

Completing a KK Budget Inquiry - GRANTS

The myUFL Commitment Control (KK) Ledger is a tool utilized by the University to ensure that commitment and expenditure of University resources are made within established budgets and available cash. The KK Ledger is comprised of the following ledger groups that are applicable to University operating funds: (1) Appropriations Ledger Group; (2) Cash-Based Ledger Group; (3) Grants Ledger Group; (4) Student Government Ledger Group; and (5) Construction Ledger Group.

Commitment Control identifies and reserves (or "commits") funds for future payment obligations. It answers the question "What is my available spending authority?"

This instruction guide provides step-by-step instructions for completing a KK Budget Inquiry as it pertains to the GRANTS ledger group.

Navigation

Navigate through **Nav Bar > Main Menu > Financials > Commitment Control > Review Budget Activities > Budget Details.**

Searching

Values may be entered into the ChartFields manually, by using the **Look up** button or by using the **Type Ahead** feature.

1. Click the **Ledger Group Look Up** button from the Search page.
2. Click the **Look Up** button to view the list of available options.
3. Click **KKGMCHD** from the Search Results table.
4. Click the **Search** button.
5. Enter a valid value (e.g., "**2905**") into the **Department** field. (Optional)
6. Select the appropriate Department from the **Type-Ahead** list.
7. Enter a valid value (e.g., "**201**") into the **Fund Code** field. (Optional)
8. Select the appropriate Fund from the **Type-Ahead** list.
9. Enter a valid value (e.g., "**00018145**") into the **Project** field.
10. Enter a valid value (e.g., "**cum**") into the Budget Period field. (Optional)
11. Click the **Search** button.
12. Scroll down, if needed.
13. Select the desired record from the Search Results list.

If only one record satisfies the search criteria, it will automatically open.

14. Click the **View Details** link.

Budget Details (see figure 1)

The top line shows **ChartFields** that were used to define the search.

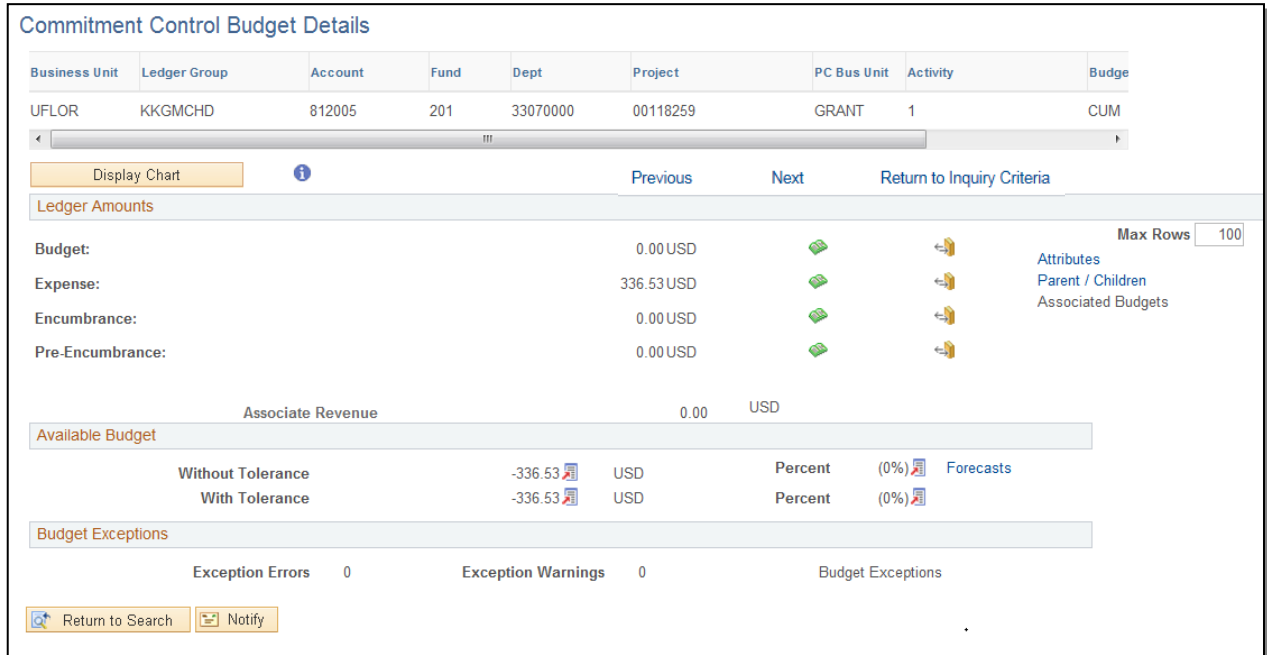


Figure 1. Budget Details

15.If you wish to view the previous or next budget line, click the Previous or Next link as appropriate.

