

# Budget Overview Inquiry

Created on 2/19/2013 5:26:00 PM

## Table of Contents

**Budget Overview Inquiry** ..... 1

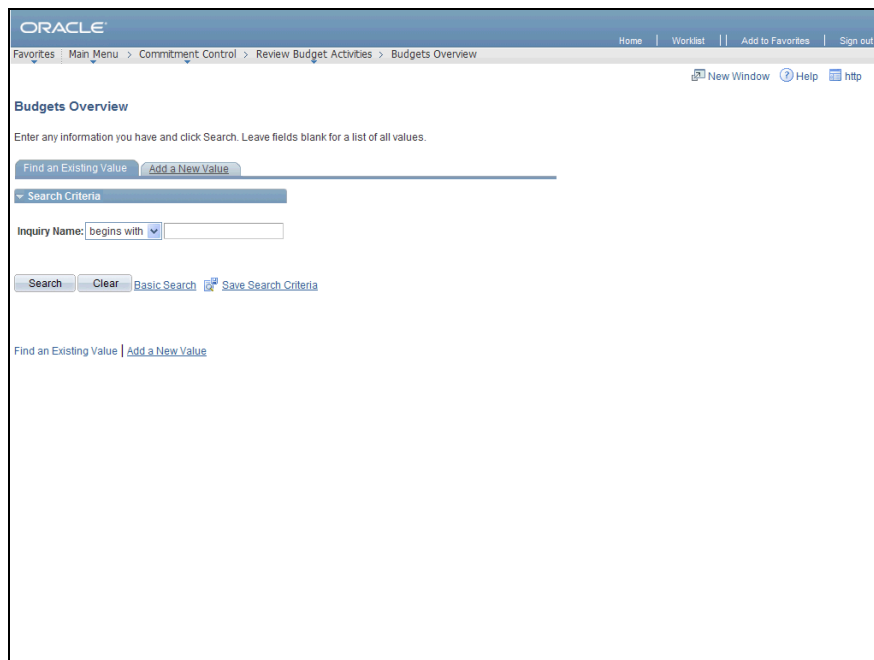
### Budget Overview Inquiry



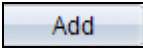
The **Budget Overview** component enables users to select and view activity for budgets based on user defined sets of criteria. Summarized budget information can be retrieved for current and past fiscal years. Users can drill down as far as the transaction level of a budget journal. Core-CT 9.1 enables users to display budget overview information in a bar chart as well as in a grid.

