



Business Process Document

PS FIN General Ledger: Inquiring Budget Exceptions

Department	
Responsibility/Role	
File Name	Inquiring Budget Exceptions_BUSPROC.doc
Version	
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Last Changed by	
Status	

Inquiring Budget Exceptions

Trigger:

Required Field(s)	Comments

Output - Results	Comments

Additional Information

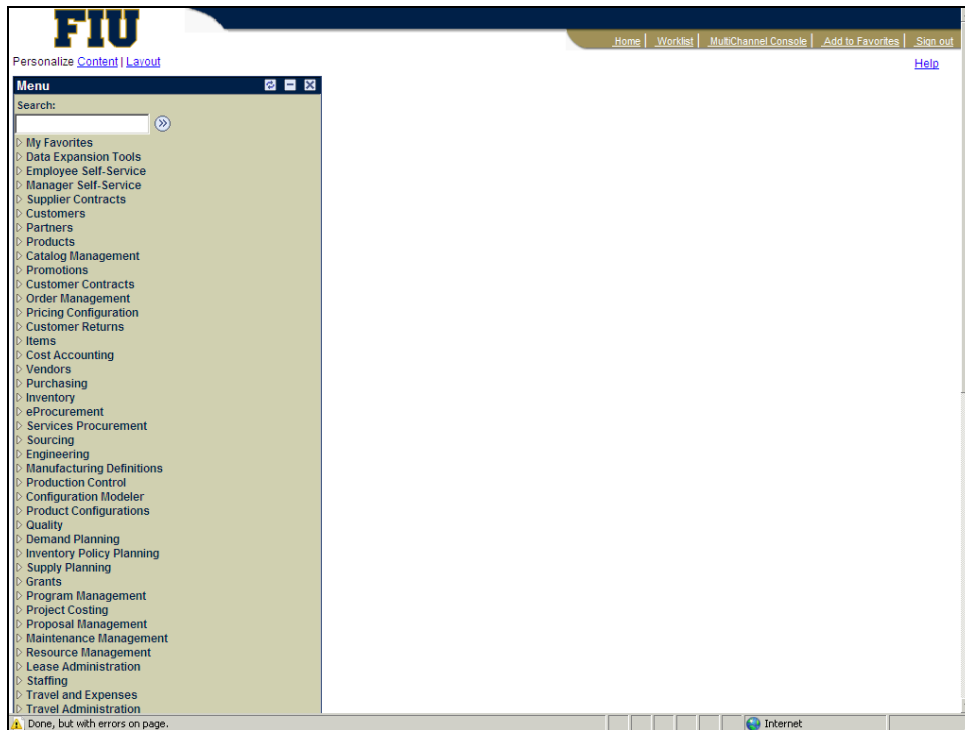
Procedure

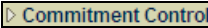
In this topic, you will inquiry budget overages also known as Budget Exceptions.

