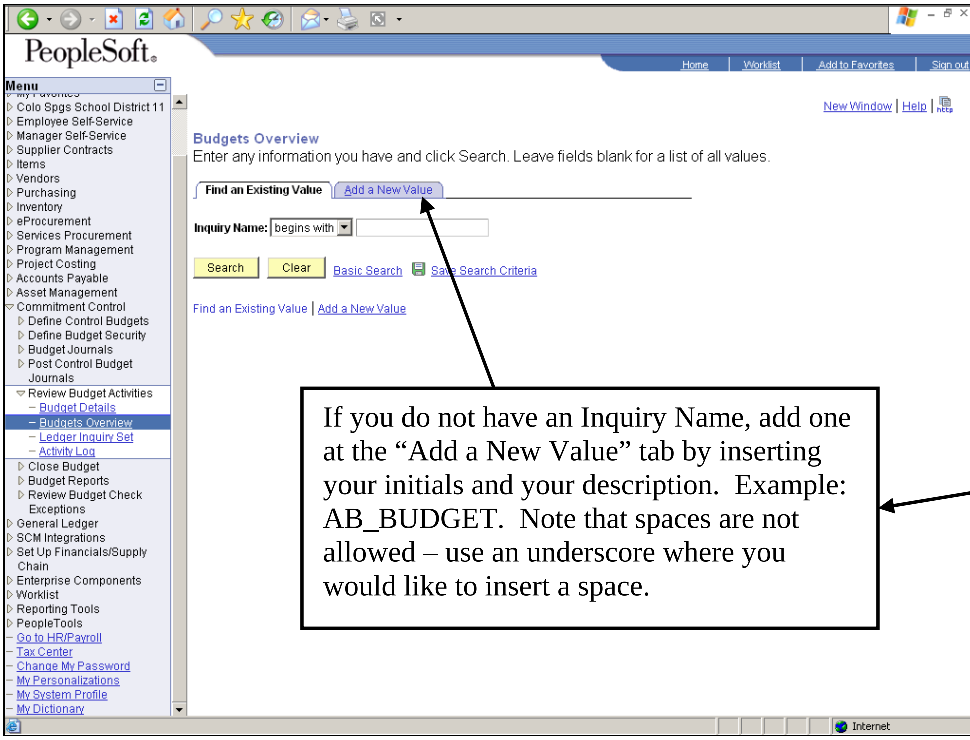
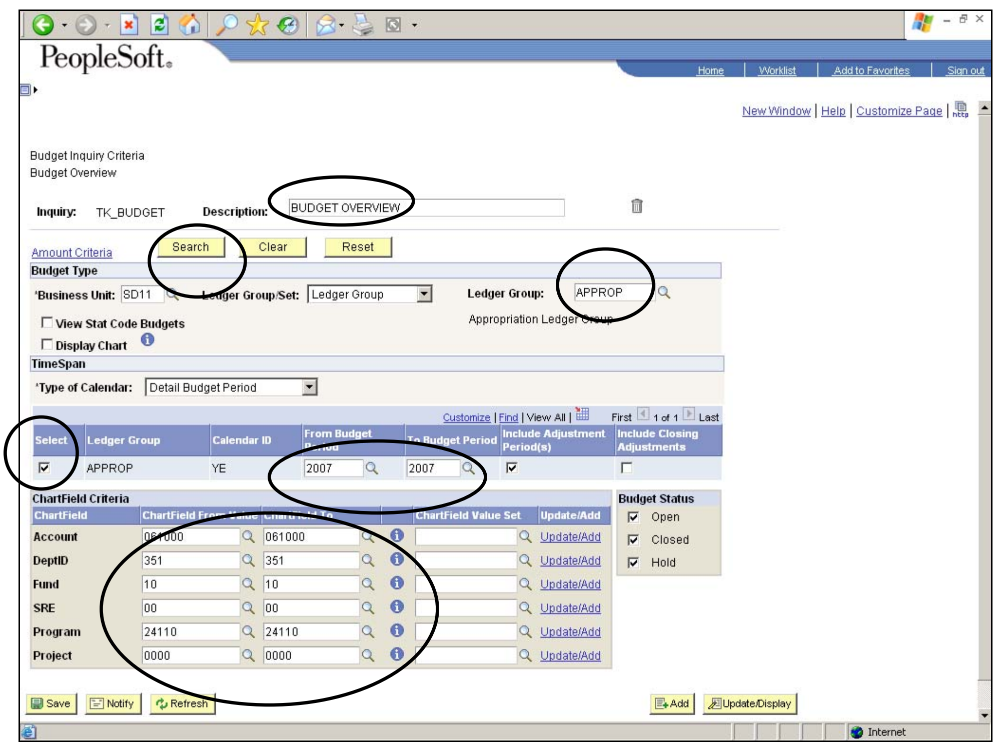


If you do not have an Inquiry Name, add one at the "Add a New Value" tab by inserting your initials and your description. Example: AB_BUDGET. Note that spaces are not allowed – use an underscore where you would like to insert a space.

