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Commitment Control - Create/Review Budget Overview Inquiry Business Process Guide

Table of Contents

Overview	3
Business Process	3
Benefits	3
Assumptions.....	3
Business Process Flow	3
Roles and Responsibilities.....	3
Budget Office	3
All Departments	4
Related Reports.....	4
Business Process Steps.....	4
Step 1 – Navigate to Budgets Overview.....	4
Step 2 – Enter the Criteria.....	5
Review/Update Budget Overview Inquiry Criteria	5
Step 3 – Review Budget Overview Inquiry Results	6
Step 4 – Review Budget Details	7
Ledger Details	7
Step 5 – Ledger Details.....	8
Step 6 – Activity Log.....	8
Activity Log.....	8
Step 7 – Show Transaction Type	9
Setting up Ledger Inquiry Sets	10
Step 1 – Enter the Criteria	10
Step 2 – Review Budget Overview Inquiry Results for Ledger Inquiry Set	11
Setting up Project Inquiry	12
Step 1 – Enter the Criteria	12
Review/Update Budget Overview Inquiry Criteria Page.....	12
Step 2 – Review Budget Overview Inquiry Results for GRT_PARENT	13
Step 3 – Review Budget Overview Inquiry Results for GRT_CHILD1	14
Budget Overview Budget Details Navigation	14
Step 4 – Review Budget Details	15
Budget Details	15

Step 5 – Parent/Children Link	15
Setting up Detail Inquiry	16
Step 1 – Enter the Criteria	16
Review/Update Budget Overview Inquiry Criteria screen	16
Step 2 – Review Budget Overview Inquiry Results for Detail Ledger Inquiry	17
Questions.....	18
Documentation Revision.....	189

Overview

The Budgets Overview inquiry process provides a view of budget activity for one or multiple budgets, from the level of a ledger group or ledger inquiry set to the more detailed level of individual budgets. From the overview, a user can further drill down to budget journal lines and source transaction lines.

Business Process

This Business Process Guide will provide the steps to view or create Budget Overview inquiries.

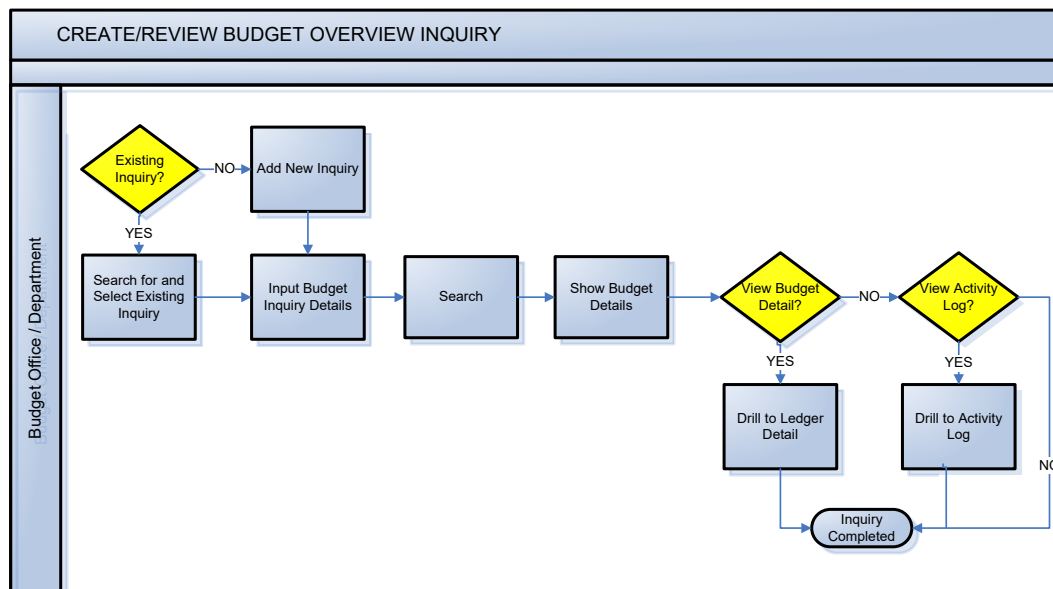
Benefits

The process allows users to view detailed information for selected activities and see the individual entries that make up the balances displayed. This is useful in budget administration by both the Budget Office and individual departments.

