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:
   a. From the Homepage, click the NavBar icon.
   b. Click Navigator.
   c. Scroll down Navigator menu. Select Reporting Tools.
   d. Select Query.
   e. Select Query Viewer.

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

Navigate to the PeopleSoft site for additional resources and training opportunities.
SDUSD > Staff Portal > Technical Support/ Help Desk > select PeopleSoft from the IT Resources drop down menu.
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:

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