

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

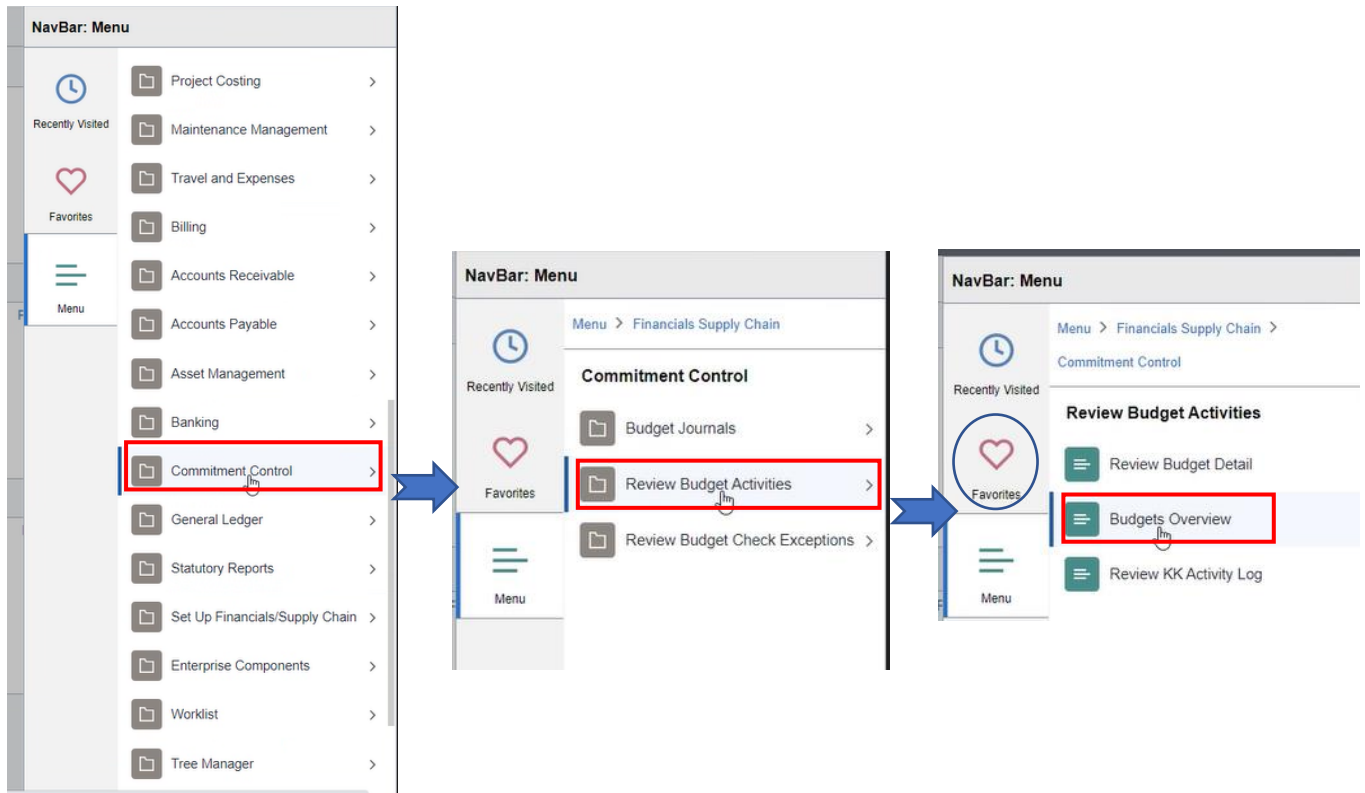
1. Access PeopleSoft by clicking the Tools tab from MyUTSW, then login with your UTSW credentials.

The screenshot shows the UTSouthwestern Medical Center website. The 'MyUTSW' link is highlighted with a red box. The 'Tools' tab in the navigation menu is also highlighted with a red box. Below the navigation bar, the 'Tools' section lists various services. 'PeopleSoft' is highlighted with a red box, and a blue arrow points to a separate login window. The login window is titled 'UTSouthwestern Medical Center PeopleSoft Portal 9.2' and contains fields for 'User ID' (with a red box), 'Password' (with a red box), and a 'Select a Language' dropdown menu set to 'English'. A 'Sign In' button is highlighted with a red box.

