

**GEARS**

General Enterprise And Resource Support

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**KK210**

**July 2013**

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## **KK210**

### **KK210 Managing Budgets**

#### **Course Overview**

The Commitment Control module in GEARS allows you to control and monitor transactions against predefined approved budgets.

Commitment Control allows users to establish and post original budgets, budget adjustments, and budget transfers. In addition, it allows you to control and/or monitor pre-encumbrances (i.e., Requisitions), encumbrances (i.e., Purchase Orders), and expenditure transactions (i.e., Vouchers or GL Journals) against pre-defined budgets.

The Judiciary will track budget activity for Operating budgets and for Capital Project and Grant (Project-Grant) budgets in Commitment Control.

The *KK210 Managing Budgets* course focuses on the management of Judiciary Operating budgets.

#### **Course Outline**

The following course sections and lessons provide information and step-by-step procedures used to manage and track Judiciary Operating budgets in Commitment Control:

- Course Audiences and Pre-requisites
- Lesson 1: Understanding Commitment Control
- Lesson 2: Performing Budget Transfers
- Lesson 3: Reviewing Budget Activity
- Course Summary

### **Course Audiences and Prerequisites**

#### **Audience(s)**

The Judiciary audiences for this course are:

- Circuit Court
- Court of Appeals
- Court of Special Appeals
- Court Related Agencies
- AOC - Non-DBF Offices
- State Law Library

#### **GEARS Role(s)**

This course is intended for Judiciary employees with the following GEARS role(s):

- KK Budget Analyst

#### **Prerequisites**

The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- KK100 Understanding GEARS Commitment Control for Managing Budgets

## Lesson 1: Understanding Commitment Control

### Lesson Overview

Budget journals are used to establish budgets or update existing budgets. Operational budgets are loaded by the **DBF Budget Analyst**, using a spreadsheet upload process. Budget transfers are performed within the same PCA at the account (sub-object) level, by authorized GEARS users.

Project-Grant budgets are established in the **Project Costing** module and loaded into Commitment Control via automated processes. These processes generate the budget and automatically establish budget journals. If needed, an authorized GEARS user(s) updates the budget journals online.

### Lesson Objectives

After completing this lesson, you will be familiar with:

- Commitment Control budget journals

### 1.1 Reviewing Budget Journals

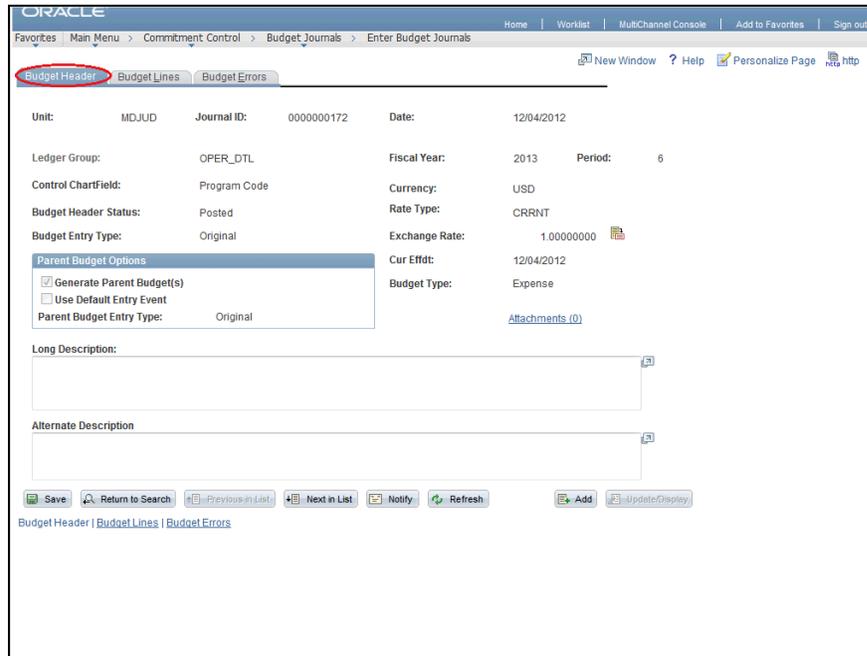
When budget journals are established, information about the budget is recorded on the budget header and budget lines. The journal header stores high-level information about the journal, including journal ID, journal date, journal status, etc. The journal lines contain the budget to which you are posting funds (e.g., PCA, Fund, Account, Program, Appropriation Number, Appropriation Year) and the budget amount.

