UNIVERSITY OF CALIFORNIA
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Procurement

Oracle Procurement Step-by-Step Guide

View Budget Information from Requisition

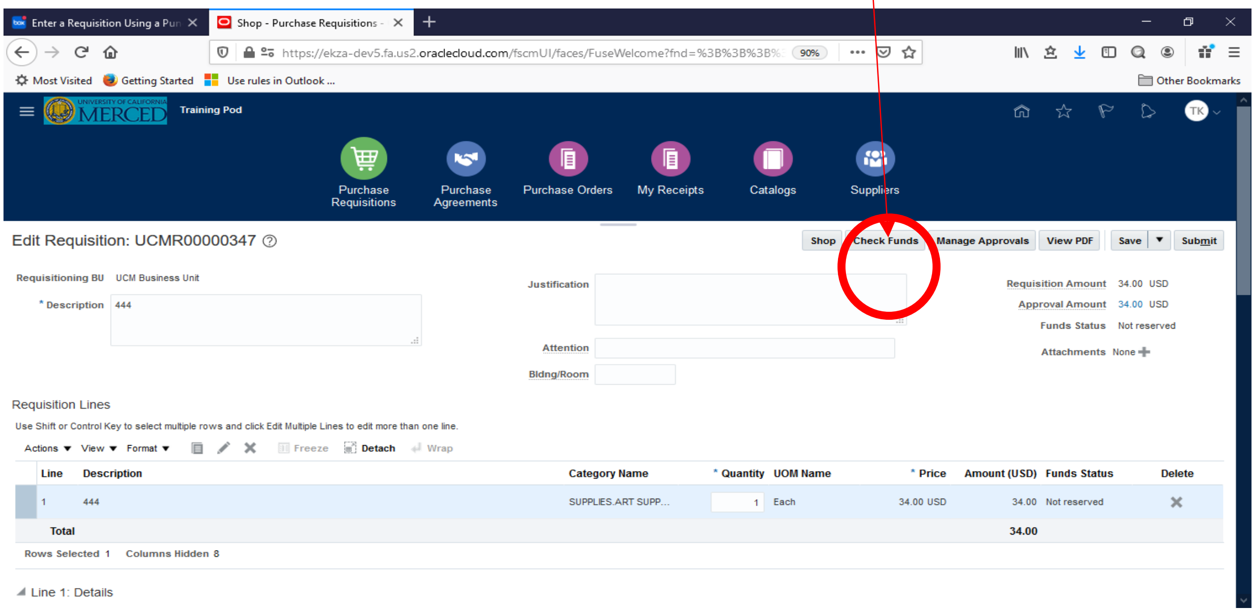
January 29, 2021

FINAL

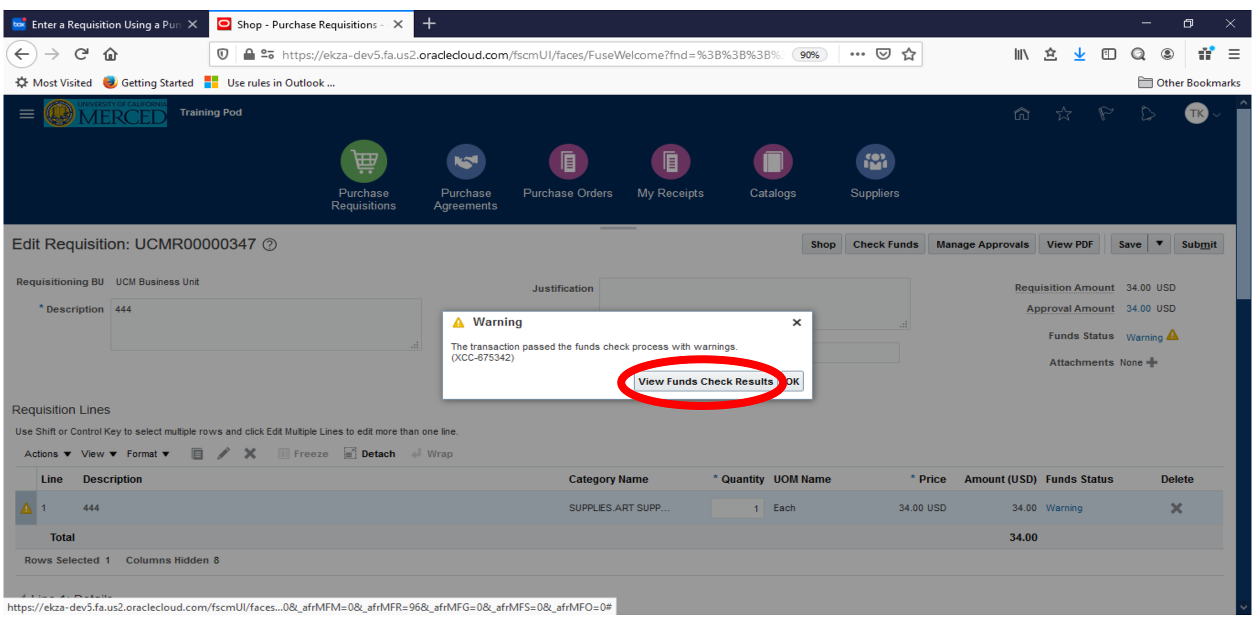
View Requisition Budget

After creating requisition line items and assigning the Chart of Accounts or POET information you can quickly perform a funds check on the requisition and view the available budget for each line item directly within the requisition.

Select the “check funds” option in the upper right corner of the requisition.



The Funds Warning box will appear. Select “View Funds Check Results” to view funds balance



