

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.

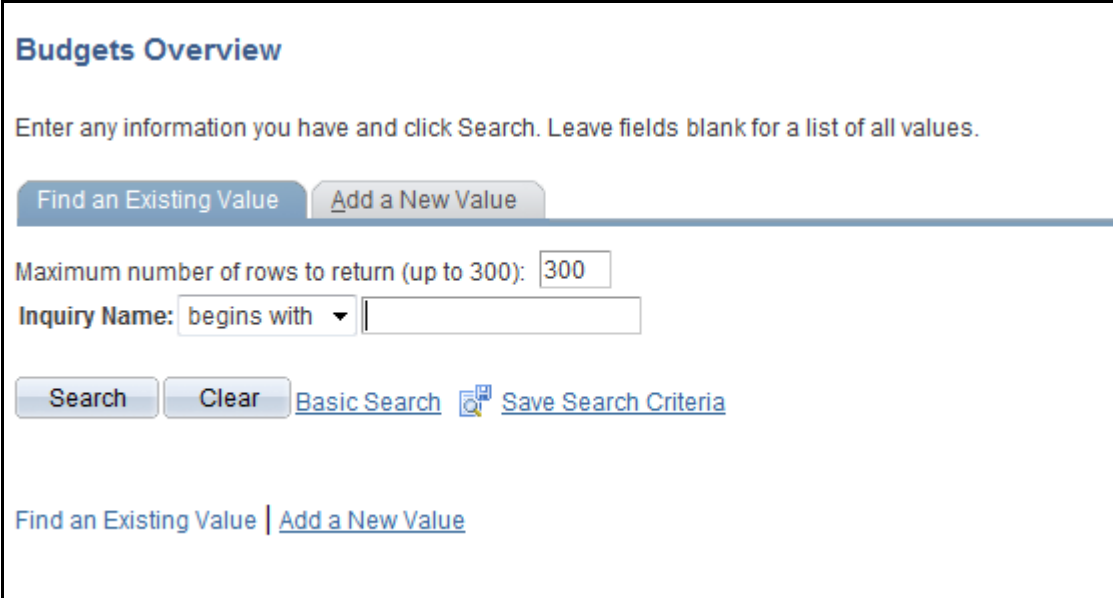
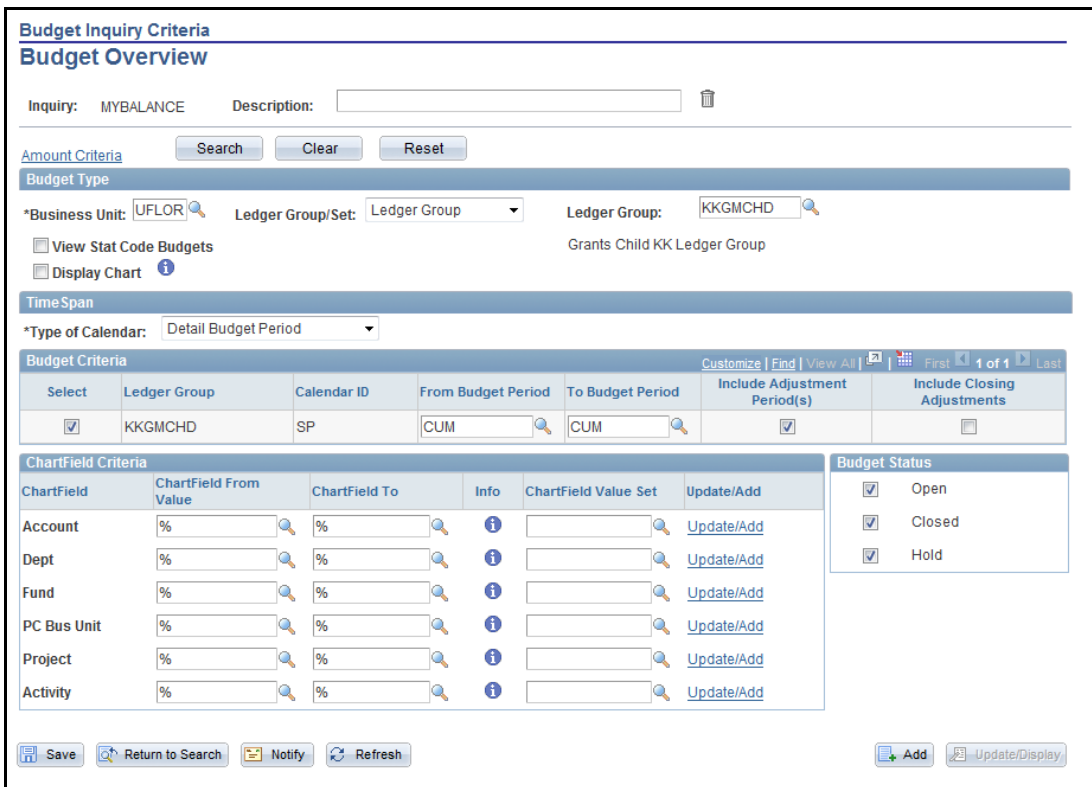


Figure 1: Budgets Overview Search page

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 **KKGMCHD** ledger group.

10. The setup is complete, so click **Save**. The inquiry is saved.



Budget Inquiry Criteria
Budget Overview

Inquiry: MYBALANCE Description:

Amount Criteria Search Clear Reset

Budget Type

*Business Unit: UFLOR Ledger Group/Set: Ledger Group Ledger Group: KKGMCHD
 View Stat Code Budgets Grants Child KK Ledger Group
 Display Chart

Time Span

*Type of Calendar: Detail Budget Period

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	KKGMCHD	SP	CUM	CUM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	% <input type="text"/>	% <input type="text"/>	i	<input type="text"/>	Update/Add
Dept	% <input type="text"/>	% <input type="text"/>	i	<input type="text"/>	Update/Add
Fund	% <input type="text"/>	% <input type="text"/>	i	<input type="text"/>	Update/Add
PC Bus Unit	% <input type="text"/>	% <input type="text"/>	i	<input type="text"/>	Update/Add
Project	% <input type="text"/>	% <input type="text"/>	i	<input type="text"/>	Update/Add
Activity	% <input type="text"/>	% <input type="text"/>	i	<input type="text"/>	Update/Add

Budget Status

Open
 Closed
 Hold

Save Return to Search Notify Refresh Add Update/Display

Figure 2: Budget Overview page

Running a Budgets Overview Inquiry

To run a budgets Criteria 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.

Inquiry Results													
Business Unit:		UFLOR											
Ledger Group:		KKG MCHD										Grants Child Ledger Group	
Type of Calendar:		Detail Budget Period											
Amounts in Base Currency:		USD											
Revenue Associated:		<input type="checkbox"/>											
Return to Criteria		Max Rows:		100		Display Options		<input type="button" value="Search"/>					
Ledger Totals (2 Rows)													
Budget:		400,000.00											
Expense:		259,175.99											
Encumbrance:		4,642.15											
Pre-Encumbrance:		0.00											
Budget Balance:		136,181.86											
Associate Revenue:		0.00											
Available Budget:		136,181.86											
Budget Overview Results													
		Ledger Group	Account	Fund	Dept	PC Bus Unit	Project	Activity	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance
1		KKG MCHD	DIRECT	201	19090100	GRANT	00062790	1	CUM	287,144.000	185,773.850	4,642.150	0.00
2		KKG MCHD	INDIR	201	19090100	GRANT	00062790	1	CUM	112,856.000	73,402.140	0.000	0.00

Figure 3: Budget Overview Inquiry Results page