Completing a KK Budget Overview

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 Budgets Overview. This is an example of how a user might complete this procedure. Note: Figures in this instruction guide reflect a Budgets Overview for the Grants Ledger Group.

Navigation

Navigate through Nav Bar > Main Menu > Financials > Commitment Control > Review Budget Activities > Budgets Overview.

1. Click the Add a New Value tab.

2. Enter a valid value (e.g., "BudgetOverview") into the Inquiry Name field. This name is retrievable in future searches.

3. Click the Add button to open the Budget Inquiry Criteria form (see Figure 1).

![Budget Inquiry Criteria form](image)

**Figure 1.** Budget Inquiry Criteria form

4. Enter a valid description into the Description field.
Searching
Values may be entered into the ChartFields manually, by using the Look up button or by using the Type Ahead feature.

5. Click the Look up Ledger Group icon.

6. Click the Look Up button.

7. Click the desired ledger group link (e.g., KKGMCHD Grants Child KK Ledger Group). Note the Budget Period in the Budget Criteria section appears appropriate for the Ledger Group selected.

8. Enter a valid value (e.g., "201") into the Fund field.

9. Enter a valid value (e.g., "00117011") into the Project field.

10. De-select the Closed option to exclude closed budgets.

11. De-select the Hold option to exclude budgets with hold status.

12. Click the Search button to display the screen show in Figure 2.

Figure 2. Budgets Overview search criteria results

13. Enter a valid value (e.g., "500") into the Max Rows field if needed. Increasing the Max Rows field to at least 500 will display a larger result set.
14. Click the **Search** button.
15. Scroll over, if needed.
16. Note the Budget, Expense and Available Budget information; then click **Show Budget Details** button (Figure 3).

![Budget Details](image)

**Figure 3.** Budget Details screen

17. Click the **OK** button.
18. Click the **Return to Criteria** link.

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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