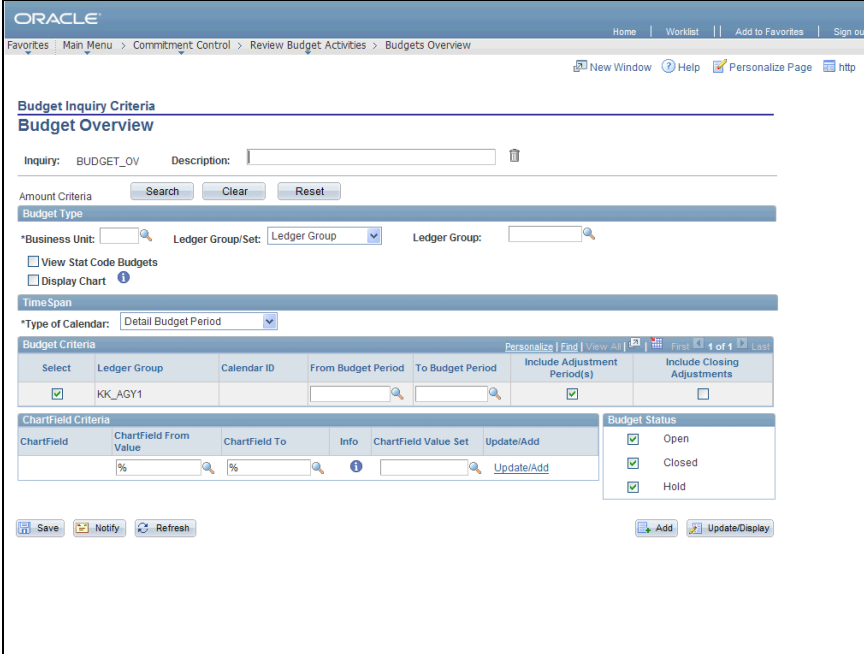
#### Procedure


Navigation: Commitment Control > Review Budget Activities > Budgets Overview

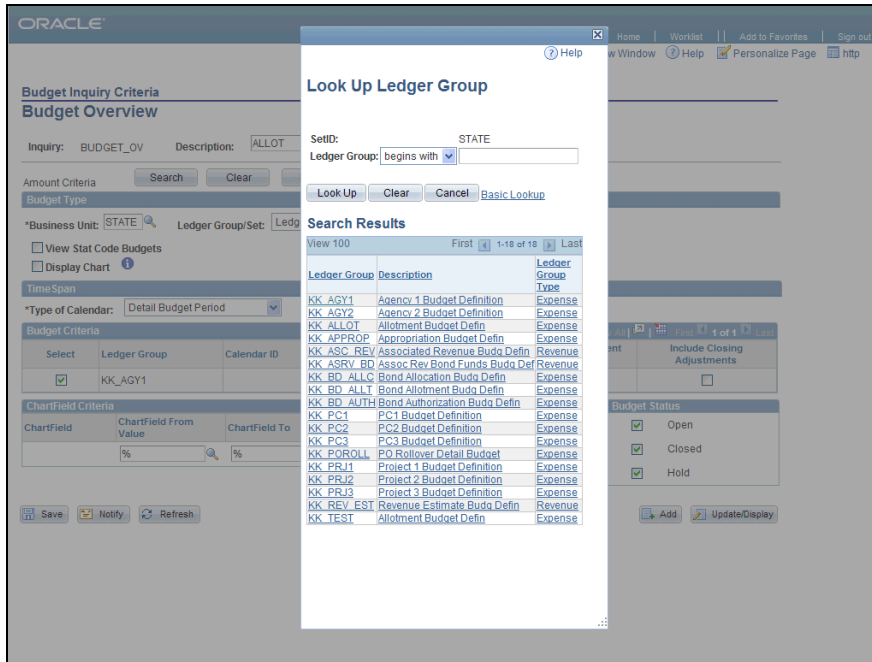


Step	Action
1.	Click the <b>Add a New Value</b> tab. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Add a New Value</div>

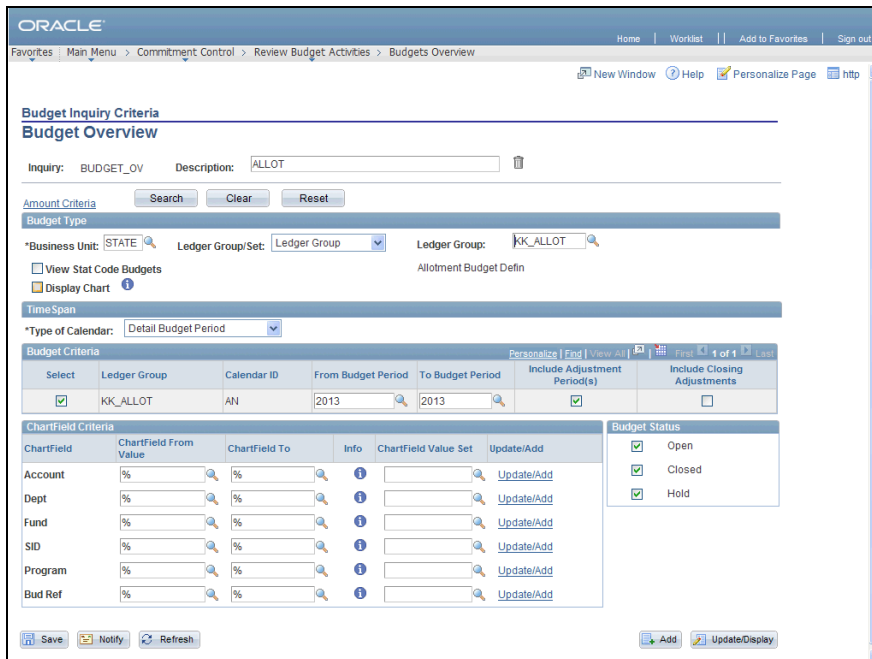
Step	Action
2.	Enter <b>BUDGET_OV</b> into the <b>Inquiry Name</b> field.
3.	Click the <b>Add</b> button. 