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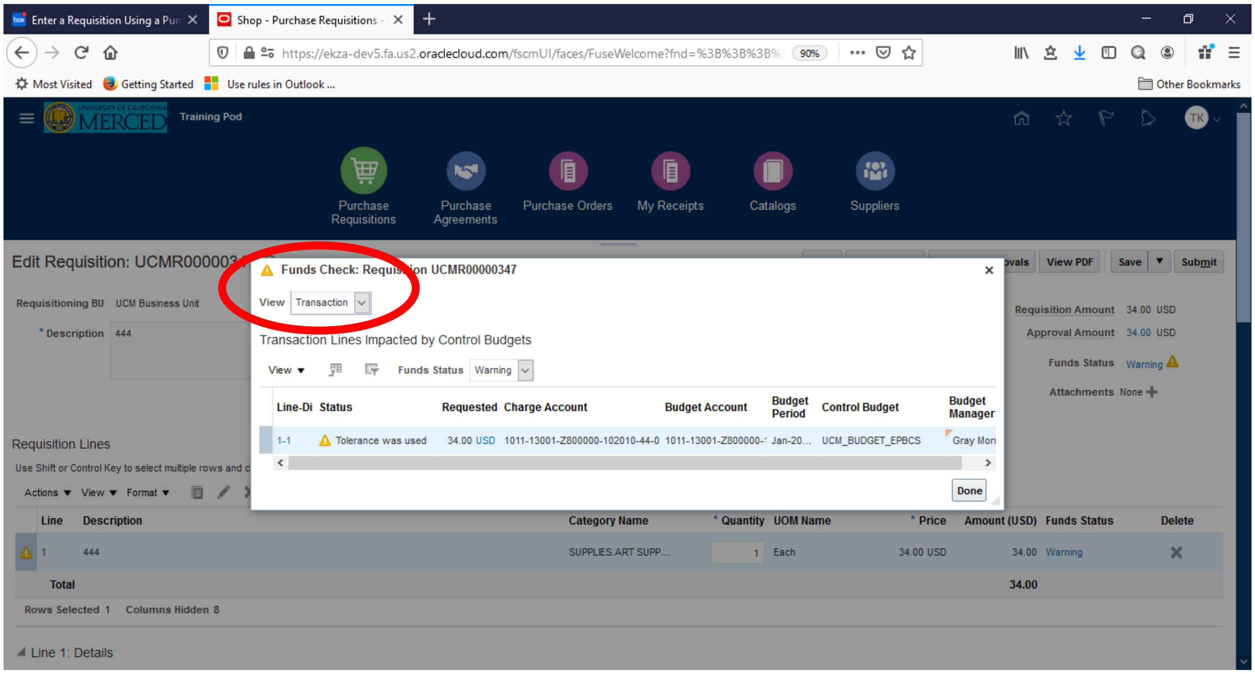
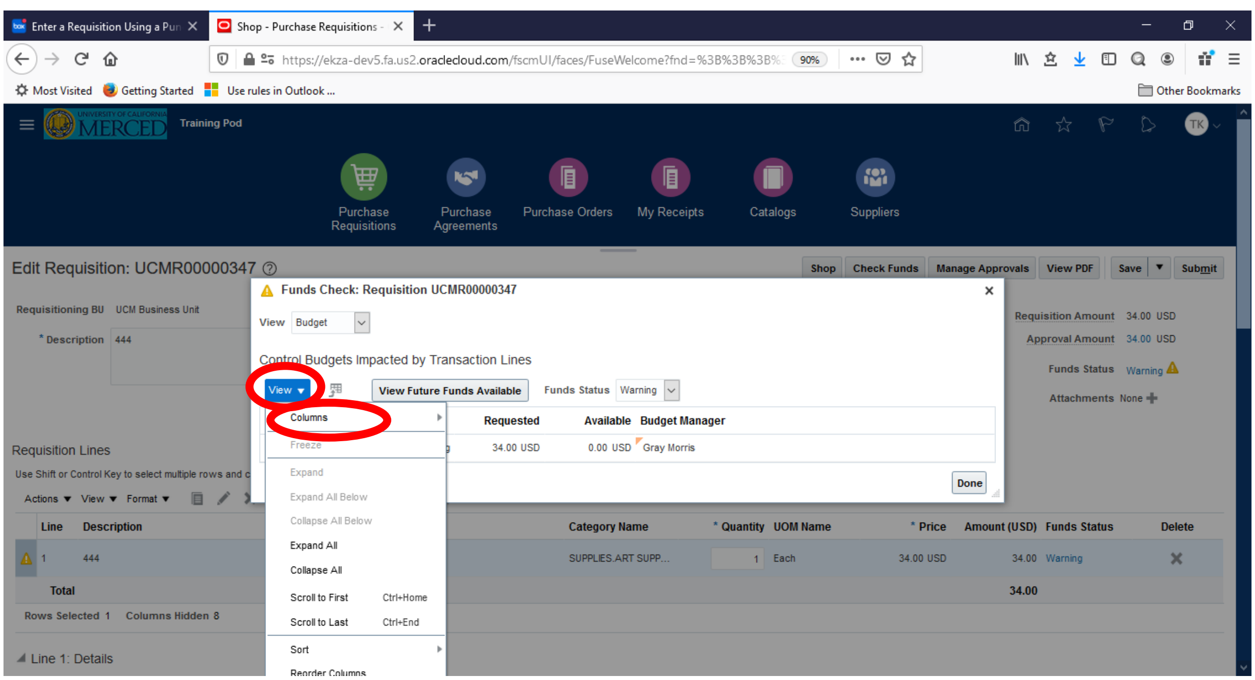
