

## KK.060.005 - PERFORMING BUDGET OVERVIEW INQUIRIES

<b>Purpose</b>	<ul style="list-style-type: none"> <li>Create a Budget Overview inquiry.</li> <li>Identify the required information to run a Ledger Group inquiry.</li> <li>Use the Budget Overview page to drilldown into budget transaction line details.</li> <li>Use the Budget Overview page to drilldown into expense transaction line details.</li> </ul>
<b>Description</b>	<p>This topic demonstrates the Ledger Group inquiry component which provides summarized and detailed information based off the provided ChartField search criteria.</p> <p>The Budget Overview allows users to drilldown into the activity log as well as the budget details screen.</p>
<b>Security Role</b>	BOR_KK_INQUIRY
<b>Dependencies/ Constraints</b>	None
<b>Additional Information</b>	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.

<b>Step</b>	<b>Action</b>
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Navigator</b> icon.
3.	Click the <b>Commitment Control</b> link.
4.	Click the <b>Review Budget Activities</b> link.
5.	Click the <b>Budgets Overview</b> link.
6.	Click the <b>Add a New Value</b> tab.
7.	Enter an inquiry name in the <b>Inquiry Name</b> field. For example, a user could name an Organization level inquiry ORG1, a Revenue level inquiry REVEST, etc.
8.	Click the <b>Add</b> button. The system navigates to the Budget Inquiry Criteria page.
9.	Enter a Description in the <b>Description</b> 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 <b>Ledger Group/Set</b> dropdown menu.
11.	Click in the <b>Ledger Group</b> field.
12.	Enter or search for the appropriate Ledger Group. Ledger Group options are: <ul style="list-style-type: none"> <li>• <b>APPROP</b></li> <li>• <b>DETAIL</b></li> <li>• <b>ORG</b></li> <li>• <b>PRMST_EXP</b></li> <li>• <b>PRMST_REV</b></li> <li>• <b>PROJ_GRT</b></li> <li>• <b>REVEST</b></li> </ul>
13.	Select " <b>Detail Accounting Period</b> " from the Time Span - Type of Calendar Dropdown Menu.
14.	Verify the fields <b>From Year, From Period, To Year,</b> and <b>To Period</b> default to the current accounting period.  <i><b>Note:</b> Users may enter a different accounting period or range of periods, if needed.</i>

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