ADDY NOTE

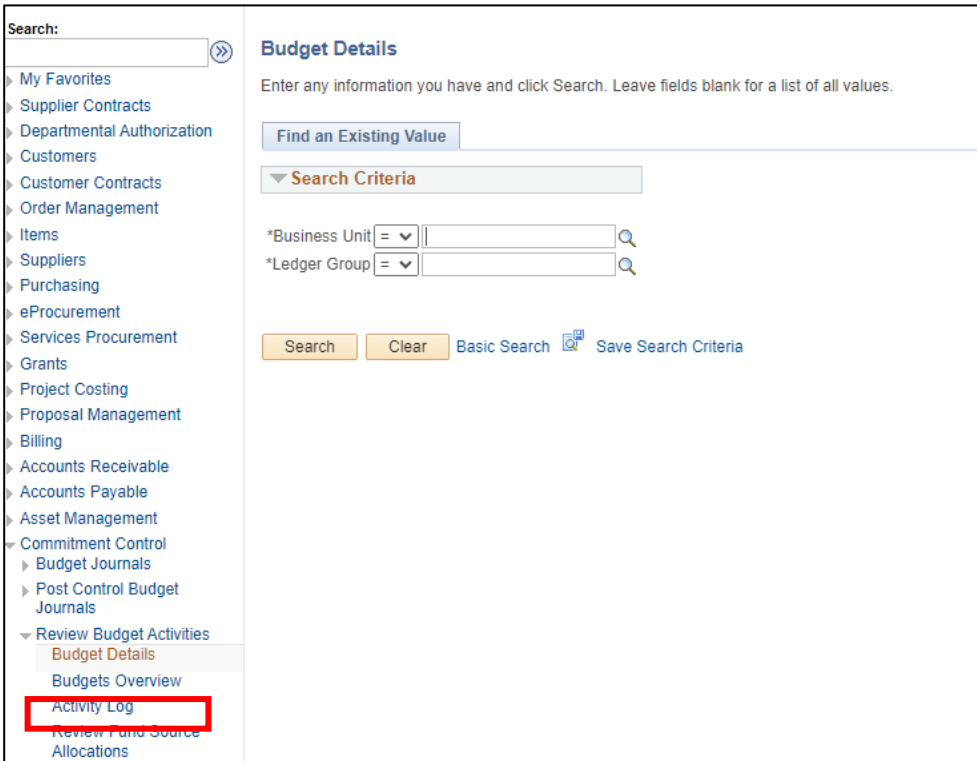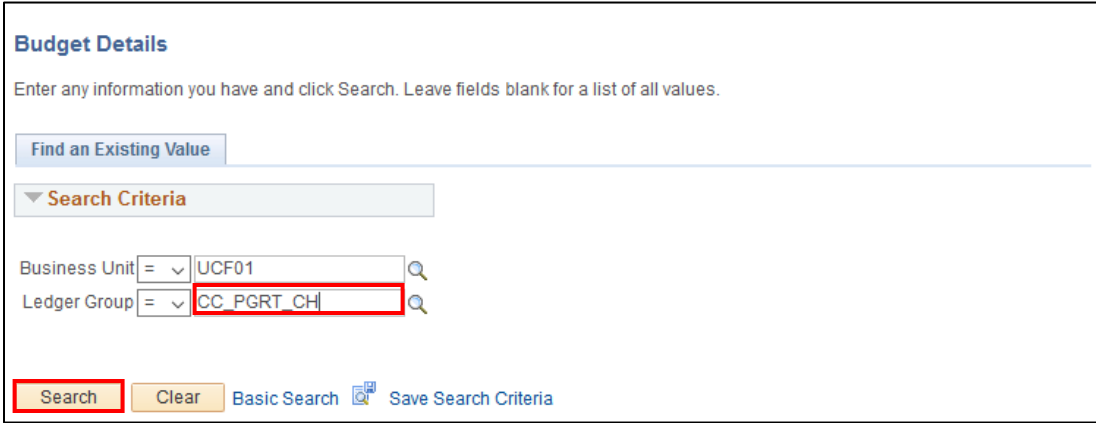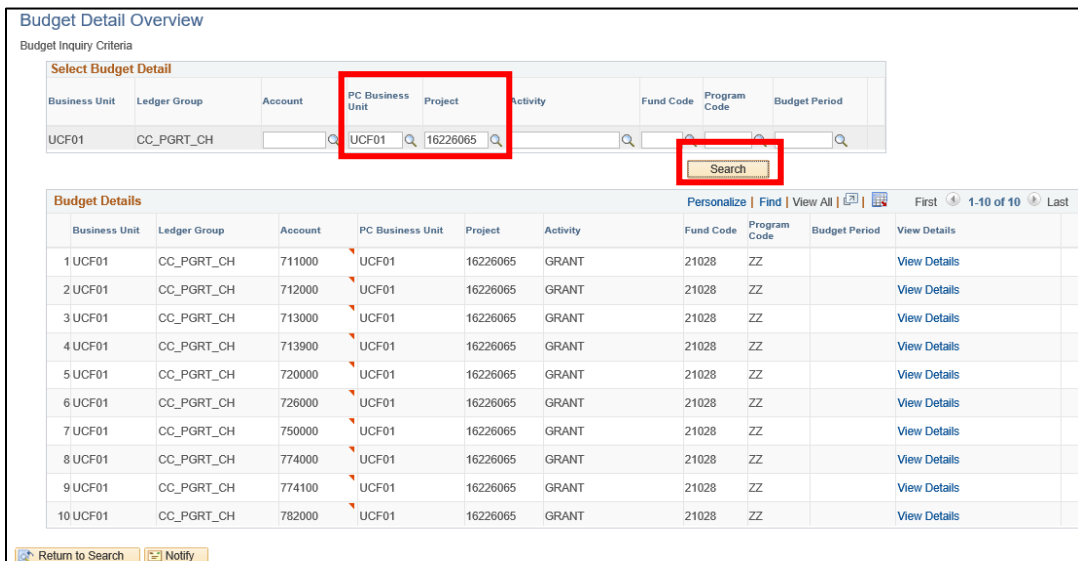**ATTENTION:**
This Addy Note is a procedural resource for the UCF Financials Reference Database, which only contains data prior to July 1, 2022.

