Tips on Running a Budget Position Report

There are two ways to run a Budget Position Report – either from within UCF Financials or from the portal. Each method offers different advantages.

From the portal –

The data on the report is static as of month-end.

You do not need to access UCF Financials to view a report.

You can get either summarized or detailed results.

From within UCF Financials –

The data is up to the minute.

You can drill down on amounts to get transaction details.

To review how to run a Budget Position report from within UCF Financials, see the Addy Note, *Running a Budget Position Report from within UCF Financials.*

Changing Field Values

Whenever you use the **Scope and Delivery Templates** link to select the appropriate department or project or specify an ending date on the **NVision Report Request** tab, you are making a **global change**. Global changes affect the values that display in the fields used to generate a Budget Position Report. Therefore, you may be affected by a global change made by another user who selected criteria different from what you used since the last time you ran a report. Because of the possibility of global changes, you **must** look carefully at the **Scope and Delivery Templates** link options and the **As Of Reporting Date – Report Date Selection** each time you run a Budget Position report from within UCF Financials.

Drill-down Tips

When drilling down for details, consider where the detail is likely to reside. For example, if you are seeking details for a transaction that gets paid via voucher, you will likely find the details in the **AP Detail** drill-down. If, on the other hand, you are seeking details about a charge that has impacted your budget, the **Journal Lines** drill-down likely contains the details, because that location is where the detail of departmental transfers resides.