Assumptions

It is assumed that the principal users will be Budget Officers and Departments and that they will have the appropriate level of security to view the information presented.

Business Process Flow



Roles and Responsibilities

Listed below is a general overview of the roles and responsibilities. However, the responsible office for the tasks listed below varies among the participating institutions.

Budget Office

This will be the primary role and directly affected or active participant in the business process.

All Departments

This will be the secondary role, made up of those providing input from the business process or that are indirectly affected.

Related Reports

1. Budget Status Report
2. Ledger Details Report
3. Associated Budgets Report

Business Process Steps

Step 1 – Navigate to Budgets Overview

Navigation: NavBar Menu > Commitment Control > Review Budget Activities > Budgets Overview

Fluid Navigation: Commitment Control Landing Page > Budgeting and Planning Tile > Budgets Overview

Enter or search for a previously defined **Inquiry Name**. Then click **Search**. If no Inquiry was previously defined, click the 'Add a New Value tab' and click **Add**.

You can create "OPE" – for expense accounts.

"OPR" – for revenue accounts.

"OPE_OPR" – It will show both expense and revenue in single view. (*Setting up Ledger Inquiry Sets Page 10*)

Step 2 – Enter the Criteria

Budget Overview

Budget Inquiry Criteria

Inquiry OPE_HSC Description OPE_EXPENSE_UTHTY

Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity

Budget Type

*Business Unit UHTTY Ledger Group/Set Ledger Group Ledger Group OPE

☐ View Stat Code Budgets ☐ Display Chart Operations - Expense

TimeSpan

*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"/>	OPE	BY	2025	2025	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Program	%	%	i		Update/Add
Cost Centre	%	%	i		Update/Add
Project	%	%	i		Update/Add

Budget Status

☒ Open ☒ Closed ☒ Hold

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Review/Update Budget Overview Inquiry Criteria

1. Enter a **Description** of the Inquiry in the Description field.
2. Enter/select the appropriate business unit in the **Business Unit** Field.
3. In the **Ledger Group/Set** field, select from the drop-down box whether a ledger group or a ledger inquiry set will be used. For these instructions, it is assumed that a ledger group is used, however, a section has been created for Ledger Inquiry Set, Grant Projects, and Plant Projects that describes this process.
4. In the **Ledger Group** field, select the desired ledger group name (e.g. OPE, OPR, etc.). It is important to select this through the magnifying glass/search process rather than just entering the name so that the page will auto-populate other fields including portions of the Budget Criteria section and the ChartFields in the ChartField Criteria section.
5. In the TimeSpan section, the **Type of Calendar** field must be populated. The default is Detail Budget Period. Step 6 as described assumes that the default is used.
6. Within the Budget Criteria section, the **Ledger Group**, **Calendar ID**, **From Budget Period**, and **To Budget Period** are auto-populated. From Budget Period and To Budget Period can be changed from the default current period if desired by entering the appropriate dates. Budget Periods can be identified by using the magnifying glass icon next to each field. The default auto-populate activity selects Include Adjustment Period(s) and does not select Include Closing Adjustments.

7. Enter **Chartfield Criteria** upon which the query will be based. In lieu of entering Chartfield value ranges, Chartfield Value Sets can be used if they have been established.
8. Ensure that the appropriate budgets have been included by selecting or deselecting checkboxes in the **Budget Status** box.
9. Click **Save** to save the inquiry.
10. Click **Search** to view Inquiry Results.