UCF
FINANCIALS REFERENCE DATABASE

Understanding Budget Definition for Sponsored Projects

This Addy Note explains the budget definition for sponsored projects with the addition of the Grants module. As of November 2019, direct and indirect rollups will default to the control parent ledger, CC_PGRT_PT. Child rollups will Track with Budget on ledger CC_PGRT_CH.

Note: Projects that need to be controlled at specific child budget categories will have different controls noted as an exception to this default. Related Content showing these exceptions on sponsored (research) project child budget ledger CC_PGRT_CH is now on the Budget Details page on UCF Financials.

Step	Action
1.	Navigate to: **Commitment Control** > **Review Budget Activities** > **Budget Details**.

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Step	Action
2.	Enter **CC_PGRT_CH** for the **Ledger Group**. Then, select the **Search** button.

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit = ∨ UCF01
Ledger Group = ∨ CC_PGRT_CH

Search   Clear   Basic Search   Save Search Criteria

Step	Action
3.	Enter the **PC Business Unit** and **Project ID**. Then, select the **Search** button.

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Account	PC Business Unit	Project	Activity	Fund Code	Program Code	Budget Period
UCF01	CC_PGRT_CH		UCF01	16226065				

Search

Budget Details   Personalize | Find | View All | 🖵 | 🖼   First ◄ 1-10 of 10 ► Last

	Business Unit	Ledger Group	Account	PC Business Unit	Project	Activity	Fund Code	Program Code	Budget Period	View Details
1	UCF01	CC_PGRT_CH	711000	UCF01	16226065	GRANT	21028	ZZ		View Details
2	UCF01	CC_PGRT_CH	712000	UCF01	16226065	GRANT	21028	ZZ		View Details
3	UCF01	CC_PGRT_CH	713000	UCF01	16226065	GRANT	21028	ZZ		View Details
4	UCF01	CC_PGRT_CH	713900	UCF01	16226065	GRANT	21028	ZZ		View Details
5	UCF01	CC_PGRT_CH	720000	UCF01	16226065	GRANT	21028	ZZ		View Details
6	UCF01	CC_PGRT_CH	726000	UCF01	16226065	GRANT	21028	ZZ		View Details
7	UCF01	CC_PGRT_CH	750000	UCF01	16226065	GRANT	21028	ZZ		View Details
8	UCF01	CC_PGRT_CH	774000	UCF01	16226065	GRANT	21028	ZZ		View Details
9	UCF01	CC_PGRT_CH	774100	UCF01	16226065	GRANT	21028	ZZ		View Details
10	UCF01	CC_PGRT_CH	782000	UCF01	16226065	GRANT	21028	ZZ		View Details