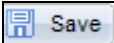


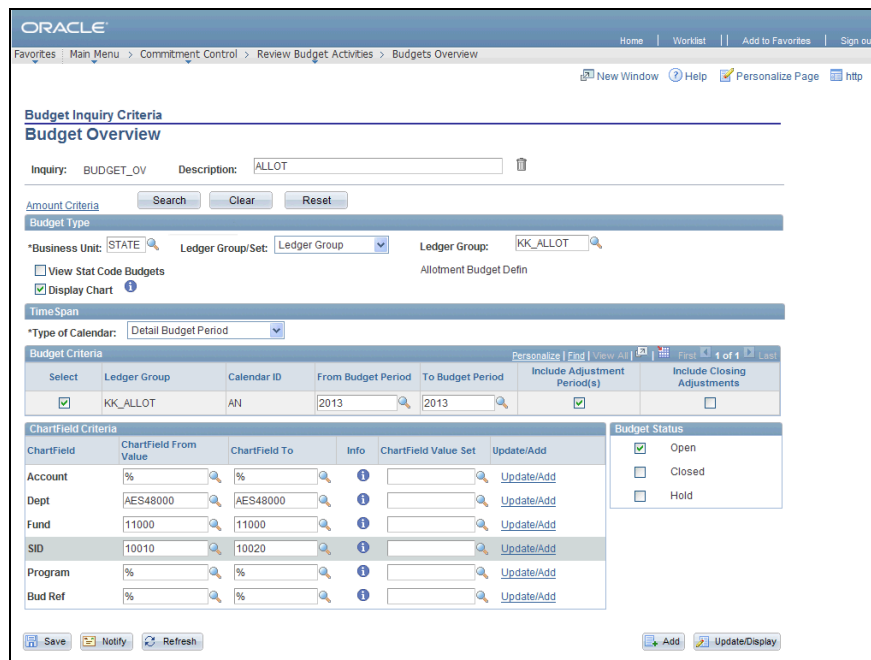
Step	Action
4.	Enter <b>ALLOT</b> into the <b>Description</b> field.
5.	The <b>Business Unit</b> is always STATE. Enter <b>STATE</b> into the <b>Business Unit</b> field.
6.	Accept the default of Ledger Group in the <b>Ledger Group/Set</b> field.
7.	Click the <b>Look up Ledger Group</b> button. 



Step	Action
8.	Click the <b>KK_ALLOT</b> link. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <span style="color: blue; text-decoration: underline;">KK ALLOT</span> Allotment Budget Defin         </div>



Step	Action
9.	Click the <b>Display Chart</b> option to display the search results in chart form as well as on a grid. 
10.	Accept the Detail Budget Period default value in the <b>Type of Calendar</b> field.
11.	This inquiry will include only Open budgets.  Click the <b>Closed</b> option to deselect this option. 
12.	Click the <b>Hold</b> option to deselect this option. 
13.	Enter <b>AES48000</b> in the <b>Dept</b> field.
14.	Enter <b>AES48000</b> in the <b>Dept</b> field in the <b>ChartField To</b> column.
15.	Enter <b>11000</b> in the <b>Fund</b> field in the <b>ChartField From</b> column.
16.	Enter <b>11000</b> into the <b>Fund</b> field in the <b>ChartField To</b> column.
17.	Enter <b>10010</b> into the <b>SID</b> field in the <b>ChartField From</b> column.
18.	Enter <b>10020</b> into the <b>SID</b> field in the <b>ChartField To</b> column.
19.	Click the <b>Save</b> button. 