Step 3 – Review Budget Overview Inquiry Results

Please note that the totals below are taken from a lower environment and do not reflect actual budgets.

Inquiry Results



Business Unit SAD01
Ledger Group OPE
Type of Calendar Detail Budget Period
Amounts in Base Currency USD
Revenue Associated: ☒

[Return to Criteria](#)
Max Rows
[Display Options](#)
[Search](#)

Ledger Totals (1 Rows)

Budget	45,000.00	Net Transfers	0.00
Expense	9,541.50		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	35,458.50		
Associate Revenue	0.00		
Available Budget	35,458.50		

Budget Overview Results [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | First 1 of 1 Last




	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Function	
1			OPE	A4000	Operating Expenses	2100	E&G General Funds	HEA100	Health Affairs	700	Institution

< >

[Return to Criteria](#) *Notes

Click on the **Details** icon to travel to the screen where more detailed information is presented.

Budget Overview Results [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | First 1 of 1 Last

	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Function	
1	 		OPE	A4000	Operating Expenses	2100	E&G General Funds	HEA100	Health Affairs	700	Institution

< >

[Return to Criteria](#) *Notes

Step 4 – Review Budget Details

Budget Details					
Display Chart					
Ledger Amounts					
Budget:	45,000.00 USD			Max Rows 100	
Expense:	9,541.50 USD			Attributes	
Encumbrance:	0.00 USD			Parent / Children	
Pre-Encumbrance:	0.00 USD			Associated Budgets	
Associate Revenue	0.00 USD				
Available Budget					
Without Tolerance	35,458.50	USD	Percent (78.8%)	Forecasts	
With Tolerance	35,458.50	USD	Percent (78.8%)		
Budget Exceptions					
Exception Errors	0	Exception Warnings	0		
OK					

Ledger Details

1. To view the Ledger detail, click the **Drill to Ledger** Icon. Proceed to Step 5 in this process description.
2. To view the Activity Log, click the **Drill to Activity Log** Icon. Proceed to Step 6 in this process description.

Step 5 – Ledger Details

X
Help

Business Unit SAD01
Ledger OPE_BUD

Budget Details
Personalize | Find |

Budget Chartfields
Amounts

	Account	Fund	Dept	Cost Center	Function	Project	Budget Period
	A4000	2100	HEA100	21000038	700		2022

OK

Click the **Magnifying Glass icon** to view more detailed information on the underlying journal activity.

Step 6 – Activity Log

X
Help

Ledger OPE_BUD

Activity Log
Personalize | Find | View All |


		Tran Line	Document Label	Document ID	Ref Bdgt?	Account	Fund	Dept	Cost Center	Function	Project	Budget
		304	Journal ID:	ORIG565999	N	A4000	2100	HEA100	21000038	700		2022


OK

Activity Log

Click the **desired detail icon** for additional information. With the Activity Log, a user creates a one-time or a reusable inquiry to view transaction lines and affected budgets for budget-checking transactions of a single source transaction type. Enter document-related criteria fields that become available depending on the transaction type specified to further refine the search criteria.

Step 7 – Show Transaction Type

Budget Transactions Types can be viewed from Budget Overview by clicking on the  icon.

Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Function	
1		OPE	A4000	Operating Expenses	2100	E&G General Funds	HEA100	Health Affairs	700	Institution

Budget Transaction Types							
Ledger Group	Account	Fund Code	Department	Cost Center	Function	Project	Budget Period
OPE	A4000	2100	HEA100	21000038	700		2022
Budget Transaction Type		Budget Amount		Base Currency			
Original		45,000.00		USD			
Adjustment		0.00		USD			
Transfer Adjustment		0.00		USD			
Transfer Original		0.00		USD			
Closing		0.00		USD			
Roll Forward		0.00		USD			
Total Budgeted Amount		45,000.00		USD			

Setting up Ledger Inquiry Sets

Ledger Inquiry Sets allow for the viewing of Operations Expense (OPE) and Operations Revenue (OPR) ledgers in one inquiry. The steps to set up a Budget Overview Inquiry will remain the same as described beginning on page 4, please see below for additional information/insight.

