

How to Check a Project's Remaining Budget Available

1. Log in the PeopleSoft and click the "Research" tile

MacEwan	▼ MacEwan Home				â	:	۲
×	Other Approvals	Faculty Center	Employee Self Service				
	FSCM, T&E, Smart HR, Workload Adjustments	&					
	Research	Travel and Expenses					
\rightarrow							

2. Select "Project Financial Detail Rpt" if the screen does not default to this tab. Click the "add a New Value" tab.

MacEwan Home		Research
Project Financial Detail Rpt	Project Financial Detail Rpt*	
Payroll Charges by Project	Enter any information you have and click Search. Leave fields blank for a list of all values.	
My Grant Applications*	▼Search Criteria	
Grant Applications for Review*	Search by: Run Control ID begins with Case Sensitive Search Advanced Search Find an Existing Value Add a New Value	

How to Check a Project's Remaining Budget Available V.1.2 November 2019 Page 1 of 3 3. Name the Run Control ID for this report. You can use the word "report" as shown in this example.

🔇 MacEwan Home	
Toject Financial Detail Rpt	Project Financial Detail Rpt*
Payroll Charges by Project	Eind an Existing Value Add a New Value
My Grant Applications*	Run Control ID report
Grant Applications for Review*	Add
	Find an Existing Value Add a New Value

4. Enter your project number, date range, and output preference. Once all information has been entered, click "Save" and then "Generate Report"

avorites 🗸	Main Menu 👻 🔷 >	Project Costing -	Custom Reports	s* ▼ → Projec	t Finarcial Detail Rp	
Project Financial	Detail Rpt*					
Run Control I	D report					
Project Finan	cial Detail Report					
*Business Un	it: MCEWN Q					
Project	01455	Q				
*From Date:	2003-09-01	Exclude	e Manual GL Expense			
*To Date:	2017-09-13		~			
Output Forma	at: PDF XL: Gene	S erate Report				
If no Project II) is selected then the	report will be gener	ated only in PDF			

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Notes:

- Ensure the correct Project Number is entered (including 0 as the first digit). If you are unsure of your project's number, contact the Office of Research Services <u>research@macewan.ca</u>
- When entering the "From" date, select a date at least five years in the past. When entering the "To" date, select today's date. If you wish to see the budget for the entire life of your project, you can put a future date of when your project will be ending.
- Ensure the "Exclude Manual GL Expense" box is selected. Leaving this box unselected could cause your report to generate with additional erroneous data.
- 5. Your report will open in a new window (please ensure Pop-Up Blockers are turned off). Please review your report to ensure all pertinent financial data has been captured. To see your available balance remaining in your research project, please look at the value highlighted on the box below.

MacEwan			Run Date Run Time	2017-09- 09:07
	Project	Financial Detail Report		
Project Summary				
Project Manager	Wicks,Bryce			
Project	01455 -			
Reporting Period Start Date	2003-09-01			
Reporting Period End Date	2017-09-13			
Overall Budget	27,000.00	Current Budget		27,000.00
Overall Expenses	25,875.00	Current Expenses		25,875.00
Overall Commitment	0.00	Current Commitment		0.00
Total Overall Expenses, GL Expenses & Commitment for the Project	25,875.00	Total Current Expenses, GL Expenses & Commitment for Reporting Period		25,875.00
Remaining Budget Available	1,125.00	Remaining Budget Available for Reporting Period		1,125.00

6. When you have generated this report at least once, you will then be able to search for it in the "Find an Existing Value" screen

MacEv	van	All 👻 S	earch		Advanced Search	🧕 Last Search Results
Favorites -	Main Menu 👻	> Froject Cost	ing 🔻 🔸 Custom I	Reports* 🔻 🚿	Project Financial Detail Rpt	
Project Finar	ncial Detail Rpt	*				
Inter any information	ation you have and o	click Search. Leave	iclds blank for a list o	f all values.		
Find an Existi	ng Value <u>∧</u> dd a	New Value				
Search Cri	teria					
Search by:	Run Control ID begin	ns with				
Case Sensit	live					
Search	Advanced Search					
Search Resul	ts					
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Run Control ID						
Run Control ID epoil						

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