

Saving Searches with Budgets Overview

Due to the redesigned Budget Details Search Screen in myUFL 9.2, the ability to save specific search criteria outside of a ledger group is no longer available within Budget Details. However, saved searches are available using Budgets Overview.

Navigation

Navigate through Nav Bar > Main Menu > Financials > Commitment Control >

Review Budget Activities > Budgets Overview.

Process

- 1. Click the **Add a New Value** tab and enter a new inquiry name.
- 2. Click Add.

Budgets Overview

Find an Existing Value	Add a New Value
Inquiry Name FLEX	×
Add	

Find an Existing Value Add a New Value



- 3. Select your Ledger Group (i.e., CASH, BASED, KKGMCHD, APPROP).
- 4. Enter the relevant **Chartfield criteria**.
- 5. Click the **Save** button.
- 6. Click the **Search** button.

Budget Ov	erview	1									
	Inquiry FLEX					Descriptio	on Flex fund	143			7
Amount Criteria	Search	h	Clear	R	eset						
Budget Type											
"Busine:	ss Unit UFLOR 🔍			10	edger Gr	oup/Set Leo	dger Group	•	Ledge	or Group CASH	BASED
	View Sta Display (at Code Chart	Budgets						Cash Base	d	
TimeSpan											
*Type of Ca	lendar Detail Budg	jet Peri	od 🔹								
Budget Criteria							Person	alize F	ind View All 🖉 🔤	First 🕙 1	of 1 🕑 Last
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	CASH_BASED	ĺ	SP		CUM	2	CUM	0	2	E	5
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Dept	32000000	0	32090300	۹,	0	[9	Update/	/Add		Hold
Source	96	9	%	9	0		9	Update/	Add		
Fund	143	9	143	9	0		9	Update	/Add		
Program	96	0	%	9	0		9	Update	/Add		
Flex	96	2	96		0	-	2	Update	Add		
100000000	96	0	96	a	0		Q	Update/	/Add		

Figure 1.1 CASH_BASED Ledger Group Example



Budget Inquiry Budget Ove	Criteria erview	/								
	Inquiry PROJECT			Descri	ption Project ba	ased in	quiry		Î	
Amount Criteria Budget Type	Search	Clear	Reset							
*Busines	s Unit UFLOR		Ledger Gro	oup/Set	Ledger Group	Ŧ	Ledg	er Group	KGMCHD	
View Stat Code Budgets Grants Child KK Ledger Group Image: Display Chart Image: Child KK Ledger Group										
TimeSpan										
*Type of Cal	endar Detail Budget Per	iod 🔻								
Budget Criteria					Person	alize I	Find View All 🔄 🗎	Firs	t 🕚 1 of 1 🕑 Last	
Select	Ledger Group	Calendar ID	From Budg	et Period	To Budget Per	iod	Include Adjustment Period(s)	Include C	osing Adjustments	
V	ККӨМСНД	SP	CUM	Q	CUM	<u> </u>				
ChartField Criter	ria		_					Budg	get Status	
ChartField	ChartField From Value	ChartField To	Info	ChartFie	eld Value Set	Update	e/Add		Open	
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Fund	%	%	۹ 🚯			Update	e/Add			
PC Bus Unit	%	%	۹ 🚯		Q	Update	e/Add			
Project	00020994	%	۹ 🚯			Update	e/Add			
Activity	%	%	۹ 🚯			Update	e/Add			
🔚 Save 🔯 F	Return to Search 1	Previous in List	🗐 Next in Li	st 🖭	Notify 🤶 F	lefresh			📑 Add 🖉 Upda	te/Displa;