Step 1 – Enter the Criteria

Budget Overview

Budget Inquiry Criteria

Inquiry: OPEOPR_UTH Description: OPE_OPR_UTHTY

Budget Type

*Business Unit: UTHTY Ledger Group/Set: Ledger Inquiry Set Ledger Inquiry Set: OPE_OPR

☐ View Stat Code Budgets

Time Span

*Type of Calendar: Detail Budget Period

Budget Criteria Personalize | Find | View All | First 1-2 of 2 Last

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	OPE	BY	2025	2025	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	OPR	BY	2025	2025	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%			Update/Add
Dept	%	%			Update/Add
Fund	%	%			Update/Add
Function	%	%			Update/Add
Program	%	%			Update/Add
Cost Centr	%	%			Update/Add
Project	%	%			Update/Add

Budget Status

☒ Open

☒ Closed

☒ Hold

1. Enter a **Description** of the Inquiry in the Description field.
2. Enter/select the appropriate business unit in the **Business Unit** Field. The magnifying glass icon can be used to search for a business unit if desired.
3. In the **Ledger Group/Set** field, select from the drop-down box whether a ledger group or a ledger inquiry set will be used. For these instructions, it is assumed that a **ledger inquiry set** is used.
4. In the **Ledger Group** field, select the desired ledger group name (e.g. **OPE_OPR**). It is important to select this through the magnifying glass/search process rather than just entering the name so that the page will auto-populate other fields including portions of the Budget Criteria section and the ChartFields in the ChartField Criteria section.

5. In the **TimeSpan** section, the Type of Calendar field must be populated. The default is Detail Budget Period. Step 6 as described assumes that the default is used.
6. Within the Budget Criteria section, the **Ledger Group, Calendar ID, From Budget Period, and To Budget Period** are auto-populated. From Budget Period and To Budget Period can be changed from the default current period if desired by entering the appropriate dates. Budget Periods can be identified by using the magnifying glass icon next to each field. The default auto-populate activity selects Include Adjustment Period(s) and does not select Include Closing Adjustments.
7. Enter **Chartfield Criteria** upon which the query will be based. In lieu of entering Chartfield value ranges, Chartfield Value Sets can be used if they have been established.
8. Ensure that the appropriate budgets have been included by selecting or deselecting checkboxes in the **Budget Status** box.
9. Click **Save**.
10. Click **Search**.

Step 2 – Review Budget Overview Inquiry Results for Ledger Inquiry Set

Please note that the totals below are taken from a lower environment and do not reflect actual budgets.

[Inquiry Results](#)

Business Unit

SAD01

Type of Calendar

Detail Budget Period

Amounts in Base Currency

USD

Revenue Associated:

☒

[Return to Criteria](#)

Max Rows

[Display Options](#)

Search

Ledger Totals (3 Rows)

Budget	3,888,792.17	Revenue Estimate	0.00
Expense	1,525,672.72	Recognized Revenue	0.00
Encumbrance	0.00	Available Budget	0.00
Pre-Encumbrance	0.00	Collected Revenue	0.00
Budget Balance	2,363,119.45	Uncollected Revenue (Rec-Coll)	0.00
Associate Revenue	0.00		
Available Budget	2,363,119.45		

Budget Overview Results

Personalize | Find | View All |

First 1-3 of 3 Last

	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Function	
1			OPE	A1000	Staff Salaries	2100	E&G General Funds	HEA100	Health Affairs	700	Institution
2			OPE	A3000	Payroll Related Costs	2100	E&G General Funds	HEA100	Health Affairs	700	Institution
3			OPE	A4000	Operating Expenses	2100	E&G General Funds	HEA100	Health Affairs	700	Institution

[Return to Criteria](#)

*Notes

Setting up Project Inquiry

Budget Overview Inquiry allows for viewing of Project Budgets when a Project Ledger Group is selected (GRT_PARENT, GRT_CHILD1, PLANT, etc.). Grant Ledgers Grant Parent (GRT_PARENT) and Grant Child (GRT_CHILD1) will be used for this example. The steps to set up a Budget Overview Inquiry will remain the same as described beginning on page 4, please see below for additional information/insight.