Return to Search   Notify

Note: The image above shows all the budget items that have been defined for the project. If budget dollars (or a zero budget) has been posted, there will be a line for that account rollup. The default control is at the Direct (Account 720000) and Indirect (Account 782000) rollups. Only a few, or none of these individual budget items might be controlled as an exception to this default.
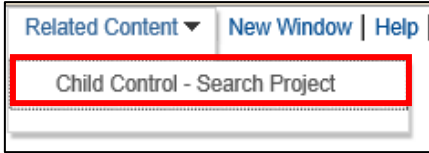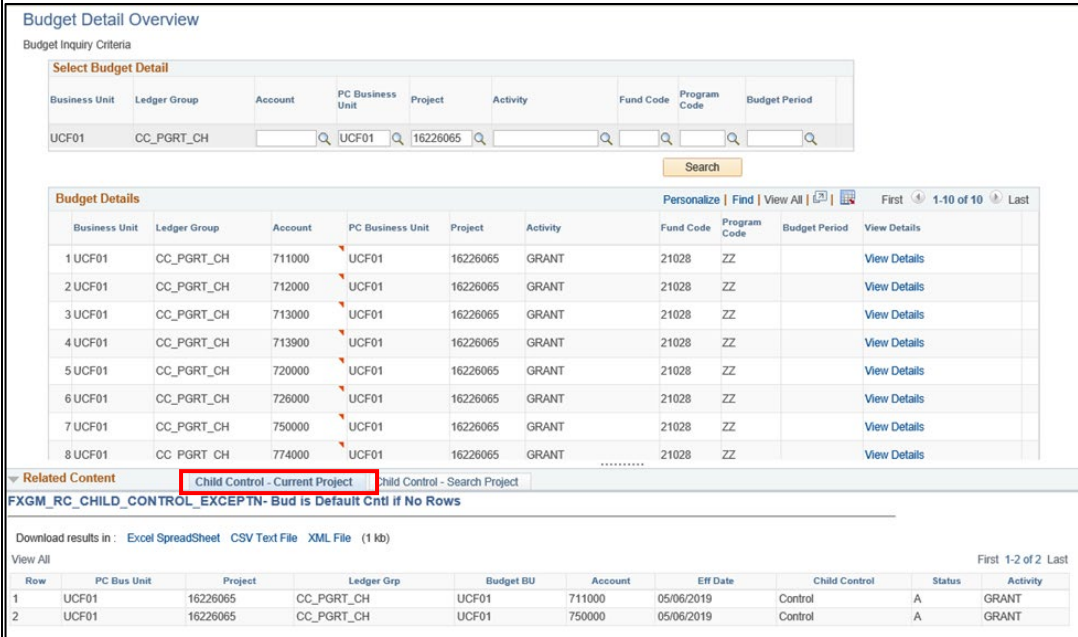
ADDY NOTE

ATTENTION:

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Step	Action
4.	The related content of **Child Control - Search Project** will show whether any of the budget rollups are controlled. It will display at the bottom of the page. Related Content ▼ New Window | Help Child Control - Search Project
5.	Select the **Child Control - Current Project** tab in the Related Content window. **Note**: If there are exceptions to the default, they will be shown here. The image above shows that the Salary (Account 711000) and Equipment (Account 750000) budget rollups are controlled at the child level as an exception to the default.

ADDY NOTE

ATTENTION:

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Step	Action
6.	If the project budget follows the default control level, the exception query will return no results as shown below.
7.	The **View Details** link (see image from Step 6) allows you to review information related to budget, expenses, encumbrances, pre-encumbrances and available budget at each child level.

ADDY NOTE

ATTENTION:

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Step	Action
8.	To search for an RFD01 project, enter the **RFD01** in the **PC Business Unit** field.

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Account	PC Business Unit	Project	Activity	Fund Code	Program Code	Budget Period
UCF01	CC_PGRT_CH		RFD01	16268294				

Search

Budget Details   Personalize | Find | View All | | First ◄ 1-4 of 4 ► Last

	Business Unit	Ledger Group	Account	PC Business Unit	Project	Activity	Fund Code	Program Code	Budget Period	View Details
1	UCF01	CC_PGRT_CH	711000	RFD01	16268294	GRANT	91505	ZZ		View Details
2	UCF01	CC_PGRT_CH	712000	RFD01	16268294	GRANT	91505	ZZ		View Details
3	UCF01	CC_PGRT_CH	720000	RFD01	16268294	GRANT	91505	ZZ		View Details
4	UCF01	CC_PGRT_CH	782000	RFD01	16268294	GRANT	91505	ZZ		View Details

Return to Search   Notify

Note: If entered incorrectly, you will see the mirrored budget that is maintained in UCF01. This is to allow payroll journals to post. An example of the mirrored budget is displayed below:

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Account	PC Business Unit	Project	Activity	Fund Code	Program Code	Budget Period
UCF01	CC_PGRT_CH			16268294				

Search

Budget Details   Personalize | Find | View All | | First ◄ 1-6 of 6 ► Last

	Business Unit	Ledger Group	Account	PC Business Unit	Project	Activity	Fund Code	Program Code	Budget Period	View Details
1	UCF01	CC_PGRT_CH	711000	RFD01	16268294	GRANT	91505	ZZ		View Details
2	UCF01	CC_PGRT_CH	711000	UCF01	16268294	GRANT	91505	ZZ		View Details
3	UCF01	CC_PGRT_CH	712000	RFD01	16268294	GRANT	91505	ZZ		View Details
4	UCF01	CC_PGRT_CH	712000	UCF01	16268294	GRANT	91505	ZZ		View Details
5	UCF01	CC_PGRT_CH	720000	RFD01	16268294	GRANT	91505	ZZ		View Details
6	UCF01	CC_PGRT_CH	782000	RFD01	16268294	GRANT	91505	ZZ		View Details

Return to Search   Notify