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.

| UT Southwestern Medical Center | | Search this site Search | h |
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| About Us Administration Departments & | Centers Education Hospital & Clinics | Human Resources Research Services Tools 🗞 🕶 | |
| Home / Tools | | | |
| A-Z Index ADAPT Archibus Clinical Trials CORE LIMS Doctor & Faculty Profiles eAgreements | Kronos Library MyChart myTime Login Net Guide ORBIT – UTSW Reporting Portal Outlook Web App (Children's) | REDCap Research Portal Talent Acquisition Management Taleo Learn TOPAZ Total Professional Effort TracDat | |
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| | | Select a Language English Sign In | ~ |

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**).

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| | Department Contacts | Non-Salary Cost Transfer | My Benefits | UTSW Alert (Everbridge) | PeopleSoft Training Library |
| | myTime | 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.

| Budgets Overview | | |
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| Enter any information you have and click Search. Leave fields blank for | a list of all values. | |
| Search Criteria Inquiry Name begins with | | tgets Overview |
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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.

| Budget Inquiry | Criteria | | | | | | | Look Up Ledger Gro | up > |
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6. The Inquiry Results will populate.

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

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| | Download Budget Overview Results Table to Excel 5 |

| | Grid Customization | |
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| To order columns or add fields to sort | order, highlight column name, then press the a | ppropriate button. |
| Frozen columns display under every | tab. | |
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