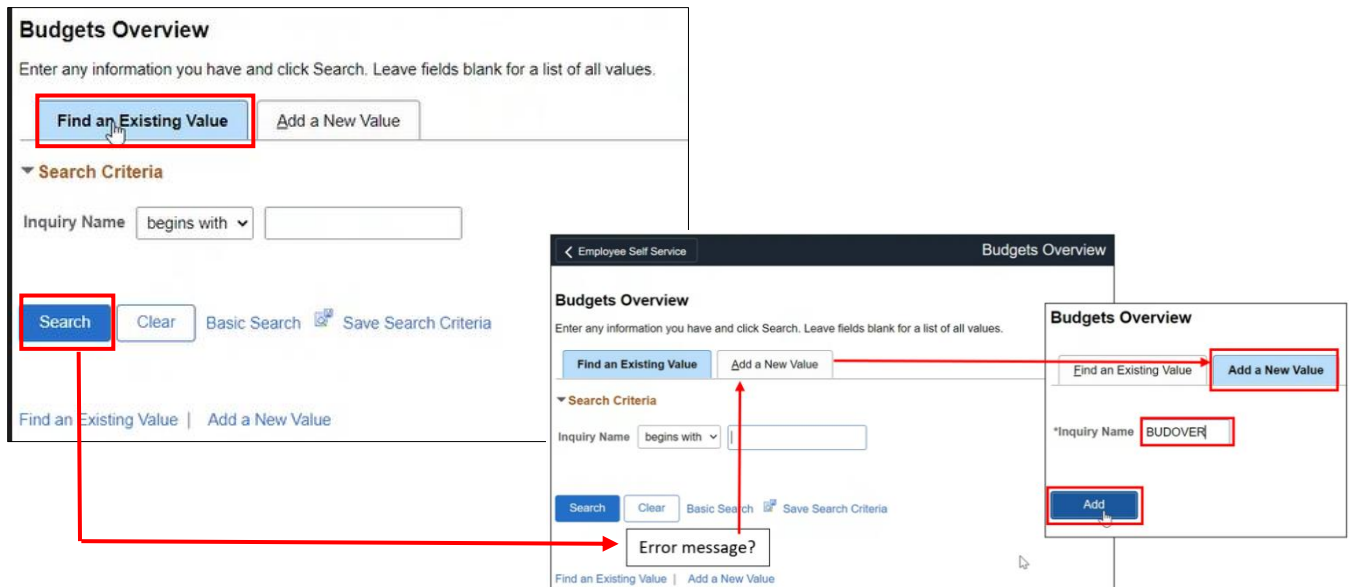
2. To locate current award balance and view expenditures in PeopleSoft, run the Budgets Overview Query for your project/activity by clicking the *navigation control panel* (see 1), select Menu (see 2), then Financials Supply Chain (see 3).

The screenshot shows the PeopleSoft Employee Self Service interface. The 'Menu' button in the top right corner is highlighted with a red box and labeled '1'. The 'NavBar: Menu' dropdown is open, showing a list of options. The 'Menu' option is highlighted with a red box and labeled '2'. The 'Financials Supply Chain' option is highlighted with a red box and labeled '3'. The main content area displays various service tiles such as 'Approvals', 'Company Directory', 'Payroll', 'My Leave', 'HCM Manage Delegation', 'Personal Details', 'Travel and Expense Center', 'My Service Requests', 'Department Contacts', 'Non-Salary Cost Transfer', 'My Benefits', 'UTSW Alert (Everbridge)', 'myTime', and 'Budgets Overview'.

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.



- 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.