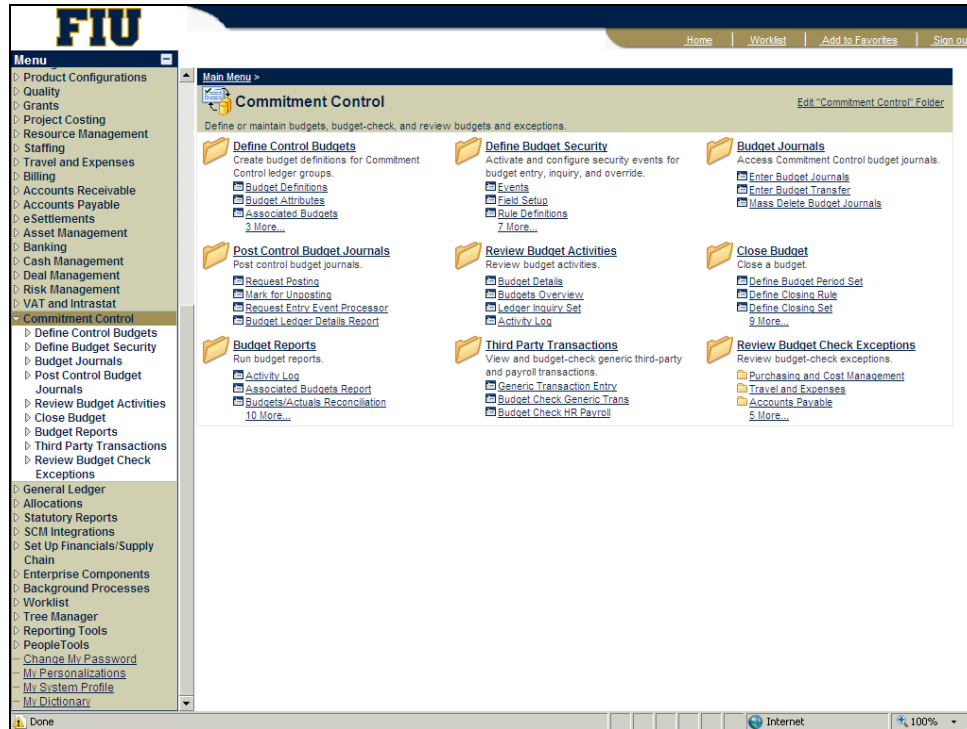
The following topic will demonstrate how to inquire on a budget exception for a department ID. This functionality can also be used to inquire on budget exception for Project IDs. Please refer to the business process documentation as well as the 'Managing Grants in PeopleSoft' course offered by OSRA for more information specific to Contracts & Grants.

Note: the budget overages need to be cleared according to the "**Managing Budget Exceptions**" process.

Please refer to the Business Process for more detail. For additional information, please visit this website at: panthersoft.fiu.edu/financials



Step	Action
1.	Click the Vertical scrollbar.
2.	Click the Commitment Control link. 




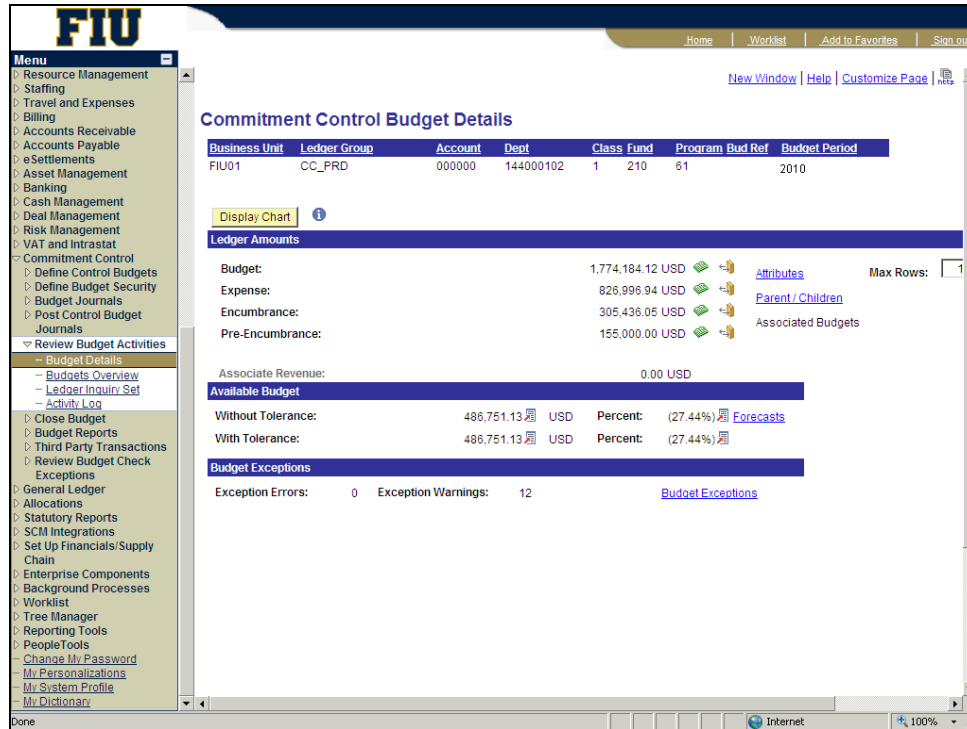
Step	Action
3.	Click the Review Budget Activities link. Review Budget Activities
4.	Click the Budget Details link. Budget Details