After completing this topic you will be familiar with:

- The structure of a budget journal
- Required fields on the budget journal header and line

### Procedure

In this topic, you will review a budget journal that has been created, approved, and posted in the system.



**ORACLE** Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Budget Journals > Enter Budget Journals

Budget Header | Budget Lines | Budget Errors

Unit: MDJUD Journal ID: 000000172 Date: 12/04/2012

Ledger Group: OPER\_OTL Fiscal Year: 2013 Period: 6

Control ChartField: Program Code Currency: USD

Budget Header Status: Posted Rate Type: CRRNT

Budget Entry Type: Original Exchange Rate: 1.00000000

Parent Budget Options

Generate Parent Budget(s)

Use Default Entry Event

Parent Budget Entry Type: Original

Cur Effdt: 12/04/2012

Budget Type: Expense

Attachments (0)

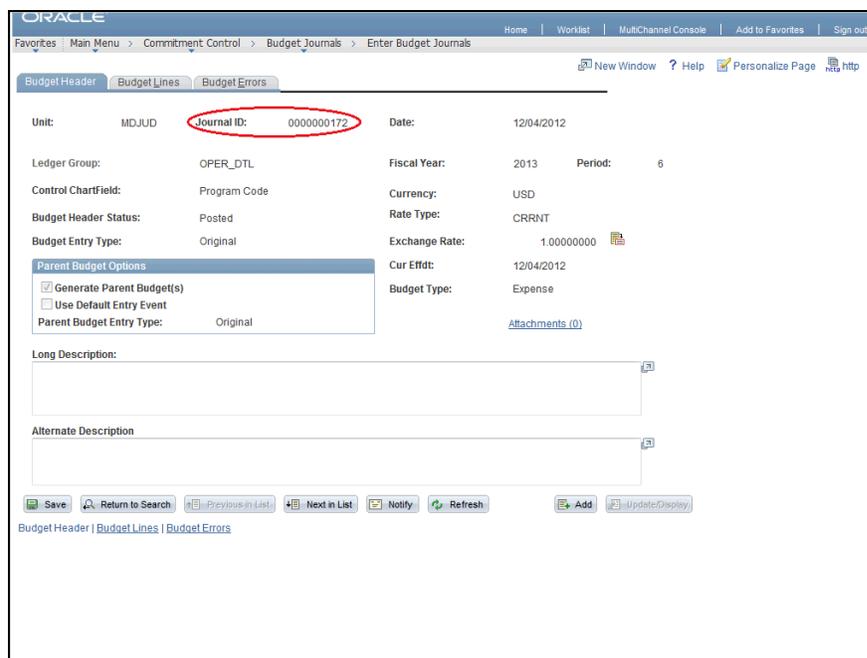
Long Description:

Alternate Description

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Budget Header | Budget Lines | Budget Errors

Step	Action
1.	<p>The <b>Budget Header</b> page displays the budget header information for the budget journal.</p> <p>In this example, we are displaying a budget journal for the <b>Operating Detail</b> Ledger Group for Fiscal Year 2013.</p>



**ORACLE** Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Budget Journals > Enter Budget Journals

Budget Header | Budget Lines | Budget Errors

Unit: MDJUD Journal ID: 000000172 Date: 12/04/2012

Ledger Group: OPER\_OTL Fiscal Year: 2013 Period: 6

Control ChartField: Program Code Currency: USD

Budget Header Status: Posted Rate Type: CRRNT

Budget Entry Type: Original Exchange Rate: 1.00000000

Parent Budget Options

Generate Parent Budget(s)

Use Default Entry Event

Parent Budget Entry Type: Original

Cur Effdt: 12/04/2012

Budget Type: Expense

Attachments (0)

