

Budget Details and Budget Overview

Updated 8/22/2024

Overview

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 may be used to view a range of departments, funds, and/or accounts. This job aid includes sections on each. Use the Table of Contents below to navigate to the respective section.

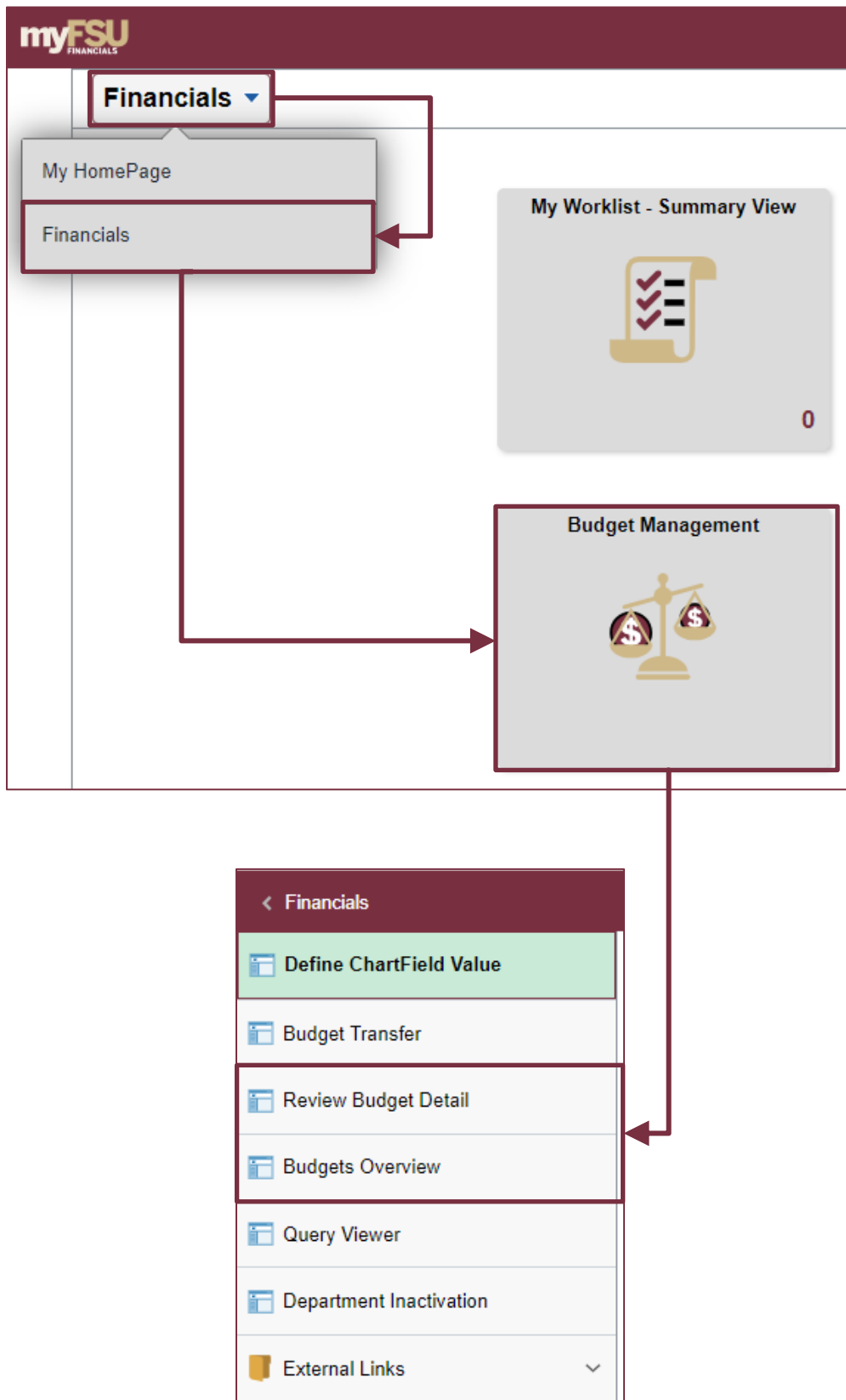
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Navigation

Both the Budget Details and Budget Overview screens can be found via the following navigation.

myFSU Portal → Financials (FI) → Financials (homepage) → Budget Management (tile)



Budget Details

Navigate to the Budget Details screen using the navigation described in the previous section. Once there, you'll need to select the Ledger Group. Click the magnify button to look at the list of Ledger Groups. Most users will use CC_EXP_GRP.

Once you have made your Ledger Group selection, click "Search."

On the following screen, you can now enter the criteria for your inquiry. Anywhere you see a magnify button, you make use that to see which selections are available. Once you've made your selection, click "Search."

Budget Details

Enter any information you have and click Search. Leave fields blank for

Find an Existing Value

▼ Search Criteria

*Business Unit = 🔍

*Ledger Group = 🔍

Search
Clear
Basic Search Save Search Criteria

Important Inquiry Notes

- When using the Account field, you must use a Budgetary Account such as 740000 (Expense) or 710200 (Budget Faculty). Entering sub-budgetary accounts or GL accounts will result in an error.
- Budget Period is Fiscal Year (e.g., 2025).

