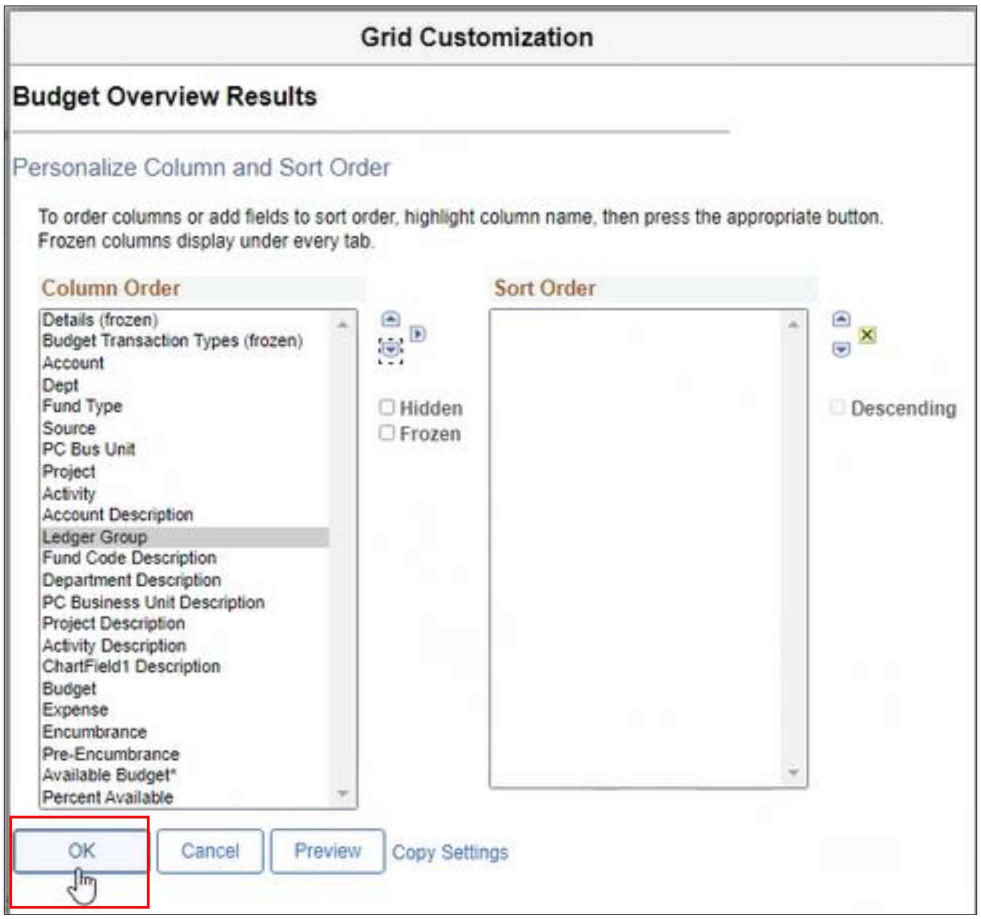
6. The Inquiry Results will populate.



7. Users can personalize their Budgets Overview Results screen using the directions below.







END OF INSTRUCTIONS