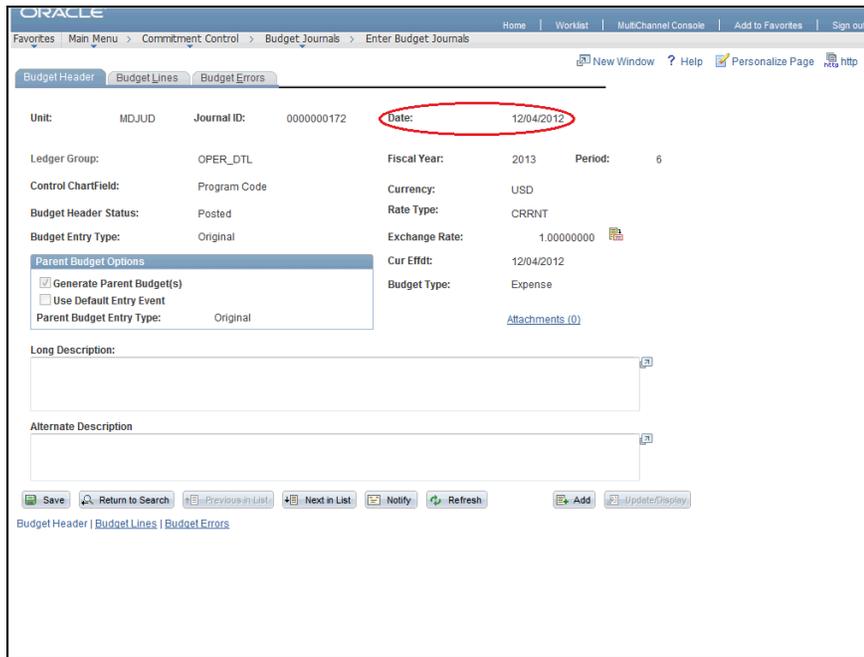
Long Description:

Alternate Description

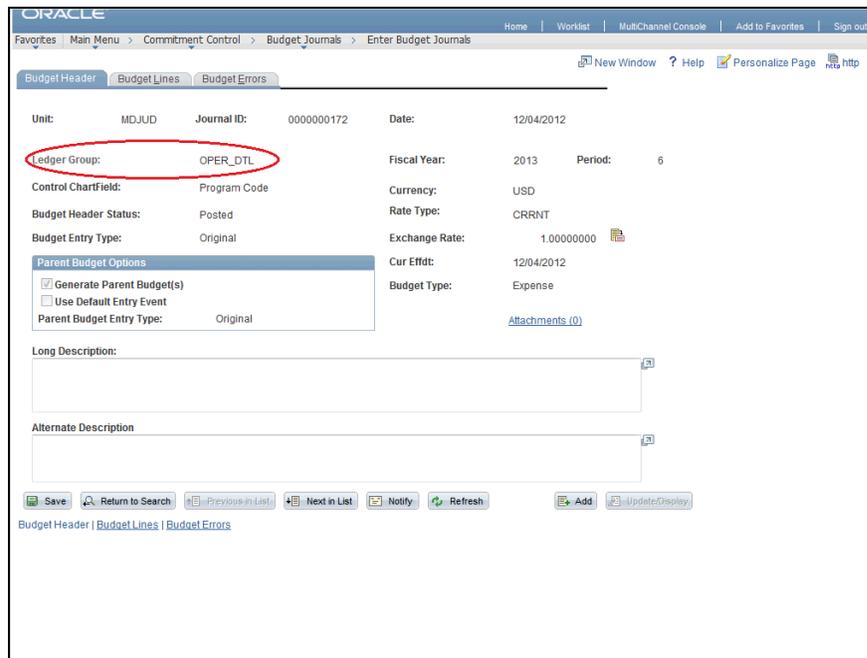
Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Budget Header | Budget Lines | Budget Errors

Step	Action
2.	<p>Let's take a look at some of the key fields included on the <b>Budget Header</b> page.</p> <p>Once a new budget journal is saved, the system will auto assign a <b>Journal ID</b>. You can use the Journal ID when searching for journals created in Commitment Control.</p> <p>In this example, the Journal ID is 0000000172.</p>



Step	Action
3.	<p>The <b>Journal Date</b> field indicates the date that the budget journal was established in the system. You can use the Journal Date when searching for journals created in Commitment Control.</p> <p>The Journal Date establishes the Fiscal Year and accounting period that the journal will apply to.</p> <p>In this example, the budget journal was established on 12/04/2012.</p>



ORACLE  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Budget Journals > Enter Budget Journals

Budget Header | Budget Lines | Budget Errors

Unit: MDJUD Journal ID: 000000172 Date: 12/04/2012

**Ledger Group:** OPER\_DTL Fiscal Year: 2013 Period: 6

Control ChartField: Program Code Currency: USD

Budget Header Status: Posted Rate Type: CRRNT

Budget Entry Type: Original Exchange Rate: 1.00000000

Parent Budget Options

Generate Parent Budget(s)

Use Default Entry Event

Parent Budget Entry Type: Original Cur Effdt: 12/04/2012

Budget Type: Expense Attachments (0)