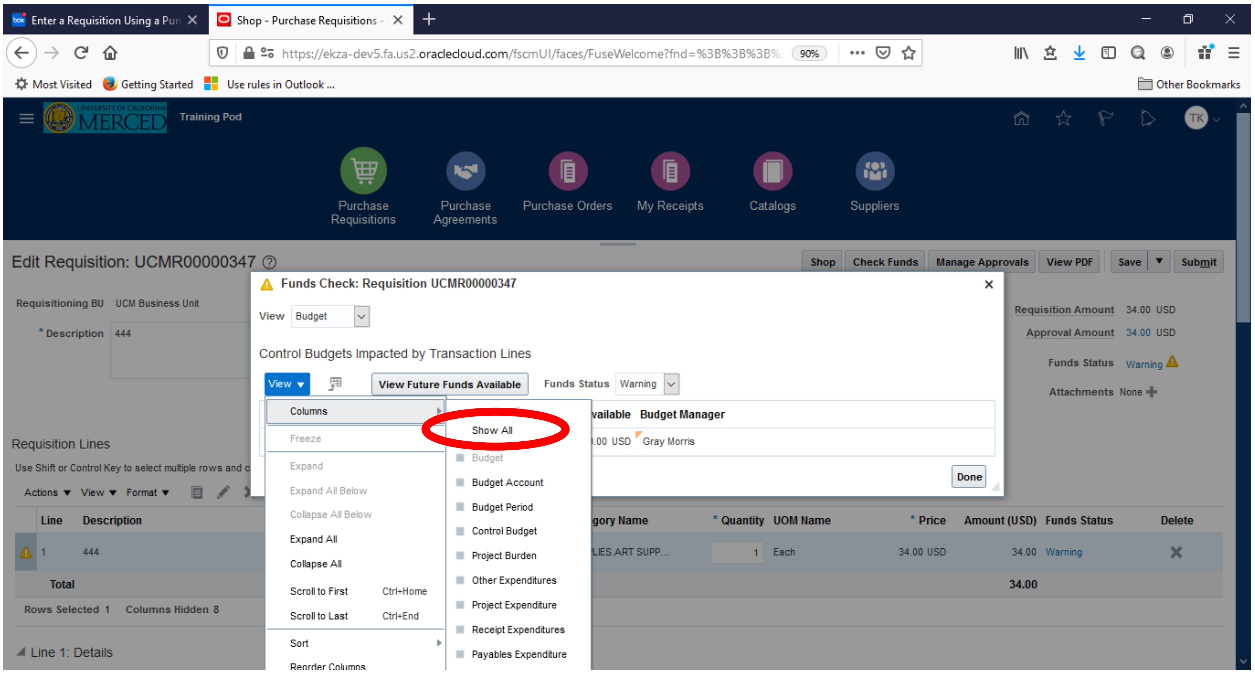
Funds Check box appears. Select “View” dropdown and change from Transaction to budget in the dropdown menu.



