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.

1. Click the Main Menu link.
2. Click Commitment Control.
3. Click Review Budget Activities.
4. Click Budget Details.

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 Ledger Group Look Up button from the Search page.
6. Click the Look Up button to view the list of available options.
7. Click KKGMCHD from the Search Results table.
8. Enter a valid value (e.g., "2905") into the Department field.
9. Enter a valid value (e.g., "201") into the Fund Code field.
10. Enter a valid value (e.g., "00018145") into the Project field.
11. Scroll down, if needed.
12. Click the Search button.
13. Scroll down, if needed.
14. Select the desired record from the Search Results list.
   If only one record satisfies the search criteria, it will automatically open.
Budget Details (see figure 1)
The top line shows ChartFields that were used to define the search.

Figure 1. Budget Details

15. 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

16. Click the Expense Drill to Ledger button.
17. 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.
18. 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.

19. Click the **Drill Down** icon on the desired transaction (see figure 2).

![General Ledger Journal Line Drill Down](image)

**Figure 2.** Transaction Details

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

21. 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.
22. Note the dates; then click the **OK** button.
23. Scroll down, if needed.
24. Click the **Return to Search** button.
25. 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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