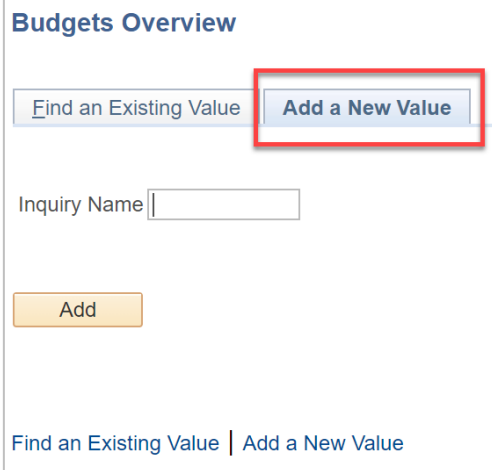# Create or Delete a Budget Overview Inquiry

The purpose of this job aid is to explain how to create or delete a Budget Overview Inquiry which can be used for Cost Center, Sponsored Project (Grants), and Capital Project (Plant Funds).

1. Begin by navigating to: **NavBar > Menu > Financials > Commitment Control > Review Budget Activities > Budget Overview**

2. Click the **Add a New Value** tab.

3. In the **Inquiry Name** field, enter a name for your inquiry, e.g. Cost Center, Grant, General Ledge Account, etc., and click **Add**.

4. The **Budget Overview** page is displayed.

5. Complete the required fields.

    a. Provide a brief description for the inquiry in the **Description** field.

    b. The **Business Unit** field defaults with the appropriate value "**UTARL**".

    c. If necessary, select **Ledger Group** or **Ledger Inquiry Set** from the drop-down menu.

        • **Ledger Group** is used to view a single ledger, e.g. OPE_CHILD1, OPR, GRT_CHILD1, PLANT, or DETAIL.

        • **Ledger Inquiry Set** is used to view a combined ledger, i.e. OPE_CH_OPR. This option is only available for Cost Centers.

    d. Depending on your choice in step 4c, enter or look up the desired **Ledger Group** or **Ledger Inquiry Set.**

        • Use Ledger Group **OPE_CHILD1** (Operations Expense) to view budget activity for a Cost Center.

        • Use Ledger Group **OPR** (Operations Revenue) to view budget activity for a Cost Center.

        • Use Ledger Inquiry Set **OPE_OPR** to view a combined ledger for a Cost Center at the parent level.

        • Use Ledger Inquiry Set **OPE_CH_OPR** to view a combined ledger for a Cost Center at the B level.

- Use Ledger Group **PLANT** to view budget activity for a Capital Project (Plant Fund)

- Use Ledger Group **GRT_CHILD1** to view budget activity for a Sponsored Project (Grant).

- Use Ledger Group **DETAIL** to view General ledge Account information, i.e. 63003 = Office Supplies, for a Cost Center, Sponsored Project, or Capital Project

6. Click the **Save** button to save your budget inquiry for future use.

Delete a Budget Overview Inquiry

1. Begin by navigating to: Navigator > Financials > Commitment Control > Review Budget Activities > Budget Overview

2. The Budgets Overview page is displayed, and you have two options.

3. Enter the Inquiry Name you want to delete and click Search.

4. Leave the Inquiry Name field blank and click Search.

   a. If you have created only one inquiry, the Budget Overview page will display.

   b. If you have multiple inquiries, a Search Results table will display, and you must select the appropriate inquiry to use.

5. Select the inquiry you want to delete.

6. On the Budget Overview page, click the Delete icon on the right side of the page (trash can).

7. To verify the inquiry was deleted successfully, click the Search button again.