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Step	Action
5.	Enter the desired information into the Ledger Group field. Enter " cc_prd ".
6.	Enter the desired information into the Department field. Enter " 144000102 ".
7.	Enter the desired information into the Budget Period field. Enter " 2010 ".
8.	Click the Search button. 



Commitment Control Budget Details

Business Unit	Ledger Group	Account	Dept	Class	Fund	Program	Bud Ref	Budget Period
FIU01	CC_PRD	000000	144000102	1	210	61		2010

Display Chart

Ledger Amounts

Budget:	1,774,184.12 USD	Attributes	Max Rows: 1
Expense:	826,996.94 USD	Parent / Children	
Encumbrance:	305,436.05 USD	Associated Budgets	
Pre-Encumbrance:	155,000.00 USD		

Associate Revenue: 0.00 USD

Available Budget

Without Tolerance:	486,751.13 USD	Percent: (27.44%)	Forecasts
With Tolerance:	486,751.13 USD	Percent: (27.44%)	

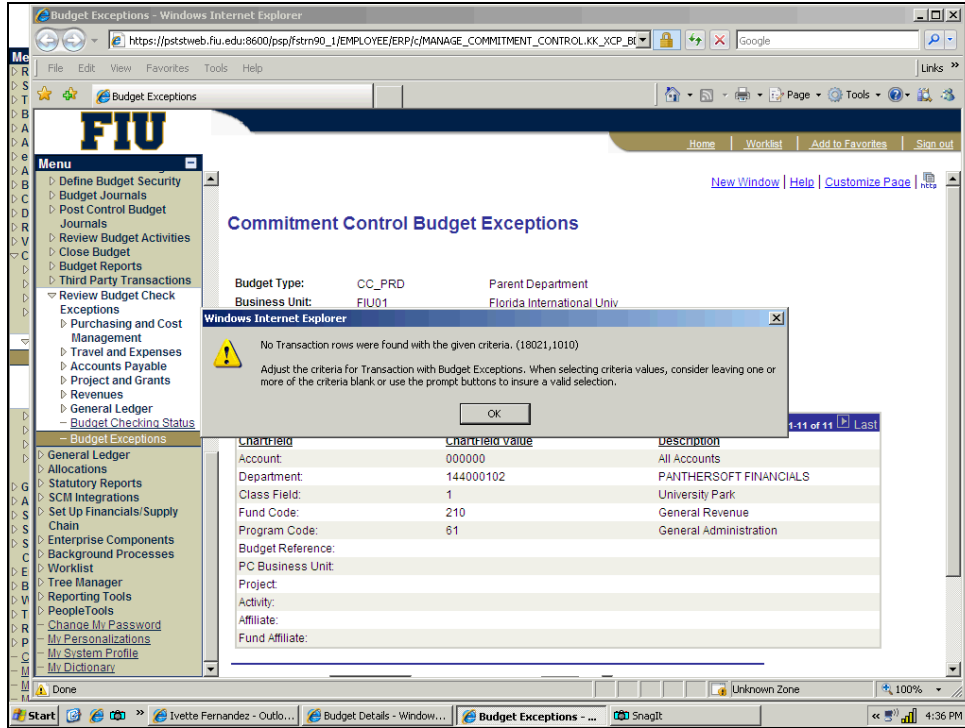
Budget Exceptions

Exception Errors:	0	Exception Warnings:	12	Budget Exceptions
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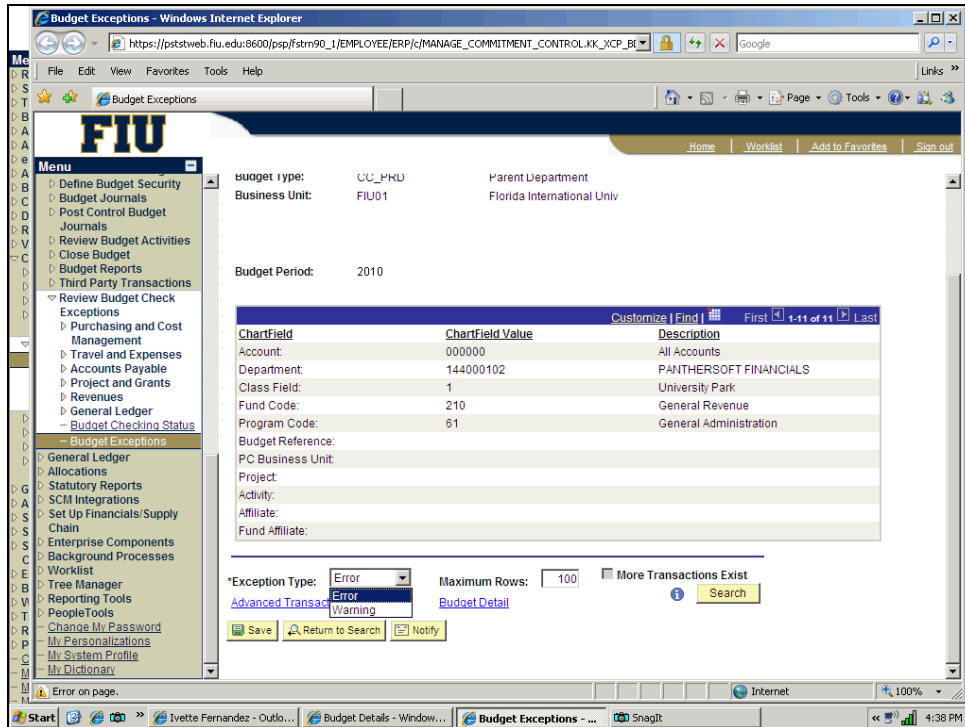
Step	Action
9.	Click the Budget Exceptions link. Budget Exceptions

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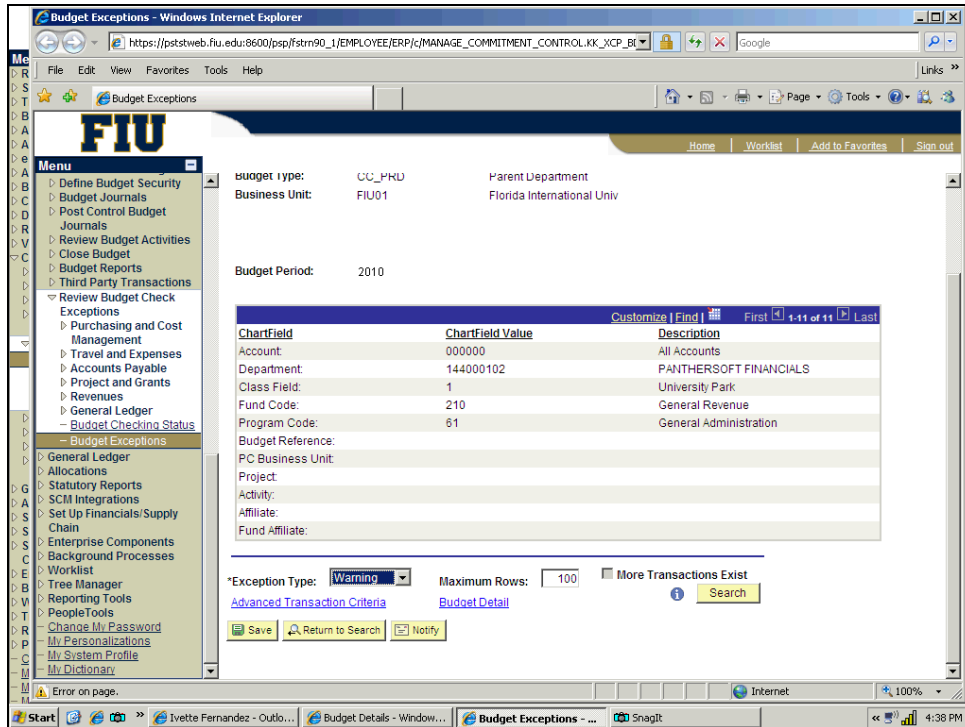
Step	Action
10.	Click the Vertical scrollbar.