Step 1 – Enter the Criteria

Budget Inquiry Criteria

Budget Overview

Inquiry INQUIRY Description UTPB1 Inquiry

Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity

Budget Type

*Business Unit UTPB1 Ledger Group/Set Ledger Group Ledger Group GRT_CHILD1

☐ View Stat Code Budgets
☐ Display Chart

TimeSpan

*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"/>	GRT_CHILD1				<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Cost Centr	%	%	i		Update/Add
PC Bus Unit	%	%	i		Update/Add
Project	1000004301	%	i		Update/Add
Activity	%	%	i		Update/Add

Budget Status

☒ Open
☒ Closed
☒ Hold

Save Return to Search Notify Refresh Add Update/Display

Review/Update Budget Overview Inquiry Criteria Page

1. Enter a **Description** of the Inquiry in the Description field.
2. Enter/select the appropriate business unit in the **Business Unit** Field. The magnifying glass icon can be used to search for a business unit if desired.
3. In the **Ledger Group/Set** field, select from the drop-down box whether a ledger group or a ledger inquiry set will be used. For these instructions, it is assumed that a **ledger inquiry group** is used.
4. In the **Ledger Group** field, select the desired ledger group name (e.g. **GRT_PARENT** or **GRT_CHILD1**). It is important to select this through the magnifying glass/search process rather than just entering the name so that the page will auto-populate other fields including portions

of the Budget Criteria section and the ChartFields in the ChartField Criteria section. NOTE: GRT_PARENT will display the overall Project Budget, and GRT_CHILD1 will display the Budget Accounts associated with the Project (please see below for screenshots).

5. In the **TimeSpan** section, the Type of Calendar field must be populated. The default is Detail Budget Period. Step 6 as described assumes that the default is used.
6. Within the Budget Criteria section, the **Ledger Group, Calendar ID, From Budget Period, and To Budget Period** are auto-populated. From Budget Period and To Budget Period can be changed from the default current period if desired by entering the appropriate dates. Budget Periods can be identified by using the magnifying glass icon next to each field. The default auto-populate activity selects Include Adjustment Period(s) and does not select Include Closing Adjustments.
7. Enter **Chartfield Criteria** upon which the query will be based. In lieu of entering Chartfield value ranges, Chartfield Value Sets can be used if they have been established.
8. Ensure that the appropriate budgets have been included by selecting or deselecting checkboxes in the **Budget Status** box.
9. Click **Save**.
10. Click **Search**.

Step 2 – Review Budget Overview Inquiry Results for GRT_PARENT

Please note that the totals below are taken from a lower environment and do not reflect actual budgets.

Inquiry Results

Business Unit

UTPB1

Ledger Group

GRT_PARENT

Type of Calendar

Detail Budget Period

Amounts in Base Currency

USD

Revenue Associated:

☐

Return to Criteria

Max Rows

100

Display Options

Search

Ledger Totals (100 Rows)

Budget	50,758,481.92	Net Transfers	0.00
Expense	46,945,478.31		
Encumbrance	-197,148.77		
Pre-Encumbrance	52.80		
Budget Balance	4,010,099.58		
Associate Revenue	0.00		
Available Budget	4,010,099.58		

Budget Overview Results

Personalize

Find

View All

First

1-100 of 100

Last

	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	PC Bus Unit	PC Business Unit Description	Project
1			GRT_PARENT	G1000	L1 All Expenses	2100	E&G General Funds	UTPSP	UT Permian Basin Sponsor Prog	1000003739
2			GRT_PARENT	G1000	L1 All Expenses	2115	E&G Special Items (i.e. SALSI)	UTPSP	UT Permian Basin Sponsor Prog	1000000938
3			GRT_PARENT	G1000	L1 All Expenses	3100	DES Organized Act Rel to Instr	UTPSP	UT Permian Basin Sponsor Prog	1000003313

Step 3 – Review Budget Overview Inquiry Results for GRT_CHILD1














Please note that the totals below are taken from a lower environment and do not reflect actual budgets.

