


From your home screen, click Budgetary Control, then Budgetary Control.

Good morning, Sarah Farris

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APPS


From the Budgetary Control Dashboard, click View, Budget Account Group, then select TWU Monthly Budget.

Budgetary Control Dashboard

Budget Monitor

View **Detach** Budget Account Group TWU Annual Budget * Budget Period FY24 * Balance Period to date

Budget Account Group: Create, View, Manage
 Columns
 Detach
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 Query By Example

ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)	Consumption (USD)	Funds Available	
			Total	Total	Amount (USD)	Budget (%)
All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	326,704,055.28	502,662,796.42	-175,958,741.14	-53.86

Budget Status Exceptions (0)

You'll need to know, or have a good idea, of when your expenses posted to retrieve the necessary IDT screenshot. Select the appropriate month as shown below. If you follow the rest of the instructions and don't see the expense you're looking for, you may have to come back to this stage to select a different month.

Budgetary Control Dashboard

Budget Monitor

View **Detach** Budget Account Group TWU Monthly Budget * Budget Period Feb-24 * Balance Period to date

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)	Consumption (USD)	Funds Available	
						Total	Total	Amount (USD)	Budget (%)
All FUND CLAS...	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	18,043,072.49	-18,043,072.49	0.00

Start selecting the appropriate account string for the expense needing to be transferred. Click All Fund Class link to drill down funds.

Budget Monitor

View [Icons] Detach Budget Account Group TWU Monthly Budget * Budget Period Jul-25 * Balance Period to date [Refresh]

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)		Consumption (USD)		Funds Available	
						Total	Total	Total	Total	Amount (USD)	Budget (%)
All FUND CLAS...	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	73,873,985.57			-73,873,985.57	0.00

Click All Fund Source SOUR link to drill down fund sources next to your fund.

Budget Monitor

TWU Monthly Budget > FUND CLASS: All FUND CLASS Values

View [Icons] Detach Budget Account Group TWU Monthly Budget Budget Period Jul-25 Balance Period to date [Refresh]

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)		Consumption (USD)		Funds Available	
						Total	Total	Total	Total	Amount (USD)	Budget (%)
110	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	19,829,923.82			-19,829,923.82	0.00
111	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	50,248,561.31			-50,248,561.31	0.00
112	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	5,166,473.25			-5,166,473.25	0.00
114	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	12,093,335.37			-12,093,335.37	0.00
115	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	2,262,559.74			-2,262,559.74	0.00
116	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	143,089.78			-143,089.78	0.00
117	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	366,940.68			-366,940.68	0.00
118	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	64,709.55			-64,709.55	0.00
119	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	7,552,684.80			-7,552,684.80	0.00
120	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	38,447.00			-38,447.00	0.00
140	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	-11,616,600.47			11,616,600.47	0.00
141	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	-16,133,856.01			16,133,856.01	0.00
150	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	3,592,190.75			-3,592,190.75	0.00
210	All FUND SOUR...	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	265,526.00			-265,526.00	0.00

Click All Department link to drill down department codes next to your fund/fund source.

Budget Monitor

TWU Monthly Budget > FUND CLASS: All FUND CLASS Values > FUND SOURCE: All FUND SOURCE Values

View [Icons] Detach Budget Account Group TWU Monthly Budget Budget Period Jul-25 Balance Period to date [Refresh]

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)		Consumption (USD)		Funds Available	
						Total	Total	Total	Total	Amount (USD)	Budget (%)
111	00000	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	1,063,239.70			-1,063,239.70	0.00
111	21210	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	-10,653.00			10,653.00	0.00
111	21230	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	-213,757.53			213,757.53	0.00
111	44000	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	445,088.18			-445,088.18	0.00
111	44100	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	26,738,224.83			-26,738,224.83	0.00
111	44110	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	3,870,502.00			-3,870,502.00	0.00
111	44120	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	675,814.59			-675,814.59	0.00
111	44130	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	368,547.98			-368,547.98	0.00
111	44180	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	1,892,632.25			-1,892,632.25	0.00
111	44190	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	32,098.29			-32,098.29	0.00
111	44250	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	240,575.23			-240,575.23	0.00
111	44300	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	14,045.35			-14,045.35	0.00
111	44330	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	1,765,789.36			-1,765,789.36	0.00
111	44400	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	7,536.39			-7,536.39	0.00
111	44410	All DEPARTME...	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	68,625.06			-68,625.06	0.00

Click All Account Values link to drill down natural account codes next to your fund/fund source/department. At this point, if you're unsure of what natural account your expense was posted to, you can also click on the Consumption amount link on your fund/fund source/department line (blue outline – scroll to end of tutorial for further instruction on using this option).