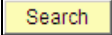




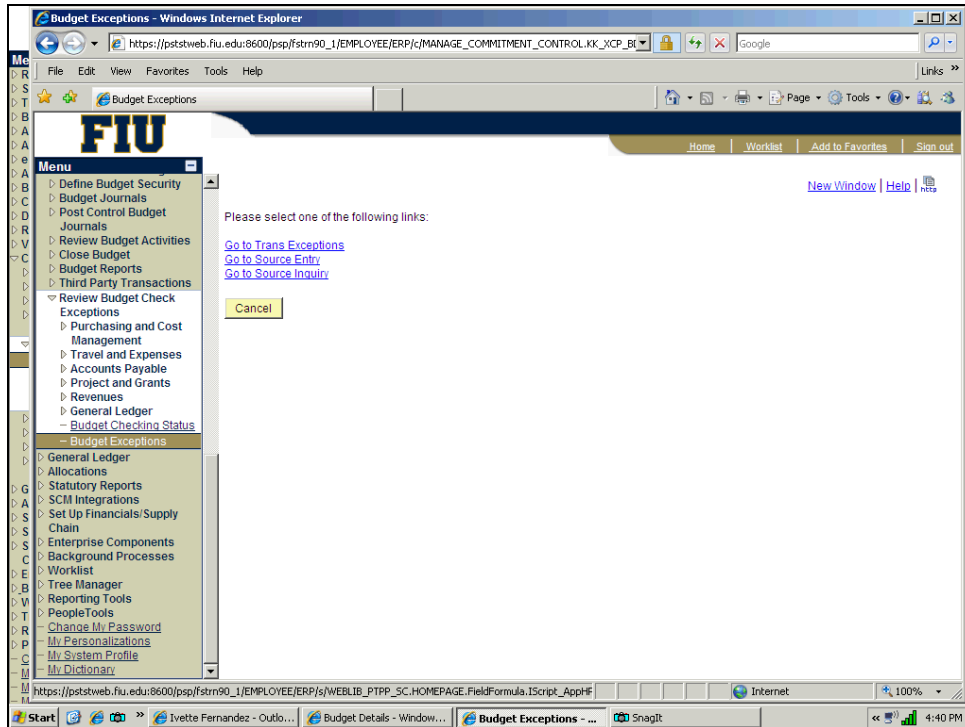
Step	Action
11.	Click the Warning list item.


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Step	Action
12.	Click the Save button. 
13.	Click the Search button. 
14.	Click the Show all columns button. 
15.	Click the Transfer button. 



Step	Action
16.	Click the Close button. 

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FIU

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FIU01	CC_PRD	00000	144000102	1	210	61		2010

Display Chart

Ledger Amounts

Budget: 1,774,184.12 USD [Attributes](#) Max Rows:

Expense: 826,996.94 USD [Parent/Children](#)

Encumbrance: 305,436.05 USD [Associated Budgets](#)

Pre-Encumbrance: 155,000.00 USD

Associate Revenue: 0.00 USD

Available Budget

Without Tolerance: 486,751.13 USD **Percent:** (27.44%) [Forecasts](#)

With Tolerance: 486,751.13 USD **Percent:** (27.44%)

Budget Exceptions

Exception Errors: 0 Exception Warnings: 12 [Budget Exceptions](#)

Step	Action
17.	Click the Home link.
18.	Congratulations. You have successfully Inquired Budget Exceptions. End of Procedure.