

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 x

Add

Find an Existing Value | Add a New Value

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

Budget Inquiry Criteria
Budget Overview

Inquiry FLEX Description Flex fund 143

Amount Criteria Search Clear Reset

Budget Type

*Business Unit UFLOR Ledger Group/Set Ledger Group Ledger Group CASH_BASED
View Stat Code Budgets Cash Based
Display Chart

TimeSpan

*Type of Calendar Detail Budget Period

Budget Criteria

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CASH_BASED	SP	CUM	CUM	<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	32000000	32090300	i		Update/Add
Source	%	%	i		Update/Add
Fund	143	143	i		Update/Add
Program	%	%	i		Update/Add
Flex	%	%	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

Figure 1.1 CASH_BASED Ledger Group Example

Budget Inquiry Criteria
 Budget Overview

Inquiry PROJECT Description Project based inquiry

Amount Criteria Search Clear Reset

Budget Type

*Business Unit UFLOR Ledger Group/Set Ledger Group Ledger Group KKGMCCHD
 Grants Child KK Ledger Group

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"/>	KKGMCCHD	SP	CUM	CUM	<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
PC Bus Unit	%	%	i		Update/Add
Project	00020994	%	i		Update/Add
Activity	%	%	i		Update/Add

Budget Status

- Open
- Closed
- Hold

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

Figure 1.2 KKGMCCHD Ledger Group Example

Budget Inquiry Criteria
 Budget Overview

Inquiry APP Description Appropriations

Amount Criteria Search Clear Reset

Budget Type

*Business Unit UFLOR Ledger Group/Set Ledger Group Ledger Group APPROP
 Appropriations

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"/>	APPROP	KK	2015	2015	<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	74070000	%	i		Update/Add
Fund	101	%	i		Update/Add
Program	%	%	i		Update/Add
Bud Ref	CYFWD	%	i		Update/Add

Budget Status

- Open
- Closed
- Hold

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

Figure 1.3 APPROP Ledger Group Example

- 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.

Business Unit: UFLOR
 Ledger Group: CASH_BASED Cash Based
 Type of Calendar: Detail Budget Period
 Amounts in Base Currency: USD
 Revenue Associated:

Return to Criteria Max Rows: 99999 Display Options Search

Ledger Totals (66 Rows)

Budget	0.00	Net Transfers	0.00
Expense	-10,291,993.00		
Encumbrance	2,023,420.12		
Pre-Encumbrance	0.00		
Budget Balance	10,291,993.00		
Associate Revenue	0.00		
Available Budget	10,291,993.00		

Budget Overview Results

Source	Fund	Dept	Program	Project	Dept Flex	Budget Period	Budget	Expense	Encumbrance
52	143	32080500			52MSCP	CUM	0.000	-7,509.540	0.000
53	143	32080500			52MTM	CUM	0.000	-296,374.300	158,231.560
54	143	32080500			52OSPHARM	CUM	0.000	0.000	0.000
55	143	32080500			52PHARMCE	CUM	0.000	-24,314.470	0.000
56	143	32080500			52PHARMDL	CUM	0.000	-313,494.450	0.000
57	143	32080500			52PHARMENT	CUM	0.000	-73,058.410	0.000
58	143	32080500			52PHARMFD	CUM	0.000	0.000	0.000
59	143	32080500			52PHARMKGI	CUM	0.000	0.000	0.000

Figure 2.1 Budget Overview Results for CASH_BASED Ledger Group

[Favorites](#) > [Main Menu](#) > [Commitment Control](#) > [Review Budget Activities](#) > [Budgets Overview](#)

Inquiry Results

Business Unit UFLOR
 Ledger Group KKGCMCHD Grants Child Ledger Group
 Type of Calendar Detail Budget Period
 Amounts in Base Currency USD
 Revenue Associated:

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

Ledger Totals (4 Rows)

Budget	131,024.01	Net Transfers	0.00
Expense	131,024.01		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	0.00		
Associate Revenue	0.00		
Available Budget	0.00		

Budget Overview Results

[Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1-4 of 4](#) | [Last](#)

	Ledger Group	Account	Fund	Dept	PC Bus Unit	Project	Activity	Budget Period	Budget	Expense	Encumbrance
1	KKGCMCHD	600005	209	29080100	GRANT	00020994	1	CUM	80,679.190	80,679.190	0.000
2	KKGCMCHD	700005	209	29080100	GRANT	00020994	1	CUM	36,509.800	36,509.800	0.000
3	KKGCMCHD	771005	209	29080100	GRANT	00020994	1	CUM	1,923.750	1,923.750	0.000
4	KKGCMCHD	812005	209	29080100	GRANT	00020994	1	CUM	11,911.270	11,911.270	0.000

Figure 2.2 Budget Overview Results for KKGCMCHD Ledger Group

Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Inquiry Results

Business Unit UFLOR
 Ledger Group APPROP Appropriations
 Type of Calendar Detail Budget Period
 Amounts in Base Currency USD
 Revenue Associated:

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

Ledger Totals (1 Rows)

Budget	966,064.39	Net Transfers	0.00
Expense	0.00		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	966,064.39		
Associate Revenue	0.00		
Available Budget	966,064.39		

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

	Ledger Group	Account	Fund	Dept	Program	Bud Ref	Budget Period	Budget	Expense	Encumbrance	Pre
1	APPROP	600000	101	74070000		CYFWD	2015	966,064.390	0.000	0.000	

[Return to Criteria](#) *Notes

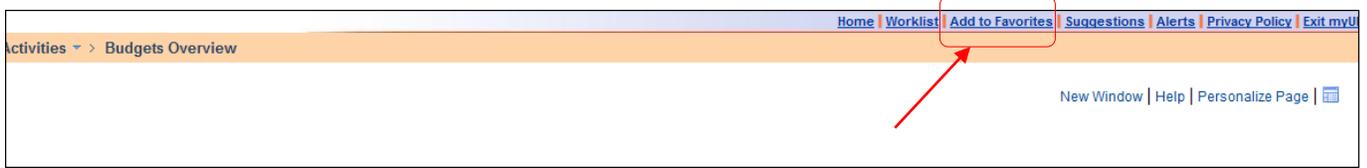
Figure 2.3 Budget Overview Results for CASH_BASED Ledger Group

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 Overview Results [Personalize](#) | [Find](#) | [View All](#) | | [First](#) 1-66 of 66 [Last](#)

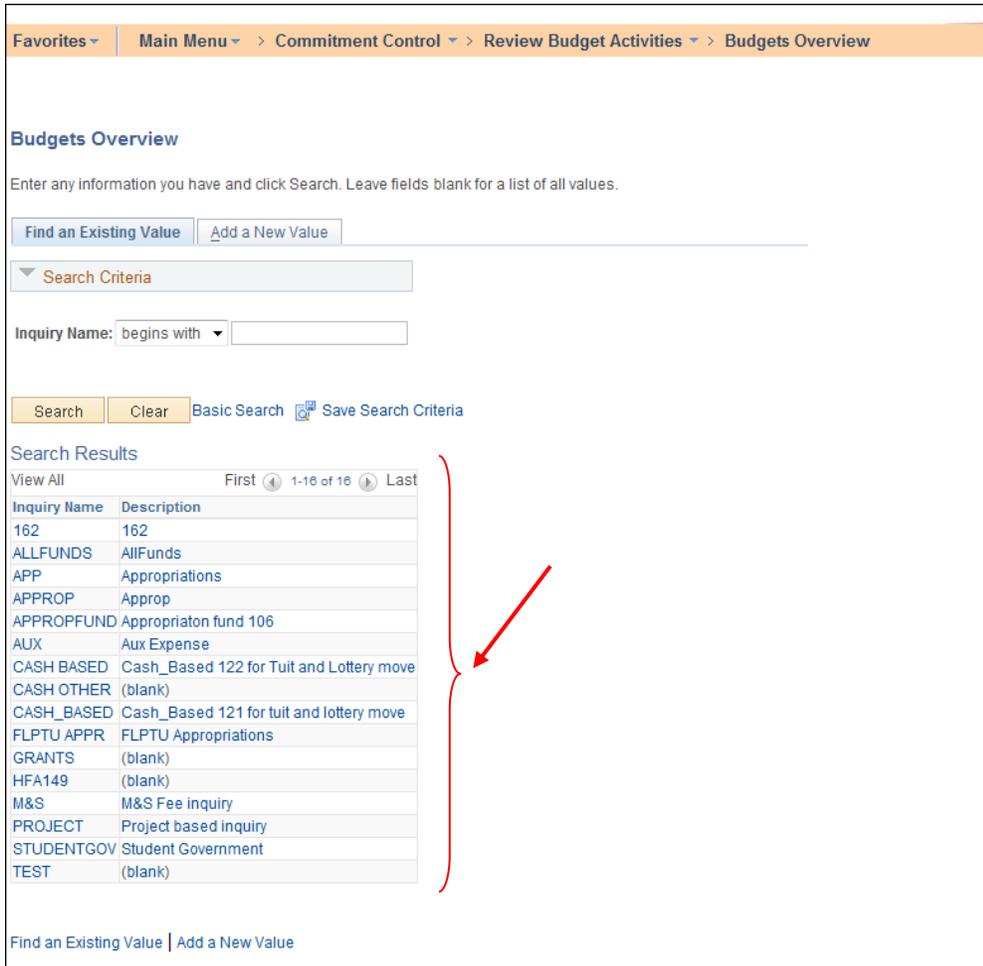
	urce	Fund	Dept	Program	Project	Dept Flex	Budget Period	Budget	Expense	Encumbrance

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



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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