Inquiry Results										
Business Unit		UTPB1								
Ledger Group		GRT_CHILD1								
Type of Calendar		Detail Budget Period								
Amounts in Base Currency		USD								
Revenue Associated:		<input type="checkbox"/>								
Return to Criteria		Max Rows		100		Display Options		Search		
Ledger Totals (2 Rows)										
Budget		19,034.00				Net Transfers		0.00		
Expense		5,163.05								
Encumbrance		0.00								
Pre-Encumbrance		0.00								
Budget Balance		13,870.95								
Associate Revenue		0.00								
Available Budget		13,870.95								
Budget Overview Results										
Personalize Find View All First 1-2 of 2 Last										
	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Function
1			GRT_CHILD1	G4010	L4 Salaries	5200	RES State Sponsored Programs	FINAID	Financial Aid	100
2			GRT_CHILD1	G4020	L4 Fringe Benefits	5200	RES State Sponsored Programs	FINAID	Financial Aid	100
Return to Criteria *Notes										



Budget Overview Budget Details Navigation

Click on the **Details** icon to travel to the screen where more detailed information is presented.

Step 4 – Review Budget Details




Budget Details				
<div>Display Chart </div>				
Ledger Amounts				
Budget:	62,319.18 USD			Attributes Parent / Children Associated Budgets
Expense:	0.00 USD			
Encumbrance:	0.00 USD			
Pre-Encumbrance:	0.00 USD			
Associate Revenue 0.00 USD				
Available Budget				
Without Tolerance	62,319.18 	USD	Percent (100%) 	
With Tolerance	62,319.18 	USD	Percent (100%) 	
Budget Exceptions				
Exception Errors	0	Exception Warnings	0	
OK				

Budget Details

1. To view the Ledger detail, click the **Drill to Ledger**  Icon.
2. To view the Activity Log, click the **Drill to Activity Log**  Icon.
3. To view the Attributes, click the **Attributes** link.
4. To view the Parent/Children associated with this Project, click the **Parent/Children** link. Proceed to step 5 for example.

Budget Detail Attributes	
Control Budget Attributes	
Commitment Control Option	Control
Tolerance Percent	0.00000000
Budget Status	Open
Begin Date	10/01/2020
End Date	09/30/2022
OK	

Step 5 – Parent/Children Link

Parent & Children Budgets										
<input checked="" type="checkbox"/> Parent Budget <input type="checkbox"/> Child Budget Amounts in Base Currency USD										
Children Personalize Find View All   First 1-3 of 4 Last										
<div>Budget Chartfields Budget Amounts </div>										
	Ledger Group	Account	Fund	Dept	Cost Center	Function	PC Bus Unit	Project	Activity	Budget Period
1	GRT_CHILD1	G4010	2100	ENGELE	21112000	200	UTPSP	1000003739	1	
2	GRT_CHILD1	G4010	2100	ENGELE	21130009	200	UTPSP	1000003739	1	
3	GRT_CHILD1	G4020	2100	ENGELE	21112000	200	UTPSP	1000003739	1	
Parent: None										
OK										

Setting up Detail Inquiry

The Detail Ledger Inquiry allows for viewing of transactions by General Ledger Account (expense Account). The steps to set up a Budget Overview Inquiry will remain the same as described beginning on page 5, please see below for additional information/insight.

