MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

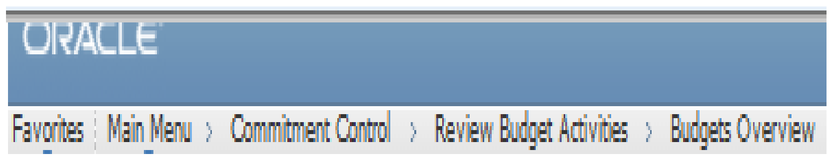
Quick Reference Tip Sheet

LAST REVISED DATE: 09/12/2014

General Information

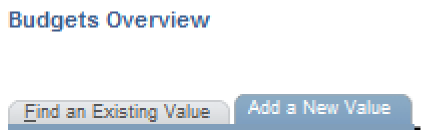
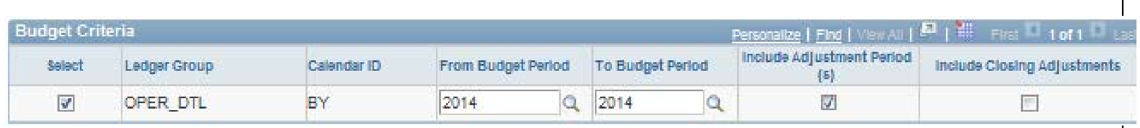
Task	Process Information
Commitment Control Budgets Overview	The Budgets Overview inquiry component provides summarized and detailed information about activity across several control budgets and allows you to drill into corresponding transactions.

GEARS Navigation

Commitment Control > Review Budget Activities > Budgets Overview	

1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	**Select the "Add a New Value" Tab.**	
2.	**Enter an Inquiry Name** **This name can provide information about the type of criteria in the inquiry. No spaces are allowed.**	
3.	**Click the** Add **button.**	
4.	**Enter a meaningful description.**	
5.	**In the** Budget Type **box, enter:**	• **Business Unit** – This value will always be 'MDJUD'. • **Ledger Group/Set** – This value will always be 'Ledger Group'. • **Ledger Group** – Choose the ledger group you would like to inquire. (In most cases, you would use the OPER_DTL ledger.)
6.	**In the** TimeSpan **box, enter:**	• **Type of Calendar** – This value will always be 'Detail Budget Period'.
7.	**In the** Budget Criteria **box, enter:**	• **From Budget Period/To Budget Period** – Enter the year that you would like to view. • **Include Adjustment Period** – Check box if you want to see year-end close period entries. • **Include Closing Adjustments** – Do <u>NOT</u> check this box as MDJUD does not generate closing budget entries. 

8.	**In the** ChartField Criteria **box, enter:**	For each Chartfield type, you can either enter a range of values or a Chartfield Value Set to limit the data returned: • **Chartfield From Value/Chartfield To** - Enter the ChartField value range for each ChartField for the budgets that you want to view. You can use the ChartField From Value and ChartField To fields to enter a range of values. ***Note:*** *You can also leave both the to and from values set to the default % (wildcard) value to pull back all applicable values.* • **Chartfield Value Set** - You can select a ChartField value set, which is a predefined set of selection criteria for a given ChartField. ***Note:*** *Some ChartFields do not have Value Sets. Chartfield Value Sets have been configured for the Account field, which is the most commonly used Value Set.* Enter any other applicable criteria. Remember, the more criteria you add, the more granular your inquiry results will be. However, at a minimum, you should include your selected PCA(s) and appropriation year(s).)

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%		EXPENSE_ACCT	Update/Add
Batch Agy	%	%			Update/Add
PCA	40501	40501			Update/Add
Fund	%	%			Update/Add
Approp Num	%	%			Update/Add
Program	%	%			Update/Add
Approp Yr	AY2014	AY2014			Update/Add

9.	**Check the box(es) next to the budget status(es) you would like to include in your results.**	**Budget Status** ☑ Open ☐ Closed ☐ Hold ***Note:*** *Typically, you will only need to check the 'Open' box which will show all current, active budget information. To see full results, be sure to include "closed" as well.*
10.	***(Optional)*** **Click on the** Amount Criteria **hyperlink (at top of page).**	***Note:*** *Setting up amount criteria allows you to further define the data returning based on the amount of money in various buckets (e.g., budget, pre-encumbrance, encumbrance, expense, or available budget). For example, for an expenditure ledger group, you could choose to view only those budgets with an Available Budget less than 20 percent of the Budget amount.* ***NOTE: Until you are experienced with this report, it is not recommended that you utilize this option.***

<table>
<tr><td>11.</td><td>(Optional)
In the Amount Criteria box, enter:</td><td>

Amount Type - Select one of the amount types to use in this calculation.
Operator - Enter a Boolean logic operator to create a formula for selecting ledger rows.
Multiplier - The multiplier can be either the number by which to multiply the second amount type, or it can be an actual amount. If it is an actual amount, enter 1 in the second Amount Type field.

