

Commitment Control Inquiry - Budgets Overview

Purpose

Budget, Encumbrance, Expense, 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 may 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 covers the Budgets Overview inquiry only. See the "Commitment Control Inquiry – Budget Details" job aid to learn more about the Budget Details inquiry.

Overview

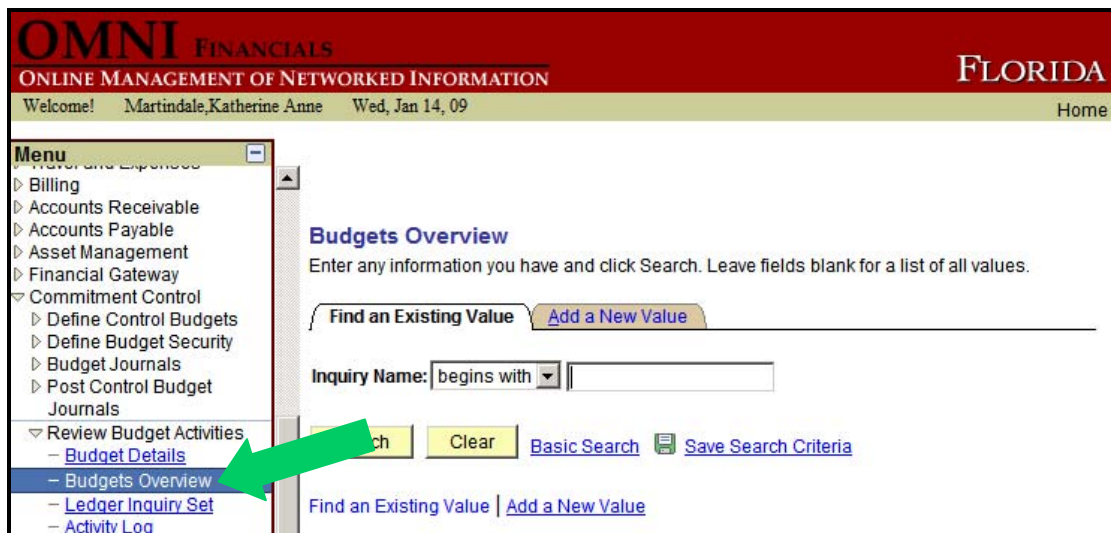
1. Log into OMNI Financials and navigate to the Budgets Overview screen. Add a new Inquiry.
2. Complete the Budget Inquiry Criteria and click the "Search" button.
3. Review the Inquiry Results.

Navigation

OMNI Portal > OMNI Financials > Commitment Control > Review Budget Activities > Budgets Overview

Step 1

Begin by logging into OMNI Financials from the OMNI Portal. Navigate to the Budgets Overview screen as described above.




Click on the "Add a New Value" tab.

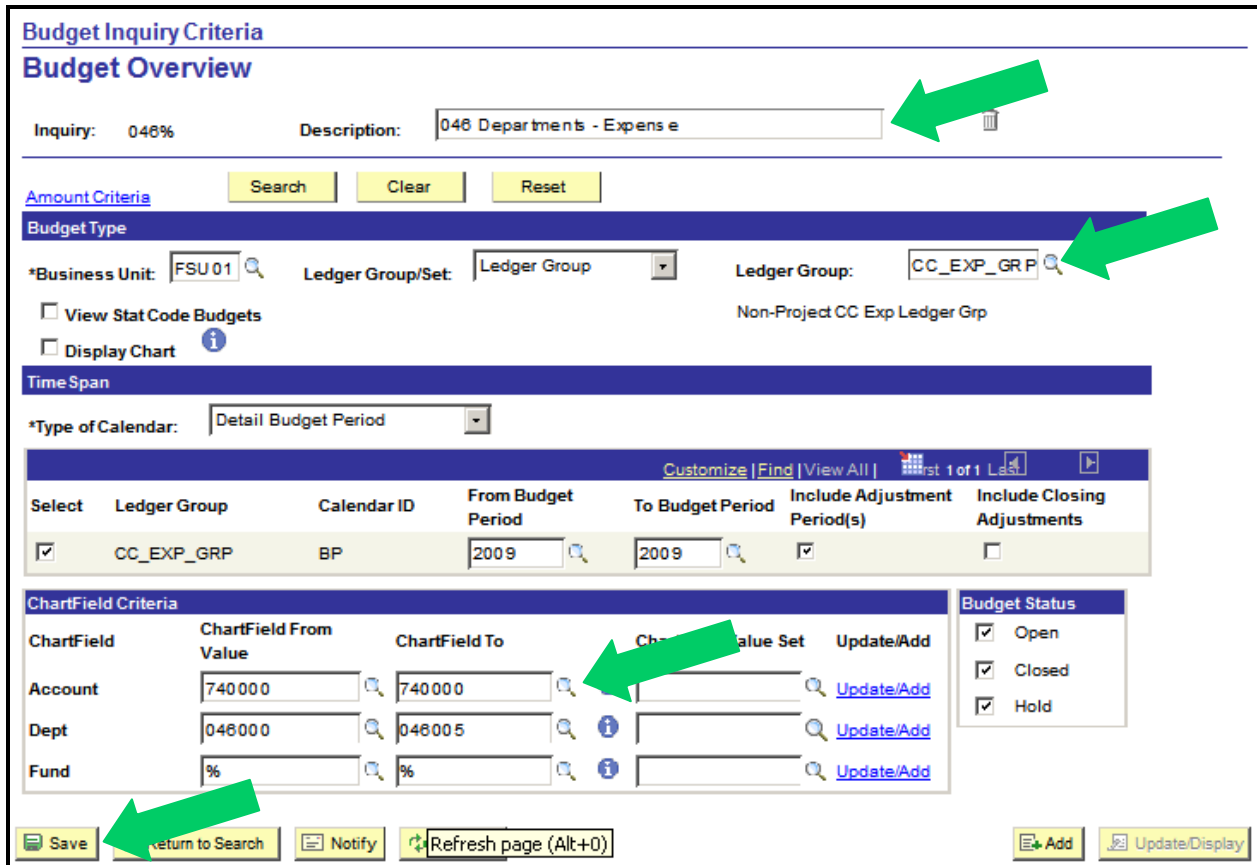
Enter an Inquiry Name and click the "Add" button.

