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

[Image of myFSU OMNI Financials interface]

**Budgets Overview**

Find an Existing Value  Add a New Value

Inquiry Name: 045 DEPTS

Add

Find an Existing Value  Add a New Value

**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.

[Image showing search criteria and search results]
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.

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

Step 3
Review the Inquiry Results (see next page).
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.
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.