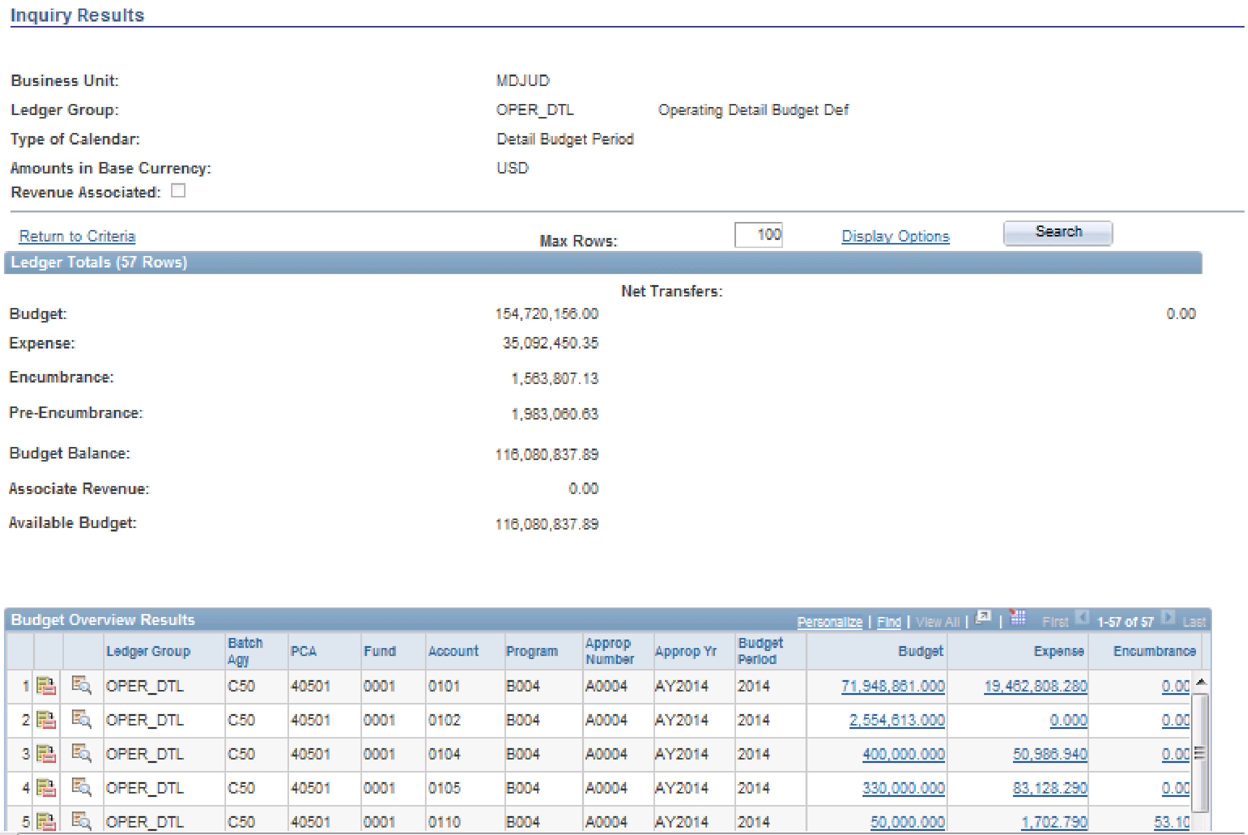
NOTE: Until you are experienced with this report, it is not recommended that you utilize this option.
<hr>
As examples:
To view only those budgets whose Available Budget is less than 20 percent of the Budget ledger amount, enter 0.2 in the Multiplier field, the less than symbol in the Operator field, and Budget in the second Amount Type field.

To view only those budgets whose Available Budget amount is less than 100,000, enter 100,000 in the Multiplier field and 1 in the second Amount Type field.
</td></tr>
<tr><td>12.</td><td>(Optional)
To add an additional row of Amount Criteria, click the +.</td><td>
Choose an operator for the new line of criteria:

AND – This will return results that meet <u>both</u> the first line and the second.
OR – This will return results that meet <u>either</u> the first line or the second.

</td></tr>
<tr><td>13.</td><td colspan="2">(Optional) When done adding Amount Criteria, then click OK .</td></tr>
<tr><td>14.</td><td colspan="2">Save the parameters selected by clicking the Save button (at bottom of page).</td></tr>
<tr><td>15.</td><td colspan="2">Run the Inquiry by clicking the Search button (at top of page).
<hr>
The following buttons can be used on the search criteria page for other functions.
Clear - Click to remove existing criteria from the page.
Reset - Click to populate dependent fields correctly if you change the business unit, ledger group, ledger inquiry set, or type of calendar while you are entering your inquiry criteria.
- Click the trash can to delete the whole inquiry. It will no longer appear on the search page list.
</td></tr>
</table>

16.



	Ledger Group	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	Budget Period	Budget	Expense	Encumbrance
1	OPER_DTL	C50	40501	0001	0101	B004	A0004	AY2014	2014	71,948,861.000	19,462,808.280	0.00
2	OPER_DTL	C50	40501	0001	0102	B004	A0004	AY2014	2014	2,554,613.000	0.000	0.00
3	OPER_DTL	C50	40501	0001	0104	B004	A0004	AY2014	2014	400,000.000	50,986.940	0.00
4	OPER_DTL	C50	40501	0001	0105	B004	A0004	AY2014	2014	330,000.000	83,128.290	0.00
5	OPER_DTL	C50	40501	0001	0110	B004	A0004	AY2014	2014	50,000.000	1,702.790	53.10

17.

(Optional)
On the results page, the following options are available:

Return to Criteria - Return to the Budget Inquiry Criteria page.

Max Rows: - Enter the maximum number of budget ledger rows that you want to appear in the Budget Overview Results scroll area.

Display Options - Click to open the Budget Display Options page, where you can specify how to summarize and sort the results. After changing these options, click the Search button again to repopulate the results.

In the Budget Overview Results area:

- The "Show Budget Details" button will take you to the details of that budget line.

- The "Show Budget Transaction Types" button will take you to the budget details for that line by transaction type (Original, Adjustment, etc.).

Budget
71,948,861.000 - Click on any of the links to drill into the Activity Log.

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Important

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.