Reviewing Budget Balances with Budgetary Control

This guide will cover:

- How to find and review your department’s budget, consumption, remaining funds and transactions by category.

**Step One**

Navigate to **Budgetary Control**.

- Click on the **Navigator button** in the top left corner.

- The **Navigator bar** is where you can find links directing you to all of the modules and pages for which you have access. For this particular process, select **Budgetary Control**.
Step Two

Navigate to the **Review Budgetary Control Balances** page and run for desired account.

- On the **Budgetary Control Dashboard**, open the **Tasks Menu** to the right, then select **Review Budgetary Control Balances**.

  - Here you will select the parameters you’d like to review using the drop downs. The following fields are **required**.
    - From Budget Period
    - To Budget Period
    - Fund Source *(Cannot be all fund sources)*
    - Organization *(Cannot be all organizations)*
    - Account
    - Program
    - Activity
  - Click **Search**.

- The Budgetary Control Balances for the selected account information will display.
Step Three
Now you will be able to explore your budget and obligations.

- You may want to add additional columns to your view to access more detail. To do this click View then Columns. You can then check or uncheck the box next to each column to include or remove.

- Each column can be sorted in ascending or descending order, to adjust hover over the column heading until up and down arrows appear. Select the arrow which corresponds to the desired sort.
This dashboard shows the total amounts for each of the following items on the right side of the table.

- **Total Budget**
- **Consumption**, which includes:
  - Commitments (requisitions)
  - Obligations (purchase orders)
  - Others (not currently in use at UW)
  - Expenditures (expenses which have posted to the general ledger)

- **Funds Available**

Each of the numbers within these columns is a hyperlink which, when clicked, opens more details about the transaction.

- For example, if you click a number under obligations, it will open additional details about the transactions which make up that sum.
- This opens the Review Budgetary Control Transactions screen. Here you can see all transactions which make up the amount.
- You can see further details by clicking each transaction name. Note: what you are able to see is based upon your security access.
- Click **Done** to return to previous screen.

- From the **Review Budgetary Control Balances** screen, you can also export to Excel. To do so, click on the **Export to Excel** icon next to **View**.

You have completed the steps to Review Budget Balances in Budgetary Control.