TEAMS: Budget Owner Allocation Report

This guide will demonstrate how to run the Budget Owner Allocation report in TEAMS, to display the upcoming year's budget.

1. Use the menu to select **Allocate Budget Owner Allocations**, either by searching or locating it under the ribbon.

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Time Card Approvers	•	Budget Change Request 🔹	Substitute Management	•
Employee Service Center	•	Stipend 👻	Requisition Search	•
Approve Requisitions	•	My Requisitions 🔻	Applicant Search	•
My Position Inventory	•	Reports 🔻	Procurement Cards	•
Allocate Budget Owner Allocations	•	Volunteer 🔹	!Vendor	•
Allocate Budget Owner Allocations				

2. The upcoming budget year should appear as default, and any allocations available to the user will be seen in the lower half of the screen. Either double-click the desired allocation, or single click it to highlight and then select **View**.

Budget Owner Allocation	Search Criteria				
Budget Year: \star 2018	~	Status:	[~	
Sudget Owner:	v	Fund -Func-Obj -Su	vb-Org-PIC-BMgr-Proj		
allocation:	~	My Budget Lines?	● Yes ○ No		
Allocation					
Category:	~	Filter		~	
Allocation Group:	~				
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Search					
Search Budget Owner Allocation	15				
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3. At the lower left corner of the screen is the **Print Worksheet** button. There are options for the report to generate in both PDF or Excel format.



Note: If it would help to sort the data by a particular account code element, run the report in Excel format, then use the **Text-to-Columns** tool featured in TEAMS Tip #8 to separate all the individual elements; the period ('.') between each element is the delimiter.