Go to: Commitment Control, Review Budget Activities, <u>Budgets Overview</u> Link

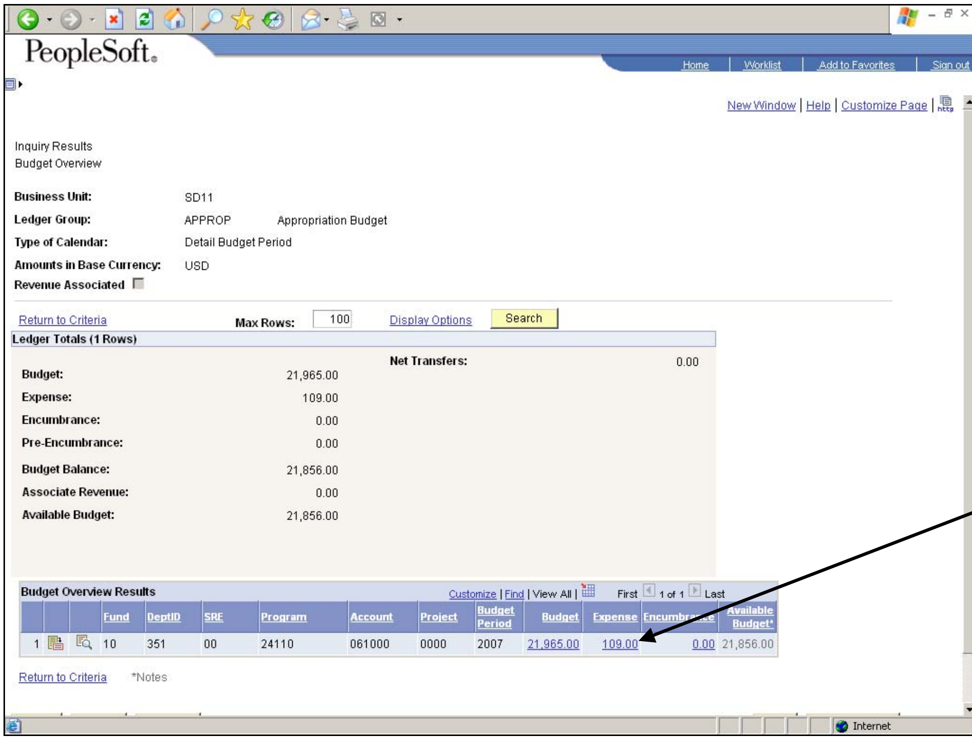
"Add A New Value" or "Find an Existing Value" for your Inquiry name.



Enter all fields where shown - **Description, Ledger Group, Budget Period;** Be sure you have a "check mark" in the Select box (once you have filled in the Budget Period, the Chartfield Criteria boxes will open).

Fill the **Chartfield values**. Please try not to be too "broad" – the values field on the left is all that *needs* to be filled in at this time.

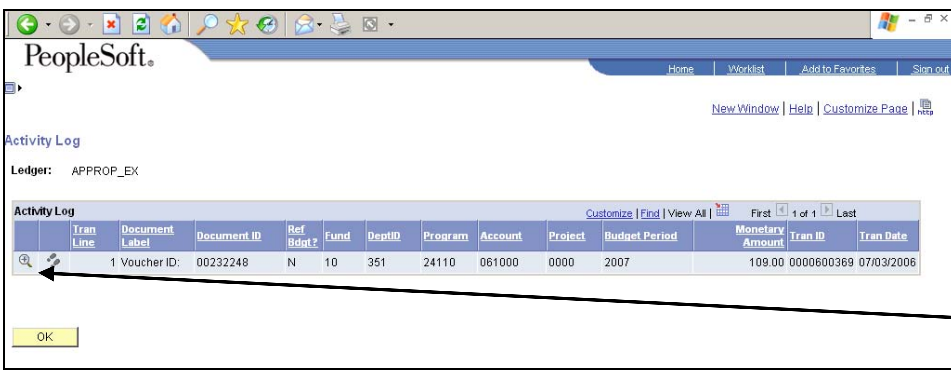
Click on the "Search" button



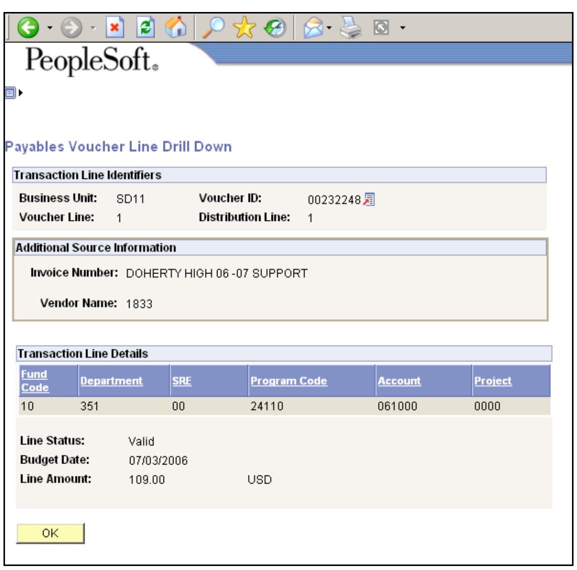
This page shows you the *Summary* of the account.

