

# PeopleSoft Training Activity Sheet

## KK1: BUDGET INQUIRY

For use in training. Last updated August 1, 2016.

### Activity 1: Budgets Overview 1

**Directions:** Find the budget information for the following Resources for **2017** for the first 100 rows. Answer the questions for each.

Resource	Questions		
5310000	Budget?	Expense?	Budget Balance?
3310000	Budget?	Pre-Encumbrance?	Available Budget?
9010000	Budget?	Encumbrance?	Available Budget?

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### Activity 2: Budgets Overview 2

**Directions:** Find the budget information for the following specific Objects by Resource for **2017** for the first 100 rows. **Hint: The last object is a Revenue object.**

Object	Resource	Questions		
5600000	0000000	Budget?	Expense?	Budget Balance?
4300000	8150000	Expense?	Encumbrance?	Budget?
8012000	1400000	Revenue Estimate?	Recognized Revenue?	Available Budget?

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## Activity 3: Ledger/Activity Log Inquiry

**Directions:** Drill down to find the specific Budget information for the following ChartStrings for **2017**. Use Budget Details for this activity. **Hint: Question 2 is a Revenue object.**

- Use ChartString: Fund **0100**, Resource **0000000**, Goal **1110**, Function **1000**, Object **1100004**, Site **111**. This is a 3-part question.
  - Budget Entry Types?** (1) \_\_\_\_\_ (2) \_\_\_\_\_
  - Amounts?** (1) \_\_\_\_\_ (2) \_\_\_\_\_
  - Journal/Document ID?** (1) \_\_\_\_\_ (2) \_\_\_\_\_
- Use ChartString: Fund **0100**, Resource **4035000**, Goal **0000**, Function **0000** Object **8290000** Site **000**.
  - Budget Entry Types?** (1) \_\_\_\_\_
  - Amounts?** (1) \_\_\_\_\_
  - Journal/Document ID?** (1) \_\_\_\_\_

## Activity 4: Revised Budget Summary Report

**Directions:** Run a Revised Budget Summary Report for the following Resources for **2017** and answer the questions.

Resource	Budget for Object	Encumbrance for Object	Pre-Encumbrance for Object
<b>0000000</b>	4300005?	5100000?	4300000?
Resource	Budget for Object	Actuals for Object	Pre-Encumbrance for Object
<b>6500000</b>	5100000?	7140000?	4300000?

## Activity 5: Budget Transaction Detail Report

**Directions:** Run a Budget Transaction Detail Report for the following Resources from **7/1/2016 to 7/31/2016** and answer the questions.

Resource	Expense Total for Object 5600000	How Many Payments Were Made?	Types of Transactions?
<b>0000000</b>			1. 2.
Resource	Expense Total for Object 4300000	Type of Transaction?	Encumbered Amount?
<b>6500000</b>			