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**

**Navigation**

Navigate through **Nav Bar > Main Menu > Financials > Commitment Control > Review Budget Check Exceptions > Budget Exceptions.**

**Searching**

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

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

![Advanced Transaction Criteria](image)

**Figure 1.** Transactions with Budget Exceptions section

7. After observing the indicated Exception, click the **Return to Search** button.
8. Click the **Clear** button.
Method 2: Drilling Down from a KK Budget Inquiry

Navigation
Navigate through Nav Bar > Main Menu > Financials > Commitment Control > Review Budget Activities > Budget Details.

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.

1. Click the Look up Ledger Group button.
2. Click the Look Up button.
3. Click the APPROP link.
4. Click in the Account field.
5. Enter the desired information into the Account field (e.g., "700").
6. Select the desired Account.
7. Enter the desired information into the Department field (e.g., "3307").
8. Select the desired department.
9. Enter the desired information into the Fund Code field (e.g., "101").
10. Enter the desired information into the Budget Reference field (e.g., "c").
11. Select the desired Budget Reference.
12. Enter the desired information into the Budget Period field (e.g., "2015").
13. Click the Search button.
14. Click the View Details link.

If the transaction contains any budget exceptions, the Budget Exceptions link will be active. (See figure 2.)
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.

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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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