To retrieve more information, click on the actual amount link.

For this users manual, I will select the "Expenses" link to retrieve details…

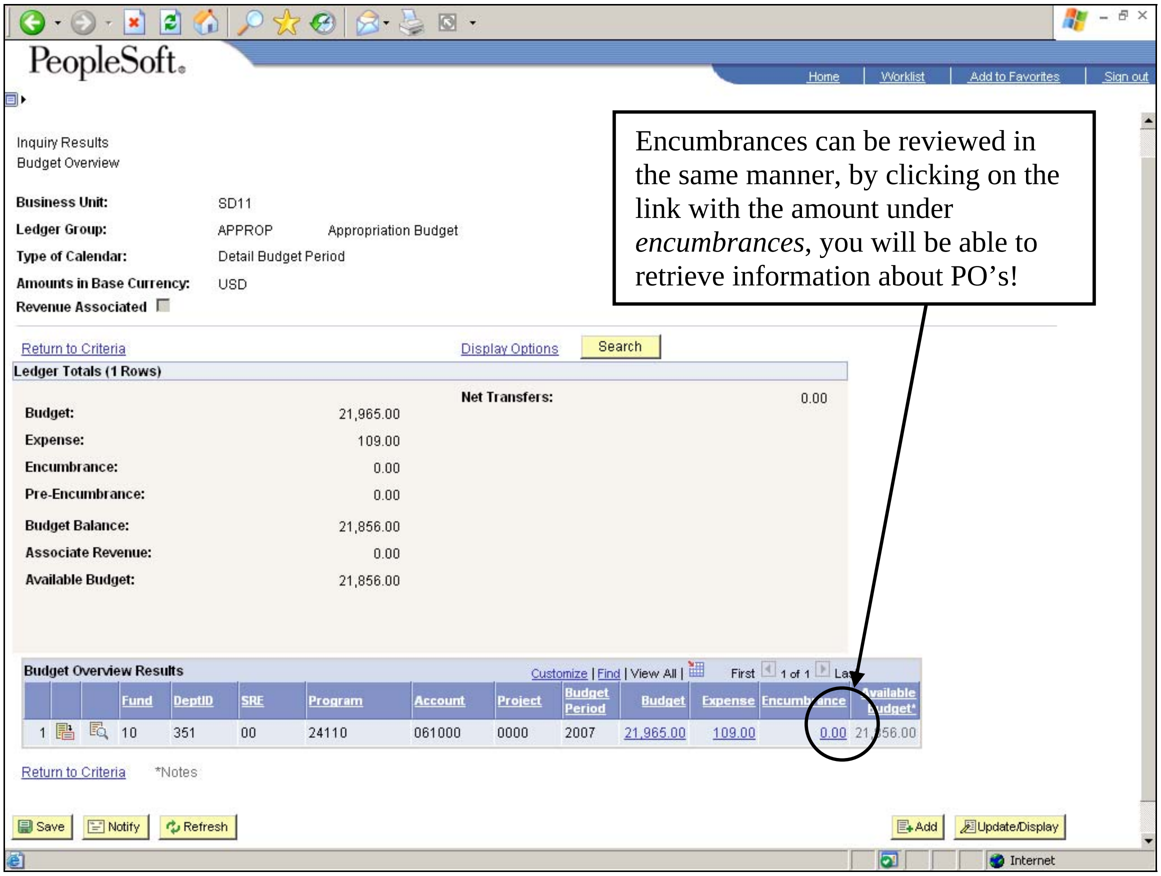


This will give you the Document ID (in this case, a voucher) and the date. Now to get more details, click on that magnifying glass!



Information about the line – the Voucher ID number, the Invoice Number, Vendor *Number*, the Chartfield used, and the dollar value amount all show here – if you have questions about a *voucher*, you can contact the Accounts Payable office with the voucher id for details.

Now you can click on the "OK" button to return for more data information.



If you would like more detailed information about your budget, you can run a Budget Transaction Detail report – directions begin on page 16 in this manual.

Any Procurement and Contracting staff member can answer questions about purchase orders, or you can contact Tina Koenig at 520.2174.

The Budget Office will answer questions about your budget information. Call Ken Wieck, 520.2293, or Becky Moore at 520.2029.