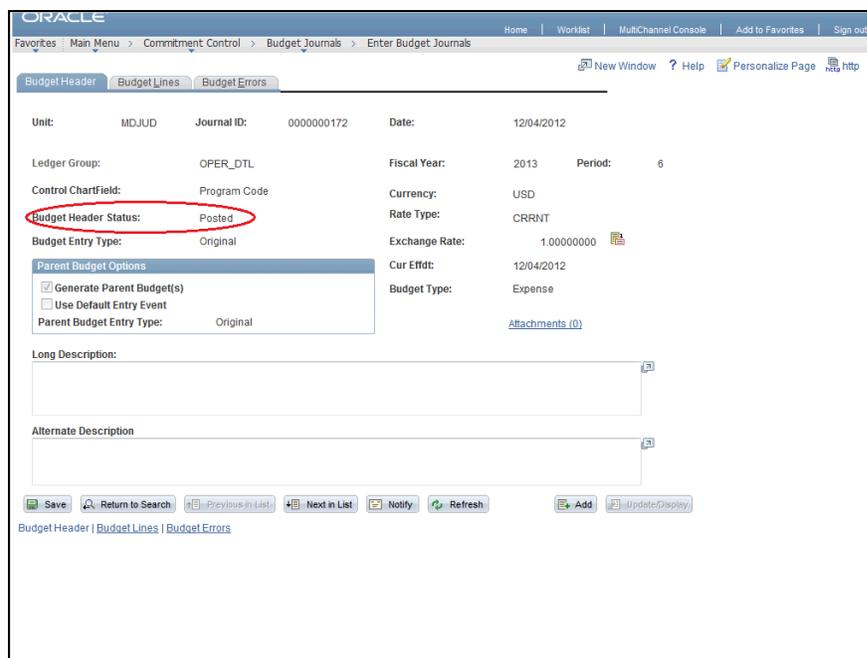
Long Description:

Alternate Description

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Budget Header | Budget Lines | Budget Errors

Step	Action
4.	<p>The <b>Ledger Group</b> field indicates the ledger group that the budget amount is posted to.</p> <p>In this example, the budget is posted to the <b>Operating Detail</b> Ledger Group (OPER_DTL).</p>



ORACLE  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Budget Journals > Enter Budget Journals

Budget Header | Budget Lines | Budget Errors

Unit: MDJUD Journal ID: 000000172 Date: 12/04/2012

Ledger Group: OPER\_DTL Fiscal Year: 2013 Period: 6

Control ChartField: Program Code Currency: USD

**Budget Header Status:** Posted Rate Type: CRRNT

Budget Entry Type: Original Exchange Rate: 1.00000000

Parent Budget Options

Generate Parent Budget(s)

Use Default Entry Event

Parent Budget Entry Type: Original Cur Effdt: 12/04/2012

Budget Type: Expense Attachments (0)

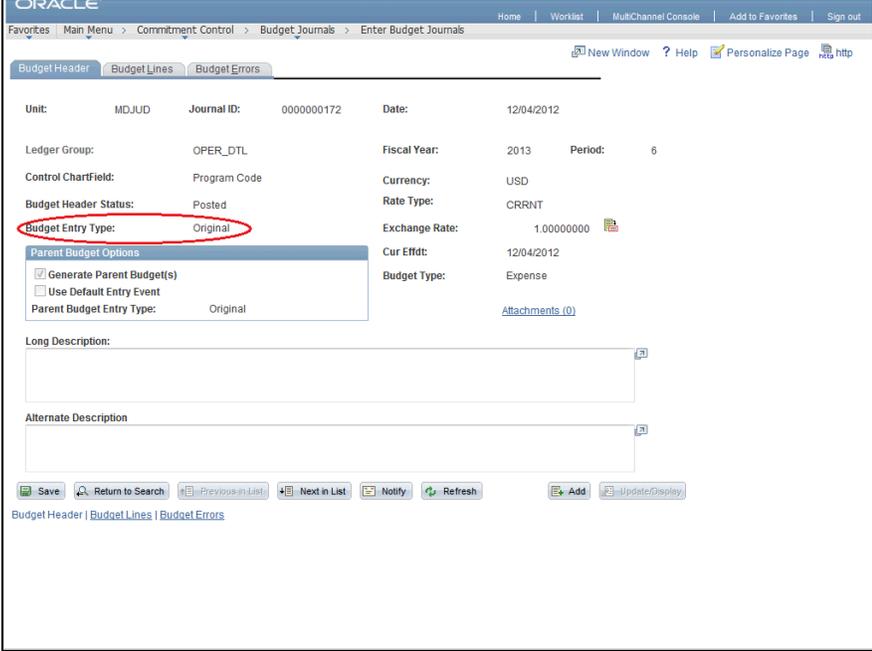
Long Description:

Alternate Description

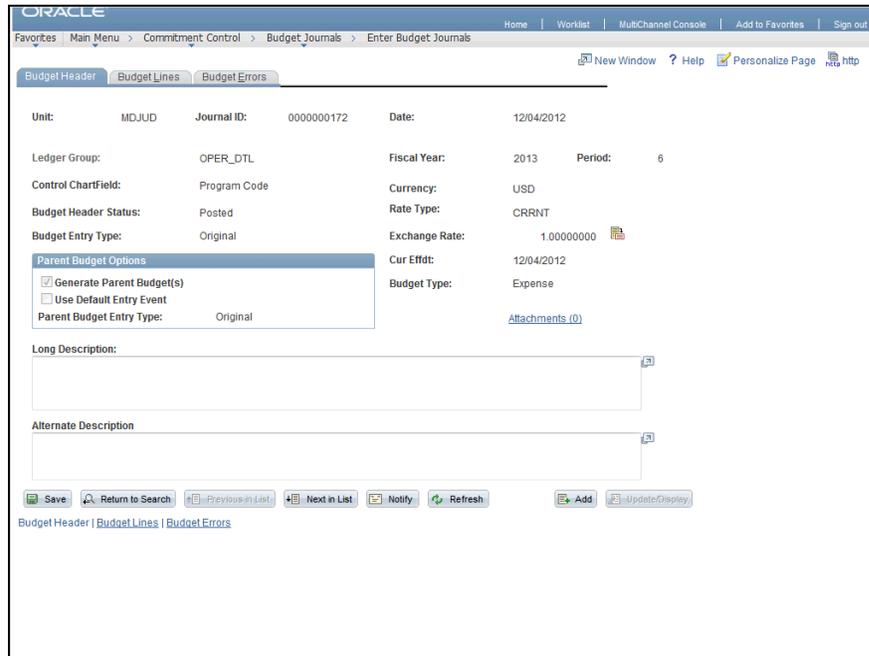
Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Budget Header | Budget Lines | Budget Errors

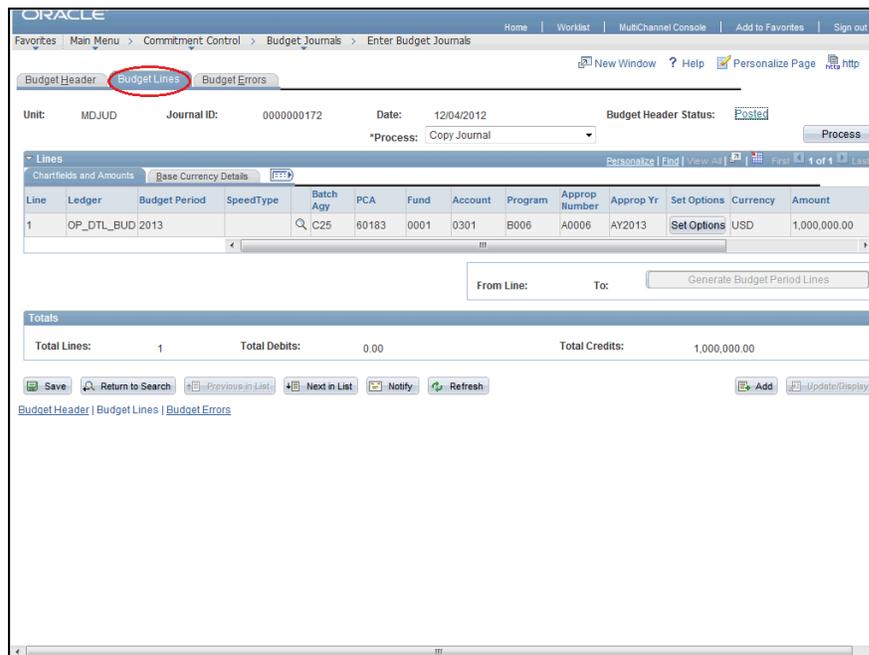
Step	Action
5.	<p>The <b>Budget Header Status</b> field indicates the status of the budget journal. When a budget journal is "Posted", the amount is available for spending.</p> <p>In this example, the budget is posted to the <b>Operating Detail</b> Ledger Group (OPER_DTL).</p>



Step	Action
6.	<p>The <b>Budget Entry Type</b> field indicates if a journal is established as the original journal, or an adjustment to the original budget. The values in this field are "Original", "Adjustment".</p> <p>In this example, the Budget Entry Type is "Original". It is an original budget entry being made for the first time.</p>



Step	Action
7.	Click the <b>Budget Lines</b> tab. 