**Budget Inquiry Criteria**  
**Budget Overview**

Inquiry: BUDGET\_OV Description: ALLOT

Amount Criteria Search Clear Reset

Budget Type

\*Business Unit: STATE Ledger Group/Set: Ledger Group Ledger Group: KK\_ALLOT

View Stat Code Budgets Allotment Budget Defin

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"/>	KK_ALLOT	AN	2013	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>

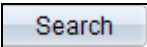
ChartField Criteria

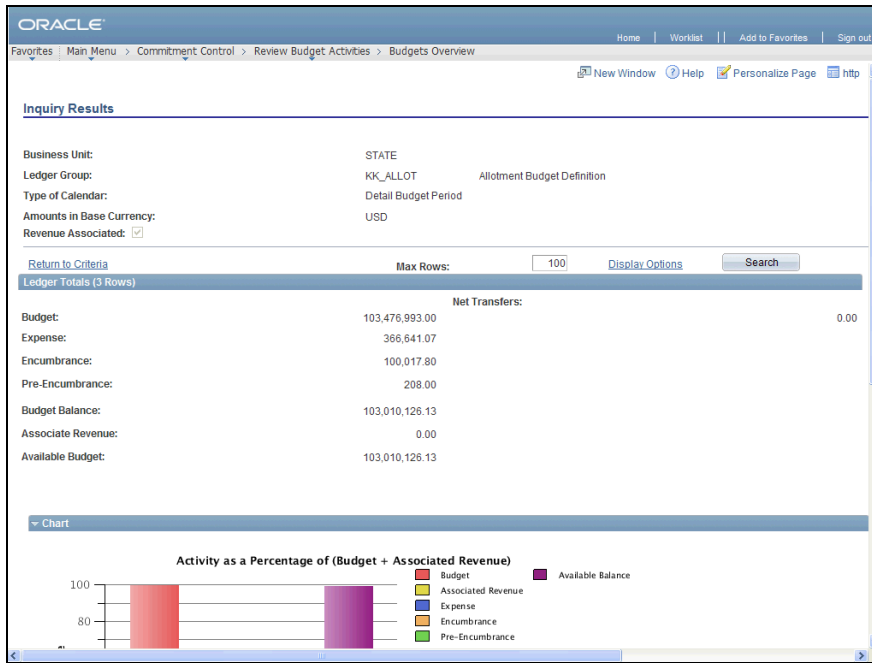
ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%			Update/Add
Dept	AES48000	AES48000			Update/Add
Fund	11000	11000			Update/Add
SID	10010	10020			Update/Add
Program	%	%			Update/Add
Bud Ref	%	%			Update/Add