16. Note the Budget Details.

Ledger Amounts section:

Budget = Allocated amount

Expense = What you’ve spent

Encumbrance = What you’re in the process of spending (e.g., Pos, TAs, etc.)

Pre-Encumbrance = no longer used

Available Budget section:

Without Tolerance = full budget amount is available to spend

With Tolerance = UF currently does not use. If used, would limit amount of budget that could be spent by a set percentage

Budget Exceptions section:

Exception Errors = the number of line items within transactions that have budget exceptions


Budget Exceptions = will become a hyperlink if budget exceptions exist

If desired, you can drill down to view activity logs.

17. Click the **Expense Drill to Ledger** button. 

18. Click the **Show all columns** button. 

This view shows the Accounting Period. UF fiscal year runs from July – June. Accounting Period 1 = July; Accounting Period 3 = September, etc.

19. Click the **Drill Down** icon on the desired Accounting Period row. 

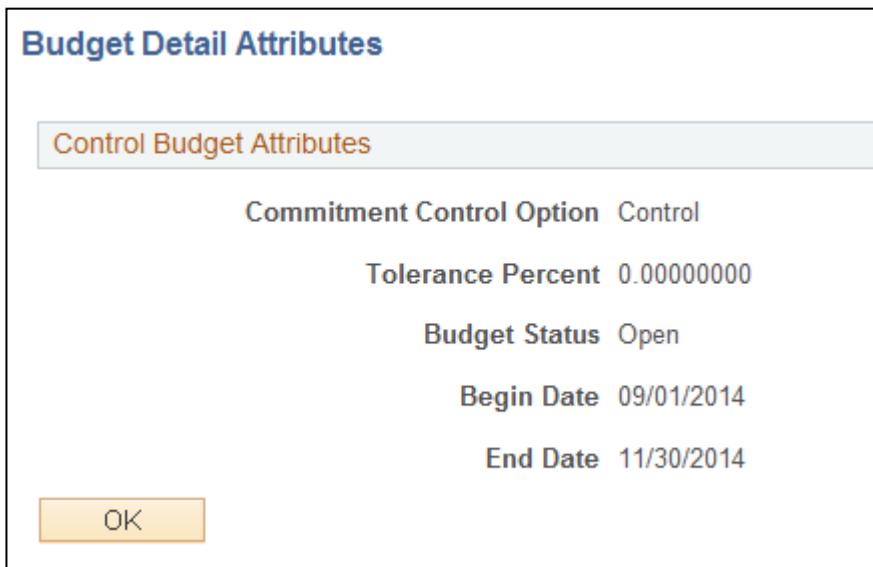
This view displays the Activity Log. This view of the Activity Log displays each transaction that occurred during that Accounting Period.

20. Click the **Drill Down** icon on the desired transaction

21. Click the **OK** button three times to return to Budget Details screen

22. Click the **Attributes** link to view Budget Details Attributes (see figure 3) which displays the Begin and End dates of the awarded project.

These dates are used by KK and Contracts & Grants to determine if the grant is still in effect. If a grant has been extended, this End date must be updated by Contracts & Grants before a transaction can be processed.



Budget Detail Attributes

Control Budget Attributes

Commitment Control Option	Control
Tolerance Percent	0.00000000
Budget Status	Open
Begin Date	09/01/2014
End Date	11/30/2014

OK

Figure 3. Budget Detail Attributes

23. Note the dates; then click the **OK** button.

24. If you wish to view the previous or next budget line, click the Previous or Next link as appropriate.



25. Click the **Return to Search** button.

26. Click the **Clear** button.

If you need help with...

- Technical issues, contact the UF Help Desk:
 - 392-HELP
 - helpdesk@ufl.edu
- Policies and Directives,
 - Contact the University Budget Office at 392-2402

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