Budget Monitor
 TWU Monthly Budget > FUND CLASS: All FUND CLASS Values > FUND SOURCE: All FUND SOURCE Values > DEPARTMENT: All DEPARTMENT Values

View [Icons] Detach Budget Account Group TWU Monthly Budget Budget Period Jul-25 Balance Period to date [Refresh]

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)	Consumption (USD)	Funds Available	
						Total	Total	Amount (USD)	Budget (%)
111	44000	11003	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	0.00	0.00	0.00
111	44000	20102	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	51.85	-51.85	0.00
111	44000	20207	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	11,685.91	-11,685.91	0.00
111	44000	20211	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	26,584.08	-26,584.08	0.00
111	44000	20504	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	1,456.61	-1,456.61	0.00
111	44000	21501	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	-2,177.96	2,177.96	0.00
111	44000	24101	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	392.25	-392.25	0.00
111	44000	24201	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	-104.60	104.60	0.00
111	44000	24702	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	27,455.40	-27,455.40	0.00
111	44000	24810	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	1,763.57	-1,763.57	0.00
111	44000	24811	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	110.00	-110.00	0.00
111	44000	24826	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	13,811.60	-13,811.60	0.00
111	44000	25101	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	904.44	-904.44	0.00
111	44000	25404	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	7,618.99	-7,618.99	0.00
111	44000	26101	All ACCOUNT V...	All FUNCTIONS...	All PROJECT V...	0.00	234.91	-234.91	0.00

If you know your fund/fund source/department/natural account, from this screen you can select the Consumption link dollar amount.

Budget Monitor
 TWU Monthly Budget > FUND CLASS: All FUND CLASS Values > FUND SOURCE: All FUND SOURCE Values > DEPARTMENT: All DEPARTMENT Values > ACCOUNT: All ACCOUNT Values

View [Icons] Detach Budget Account Group TWU Monthly Budget Budget Period Jul-25 Balance Period to date [Refresh]

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget (USD)	Consumption (USD)	Funds Available	
						Total	Total	Amount (USD)	Budget (%)
111	44000	24826	40017	All FUNCTIONS...	All PROJECT V...	0.00	450.00	-450.00	0.00
111	44000	24826	40313	All FUNCTIONS...	All PROJECT V...	0.00	2,995.00	-2,995.00	0.00
111	44000	24826	60210	All FUNCTIONS...	All PROJECT V...	0.00	85.00	-85.00	0.00
111	44000	24826	60404	All FUNCTIONS...	All PROJECT V...	0.00	513.50	-513.50	0.00
111	44000	24826	60409	All FUNCTIONS...	All PROJECT V...	0.00	373.37	-373.37	0.00
111	44000	24826	60414	All FUNCTIONS...	All PROJECT V...	0.00	10,000.00	-10,000.00	0.00
111	44000	24826	60423	All FUNCTIONS...	All PROJECT V...	0.00	116.00	-116.00	0.00
111	44000	24826	60608	All FUNCTIONS...	All PROJECT V...	0.00	100.00	-100.00	0.00
111	44000	24826	61201	All FUNCTIONS...	All PROJECT V...	0.00	919.17	-919.17	0.00
111	44000	24826	61209	All FUNCTIONS...	All PROJECT V...	0.00	1,002.98	-1,002.98	0.00
111	44000	24826	61213	All FUNCTIONS...	All PROJECT V...	0.00	69.58	-69.58	0.00
111	44000	24826	61219	All FUNCTIONS...	All PROJECT V...	0.00	437.00	-437.00	0.00
111	44000	24826	61221	All FUNCTIONS...	All PROJECT V...	0.00	-3,250.00	3,250.00	0.00

If you were unsure of what natural account your expense posted to and clicked the blue outlined Consumption link as explained above, you will see this screen to choose from different natural accounts/amounts to find your expense. Click any dollar amount link in the Expenditure column to see transaction detail for that natural account.

Review Budgetary Control Balances Done

Control Budget Monthly Budget
 Currency USD
 Budget Period Jul-25 - Jul-25

FUND CLASS 111
 FUND SOURCE 44000
 DEPARTMENT 24826

ACCOUNT All ACCOUNT Values
 FUNCTIONS All FUNCTIONS Values
 PROJECT All PROJECT Values

Budget Balances

View      Detach  Wrap

FUND CLASS	FUND SOURCE	DEPARTMENT	ACCOUNT	FUNCTIONS	PROJECT	Budget Period	Total Budget	Commitments	Obligations	Other Consumption	Expenditures	Total Consumption
111	44000	24826	40017	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	450.00	450.00
111	44000	24826	40313	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	2,995.00	2,995.00
111	44000	24826	60210	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	85.00	85.00
111	44000	24826	60404	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	513.50	513.50
111	44000	24826	60409	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	373.37	373.37
111	44000	24826	60414	100	0000000000	Jul-25	0.00	0.00	10,000.00	0.00	0.00	10,000.00
111	44000	24826	60423	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	116.00	116.00
111	44000	24826	60608	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	100.00	100.00
111	44000	24826	61201	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	919.17	919.17
111	44000	24826	61209	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	1,002.98	1,002.98
111	44000	24826	61213	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	69.58	69.58
111	44000	24826	61219	100	0000000000	Jul-25	0.00	0.00	0.00	0.00	437.00	437.00
Total							0.00	-850.00	-1,250.00	0.00	15,911.60	13,811.60