Running a Budgets Overview Inquiry

A Budgets Overview Inquiry enables you to view “real time” available balances on your projects. It’s recommended you create an inquiry for each type of funding you'll need to review (for example, one inquiry for sponsored programs and one for cash-based or appropriations funding).

Creating a Budgets Overview Inquiry

In this example, we'll create an inquiry for sponsored programs.

1. Click the Menu icon and then click Main Menu.
2. Click Financials, click Commitment Control and then click Review Budget Activities.
3. Click Budgets Overview. The Budgets Overview Search page displays.

![Figure 1: Budgets Overview Search page](image)

4. Click the Add a New Value tab.
5. In the Inquiry Name field, type a name for the inquiry using lowercase letters and no spaces.
6. Now click the Add button. A page displays that enables you to set up the criteria for the budget inquiry.
7. Click the Ledger Group lookup button.
8. To select the KKMCHD ledger group, type KK and then click the Look Up button.
9. Click the KKGMCCHD ledger group.
10. The setup is complete, so click **Save**. The inquiry is saved.

![Budget Inquiry Criteria](image)

**Figure 2: Budget Overview page**

**Running a Budgets Overview Inquiry**

To run a budgets overview inquiry, perform the following steps:

1. Click the **Menu** icon and then click **Main Menu**.
2. Click **Financials**, click **Commitment Control** and then click **Review Budget Activities**.
3. Click **Budgets Overview**. The Budgets Overview Search page displays.
4. In the Inquiry Name field, type your inquiry name.
5. Click the **Search** button. The Budget Overview page displays.
6. Click the **Project** field in the ChartField From Value column. Notice the percent sign that displays in the field. The percent sign is a "wildcard" that can be used when searching to indicate, "Match one or more characters." For this search, no wildcard will be needed.
7. Delete the % wildcard.
8. Type your project number.

9. Click the **Search** button. The Budget Overview Inquiry Results page displays. This page displays the budget, expenditures, open encumbrances, and available budget for the project.

![Figure 3: Budget Overview Inquiry Results page](image)

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