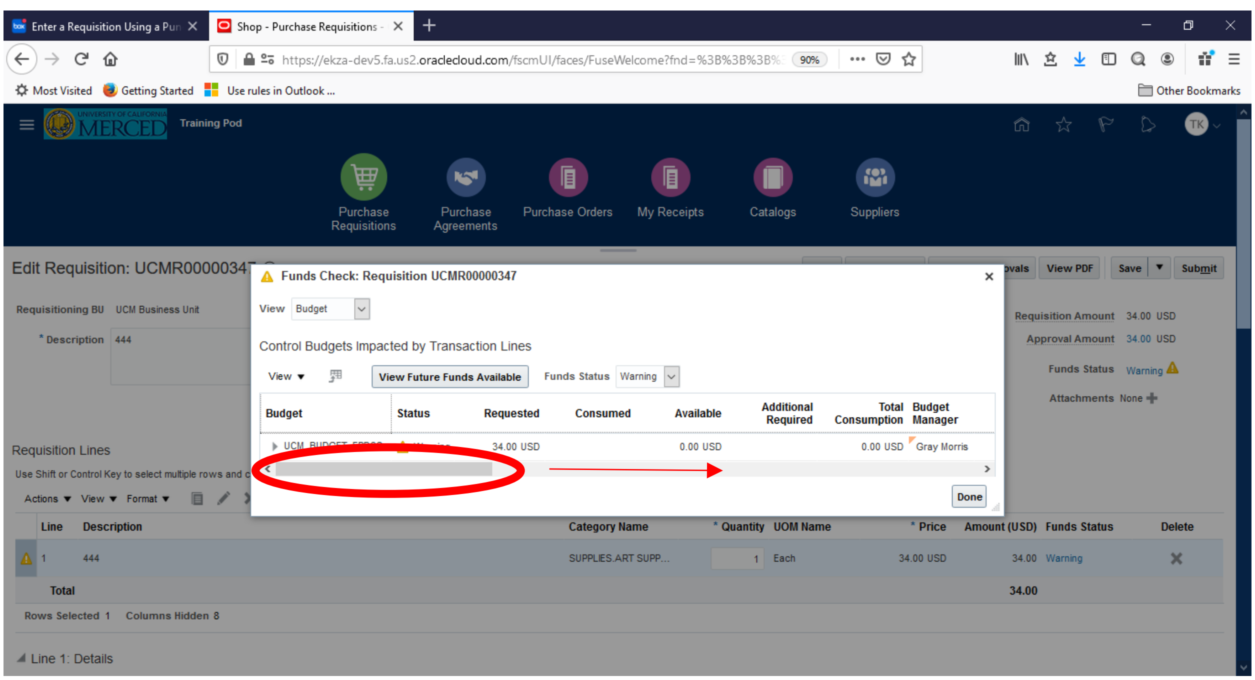
Some budget information will now appear but additional fields must be added into the view to see all related information. Select “View” under “Control Budgets Impacted by Transactions Lines” and then select “Columns”



