



Commitment Control Inquiry - Budgets Overview Job Aid

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

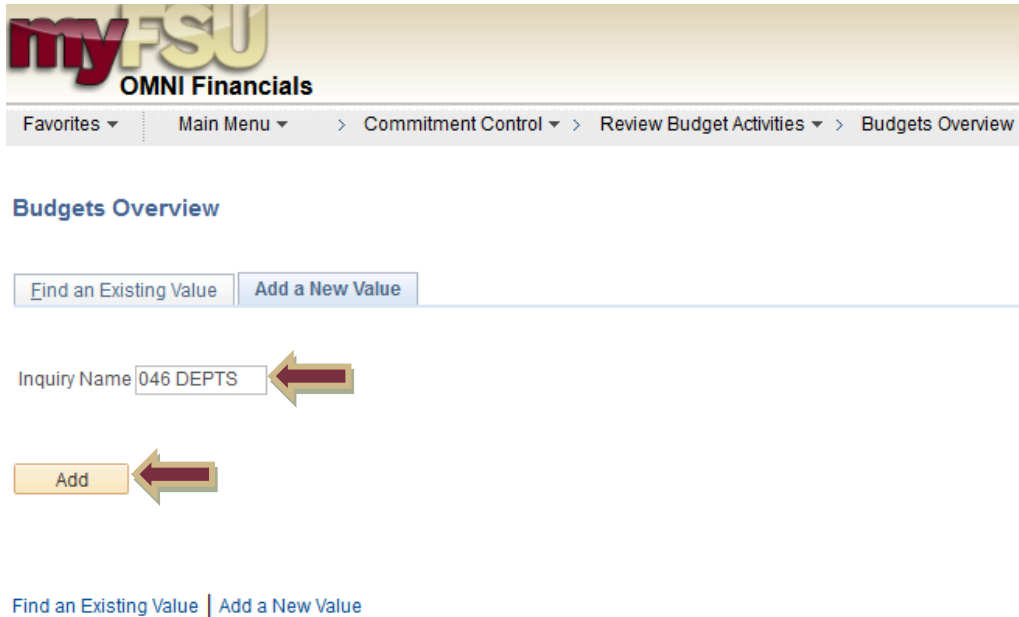
Search Criteria

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 'myFSU OMNI Financials' interface. The breadcrumb trail is: Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview. The page title is 'Budgets Overview'. There are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs, there is an 'Inquiry Name' field containing '046 DEPTS' and an 'Add' button. Red arrows point to the 'Inquiry Name' field and the 'Add' button. At the bottom, there are links for 'Find an Existing Value' and '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.

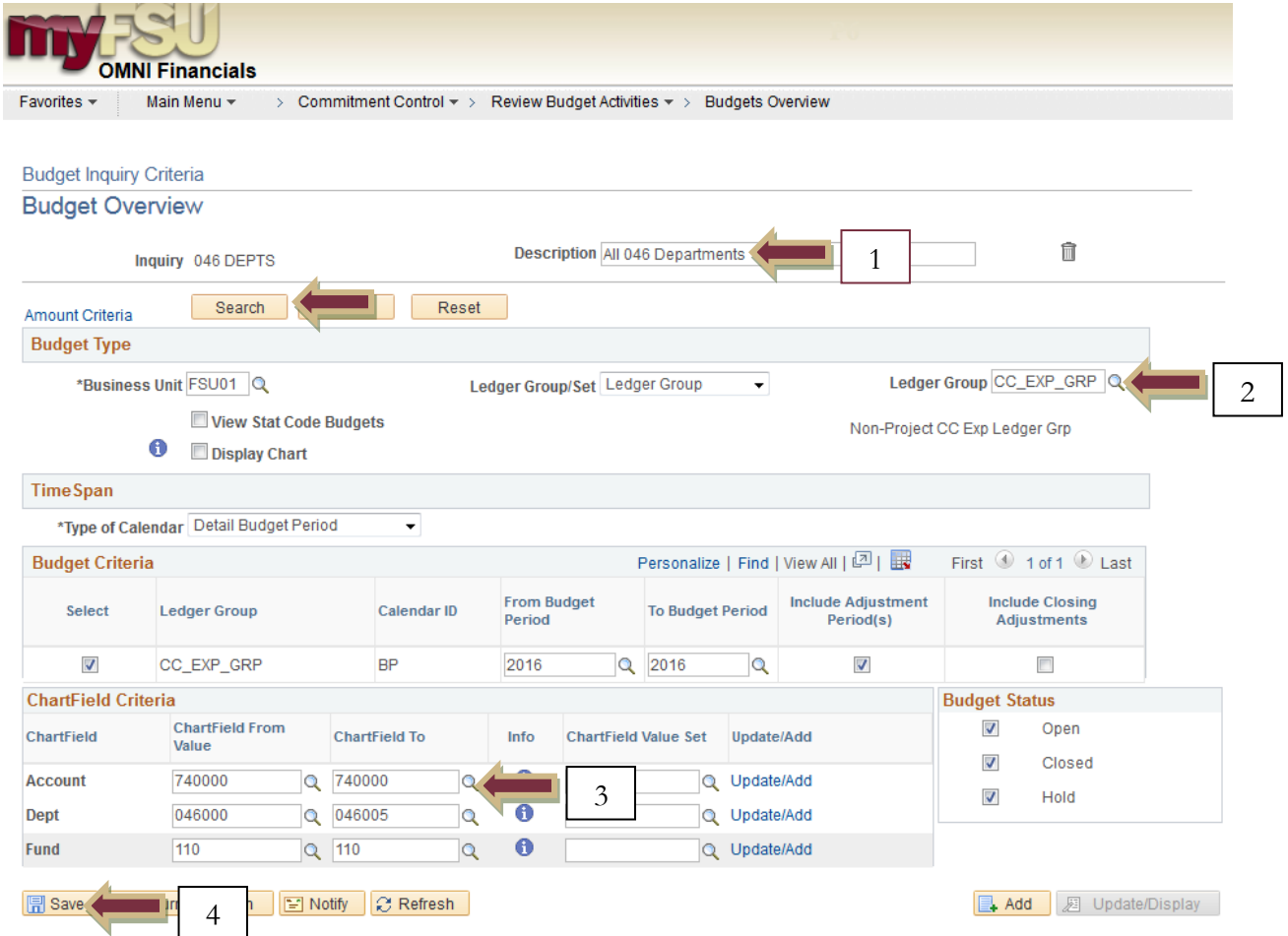


The screenshot shows the 'myFSU OMNI Financials' interface. The breadcrumb trail is: Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview. The page title is 'Budgets Overview'. Below the title, there is a instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' and 'New Value'. The 'Find an Existing Value' tab is active. Below the tabs, there is a 'Search Criteria' section with a dropdown menu set to 'begins with' and a text field containing '046'. Below the search criteria, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search buttons, there is a 'Search Results' section with a table showing one result: '046 DEPTS' with the description 'All 046 Departments'. Red arrows point to the 'Find an Existing Value' tab and the 'Search' button.

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 Search  Reset 



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





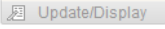
Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CC_EXP_GRP	BP	2016 	2016 	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	740000 	740000 		<input type="text"/> 	Update/Add
Dept	046000 	046005 		<input type="text"/> 	Update/Add
Fund	110 	110 		<input type="text"/> 	Update/Add

Budget Status

- Open
- Closed
- Hold

Save   Notify  Add  Update/Display 

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 x

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.