Checking for Budget Exceptions

This instruction guide provides two step-by-step procedures for checking budget exceptions:

Method 1: Checking Budget Exceptions via Commitment Control
Method 2: Drilling Down from a KK Budget Inquiry

Definition: A Budget Error Exception results from a transaction that fails budget checking, causing an error or warning to be issued.

Method 1: Checking Budget Exceptions via Commitment Control

1. Click the Main Menu button.
2. Click the Commitment Control menu.
3. Click the Review Budget Check Exceptions menu.
4. Click the Budget Exceptions menu.

Searching

Values may be entered into the ChartFields manually, by using the Look up button or by using the Type Ahead feature.

5. Enter the desired Chartfield values into the appropriate fields as needed.
6. Scroll down, if needed.
7. Click the Search button.
8. Scroll down, if needed.
9. Select the desired record from the Search Results list.
10. Scroll down, if needed, to view indicated exception (see figure 1).

Figure 1. Transactions with Budget Exceptions section
11. After observing the indicated Exception, click the **Return to Search** button.

12. Click the **Clear** button.

**Method 2: Drilling Down from a KK Budget Inquiry**

1. Click the **Main Menu** button.
2. Click the **Commitment Control** menu.
3. Click the **Review Budget Activities** menu.
4. Click the **Budget Details** menu.

**Searching**

Values may be entered into the ChartFields manually, by using the **Look up** button or by using the **Type Ahead** feature.

**Note:** In this example we are using specific Chartfields, however you would enter the appropriate Chartfield values into the associated fields for your unique search requirements.

5. Click the **Look up Ledger Group** button.
6. Click the **Look Up** button.
7. Click the **APPROP** link.
8. Click in the **Account** field.
9. Enter the desired information into the **Account** field (e.g., "700").
10. Select the desired Account.
11. Enter the desired information into the **Department** field (e.g., "3307").
12. Select the desired department.
13. Enter the desired information into the **Fund Code** field (e.g., "101").
14. Enter the desired information into the **Budget Reference** field (e.g., "C").
15. Select the desired Budget Reference.
16. Enter the desired information into the **Budget Period** field (e.g., "2015").
17. Click the **Search** button.
18. Click the **View Details** link.
If the transaction contains any budget exceptions, the Budget Exceptions link will be active. (See figure 2.)

![Budget Exceptions link active](image)

**Figure 2.** Budget Exceptions link active

19. Click the active **Budget Exceptions** link.

20. Note indicated Exception(s), and then click the **Return to Search** button. 
   **Note:** All exceptions need to be corrected before the transaction will be processed.

21. Click the **Clear** button.

If you need help with...

- Technical issues, contact the UF Help Desk:
  - 392-HELP
  - helpdesk@ufl.edu

- Policies and Directives, 
  - Contact the University Budget Office at 392-2402

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