KK.060.005 - PERFORMING BUDGET OVERVIEW INQUIRIES

Purpose	• Create a Budget Overview inquiry. • Identify the required information to run a Ledger Group inquiry. • Use the Budget Overview page to drilldown into budget transaction line details. • Use the Budget Overview page to drilldown into expense transaction line details.
Description	This topic demonstrates the Ledger Group inquiry component which provides summarized and detailed information based off the provided ChartField search criteria. The Budget Overview allows users to drilldown into the activity log as well as the budget details screen.
Security Role	BOR_KK_INQUIRY
Dependencies/ Constraints	None
Additional Information	Ledger Group criteria can be saved and used at a later time.

Procedure

Below are step-by-step instructions on using the Budget Overview to review budget and expense line detailed information for a ChartString.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Commitment Control** link.
4.	Click the **Review Budget Activities** link.
5.	Click the **Budgets Overview** link.
6.	Click the **Add a New Value** tab.
7.	Enter an inquiry name in the **Inquiry Name** field. For example, a user could name an Organization level inquiry ORG1, a Revenue level inquiry REVEST, etc.
8.	Click the **Add** button. The system navigates to the Budget Inquiry Criteria page.
9.	Enter a Description in the **Description** field. For example, a user could name an Organization level inquiry Organizational Budget Inquiry, a Revenue level inquiry Revenue Estimate Inquiry, etc.
10.	Click the **Ledger Group/Set** dropdown menu.
11.	Click in the **Ledger Group** field.
12.	Enter or search for the appropriate Ledger Group. Ledger Group options are: • **APPROP** • **DETAIL** • **ORG** • **PRMST_EXP** • **PRMST_REV** • **PROJ_GRT** • **REVEST**
13.	Select "**Detail Accounting Period**" from the Time Span - Type of Calendar Dropdown Menu.
14.	Verify the fields **From Year, From Period, To Year,** and **To Period** default to the current accounting period. ***Note:*** *Users may enter a different accounting period or range of periods, if needed.*
15.	Enter **ChartField** Criteria.

Step	Action
16.	Scroll to the top of the page and click the **Search** button. The system navigates to the Inquiry Results page.
17.	Click an entry in the **Budget** column.
18.	Click the **Drill Down** button to review the Budget Journal Line detail in the popup window.
19.	Click the **OK** button.
20.	Click an entry in the **Expense** column. ***Note****: if running a Revenue inquiry, this column is called Revenue Estimate or Recognized Revenue.*
21.	Click the **Drill Down** button to view the expense transaction line detail in the popup window.
22.	Click the **OK** button.
23.	Click the **Drill to Activity Log Inquiry** button.