Step 1: Login to PeopleSoft Financials (https://fs.uakron.edu/psp/fsprod/?cmd=login&languageCd=ENG&) and use your PeopleSoft login credentials. Your user name will either be 7 or 8 characters long. If you do not have your PeopleSoft login information, please contact CPSPE Finance and we will work with you on re-setting your password.

Login screen:

Upon login, you will see this screen:

Click on the “Main Menu” dropdown at the top and navigate to “Project-to-Date Budget” as highlighted below:
The next screen looks like this:

You can either type in a specific speedtype project number (6 digits) in the “Speedtype” field and hit search or you can just hit search without a speedtype project number identified to pull up the list of all 5-account project speedtypes that are assigned to you. Please be sure to list “AKRON” as the “Business Unit” prior to searching. (AKRON should default in.)

To open to this search box immediately upon entering the system, drag this page’s URL to your Links or Favorites page. Then after signing into the system, you will open right to this page.
This is what the screen will look like when you perform a generic search of all speedtypes assigned to you. A listing will appear and you can simply click anywhere on the individual line to pull up specific detail on that particular speedtype’s budget:

The screen below shows what an individual project detail screen looks like. You can click on the “view all” section to expand the line items, click the magnifying glass icon under “Budg Trn” to view any budget transfers and under “Jrnl Trn” to view any expenditure detail (see yellow highlights below). In the example below, the total budgeted amount is $265,000 for this project. The “Year-to-Date Amount” sums any expenditure for the current fiscal year (July-June). The “Project-to-Date Amount” sums any expenditure for the entire project period from start date. “Pre Encum” and “Encum” show any pending direct requisitions and purchase orders entered through PeopleSoft. This does not show encumbrances for salary charges and recent (within past ~1.5 months) P-card transaction activity.
Here’s what the detail screen looks like (once you click on the magnifying glass after each item description) for “Budg Trn” (budget transfers):

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Budgeted Amount</th>
<th>Remaining Post Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 5041</td>
<td>Summer Faculty</td>
<td>15,014.34</td>
<td>0</td>
</tr>
<tr>
<td>2 5020</td>
<td>Full Time Staff</td>
<td>66,023.31</td>
<td>0</td>
</tr>
<tr>
<td>3 5220</td>
<td>Part Time Staff</td>
<td>4,330.25</td>
<td>0</td>
</tr>
<tr>
<td>4 3330</td>
<td>Graduate Assistants</td>
<td>23,519.36</td>
<td>0</td>
</tr>
<tr>
<td>5 1401</td>
<td>Student Assistants</td>
<td>9,075.98</td>
<td>0</td>
</tr>
</tbody>
</table>

**TOTALS:**
- Budgeted Amount: 255,000.00
- Remaining Post Balance: 0.00

Either of these detail transaction grids can be sorted by clicking on a column heading.

Click “View All” in the grid header row to View up to 100 transactions at a time. Use the arrows to move to successive sections of transactions.

Here’s what the screen looks like once you click on the magnifying glass next to each item for “Jrnl detail” (transaction detail):

Either of these detail transaction grids can be sorted by clicking on a column heading.

Click “View All” in the grid header row to View up to 100 transactions at a time. Use the arrows to move to successive sections of transactions.
You can also export all the data in any of these screens to Excel by clicking on the link highlighted below:

To view any non-5-speedtypes assigned to you (non-sponsored project speedtypes including 2xxxxx IDC, Cost Share and Start Ups speedtypes, 3xxxxx testing speedtypes, 6xxxxx or 9xxxxx restricted speedtypes), please navigate to the following screen titled “UA Department Budget”: 
The look and feel to this screen is similar to the project budget screen shown previously. However, please note that “remaining balance” is shown in a different location (see highlight below). Also, please note that all carryover from 2xxxxx speedtypes from the previous fiscal year is in a separate line item account (“8900 carryover account”) and is shown separately. The below screen is the “Detail” tab and shows the current year budget versus revenues and expenditures.
For testing speedtypes (3xxxxx) or restricted speedtypes (6xxxxx or 9xxxxx), previous year remaining fund balances will be listed in the “Fund summary tab”; highlighted below. In the example below, current year revenues ($4000) versus expenditures (25,163.57) have resulted in a current year deficit of -21,163.57. However, a carryover balance from last year is in the “Beginning Balance” line. As a result, actual overall balance on this fund (including all previous years) is -16,788.88.

If you have searched for all of your speedtypes and had them returned in the search box, then you can enter the first speedtype and simply use the “Previous in list” and “Next in List” buttons to quickly move from one speedtype to another.