

## Completing a KK Budget Overview

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 Budgets Overview. This is an example of how a user might complete this procedure. Note: Figures in this instruction guide reflect a Budgets Overview for the Grants Ledger Group.

1. Click the **Main Menu** link.
2. Click the **Commitment Control** menu.
3. Click the **Review Budget Activities** menu.
4. Click **Budgets Overview**.
5. Click the **Add a New Value** tab.
6. Enter a valid value (e.g., "**Example**") into the **Inquiry Name** field. This name is retrievable in future searches.
7. Click the **Add** button to open the Budget Inquiry Criteria form (see Figure 1).


The screenshot shows the 'Budget Inquiry Criteria' form. At the top, there is a title bar with 'Budget Inquiry Criteria' and 'Budget Overview'. Below this, there is an 'Inquiry' field with the value 'EXAMPLE' and a 'Description' field. There are 'Search', 'Clear', and 'Reset' buttons. The form is divided into several sections: 'Amount Criteria', 'Budget Type', 'Time Span', 'Budget Criteria', and 'ChartField Criteria'. The 'Budget Type' section includes fields for '\*Business Unit' (UFLOR), 'Ledger Group/Set' (Ledger Group), and 'Ledger Group'. There are checkboxes for 'View Stat Code Budgets' and 'Display Chart'. The 'Time Span' section has a '\*Type of Calendar' dropdown set to 'Detail Budget Period'. The 'Budget Criteria' section is a table with columns: Select, Ledger Group, Calendar ID, From Budget Period, To Budget Period, Include Adjustment Period(s), and Include Closing Adjustments. The 'ChartField Criteria' section is another table with columns: ChartField, ChartField From Value, ChartField To, Info, ChartField Value Set, and Update/Add. The 'Budget Status' section has checkboxes for 'Open' and 'Closed'.

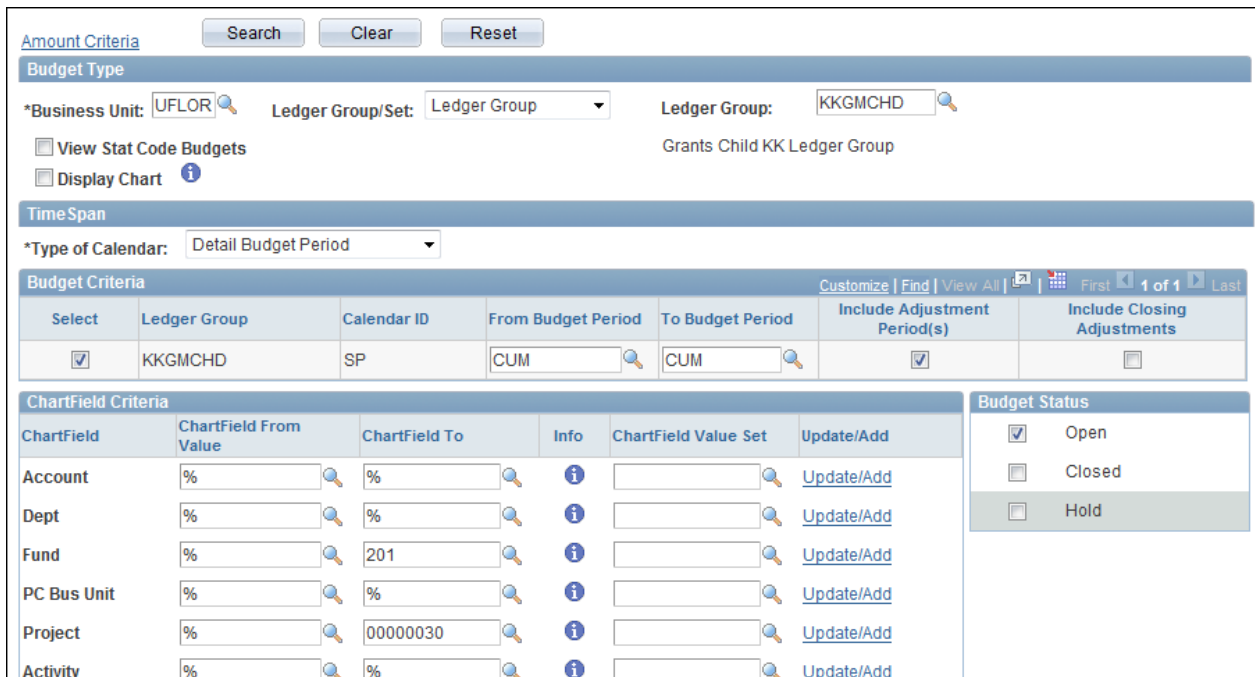
**Figure 1.** Budget Inquiry Criteria form

8. Enter a valid description into the **Description** field.

**Searching**

Values may be entered into the ChartFields manually, by using the **Look up** button or by using the **Type Ahead** feature.

9. Click the **Look up Ledger Group** icon. 
10. Click the **Look Up** button.
11. Click the desired ledger group link (e.g., **Grants Child KK Ledger Group**).  
Note the Budget Period in the Budget Criteria section appears appropriate for the Ledger Group selected.
12. Enter a valid value (e.g., "**201**") into the **Fund** field.
13. Enter a valid value (e.g., "**00000030**") into the **Project** field.
14. De-select the **Closed** option to exclude closed budgets.
15. De-select the **Hold** option to exclude budgets with hold status.
16. Click the **Search** button to display the screen show in Figure 2.



**Amount Criteria** Search Clear Reset

**Budget Type**

\*Business Unit: UFLOR Ledger Group/Set: Ledger Group Ledger Group: KKGCHD  
Grants Child KK Ledger Group

View Stat Code Budgets  
 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"/>	KKGCHD	SP	CUM	CUM	<input checked="" type="checkbox"/>	<input type="checkbox"/>


ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	201	i		Update/Add
PC Bus Unit	%	%	i		Update/Add
Project	%	00000030	i		Update/Add
Activity	%	%	i		Update/Add














**Budget Status**

Open  
 Closed  
 Hold

**Figure 2.** Budgets Overview search criteria

17. Enter a valid value (e.g., "**500**") into the **Max Rows** field.  
Increasing the Max Rows field to at least 500 will display a larger result set.

18. Click the **Search** button.
19. Scroll over, if needed.
20. Note the Budget, Expense and Available Budget information; then click **Show Budget Details** button (Figure 3). 

Budget Details					
<input type="button" value="Display Chart"/> 					
Ledger Amounts					
Budget:	35,411.27 USD			Max Rows:	<input type="text" value="500"/>
Expense:	35,064.03 USD			<a href="#">Attributes</a>	
Encumbrance:	0.00 USD			<a href="#">Parent / Children</a>	
Pre-Encumbrance:	0.00 USD			Associated Budgets	
Associate Revenue:	0.00 USD				
Available Budget					
Without Tolerance:	347.24 	USD	Percent:	(0.98%) 	<a href="#">Forecasts</a>
With Tolerance:	347.24 	USD	Percent:	(0.98%) 	
Budget Exceptions					
Exception Errors:	0	Exception Warnings:	0		

**Figure 3.** Budget Details

21. Scroll down, if needed.
22. Click the **OK** button.
23. Click the **Return to Criteria** link.

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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