

Budget Details

The Budget Details page is used to view financial activity for a single budget account (e.g. B4000, G4010).

1. To view **Budget Details**, begin by navigating to: **Navigator > Financials > Commitment Control > Review Budget Activities > Budget Details**

2. From the **Budget Details** search page:

- a. Verify the Business Unit is defaulting with "UTARL".
- b. Enter or lookup a **Ledger group**:
 - i. To view the overall balance for a Project, select ledger "GRT_PARENT" for a Sponsored Project or select "PLANT_PRNT" for a Capital Project.
 - ii. To view budget activity for a single budget account, select ledger "GRT_CHILD1" for a Sponsored Project or select "PLANT" for a Capital Project.
 - iii. To view budget activity for a Cost Center, select ledger "OPE_CHILD1" or "OPR".
 - iv. To view budget activity for a specific GL Account, select ledger "DETAIL".

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

*Business Unit =

*Ledger Group =

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail								
Business Unit	Ledger Group	Account	Fund Code	Department	Function	Project	Cost Center	Budget Period
UTARL	OPE_CHILD1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- c. Click **Search**.
3. Depending on the Ledger group selected, the appropriate **ChartFields** will be available to search by.
 4. If multiple results are available matching your input criteria, they will be displayed below. Click **View Details** on the account you would like to view.

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Account	Fund Code	Department	Function	Project	Cost Center	Budget Period
UTARL	OPE_CHILD1			320000				2022

Search

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

	Business Unit	Ledger Group	Account	Fund Code	Department	Function	Project	Cost Center	Budget Period	View Details
1	UTARL	OPE_CHILD1	B4000	3140	320000	700		310083	2022	View Details
2	UTARL	OPE_CHILD1	B4000	3140	320000	100		310086	2022	View Details

[Return to Search](#) [Notify](#)

5. The **Commitment Control Budget Details** page is displayed. This page provides a summary of budget information for a specific Cost Center or Project. The header section contains the ledger group, budget account, and the chartfield values that you are currently viewing. Balances are updated as soon as transactions receive a “Valid” budget check.

Commitment Control Budget Details

Business Unit	Ledger Group	Account	Fund	Dept	Cost Center	Function	Project	Budget Period
UTARL	OPE_CHILD1	B4000	2100	315205	200235	800		2021

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

Ledger Amounts

Budget:	0.00 USD			Max Rows <input type="text" value="100"/>
Expense:	7,200.00 USD			Attributes
Encumbrance:	4,000.00 USD			Parent / Children
Pre-Encumbrance:	1,600.00 USD			Associated Budgets
Associate Revenue	0.00 USD			

Available Budget



Without Tolerance	-12,800.00 USD	Percent	(0%)	Forecasts
With Tolerance	-12,800.00 USD	Percent	(0%)	

Budget Exceptions

Exception Errors	0	Exception Warnings	0	Budget Exceptions
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6. The **Ledger Amounts** section contains:
 - a. Total amount budgeted for the Cost Center or Project
 - b. Total Expenses charged against the budget (e.g. AP Vouchers, Expense Reports, Journals)
 - c. Total Encumbrances charged against the budget (e.g. Purchase Orders and Travel Authorizations)

- d. Total Pre-Encumbrances charged against the budget (e.g. Requisitions) The Budget Details page allows you to view one ledger at a time (e.g. OPE_CHILD1, OPR, Grant Parent or Grant Child).
7. The **Available Budget** section indicates the total dollar amount remaining in the budget. This amount is determined by the total of the Budget less Expenses, Encumbrances, and Pre-Encumbrances.
8. To view additional details for the **Ledger Amounts**, click the associated link or icon.
 - a. The **Drill to Ledger** (green icon)  displays budget period information by Accounting Period. It will also provide the transaction amount for each period.
 - b. The **Activity Log** (gold icon)  displays transaction details.
 - c. The **Parent/Children** link displays budget account information. If viewing information at the Parent level, this section provides all child budget accounts established for the Cost Center or Project and the available budget for each account