You should see a list of results. Depending on your criteria, you may see a single row or multiple rows.

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Department	Fund Code	Account	Budget Period
FSU01	CC_EXP_GRP	<input type="text" value="096000"/> 🔍	<input type="text" value="110"/> 🔍	<input type="text" value="740000"/> 🔍	<input type="text" value="2025"/> 🔍

Search

Budget Details

🔍
1-1 of 1
View All

	Business Unit	Ledger Group	Department	Fund Code	Account	Budget Period	View Details
1	FSU01	CC_EXP_GRP	096000	110	740000	2025	View Details

Select "View Details" for the respective row you wish to view.

The Commitment Control Budget Details screen will show Budget, Expense, Encumbrance, and Available Budget (Available Balance) based on your selection. See the following page for a screenshot.

Important Budget Details Notes

- The "Without Tolerance" and "With Tolerance" should always be the same. This is a PeopleSoft feature that is not currently utilized by FSU.
- Detailed transaction information can be access for Budget, Expense, and Encumbrance by clicking the Drill to Activity Log button.
- Use the "Return to Search" button to return to the previous screen.

- Some processes run by the University for fiscal year closure (such as rolling PO's) may change figures on the Commitment Control Budget Details screen retro-effectively. 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 via the "Year End Reports" available in BI.

Commitment Control Budget Details

Business Unit	Ledger Group	Dept	Fund	Account	Budget Period
FSU01	CC_EXP_GRP	096000	110	740000	2025

[Display Chart](#) ⓘ
 [Previous](#)
[Next](#)
[Return to Inquiry Criteria](#)

Ledger Amounts

Budget:		13,100.00	USD			Max Rows 100 Attributes
Expense:		506.61	USD			Parent / Children Associated Budgets
Encumbrance:		9,472.72	USD			

Available Budget

	Associate Revenue	0.00	USD		
	Without Tolerance	3,120.67	USD	Percent (23.82%)	Forecasts
	With Tolerance	3,120.67	USD	Percent (23.82%)	

Budget Exceptions

Exception Errors	0	Exception Warnings	0	Budget Exceptions
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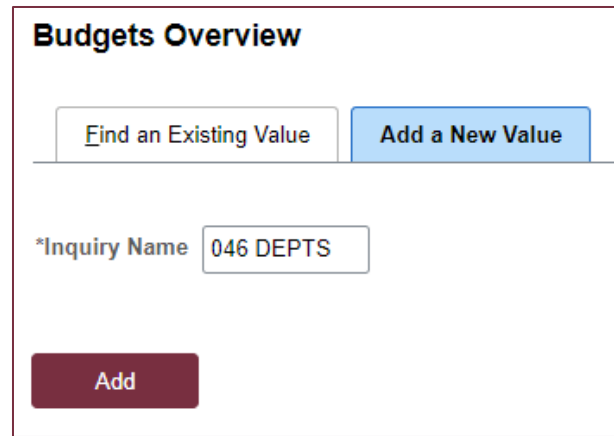
[Return to Search](#)
[Notify](#)

Budget Overview

Navigate to the Budget Overview screen using the navigation described in the previous section. Once there, you'll need to create an Inquiry.

