Quick Reference Tip Sheet

LAST REVISED DATE: 05/01/2017

General Information

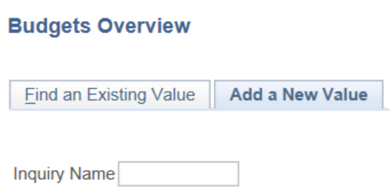
Task	Process Information
Commitment Control Budgets Overview **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	The Budgets Overview inquiry component provides summarized and detailed information about activity across several control budgets and allows you to drill into corresponding transactions.

GEARS Navigation

Commitment Control > Review Budget Activities > Budgets Overview	

1.0 Process

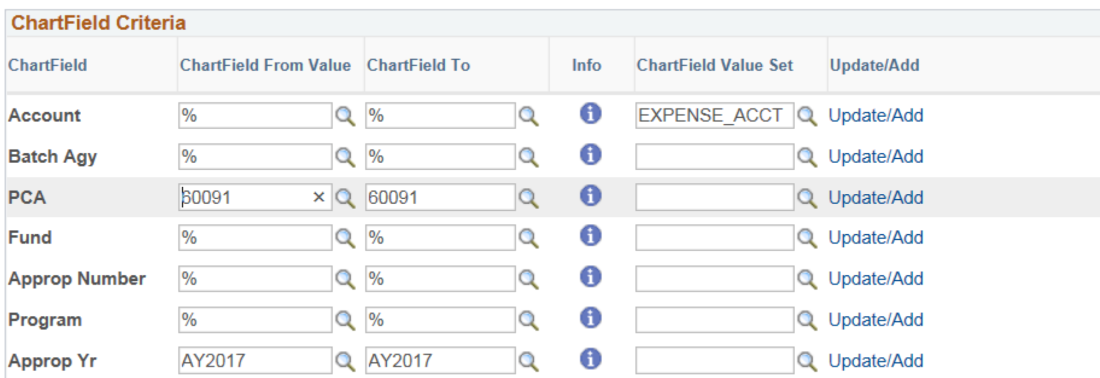
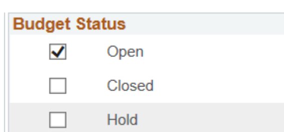
This document is intended to provide a quick reference to completing standard transactions within GEARS.

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.**	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 budget period/year that you would like to view. • **Include Adjustment Period** – Uncheck this box as MDJUD does not use the adjustment period. • **Include Closing Adjustments** – Uncheck this box as MDJUD does not generate closing budget entries.

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
☑	OPER_DTL	BY	2017	2017	☐	☐

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 From and To 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).) 
9.	**Check the box(es) next to the budget status(es) you would like to include in your results.**	 ***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 left 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 Original Budgeted amount.* ***NOTE: Until you are experienced with this inquiry, it is not recommended that you utilize this option.***
11.	***(Optional)*** **In the** Amount Criteria **box, enter:**	• **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.**

Example 1:

To view only those budgets whose Available Budget is less than 20 percent of the budgeted amount, enter 0.2 in the Multiplier field, the less than symbol in the Operator field, and Budget in the second Amount Type field.

Amount Criteria

Operator	Amount Type	*Operator	Multiplier	Operator	Amount Type
	Available Budget	<	0.2	*	Budget

Example 2:

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.

Amount Criteria

Operator	Amount Type	*Operator	Multiplier	Operator	Amount Type
	Available Budget	<	100000	*	1

12. ***(Optional)*** **To add an additional row of Amount Criteria, click the + .**

Choose an operator for the new line of criteria:

- **AND** – This will return results that meet both the first line and the second.
- **OR** – This will return results that meet either the first line or the second.