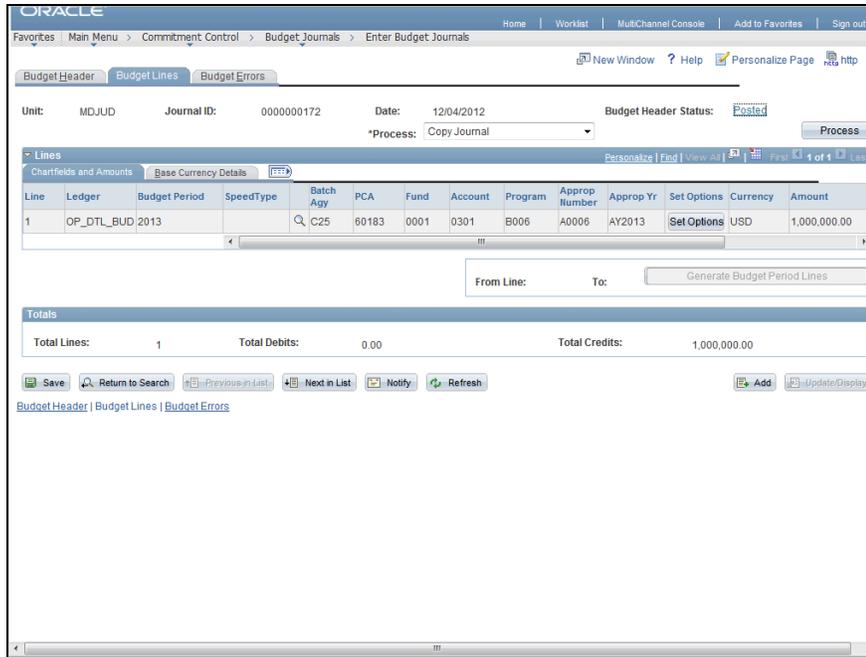


Line	Ledger	Budget Period	SpeedType	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	Set Options	Currency	Amount
1	OP_DTL_BUD	2013		C25	60183	0001	0301	B006	A0006	AY2013	Set Options	USD	1,000,000.00

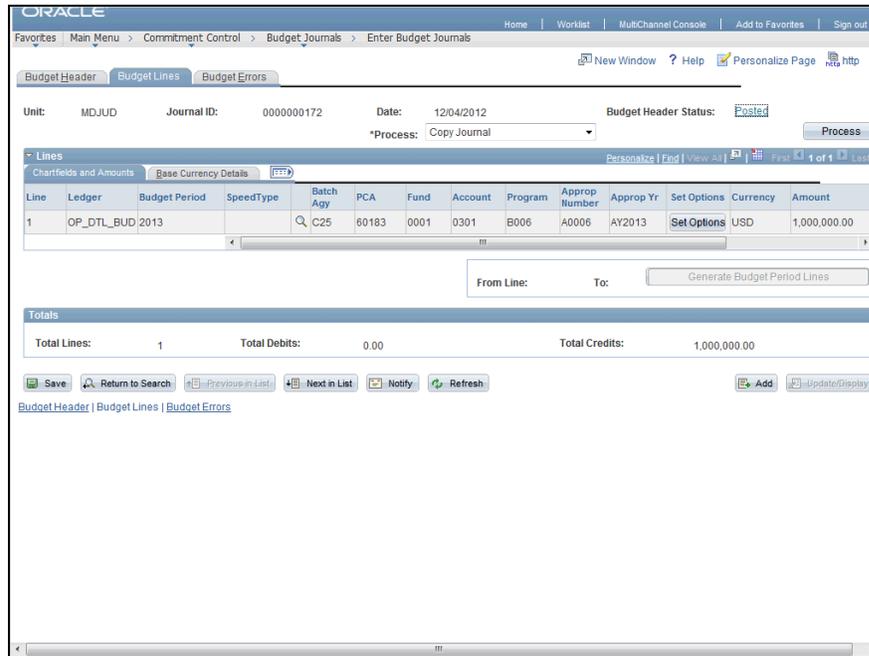
Totals

Total Lines:	1	Total Debits:	0.00	Total Credits:	1,000,000.00
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Step	Action
8.	<p>The <b>Budget Lines</b> page displays the budget chartfield information for the budget journal.</p> <p>In this example, \$1,000,000.00 is being posted to the postage account for the Department of Budget and Finance for Appropriation Year 2013.</p>