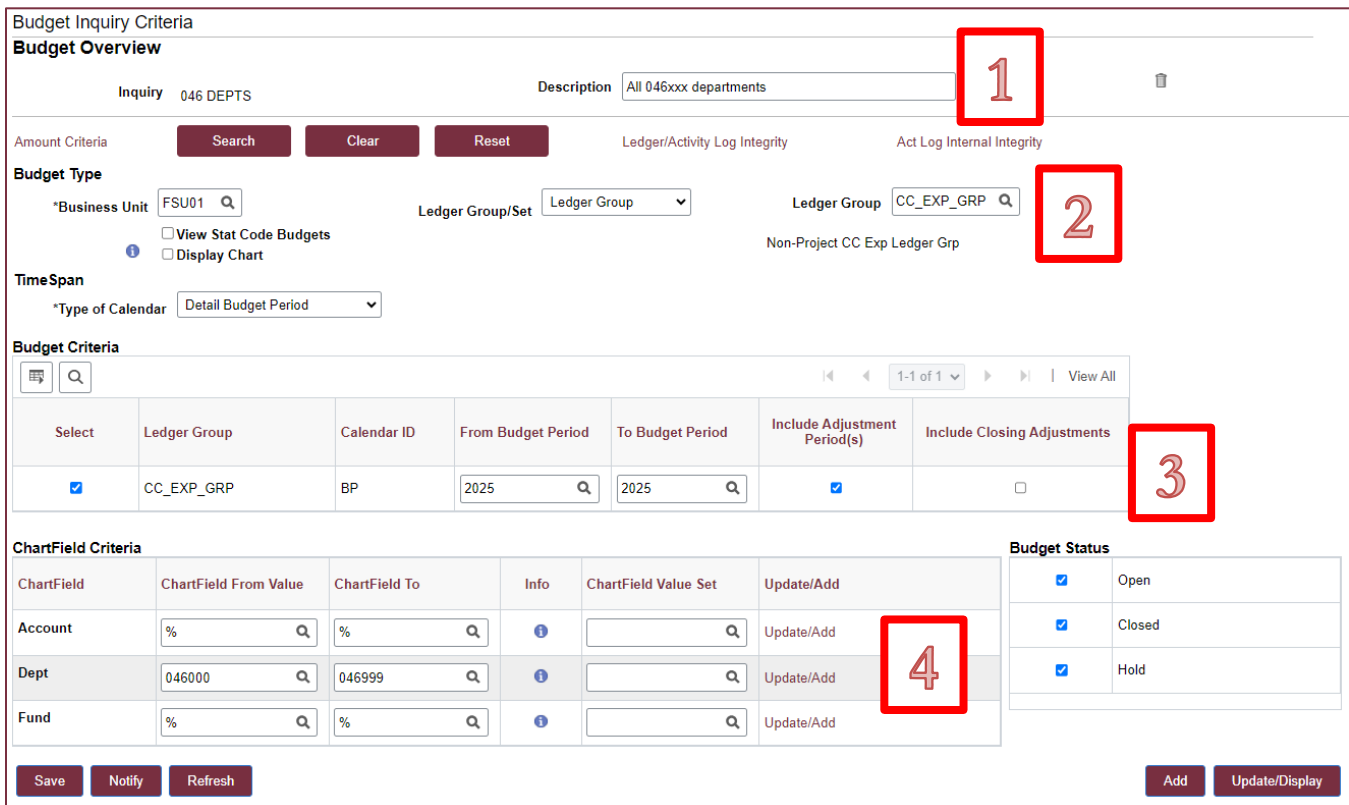
An inquiry is a preset of search prompts. Once you've created an Inquiry, it can be reused and revised at any time. You may create as many Inquiries as you want. One for each department, group of departments, funds, or however you prefer to review your budgets.

If you do not already have an Inquiry made, click the "Add a New Value" tab and type a short name (10 characters max) and click "Add."



On the following screen is where you create your Inquiry Criteria. There are a few essential pieces of information you'll need to enter:

1. **Description** (40 characters max) – Used as a brief description of your Inquiry
2. **Ledger Group** – Select your desired Ledger Group (most users will use CC_EXP_GRP)
3. **Budget Criteria** – Enter the Budget Period range (From and To) for the desired Fiscal Year
4. **Chartfield Criteria** – Enter a range for Account, Dept, and/or Fund. You may also use a wildcard (%) to capture all values available in the range.



Once you've entered your desired Inquiry criteria, click "Save" at the bottom and then click "Search" at the top.

After clicking “Search,” the Inquiry Results will be displayed. At the top, you’ll be given a total of all the Budget, Expense, Encumbrance, and Available Budget (Available Balance) based on the Inquiry Criteria. Further down, the Budget Overview Results section will include each combination based on the Inquiry Criteria.

Inquiry Results

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

Return to Criteria Max Rows: Display Options **Search**

Ledger Totals (21 Rows)

Budget	3,018,496.35	Net Transfers	29,139.24
Expense	644,401.40		
Encumbrance	2,219,319.31		
Budget Balance	154,775.64		
Associate Revenue	0.00		
Available Budget	154,775.64		

Budget Overview Results

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Details	Budget Transaction Types	Ledger Group	Dept	Fund	Account	Account Description	Fund Code Description	Department Description	Bud-Peri
1		CC_EXP_GRP	046000	110	710300	Budget Staff	E&G General Revenue	Budget Office	20
2		CC_EXP_GRP	046001	330	710300	Budget Staff	Designated-Auxiliary Overhead	Budget Office Overhead	20
3		CC_EXP_GRP	046005	110	710300	Budget Staff	E&G General Revenue	Institutional Research	20
		CC_EXP_GRP	046005	110	710300	Budget Staff	E&G General Revenue	Institutional	20

Important Budget Overview Notes

- You may need to use the horizontal scrollbar at the bottom of the window to see all the columns.
- Detailed transaction information can be accessed by clicking on any of the **garnet** values in the Budget Overview Results section. For instance, clicking the amount in the Budget column will take you to an Activity Log with rows for each Budget Journal (see the screenshot below for an example).
- Some processes run by the University for fiscal year closure (such as rolling PO’s) may change figures on the Commitment Control Budget Details screen retro-effectively. 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 via the “Year End Reports” available in BI.

Activity Log

Ledger: CC_BUD

Activity Log

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Tran Line	Document Label	Document ID	Ref Bdgt?	Dept	Fund	Account	Budget Period	Year	Period	Foreign Amount	Foreign Currency
2878	Journal ID:	BUD0000003	N	046000	110	710300	2025	2025	1	734,019.50	USD
818	Journal ID:	0000411841	N	046000	110	710300	2025	2025	1	18,851.96	USD
582	Journal ID:	0000411842	N	046000	110	710300	2025	2025	1	-433.38	USD

OK