



## Procurement

### **Oracle Procurement Step-by-Step Guide**

#### **View Budget Information from Requisition**

January 29, 2021

FINAL



Funds Check box appears. Select “View” dropdown and change from Transaction to budget in the dropdown menu.

The screenshot shows the Oracle Procurement interface with a dialog box titled "Funds Check: Requisition UCMR00000347". The "View" dropdown is set to "Transaction". The dialog displays "Transaction Lines Impacted by Control Budgets" with a table of requisition lines.

Line-Id	Status	Requested	Charge Account	Budget Account	Budget Period	Control Budget	Budget Manager
1-1	⚠ Tolerance was used	34.00 USD	1011-13001-Z800000-102010-44-0	1011-13001-Z800000-	Jan-20...	UCM_BUDGET_EPBCS	Gray Morris

Some budget information will now appear but additional fields must be added into the view to see all related information. Select “View” under “Control Budgets Impacted by Transactions Lines” and then select “Columns”

The screenshot shows the Oracle Procurement interface with a dialog box titled "Funds Check: Requisition UCMR00000347". The "View" dropdown is set to "Budget". The "Columns" dropdown is open, showing options like "Freeze", "Expand", "Collapse", etc.

Requested	Available	Budget Manager
34.00 USD	0.00 USD	Gray Morris

Select “show all”

The screenshot shows the Oracle Procurement interface with the 'Funds Check' dialog box open. The 'Columns' dropdown menu is expanded, and the 'Show All' option is highlighted with a red circle. The dialog box displays the 'Control Budgets Impacted by Transaction Lines' section, showing a table with columns for Budget, Status, Requested, Consumed, Available, Additional Required, Total Consumption, and Budget Manager. The 'Available' column shows 0.00 USD for the selected transaction line.

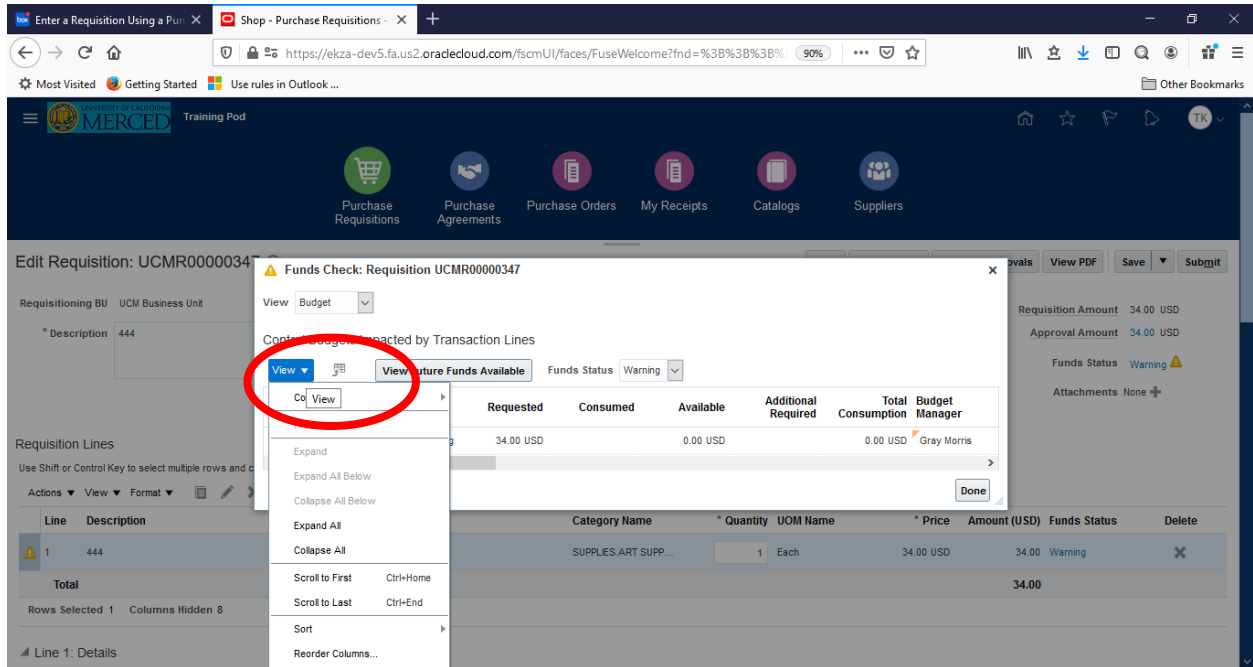
You can now view all available columns including budget related information for the Chart of Account(s) or POET information used for each line item including information such as encumbrances and remaining balance. View this information by sliding the navigation bar to the right to see additional columns.

The screenshot shows the Oracle Procurement interface with the 'Funds Check' dialog box open. The 'Columns' dropdown menu is expanded, and the 'Show All' option is highlighted with a red circle. The dialog box displays the 'Control Budgets Impacted by Transaction Lines' section, showing a table with columns for Budget, Status, Requested, Consumed, Available, Additional Required, Total Consumption, and Budget Manager. The 'Available' column is highlighted with a red circle, and a red arrow points to the right, indicating the direction to slide the navigation bar to view additional columns.

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You can change the order in which columns appear on your screen to easily view key information.

Click “view” again under “Control Budgets Impacted by Transaction Lines” and select “Reorder Columns” this allows you to sort the columns in the desired order so you can view the data in the order you choose.



Select the column you wish to move up or down to sort your view, columns will reorder left to right starting with the top column selected in the “Reorder Columns” box once you’ve completed resorting and selected “Ok”. Select the up/down keys on the right margin to move columns up or down as required.