Figure 1.2 KKGMCHD Ledger Group Example

Budget Inquiry	Criteria	/									
Budget Ove	erview										
	Inquiry APP			Descri	ption Appropria	ations				Î	
Amount Criteria	Search	Clear	Reset								
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*Busines	s Unit UFLOR 🔍		Ledger Gro	up/Set	Ledger Group		- Ledg	jer Gro	APPROF	> 🔍	
	View Stat Cod	e Budgets	Appropriations								
	1 Display Chart										
TimeSpan											
*Type of Cal	endar Detail Budget Per	iod 👻									
Budget Criteria					Persor	alize	Find View All 🔄 🗎		First 🕚 1 o	f 1 🕑 Last	
Select	Ledger Group	Calendar ID	From Budge	t Period	To Budget Pe	riod	Include Adjustment Period(s)	Includ	de Closing A	djustments	
	APPROP	КК	2015	Q	2015	Q					
ChartField Crite	rija		\					-	Budget Stat	us	
ChartField	ChartField From Value	ChartField To	Info	ChartFie	eld Value Set	Upda	ate/Add		\checkmark	Open	
Account	%	%	6		Q	Upda	ate/Add		V	Closed	
Dept	74070000 🔍	%	6		Q	Upda	ate/Add			Hold	
Fund	101	%	•		Q	Upda	ate/Add				
Program	%	%	. 1		Q	Upda	ate/Add				
Bud Ref	CYFWD	%	•		Q	Upda	ate/Add				
F Save	Return to Search 🗂	Previous in List	Next in Lis	st 🔛	Notify 🕄 F	Refres	sh		📑 Ad	d 🖉 Update/Dis	play

Figure 1.3 APPROP Ledger Group Example

7. The results will display all of the cost centers meeting the criteria you entered and you can then drill down on Budget, Expense or Encumbrances.

avorit	es 🖛	Mai	n Menu -	> Commitm	nent Control	▼ > Review E	Budget Activities *	> Budgets Ov	verview			
					1	Business Unit Ledger Group	UFLOR CASH_BASED	Cash Based				
					Тур	e of Calendar	Detail Budget Period					
					Amounts in B Revenu	ase Currency Je Associated:	USD					
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	Pre-Encumbrance					0.00						
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			Ass	ociate Revenu	e		0.00					
			A	vailable Budge	t	10,	291,993.00			λ		
Budget	Overv	iew Res	sults					Persona	alize Find Vie	w All 🖉 🛅	First 3 1-66 of 66	Last
		urce	Fund	Dept	Program	Project	Dept Flex	Budget Period	Budget	Expense	Encumbrance	
52 🖺	Eq.		143	32080500			52MSCP	CUM	0.000	-7,509.540	0.000	*
53 🖺	Eq.		143	32080500			52MTM	CUM	0.000	-296,374.300	158,231.560	
54 🏬	Eq.		143	32080500			520SPHARMD	CUM	0.000	0.000	0.000	
55 🐘	Eq.		143	32080500			52PHARMCE	CUM	0.000	-24,314.470	0.000	
56 🏬	Eq.		143	32080500			52PHARMDL	CUM	0.000	-313,494.450	0.000	
57 📑	Eq		143	32080500			52PHARMENT	CUM	0.000	-73,058.410	0.000	
58 📑	Eq.		143	32080500			52PHARMFD	CUM	0.000	0.000	0.000	
59 📑	Eq.		143	32080500			52PHARMKGI	CUM	0.000	0.000	0.000	

Figure 2.1 Budget Overview Results for CASH_BASED Ledger Group



Favorite	s –	Main Menu	-> Comm	itment Co	ntrol 🔹 > Rev	view Budg	et Activities	> Budgets	Overview					
Inquiry	Res	sults												
					Business	Init UE	OR							
					Ledger G	FOUD KKG	IIII OFENN							
					Type of Cale	ndar Deta	ail Budget Perio	d	-					
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				F	Revenue Assoc	iated:								
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Ledger	Total	ls (4 Rows)												
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			Bu	dget		131,0	024.01		Net	Transfers		0.00		
			Expe	ense		131,0	024.01							
			Encumbra	ance			0.00							
		F	re-Encumbra	ance			0.00							
			Budget Bala	ance			0.00							
		As	sociate Reve	enue			0.00				4			
											Ĩ.			
			Available Bu	dget			0.00				八			
Budget	Oven	view Results						Pe	ersonalize Fin	d I View All 🗔	First	🕙 1-4 of 4 🕑 Last		
		Ledger Group	Account	Fund	Dept	PC Bus Unit	Project	Activity	Budget Period	Budget	Expense	Encumbrance		
1 🔡	Eq.	KKGMCHD	600005	209	29080100	GRANT	00020994	1	CUM	80,679.190	80,679.190	0.000		
2 🔡	Eq.	KKGMCHD	700005	209	29080100	GRANT	00020994	1	CUM	36,509.800	36,509.800	0.000		
3 📑	EQ.	KKGMCHD	771005	209	29080100	GRANT	00020994	1	CUM	1,923.750	1,923.750	0.000		
4 📑	Eq.	KKGMCHD	812005	209	29080100	GRANT	00020994	1	CUM	11,911.270	11,911.270	0.000		
		•										•		