Step 1 – Enter the Criteria

Budget Inquiry Criteria
Budget Overview

Inquiry INQUIRY Description UTEP1 Inquiry

Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity

Budget Type

*Business Unit UTEP1 Ledger Group/Set Ledger Group Ledger Group DETAIL

☐ View Stat Code Budgets ☐ Display Chart Commitment Detail

TimeSpan

*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"/>	DETAIL	BY	2021	2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Program	%	%	i		Update/Add
Cost Centr	14152503	%	i		Update/Add
PC Bus Unit	%	%	i		Update/Add
Project	%	%	i		Update/Add
Activity	%	%	i		Update/Add

Budget Status

☒ Open
☒ Closed
☒ Hold

Save Return to Search Notify Refresh Add Update/Display

Review/Update Budget Overview Inquiry Criteria screen

1. Enter a **Description** of the Inquiry in the Description field.
2. Enter/select the appropriate business unit in the **Business Unit** Field. The magnifying glass icon can be used to search for a business unit if desired.
3. In the **Ledger Group/Set** field, select from the drop-down box whether a ledger group or a ledger inquiry set will be used. For these instructions, a **ledger inquiry group** is used.
4. In the **Ledger Group** field, select the desired ledger group name (e.g. **DETAIL**). It is important to select this through the magnifying glass/search process rather than just entering the name so that the page will auto-populate other fields including portions of the Budget Criteria section and the ChartFields in the ChartField Criteria section.

5. In the **TimeSpan** section, the Type of Calendar field must be populated. The default is Detail Budget Period. Step 6 as described assumes that the default is used.
6. Within the **Budget Criteria** section, the Ledger Group, Calendar ID, From Budget Period, and To Budget Period are auto-populated. From Budget Period and To Budget Period can be changed from the default current period if desired by entering the appropriate dates. Budget Periods can be identified by using the magnifying glass icon next to each field. The default auto-populate activity selects Include Adjustment Period(s) and does not select Include Closing Adjustments.
7. Enter **Chartfield Criteria** upon which the query will be based. In lieu of entering Chartfield value ranges, Chartfield Value Sets can be used if they have been established.
8. Ensure that the appropriate budgets have been included by selecting or deselecting checkboxes in the **Budget Status** box.
9. Click **Save**.
10. Click **Search**.

Step 2 – Review Budget Overview Inquiry Results for Detail Ledger Inquiry

Please note that the totals below are taken from a lower environment and do not reflect actual budgets.

Lender Group		DETAIL	
Type of Calendar		Detail Budget Period	
Amounts in Base Currency		USD	
Revenue Associated:		<input type="checkbox"/>	
Return to Criteria	Max Rows	100	Display Options <input type="button" value="Search"/>
Ledger Totals (3 Rows)			
Budget	0.00	Net Transfers	0.00
Expense	2,704.92		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	-2,704.92		
Associate Revenue	0.00		
Available Budget	-2,704.92		

Budget Overview Results											Personalize	Find	View All	First	1-3 of 3	Last
	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Program	Prd	Det				
1			DETAIL	50403	SW Teaching Assistant	2100	E&G General Funds	710000	College of Education							
2			DETAIL	57103	Prem Share Active - HEGI	2100	E&G General Funds	710000	College of Education							
3			DETAIL	57701	Workers Compensation	2100	E&G General Funds	710000	College of Education							

[Return to Criteria](#) *Notes

Questions?

For further queries regarding any error while reviewing Budget Overview, please reach out to budget@uttyler.edu.

Thank you!

Documentation Revision

Change Record

This documentation provides best practice guidance for the FMS Team and the information enclosed will be utilized by the employees of the FMS Team.

Date	Author	Version	Description
06/01/2022	Amanda N.	1	Last revised
04/18/2023	Gaoussou T.	2	Updated the logo, changed title's font to Calibri, size to 24, and color to dark blue (#003767), added revision period in footer, updated document spacing and table of contents.