Step	Action
9.	<p>Each budget journal line must include the following Chartfield information:</p> <ul style="list-style-type: none"> <li>- Ledger</li> <li>- Batch Agency</li> <li>- PCA</li> <li>- Fund</li> <li>- Account</li> <li>- Program</li> <li>- Appropriation Number</li> <li>- Appropriation Year</li> <li>- Budget Amount</li> </ul>



ORACLE  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Budget Journals > Enter Budget Journals

Budget Header | Budget Lines | Budget Errors

Unit: MDJUD Journal ID: 000000172 Date: 12/04/2012 Budget Header Status: Posted  
 \*Process: Copy Journal

Process

Lines  
 Chartfields and Amounts | Base Currency Details

Line	Ledger	Budget Period	SpeedType	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	Set Options	Currency	Amount
1	OP_DTL_BUD	2013		C25	60183	0001	0301	E006	A0006	AY2013	Set Options	USD	1,000,000.00

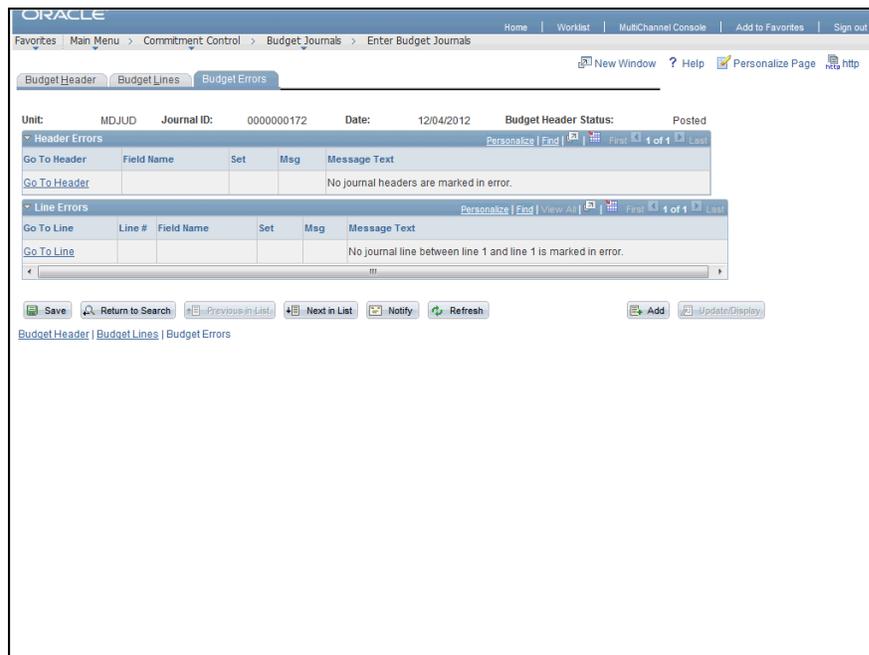
From Line: To: Generate Budget Period Lines

Totals  
 Total Lines: 1 Total Debits: 0.00 Total Credits: 1,000,000.00

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

Budget Header | Budget Lines | Budget Errors

Step	Action
10.	Click the <b>Budget Errors</b> tab. 



ORACLE  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Budget Journals > Enter Budget Journals

Budget Header | Budget Lines | Budget Errors

Unit: MDJUD Journal ID: 000000172 Date: 12/04/2012 Budget Header Status: Posted

Header Errors  
 Go To Header | Field Name | Set | Msg | Message Text  
 No journal headers are marked in error.

Line Errors  
 Go To Line | Line # | Field Name | Set | Msg | Message Text  
 No journal line between line 1 and line 1 is marked in error.

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

Budget Header | Budget Lines | Budget Errors

Step	Action
11.	The <b>Budget Errors</b> page displays errors that occur when a budget has been processed. This page shows header and line errors.
12.	You have successfully completed the Reviewing Budget Journals topic.  You have learned how to: - Review and navigate through budget journals in GEARS <b>End of Procedure.</b>

## 1.2 Understanding Budget Journals Statuses

In this topic, you will review the different budget journal statuses and how to interpret the statuses.