Select "show all"

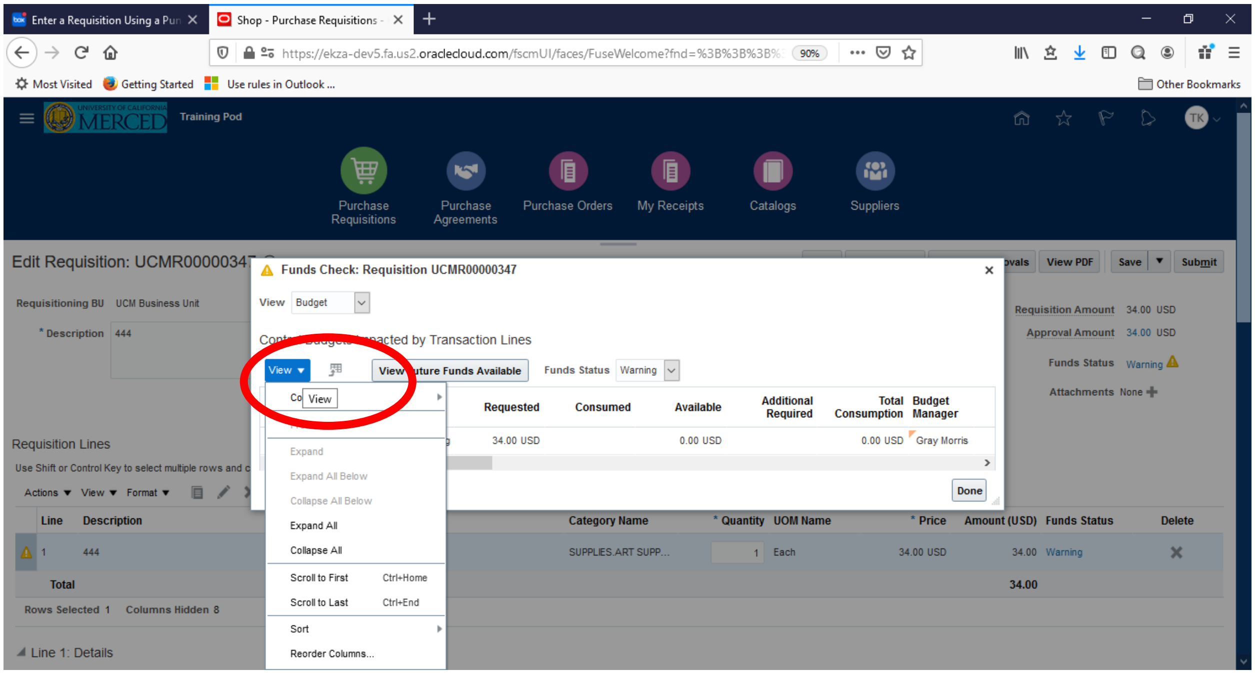


You can now view all available columns including budget related information for the Chart of Account(s) or POET information used for each line item including information such as encumbrances and remaining balance. View this information by sliding the navigation bar to the right to see additional columns.



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.