



Commitment Control Inquiry - Budgets Overview Job Aid

Questions on this Job Aid should be directed to Katie Perkins, Mary Alice Mills or Corbin deNagy

Purpose

Budget, Expense, Encumbrance, and Available Budget Balance figures can be found in OMNI Financials by performing a Commitment Control inquiry. Balances found on the Commitment Control screens reflect current OMNI activity.

There are two types of inquiries available: Budget Details, which can be used to view a single department-fund-account combination, and Budgets Overview, which can be used to view a range of departments, funds, and/or accounts. This job aid covers the Budgets Overview inquiry only. See the “Commitment Control Inquiry - Budget Details” job aid to learn more about the Budget Details inquiry.

Navigation

myFSU Portal > OMNI Financials > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Step 1

Navigate to the Budgets Overview screen as described above.

Click the “Add a New Value” tab.

myFSU
OMNI Financials

Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Budgets Overview

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Inquiry Name begins with

Search Clear Basic Search Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

Enter an Inquiry Name and click the “Add” button.

The screenshot shows the top navigation bar with the myFSU OMNI Financials logo and a breadcrumb trail: Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview. Below the navigation is the 'Budgets Overview' section with two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. An 'Inquiry Name' field contains the text '046 DEPTS'. A red arrow points to this field. Below the field is an 'Add' button, also highlighted with a red arrow.


Note: There is no need to create a new value each time you want to access the Budgets Overview screen. After a new value has been added, you can access it by searching for it on the “Find an Existing Value” tab. However, you may find it helpful to set up several inquiries for search criteria that you use on a regular basis.

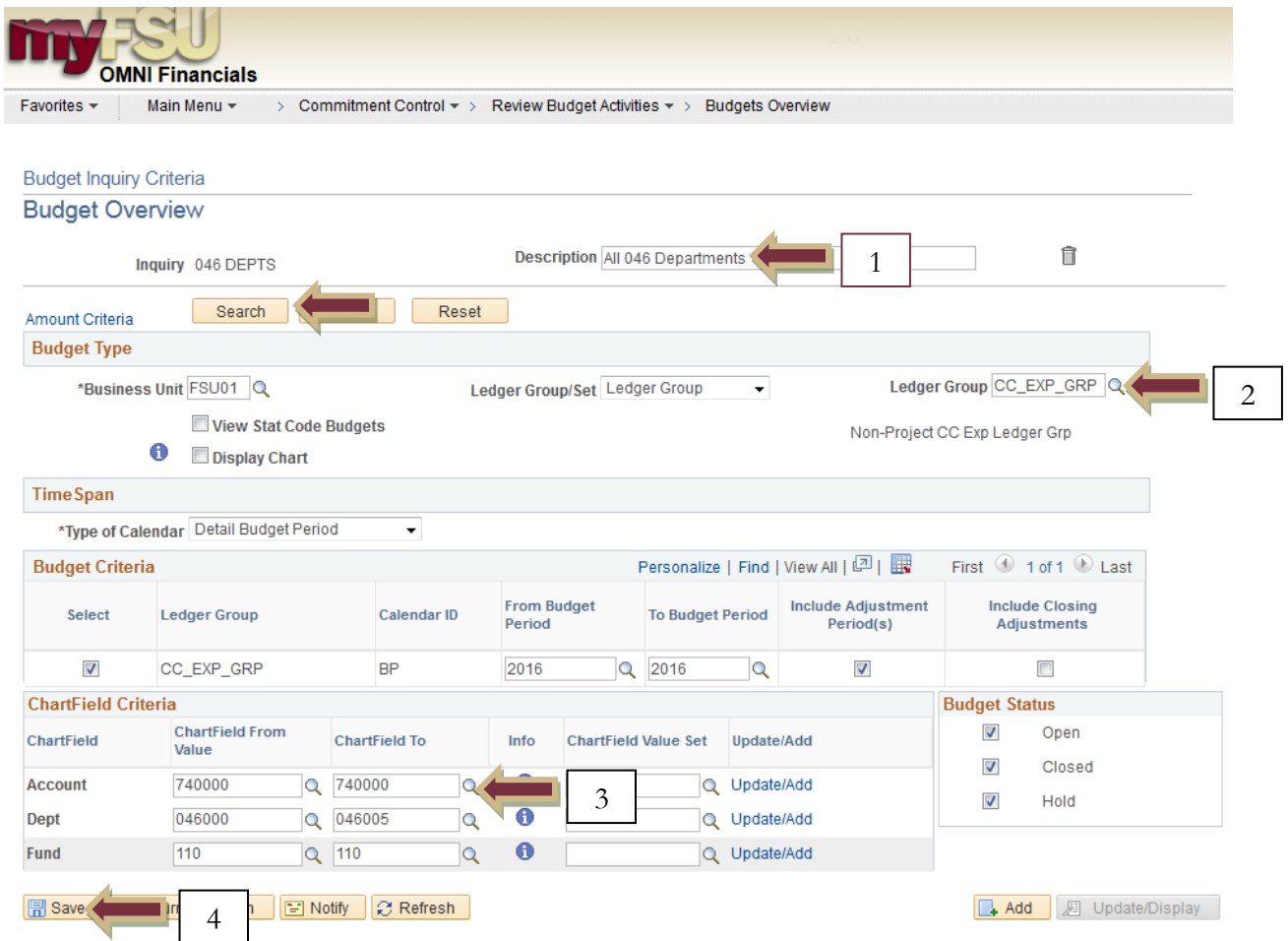
This screenshot shows the same 'Budgets Overview' page but with the 'Find an Existing Value' tab selected. A red arrow points to this tab. Below the tabs is a search area with a 'Search Criteria' dropdown menu. The 'Inquiry Name' field is set to 'begins with' and contains '046'. Below the search area are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Search Results' section shows '1 of 1' results. A table displays the search results:

Inquiry Name	Description
046 DEPTS	All 046 Departments

Step 2

To complete the Budget Inquiry Criteria:



1. Enter a Description for your Inquiry.
2. Choose a Ledger Group. (You can use the  button to search for the appropriate one or you can type it directly into the field. Most users will use CC_EXP_GRP.)
3. Choose values for Account (must be Budgetary Accounts, such as 740000 or 710299, etc.), Department and/or Fund as appropriate for your needs. (You can enter the same value in the “From” and “To” fields, you can enter a range of values, or you can leave the % as a wildcard.)
4. Click the “Save” button.



myFSU OMNI Financials



Favorites ▾ Main Menu ▾ > Commitment Control ▾ > Review Budget Activities ▾ > Budgets Overview

Budget Inquiry Criteria
Budget Overview

Inquiry 046 DEPTS Description All 046 Departments  1 



Amount Criteria



Budget Type

*Business Unit FSU01  Ledger Group/Set Ledger Group Ledger Group CC_EXP_GRP  2
View Stat Code Budgets
Display Chart Non-Project CC Exp Ledger Grp













Time Span

*Type of Calendar Detail Budget Period ▾

Budget Criteria Personalize | Find | View All |   First 1 of 1 Last

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CC_EXP_GRP	BP	2016 	2016 	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	740000 	740000  3			Update/Add
Dept	046000 	046005 			Update/Add
Fund	110 	110 			Update/Add

Budget Status

- Open
- Closed
- Hold

4

To complete the inquiry, click the “Search” button at the top.

Step 3

Review the Inquiry Results (see next page).

Inquiry Results

Business Unit FSU01
 Ledger Group CC_EXP_GRP Non-Project Budget
 Type of Calendar Detail Budget Period
 Amounts in Base Currency USD
 Revenue Associated:

Return to Criteria Max Rows Display Options

Ledger Totals (3 Rows)			
Budget	163,650.00	Net Transfers	0.00
Expense	7,681.56		
Encumbrance	3,100.00		
Budget Balance	152,868.44		
Associate Revenue	0.00		
Available Budget	152,868.44		

Budget Overview Results											Personalize	Find	View All	First	1-3 of 3	Last
	Ledger Group	Dept	Fund	Account	Budget Period	Budget	Expense	Encumbrance	Available Budget*	Percent Available						
1	CC_EXP_GRP	046000	110	740000	2016	21,202.000	786.030	0.000	20,415.970	96.29						
2	CC_EXP_GRP	046003	110	740000	2016	123,991.000	0.000	0.000	123,991.000	100.00						
3	CC_EXP_GRP	046005	110	740000	2016	18,457.000	6,895.530	3,100.000	8,461.470	45.84						

Return to Criteria *Notes

Note: Detailed transaction information can be accessed by clicking on any of the blue links in the Budgets Overview Results section. For instance, clicking the [123,991.000](#) link would show what the Budget for Line 2 consists of.

Activity Log

Help

Ledger CC_BUD

Activity Log													Personalize	Find	View All	First	1 of 1	Last
	Tran Line	Document Label	Document ID	Ref Bdgt?	Dept	Fund	Account	Budget Period	Year	Period	Foreign Amount	Foreign Currency						
	4368	Journal ID:	0000235857	N	046003	110	740000	2016	2016	1	123,991.00	USD						

OK

Note: Some processes run by the University while closing a fiscal year (such as rolling PO's) may change figures on the Commitment Control Budgets Overview screen. For this reason, you should rely on figures for the current fiscal year only.

Official versions of the Available Balance report are generated as of the end of each fiscal year and archived. These official archived reports can be accessed by selecting "Year End Reports" from the Dashboard > Financial Reports in OBI. For more information on this, see the "OBI Available Balance Report" job aid.