Figure 2.2 Budget Overview Results for KKGMCHD Ledger Group

orites - Ma	n Menu 🕶 > (Commitmen	t Control 🔹 > Re	view Budget	Activities 🔻	> Budgets O	verview					
I				5		5						
uiry Results												
			Busines	s Unit UFLOF	ε							
			Ledger (Group APPRC	APPROP Appropriations							
			Type of Cal	endar Detail B	Budget Period							
		An	nounts in Base Cur Revenue Asso	rency USD								
eturn to Criteria			Max	Rows 100		Display Opti	ons	Search				
lger Totals (1 R	ows)											
		Budget		966,064	1.39		Net T	ransfers		0.00		
		Expense		C	0.00							
	End	cumbrance		(0.00							
	Pre-End	cumbrance		(0.00				1			
	Duda	at Dalanca		066.06	1.20							
	Budg	et Balance		900,004	1.39							
	Associa	te Revenue		0	0.00		×					
	Availa	ble Budget		966,064	1.39							
lget Overview Re	sults					P	esonalize Fin	d View All 💷	First 🕢 1 of 1	Last		
Ledge	er Group Acco	ount Fu	nd Dept	Program	Bud Ref	Budget Period	Budget	Expense	Encumbrance	Pre		
		100 10	1 74070000		CYFWD	2015	966,064.390	0.000	0.000			
	OP 6000	10										

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Figure 2.3 Budget Overview Results for CASH_BASED Ledger Group

NOTE: The Budget Overview Results has a grid that is only a certain width no matter the size of your browser window. This forces you to scroll back and forth to see all of the information. If you click the Zoom icon, the search results will appear in a pop-up window that can be resized to show the whole grid with no need for scrolling.

Budget O	verview Res	ults					Personal	ze Find View	All 🖾 🛅	First @ 1-66 of 66 @ Las	
	urce	Fund	Dept	Program	Project	Dept Flex	Budget Period	Budget	Expense	Encumbrance	

8. Click Add to Favorites link to add the saved search to your Favorites list.



Looking Up Saved Searches

- 1. Navigate to Main Menu > Commitment Control > Review Budget Activities > Budgets Overview.
- 2. Select the **Find an Existing Value** tab.
- 3. Click the **Search** button.
- 4. Select the **desired saved search** from the Search Results list

Favorites -	Main Menu								
Budgets Ov	3udgets Overview								
Enter any inform	nation you have and click Search. Leave fields blank for a list of all values.								
Find on Ewist	Find an Existing Value Add a New Value								
Find an Exist	ing value Add a New value								
Search Cr	Search Criteria								
ocuron or									
inquiry name:	begins with 👻								
Search	Clear Basic Search 🖉 Save Search Criteria								
Search Recu	lte								
Search Kesu									
VIEW AII	Filst (1-16 or 16 () Last								
Inquiry Name	Description								
162	162								
ALLFUNDS	AllFunds								
APP	Appropriations								
APPROP	Approp								
APPROPFUND	Appropriaton fund 106								
AUX	Aux Expense								
CASH BASED	Cash_Based 122 for Tuit and Lottery move								
CASHOTHER									
CASH_BASED	Cash_based 121 for tuit and lottery move								
FLPTU APPR	FLP IU Appropriations								
GRANTS	(DIAIN)								
HFA149									
M&S	Mass ree inquiry								
PROJECT	Project based induity								
STUDENTGUV	Student Government								
1651									
Find on Existing	Nolva Add a Naw Valva								
Find an Existing	1 value Audia Ivew value								
1									



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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