Example 3:

To view only those budgets whose Encumbrance balance is greater than 0 **and** Available Budget greater than $100,000, enter the following using the 'and' criteria:

Amount Criteria

Operator	Amount Type	*Operator	Multiplier	Operator	Amount Type
	Encumbrance	>	0.00	*	1
AND	Available Budget	>	100000	*	1

13. ***(Optional)* *When done adding Amount Criteria,* then click OK.**

14. **Save the parameters selected by clicking the Save button (at bottom of page).**

15. **Run the Inquiry by clicking the Search button (at top of page).**

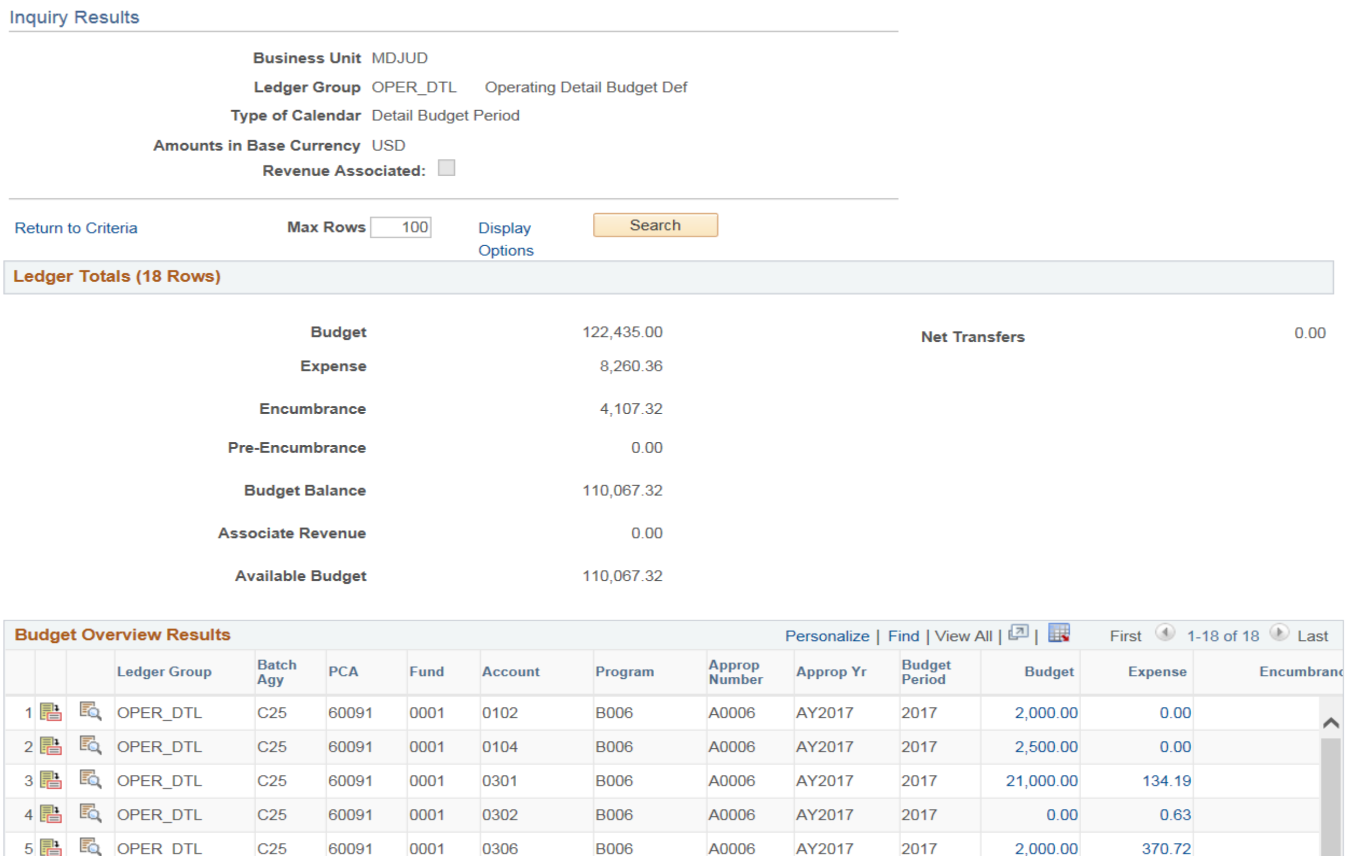
The following buttons can be used on the search criteria page for other functions.

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 inquiry. It will no longer appear on the Inquiry search list.

16.



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
2,000.00 - Click on any of the links to drill into the Activity Log.

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