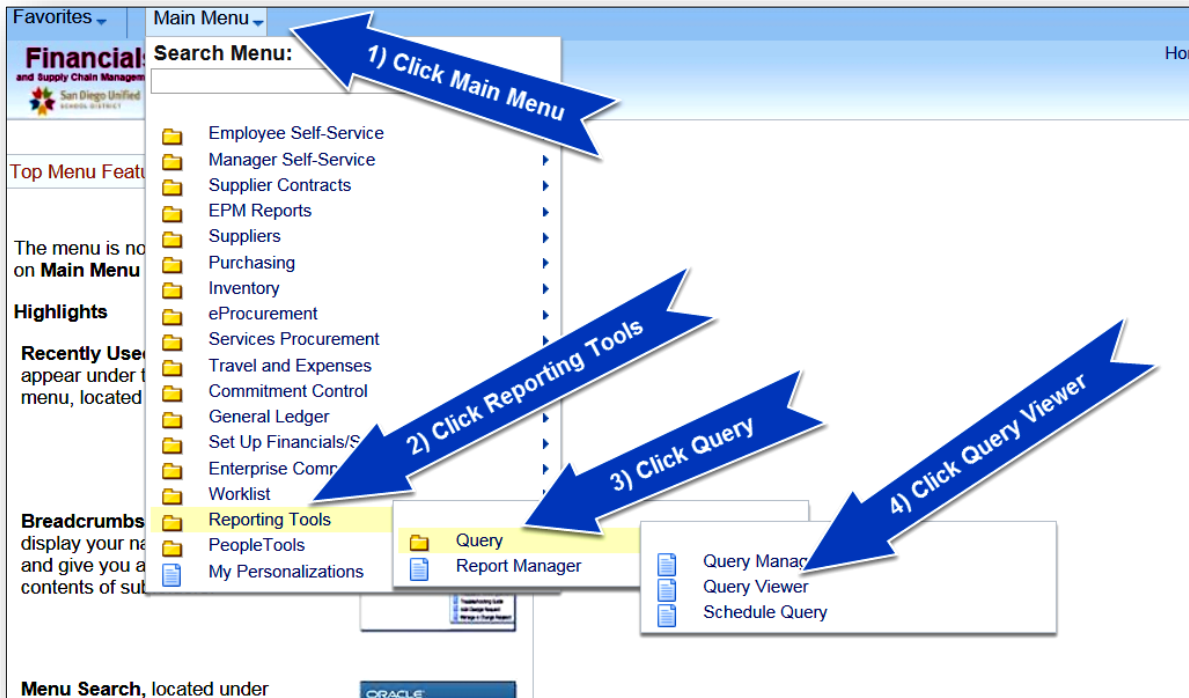


Remaining Amounts Budget Report

See How Much Money You Have Left in Your Accounts

This Job Aid shows how to run a query (*report*) that will display the remaining amounts you have in your budget accounts. It is fairly easy and quick.

1. After you sign into PeopleSoft Financials, navigate to the **Query Viewer** page, as illustrated below.



2. In the “begins with” field, type the report title: **SD_BD_REMAIN_BUDGET_AMT_EXP** and then click the **Search** button.

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. The query (report) link appears. To the right, you need to click to choose how you want to run the report and display its results. You can choose either **HTML** or **Excel**. HTML will display the report in an interactive format, where you can click on links to view additional report details. Excel will display the results in an Excel spreadsheet file, which you can then sort, edit, and/or save as is.

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

Click **HTML** or **Excel**. In this illustration we click Excel.

You can click **Favorite** to mark this as a favorite report. Then next time, you won't have to search for it; it will display automatically for you to use.

4. Enter the criteria by which the report will run. If you want to run a specific Fund or Resource Code, for instance, you would type in that number, such as 01000, or 00000. If you want to see results on all Fund or Resource Codes, then type a percent sign, which means "all". In the example below, we indicated we want to see all Fund Codes, in the 0003 Department (cost center), for the fiscal year 2015, and we want to see all Resources from 00000 up to 99999. Then, click **View Results**.

SD_BD_REMAIN_BUDGET_AMT

Fund %:

Dept %:

Budget Period:

Resource From:

Resource To:

Budget Period	DeptID
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5. Since we indicated we wanted to see the report displayed in an Excel spreadsheet, Excel opens on our screen with the data we wanted. Each row is a single budget account. On the right side, highlighted in yellow, are the remaining dollar amounts within each account. You can save this as an Excel file on your computer, or close it without saving it.

For questions on the data seen in this report, please contact the **Finance Department at (619) 725-7585**.

	C	D	E	F	G	H	I	J
1								
2	Resource	Bud Ref	Account	Program	Class	Fund	Extended	Remaining Budget Amt
3	00000	00	1192	1000	1110	01000	0000	-288.40
4	00000	00	3101	1000	1110	01000	0000	-25.61
5	00000	00	3301	1000	1110	01000	0000	-6.23
6	00000	00	3501	1000	1110	01000	0000	-0.14
7	00000	00	3601	1000	1110	01000	0000	-8.46
8	00000	00	4301	1000	1110	01000	0000	12731.43
9	00000	00	5614	1000	1110	01000	0000	4324.94
10	00000	00	5721	2700	0000	01000	0000	-18.00
11	00000	00	5920	2700	0000	01000	0000	-11.20
12	00008	00	4301	1000	1110	01000	0000	2171.00
13	00010	00	1107	1000	1110	01000	0000	20079.19
14	00010	00	1210	3110	0000	01000	0000	13774.71
15	00010	00	1308	2700	0000	01000	0000	3185.00
16	00010	00	2231	2420	0000	01000	0000	-143.61

For more information about how to use the PeopleSoft software system in our school district, as well as to find training opportunities and support, go online to www.sandi.net and follow this clicking navigation:

Staff —> Technical Support & Resources —> PeopleSoft