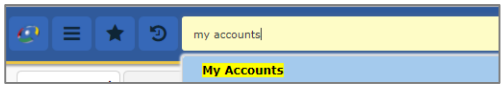
TEAMS: Budget Balances

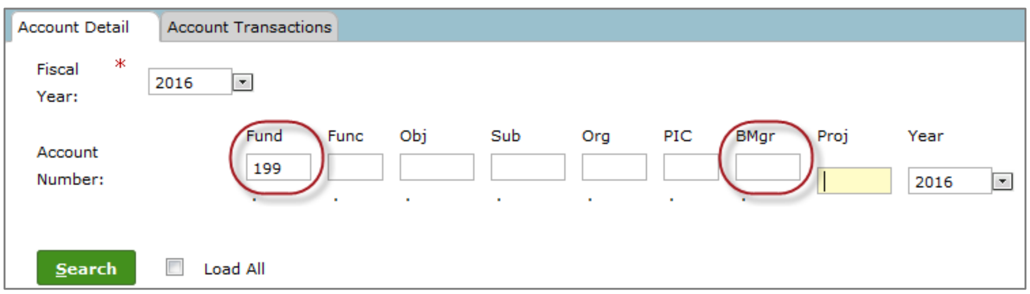
<u>Quick Access via My Accounts</u>

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.

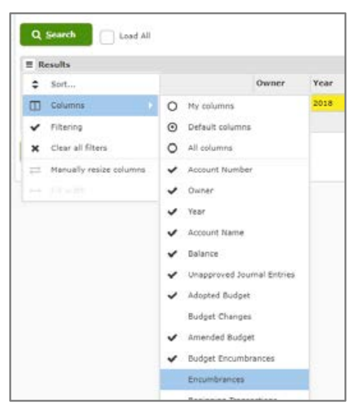
2. Enter the Funds and Budget Manager fields, or any other fields if further filtering is needed. Press **Search**.



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		

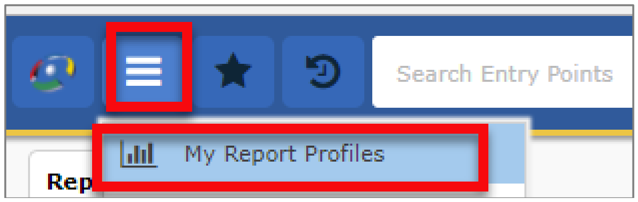
There is a column for Encumbrances (different from Budget Encumbrance), but it does not appear on your screen by default. To view this column, select **Results /Columns / Encumbrances** so a check mark appears to the left of the column name.



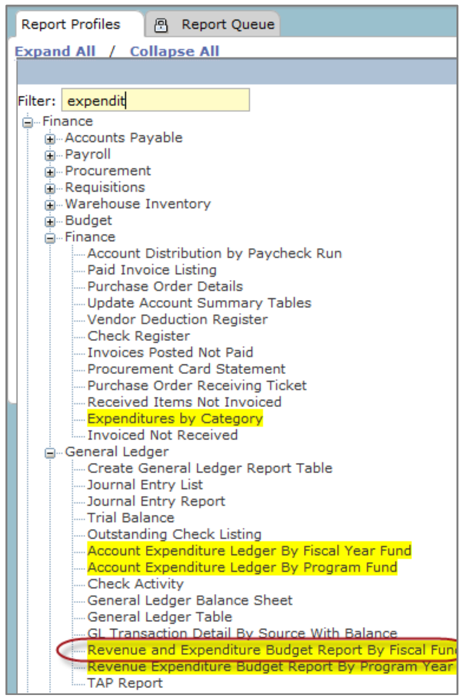
TEAMS: Budget Balances

<u>Expenditure Report</u>

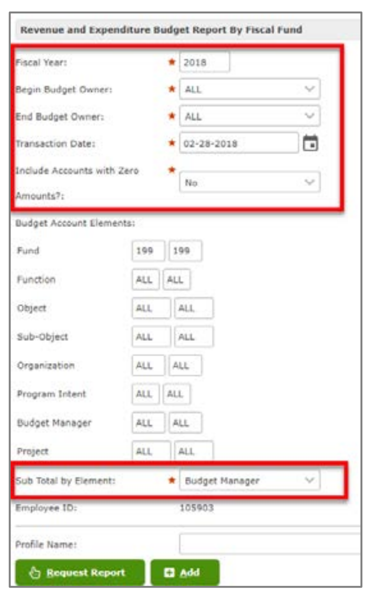
1. Select the **Report Tree** and **My Report Profiles** on the top left of your screen.



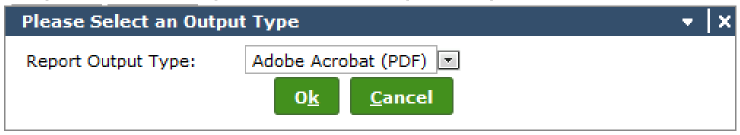
2. Search for "expenditure". Select **Revenue and Expenditure Budget Report by Fiscal Fund**



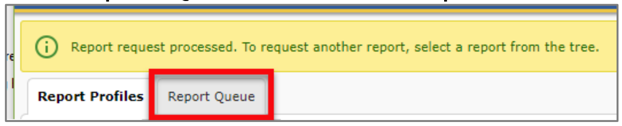
3. Enter the data into the required fields (marked by asterisk). Press **Request Report.**



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



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



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