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.

Step 2

To complete the Budget Inquiry Criteria:

1. Enter a Description for your Inquiry.
2. Choose a Ledger Group. (Type the Ledger Group in or use the  button to search for the appropriate one. Most users will use CC_EXP_GRP.)
3. Choose values for Account, Department and/or Fund as appropriate for your needs. (You may enter the same value in the "From" and "To" fields, you may enter a range of values, or you may leave the % as a wildcard.)
4. Click the "Save" button.



Budget Inquiry Criteria
Budget Overview

Inquiry: 046% Description: 046 Departments - Expense

[Amount Criteria](#) Search Clear Reset

Budget Type

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

Time Span

*Type of Calendar: Detail Budget Period

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	2009	2009	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

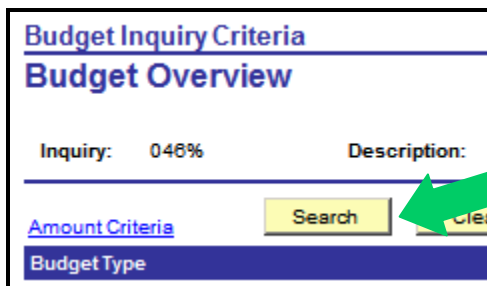
ChartField	ChartField From Value	ChartField To	ChartField Value Set	Update/Add
Account	740000	740000		Update/Add
Dept	046000	046005		Update/Add
Fund	%	%		Update/Add

Budget Status

- Open
- Closed
- Hold

Save Return to Search Notify Refresh page (Alt+0) Add Update/Display

To complete the inquiry, click the "Search" button at the top.



Budget Inquiry Criteria
Budget Overview

Inquiry: 046% Description:

[Amount Criteria](#) Search Clear

Budget Type

Step 3

Review the Inquiry Results.

Inquiry Results

Budget Overview

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 (5 Rows)

Budget:	160,231.50	Net Transfers:	38.50
Expense:	49,605.62		
Encumbrance:	106.65		
Budget Balance:	110,519.23		
Associate Revenue:	0.00		
Available Budget:	110,519.23		

Budget Overview Results [Customize](#) | [Find](#) | [View All](#) | first 1-5 of 5 Last

	Ledger Group	Dept	Fund	Account	Budget Period	Budget	Expense	Encumbrance	Available Budget*	Percent Available	
1	CC_EXP_GRP	046000	110	740000	2009	21,202.00	5,532.18	0.00	15,669.82	73.91	F5
2	CC_EXP_GRP	046001	330	740000	2009	0.00	788.83	0.00	-788.83	0.00	F5
3	CC_EXP_GRP	046003	110	740000	2009	123,991.00	38,217.86	0.00	85,773.14	69.18	F5
4	CC_EXP_GRP	046004	620	740000	2009	0.00	0.00	0.00	0.00	0.00	F5
5	CC_EXP_GRP	046005	110	740000	2009	15,038.50	5,066.75	106.65	9,865.10	65.60	F5

Note: Detailed transaction information can be accessed by clicking on any of the blue links in the bottom section. For instance, clicking the [21,202.00](#) link would show what the Budget for Line 1 consists of.

Activity Log

Ledger: CC_BUD

Activity Log

	Tran Line	Document Label	Document ID	Ref Bdgt?	Dept	Fund	Account	Budget Period	Year	Period	Monetary Amount
	289	Journal ID:	BD00000002	N	046000	110	740000	2009	2009	1	0.00
	768	Journal ID:	BUD00000002	N	046000	110	740000	2009	2009	1	21,202.00