Budget Status

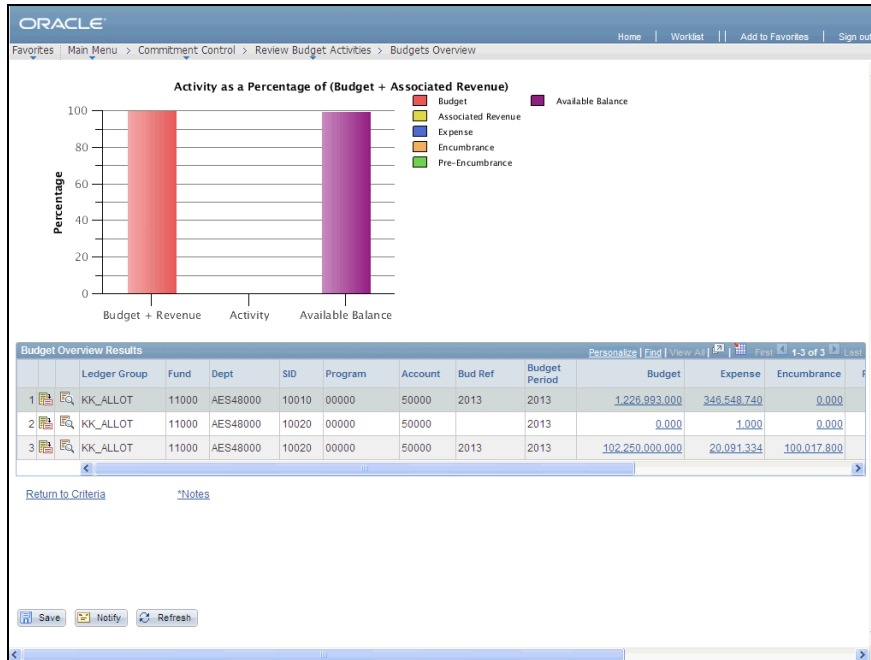
Open  
 Closed  
 Hold

Save Notify Refresh Add UpdateDisplay

Step	Action
20.	Click the <b>Search</b> button. 




Step	Action
21.	Click the scrollbar to move to the bottom of the page.

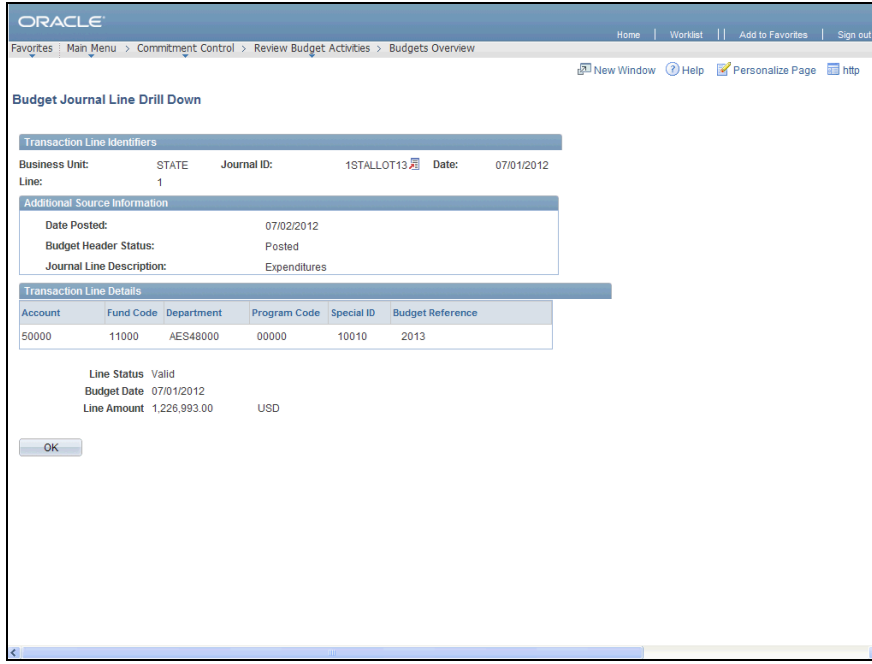


Step	Action
22.	Core-CT displays the results as a bar chart and in the <b>Budget Overview Results</b> grid.
23.	Click the <b>1,226,993.000</b> link to drill down to the Journal level for the first row. <div style="border: 1px solid black; padding: 2px; display: inline-block;">1,226,993.000</div>

The screenshot displays the Oracle Activity Log interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a breadcrumb trail: 'Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview'. The main content area features a section titled 'Activity Log' with a sub-section 'Ledger: KK\_ALT\_BD'. Below this is a table titled 'Activity Log' with columns: Tran Line, Document Label, Document ID, Ref Bdgt?, Fund, Dept, SID, Program, Account, Bud Ref, Budget Period, Year, Period, and Forecast. The table contains one row of data. Below the table is an 'OK' button.

Tran Line	Document Label	Document ID	Ref Bdgt?	Fund	Dept	SID	Program	Account	Bud Ref	Budget Period	Year	Period	Forecast
1	Journal ID:	1STALLOT13	N	11000	AES48000	10010	00000	50000	2013	2013	2013	1	1

Step	Action
24.	Click the <b>Drill Down</b> button to view the Budget Journal detail. 



Step	Action
25.	The <b>Budget Journal Line Drill Down</b> page displays details of the budget journal.
26.	<b>End of Procedure.</b>