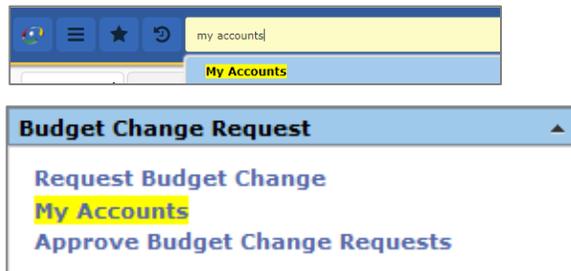


# TEAMS: Budget Balances

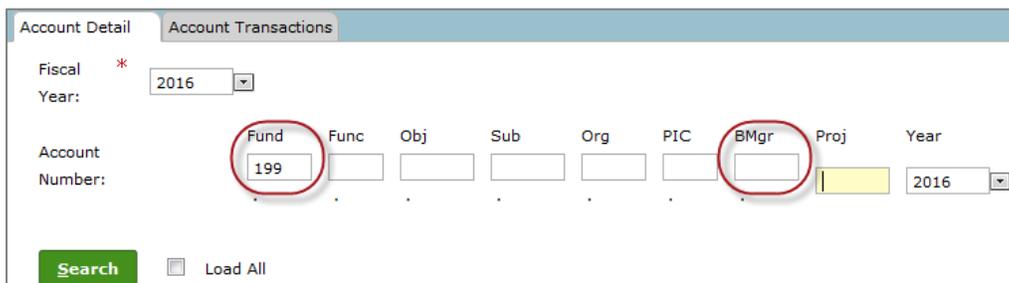
## Quick Access via My Accounts

1. Use the "Search Menu" feature to search for the **My Accounts** entry point. If you have created a Favorites ribbon, it would be a good idea to add this entry point there for quick access.



The entry point may appear under several different ribbons on your screen. Select any one, and it will take you to the search screen.

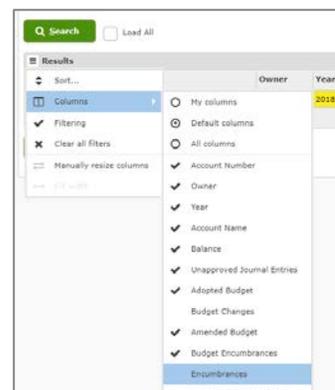
2. Enter the Funds and Budget Manager fields, or any other fields if further filtering is needed. Press **Search**.



If column changes haven't been made, they will appear in the following order:

- |                 |                 |                       |
|-----------------|-----------------|-----------------------|
| *Account Number | *Balance        | *Budget Encumbrances  |
| *Owner          | *Adopted Budget | *Transactions         |
| *Year           | *Amended Budget | *Worksheet Allocation |
| *Account Name   |                 |                       |

There is a column for Encumbrances (different from Budget Encumbrance), but it does not appear on your screen by default. To view this column, select **Results /Columns / Encumbrances** so a check mark appears to the left of the column name.



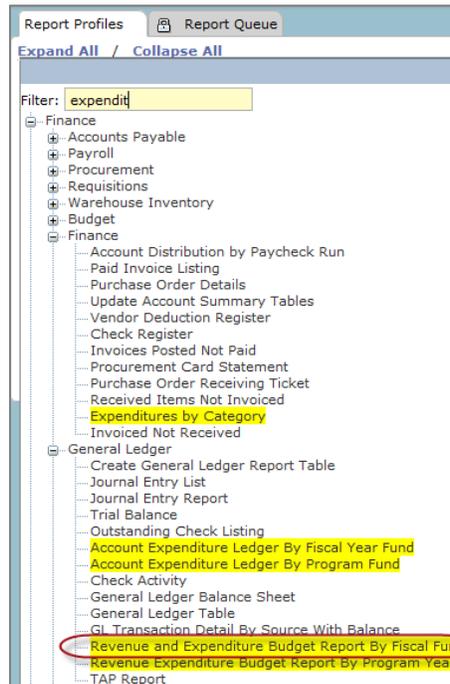
# TEAMS: Budget Balances

## Expenditure Report

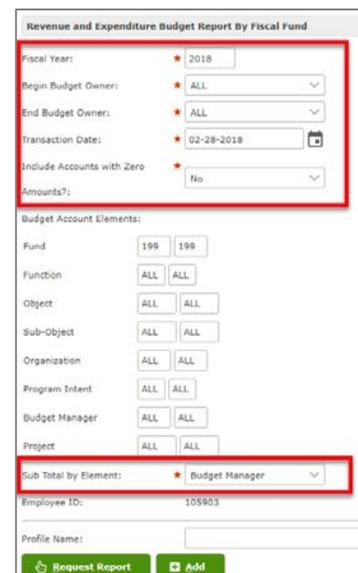
1. Select the **Report Tree** and **My Report Profiles** on the top left of your screen.



2. Search for "expenditure". Select **Revenue and Expenditure Budget Report by Fiscal Fund**



3. Enter the data into the required fields (marked by asterisk). Press **Request Report**.

A screenshot of the "Revenue and Expenditure Budget Report By Fiscal Fund" form. The form contains several fields with asterisks indicating they are required. A red box highlights the following fields: Fiscal Year (2018), Begin Budget Owner (ALL), End Budget Owner (ALL), Transaction Date (02-28-2018), and Amounts? (No). Below these are fields for Budget Account Elements: Fund (199), Function (ALL), Object (ALL), Sub-Object (ALL), Organization (ALL), Program Intent (ALL), Budget Manager (ALL), and Project (ALL). At the bottom, the "Sub Total by Element:" field is set to "Budget Manager" and is also highlighted with a red box. The form includes "Request Report" and "Add" buttons at the bottom.

## TEAMS: Budget Balances

4. Choose the report format (PDF or Excel) and press **OK**.

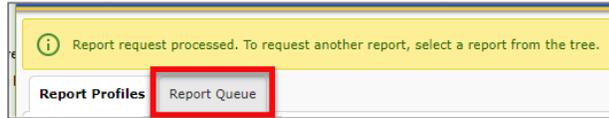


Please Select an Output Type

Report Output Type: Adobe Acrobat (PDF)

Ok Cancel

5. Select the Report Queue tab at the top left of the screen.



Report request processed. To request another report, select a report from the tree.

Report Profiles Report Queue

6. Once the report Status shows Complete, click the report name to bring it to your screen.

Status	Status Message
In Progress	Creating report.
Complete	Report request complete. Report is available.
Complete	Report request complete. Report is available.
Complete	Report request complete. Report is available.

Submitted Report Requests	
Sort   Clear Sorted by: (default)	
Name	Request Date
Revenue and Expenditure Budget Report By Fiscal Fund	