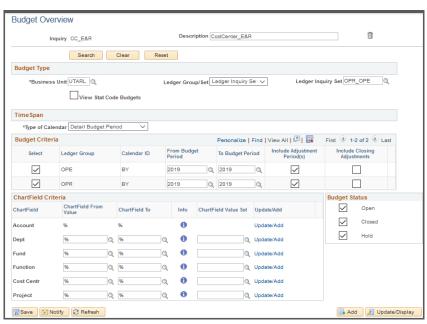# View Budget Activity for all GL Accounts

The purpose of this job aid is to explain how to view budget account and available balances for Cost Center, Sponsored Project (Grants), and Capital Project (Plant Fund). GL Accounts are used to categorize transactions for reporting purposes, i.e. 63003 = Office Supplies.

1. To generate a **Budget Overview**, begin by navigating to: **NavBar > Menu > Financials> Commitment Control > Review Budget Activities > Budget Overview**
2. The **Budgets Overview** page is displayed which is used to search for an existing budget inquiry (**Find an Existing Value**) or to create a new budget inquiry (**Add a New Value**). Note: The first time the Budgets Overview page is used, you must create a budget inquiry to view budget activity. Refer to the job aid "*Create or Delete a Budget Overview Inquiry*".
3. If you already have inquiries created, you have two options.
   a. Enter the existing **Inquiry Name** and click **Search**.
   b. Leave the **Inquiry Name** field blank and click **Search**.
      - If you have created only one inquiry, the **Budget Overview** page will display.
      - If you have multiple inquiries, a **Search Results** table will display, and you must select the appropriate inquiry to use.
4. The **Budget Overview** page is displayed with the values defined at the creation of the inquiry or that was last saved.
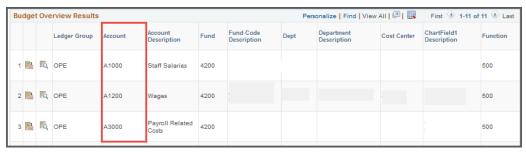

   a. Ensure **DETAIL** is selected for the **Ledger Group**.
   b. Select the appropriate **Type of Calendar**.
      - **Detail Budget Period** - View fiscal year-to-date information, i.e. September 1 – August 31.
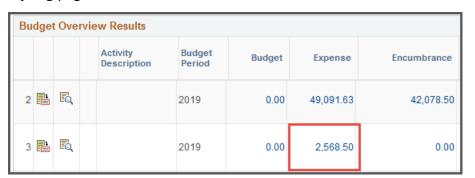   - **Detail Accocounting Period** - View information for a specific month or date range.

b. Depending on the Type of Calendar selected, enter the **Budget Period** and/or **Accounting Period** you want to view.
- NOTE: When viewing budget activity for a Sponsored or Capital Project with calendar year "Detail Budget Period", leave the Budget Period "From" and "To" fields blanks. If you want to view Project Information by Budget Period, use "Detail Account Period" calendar.

c. Enter the appropriate GL Account and the Cost Center or Project in the **ChartField Criteria** section.
- You can enter a specific GL Account number in the **Account – ChartField From** field or leave the % (percent sign) to view a summary of ALL GL Accounts for the specified period of time.
- NOTE: The purpose of the percent sign is to find all values for any unknown field.
- Note: If aspects of the chartfields are unknown, e.g. Account, Fund, Function, etc., do not remove the wildcard (%) symbol. The percent sign (%) should only be removed from the fields used to perform the search.

d. Enter the Cost Center or the Project you want to view.
e. Click the **Search** button to review the results of the inquiry.

5. The Inquiry Results page is displayed with the information defined in your search.
a. The General Ledger (GL) Accounts are displayed in the **Account** column of the Budget Overview Results table.

b. To view additional information, click the horizontal scrollbar to the right.
c. Click the monetary link in the Expense column, i.e. 2568.50, to access the **Activity Log** page.