

# Columbia University Finance Training

## Job Aid: Running an Inquiry

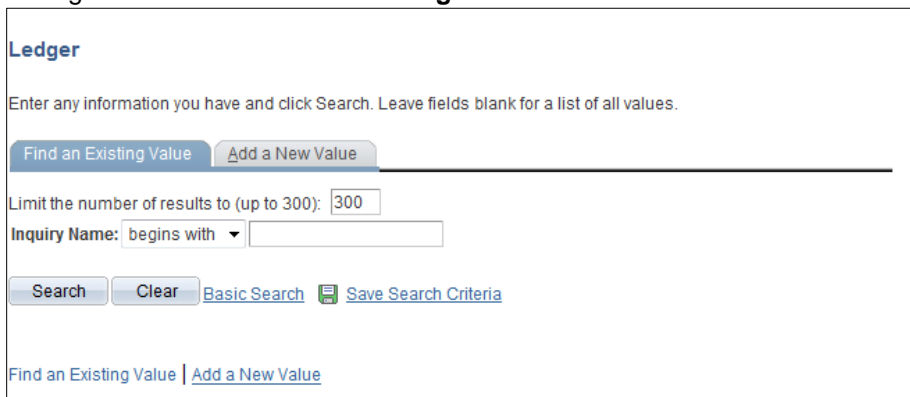
ARC delivers a variety of inquiry pages for users to track transactions throughout the system.

Inquiry pages are found throughout ARC (e.g. voucher inquiries are found within the Accounts Payable module in ARC and purchase order inquiries are found within the Purchasing module in ARC).

Refer to the Inquiry Inventory job aid for a list of the most frequently used inquiries in ARC along with their purpose and navigations.

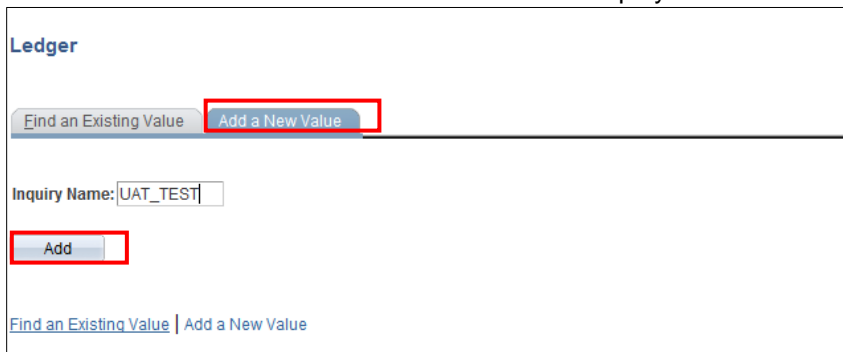
Please note that depending on your security access you may or may not have access to certain inquiry pages in ARC. In the example below, the inquiry is run from the General Ledger page.

1. Navigate to the desired inquiry page in ARC.
2. Navigate to **NavBar > General Ledger > Review Financial Information > Ledger**



The screenshot shows the 'Ledger' page in ARC. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. There is a text input field for 'Limit the number of results to (up to 300):' with the value '300' entered. Below that is a dropdown menu for 'Inquiry Name:' set to 'begins with' and an empty text input field. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' (with a document icon). At the very bottom are links for 'Find an Existing Value' and 'Add a New Value'.

3. Click on the 'Add a New Value' tab and enter an inquiry name. Click "Add"



This screenshot shows the 'Ledger' page with the 'Add a New Value' tab selected and highlighted with a red box. The 'Inquiry Name:' field now contains the text 'UAT\_TEST'. The 'Add' button at the bottom left is also highlighted with a red box. The rest of the page layout is the same as the previous screenshot.

3. Enter the desired information for the Ledger Criteria (fields with an asterisk '\*' are required).

Unit: COLUM  
Ledger: ACTUALS  
Fiscal Year: 2012  
From Period: 1  
To Period: 12  
Currency: USD

Check the following boxes:

Show YTD Balance  
Include Closing Adjustments

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## Job Aid: Running an Inquiry Only in Base Currency

4. Enter the desired information under ChartField Criteria and click “Search”.

Ledger Inquiry

Enter ledger, period, ChartField and rest of the criteria. Click on Search button to execute the query.

Ledger Criteria

Inquiry Name

UAT\_TEST

\*Unit

COLUM

\*Ledger

ACTUALS

\*Fiscal Year

2012

\*From Period

1

\*To Period

12

Currency

USD

Stat Code

☒ Show YTD Balance

☒ Include Closing Adjustments

Max Ledger Rows

100

☐ Show Transaction Details

☒ Only in Base Currency

Search

Clear

Delete


Chartfield Criteria

Customize | Find | 1-11 of 11 | Last

ChartField	Value	ChartField Value Set	Update/New	Sum By	Value Required	Order-By
Account			Update/New	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1
Department			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Fund Code			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Function			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Initiative			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Affiliate			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Fund Affiliate			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Segment			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Site			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Project			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	
Adjustment Type			Update/New	<input type="checkbox"/>	<input type="checkbox"/>	

Include Adjustment Periods

Set	Period
<input type="checkbox"/>	901
<input type="checkbox"/>	902
<input type="checkbox"/>	903
<input type="checkbox"/>	904
<input type="checkbox"/>	905
<input type="checkbox"/>	906
<input type="checkbox"/>	907
<input type="checkbox"/>	908
<input type="checkbox"/>	909
<input type="checkbox"/>	910
<input type="checkbox"/>	911
<input type="checkbox"/>	912

COLUMBIA UNIVERSITY  
IN THE CITY OF NEW YORK

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