**Budget Inquiry Criteria**

**Budget Overview**

Inquiry: BUDOVER Description: [ ]

Amount Criteria: [ Search ] [ Clear ] [ Reset ]

**Budget Type**

\*Business Unit: 20000 Ledger Group/Set: Ledger Group Ledger Group: [ ]

View Stat Code Budgets  
 Display Chart

**TimeSpan**

\*Type of Calendar: Detail Budget Period

**Budget Criteria**

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	KK_DETAIL		[ ]	[ ]	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**ChartField Criteria**

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
	% [ ]	% [ ]	[ i ]	[ ]	Update/Add

**Budget Status**

<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Closed
<input checked="" type="checkbox"/>	Hold

[ Save ] [ Notify ] [ Refresh ]

**Look Up Ledger Group**

SetID: SHARE  
Ledger Group: begins with [ ]

[ Search ] [ Clear ] [ Cancel ] Basic Lookup

Search Results

View 100 [ < ] [ > ] [ 1-7 of 7 ]

Ledger Group	Description	Ledger Group Type
KK_DETAIL	KK Detail	Expense
KK_GM_CH	Grants Child Budget	Expense
KK_GM_PR	Grants Parent Budget	Expense
KK_OPR	Operational Expense Budget	Expense
KK_OPR_REV	Operational Revenue Budget	Revenue
KK_TTL	Total Expense Budget	Expense
KK_TTL_REV	Total Revenue Budget	Revenue

**Budgets Overview**

**Budget Inquiry Criteria**

**Budget Overview**

Inquiry: BUDOVER Description: [ ]

Amount Criteria: [ Search ] [ Clear ] [ Reset ]

**Budget Type**

\*Business Unit: 20000 Ledger Group/Set: Ledger Group Ledger Group: KK\_GM\_CH  
Grants Child Budget

View Stat Code Budgets  
 Display Chart

**TimeSpan**

\*Type of Calendar: Detail Budget Period

**Budget Criteria**

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	KK_GM_CH		[ ]	[ ]	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**ChartField Criteria**

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	% [ ]	% [ ]	[ i ]	[ ]	Update/Add
Dept	% [ ]	% [ ]	[ i ]	[ ]	Update/Add
Fund Type	% [ ]	% [ ]	[ i ]	[ ]	Update/Add
Source	% [ ]	% [ ]	[ i ]	[ ]	Update/Add
PC Bus Unit	% [ ]	% [ ]	[ i ]	[ ]	Update/Add
Project	% [ ]	% [ ]	[ i ]	[ ]	Update/Add
Activity	% [ ]	% [ ]	[ i ]	[ ]	Update/Add

**Budget Status**

<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Closed
<input checked="" type="checkbox"/>	Hold

[ Save ] [ Notify ] [ Refresh ]

[ Add ] [ Update/Display ]

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

6. The Inquiry Results will populate.

The screenshot shows the 'Budgets Overview' interface. At the top, there are filters for Business Unit (20000), Ledger Group (KK\_GM\_CH), Type of Calendar (Detail Budget Period), and Amounts in Base Currency (USD). Below these are options for 'Return to Criteria', 'Max Rows' (set to 100), and 'Display Options' with a search button. A summary table is highlighted with a green box:

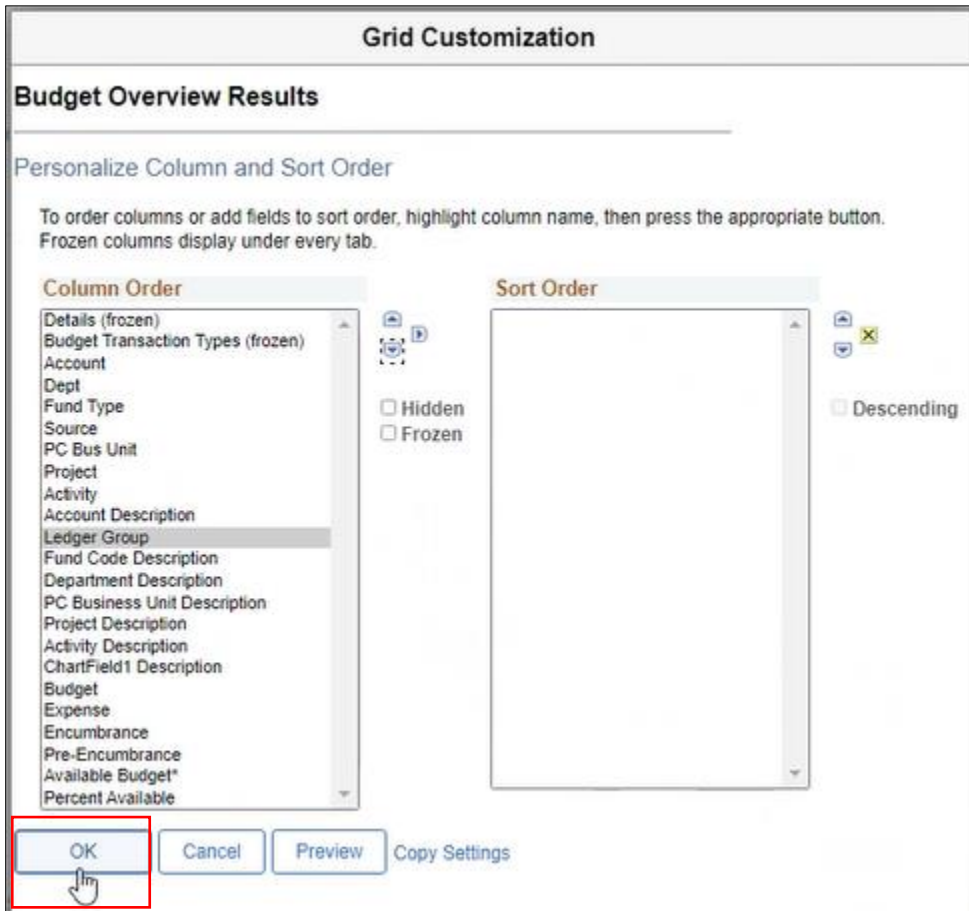
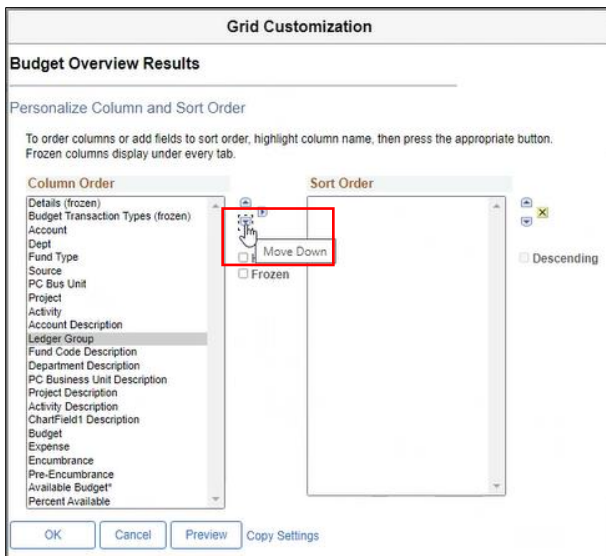
Budget	171,147.00	Net Transfers	0.00
Expense	156,077.69		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	15,069.31		
Associate Revenue	0.00		
Available Budget	15,069.31		

Below the summary is a 'Budget Overview Results' table with a search icon in a red box. The table has columns: Details, Budget Transaction Types, Ledger Group, Account, Dept, Fund Type, Source, PC Bus Unit, Project, Activity, Account Description, Fund Code Description, and Depart Descr. It contains 4 rows of data.

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

This diagram illustrates the process of personalizing the 'Budget Overview Results' screen. On the left, a 'Grid Action Menu' is shown with icons for a grid and a search function. An arrow points from this menu to the right, where the 'Budget Overview Results' screen is shown. A red box highlights the 'Personalize' button in the top-left corner of the grid area. Below this button, a dropdown menu is visible with options: 'Zoom Budget Overview Results' and 'Download Budget Overview Results Table to Excel'.

The 'Grid Customization' dialog box for 'Budget Overview Results' is shown. It has a title bar 'Grid Customization' and a subtitle 'Budget Overview Results'. The main area is titled 'Personalize Column and Sort Order' and includes instructions: 'To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.' There are two panes: 'Column Order' and 'Sort Order'. The 'Column Order' pane lists various fields, with 'Ledger Group' highlighted and a red box around the 'Move Up' button. The 'Sort Order' pane has checkboxes for 'Hidden' and 'Frozen'. On the right, there is a 'Descending' checkbox. At the bottom, there are buttons for 'OK', 'Cancel', 'Preview', and 'Copy Settings'.



**END OF INSTRUCTIONS**