EBS Support Site: Quick Guides

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EBS Support Site: Reference Guides

- **Account Balance**: Describes Current Account Balance in the Finance system, used to view basic information for one or more accounts or sub-accounts.
- **Account Balance Information by Fund Group & Sub Fund Group**: This guide lists where to find account balance information on BI reports, fund group names, sub fund group codes and descriptions.
- **Accounting String Overview**: Describes the fields and layout of accounting strings.
- **Action List**: Provides a complete overview of the Finance Action List, including location, layout and descriptions and how to set preferences.
- **Advance Deposit E-Doc**: Provides a complete overview of using the Advance Deposit document.
- **Budget Reallocation E-Doc**: Provides a complete overview of using the Budget Reallocation document.
- **Budget Reallocation and Transfer of Funds E-Docs**: Guidelines for using the Budget Reallocation and Transfer of Funds documents.
- **Capital Asset Management Reports Overview**: Details the purposes of, prompts used to run, and fields displayed on Capital Asset Management reports in the Business Intelligence system.
- **Cash Receipt E-Doc**: Provides an overview of using the Cash Receipt document.
- **Closing an Account**: Information, including a checklist, to help you with the necessary steps to expire an account and prevent future activity.
- **Contract and Grant Reports Overview**: Describes prompts used to run, and fields displayed on Contract and Grant reports in the Business Intelligence system.
- **Defining E-Docs**: Describes the purposes of various financial e-Docs.
- **Document Search**: Instructions on how to search for a document in the Finance system, starting with the document type, and then entering any additional pertinent information.
- **Document Type Hierarchy**: Hierarchical chart of financial e-Docs, broken out by maintenance documents and transactional documents.
- **Finance Forms Crosswalk**: Crosswalk between legacy financial forms and the respective electronic document (e-Doc) in EBS.
- **From and To Lines on E-Docs**: Tips for using the From and To lines on documents to process debits and credits.
- **Fiscal Officer Change**: Step-by-step instructions, including screenshots, on how to change the Fiscal Officer on an account.
- **Fund Groups**: Maps legacy account ranges to current fund/sub-funds.
- **Funds and Sub-Funds**: Lists funds and sub-funds including codes, names, description and whether the sub-funds allow payroll charges.
- **General Ledger Reports Overview**: Information on General Ledger reports in the Business Intelligence system including examples, how to access and run, and prompt and field information.
- **Intra Account Adjustment E-Doc**: Provides a complete overview of using the IAA document.
- **Operating Statement Overview**: Describes how to run and read the Operating Statement (FIN049) in the Business Intelligence system.
- **Pcard Statements Overview**: Information regarding Pcard Statements (FIN018 and FIN066). Describes the prompts used to run the reports, and the fields displayed on the reports.
- **Pcard Transaction Overview**: Complete overview of the Pcard transaction process and document.
- **Pcard Maintenance**: Information on maintaining Pcard information, cardholder information, and new card requests.
- **PO - Responding to Contract Manager's Notes/Request for Changes**: Describes using the Notes and Attachments tab on a PO when the contract manager (buyer) has sent the PO with Action Requested to Read Notes, to your Action List.
- **PO - Sending Notes to Contract Manager (Buyer)**: Describes locating a PO, using the Notes and Attachments tab, and sending the Notes to the contract manager's Action List.
- **Project Code Import**: An overview of using the Project Code Import e-Doc to import a list of project code names and numbers into the Finance system.
- **Search For and Print a Purchase Order in Doc Viewer**: Instructions with screenshots, describing how to locate a purchase order in Doc Viewer, and how to print the PO.
- **Search Tips for Converted Orders**: Information on searching for converted legacy purchase orders in the EBS Finance System.
- **Searching for Vendors when Setting Up a Disbursement Voucher**: Instructions and tips for entering the vendor on a DV.
- **Service Billing Supporting Documentation Locations**: Lists the locations of supporting documentation, based on type of service biller.
- **Setting an Auto Order Limit**: Explains how to create an edit an Order Auto Limit on Shop at State orders.
- **Sub-Account Import**: An overview of using the Sub-Account Import e-Doc to import a list of sub-account names and numbers into the Finance system.
- **Sub-Object Code Import**: An overview of using the Sub-Object Code Import e-Doc to import a list of sub-object code names and numbers into the Finance system.
- **Transferring an Asset for Sale Internally**: Explains which document to use when transferring an asset, and which document to use to process a monetary transfer for the purchase of the asset.