After completing this topic, you will be familiar with:

- Budget journal statuses

### Budget Journal Statuses

After you run the posting process for a budget journal, the budget header status is updated from "N" or "None" to one of several statuses depending on the processing results. The Budget Header status can be one of the following statuses:

**N (None):** The initial value when you create the journal.

**I (Incomplete):** Only applies to copied journals when commitment control security is enabled.

**E (Errors):** The journal has errors after running system edits. View the journal errors on the **Budget Errors** tab of the journal.

**P (Posted):** The journal has been posted to the budget ledger identified on the budget journal header.

**S (Security Error):** The person entering the journal did not have security access. Security access inquiries are directed to the Help Desk.

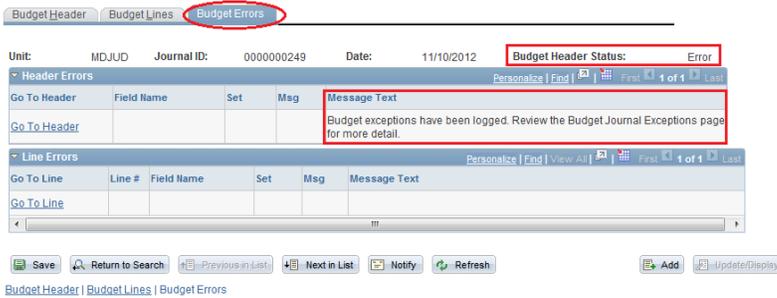
**B (Balance):** Unbalanced transfer. When the budget is transferred using the Transfer option, the journal lines must balance.

**U (Unposted):** The journal has been posted and then unposted for any number of reasons via an unposting process. Only the Department of Budget and Finance and other authorized users have access to unpost budget journal transactions.

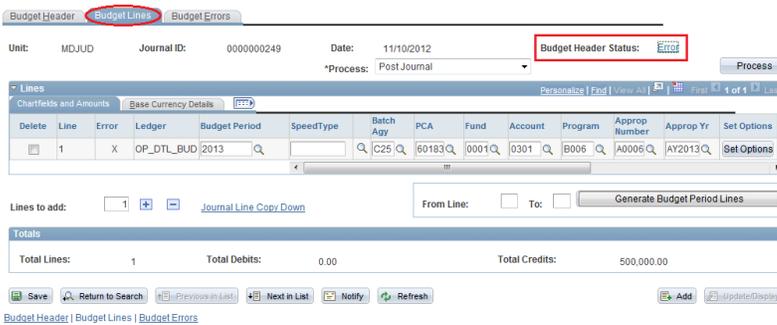
### Managing Journal Errors

Edit and budget checking errors at the header level are displayed on the **Budget Journal Exceptions** page. You can access the budget exceptions from the budget journal on the **Budget Errors** tab or by navigating to the **Budget Journal Exceptions** page. Commitment control security errors, balancing errors when an unbalanced transfer is saved, and combination editing errors are displayed on the **Budget Errors** page of the journal entry component.

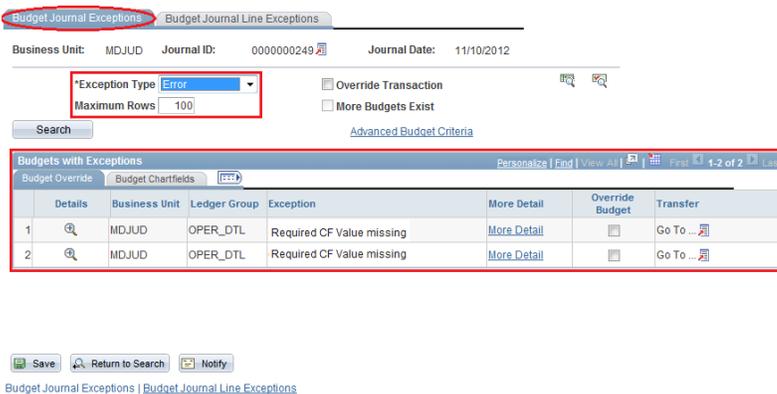
The first image below is an example of a budget journal with an error status. The second image shows the Budget Journal Exceptions page that displays the budget journal error. You can click on the error link to access the **Budget Journal Exceptions** page. The third image shows the **Budget Journal Exceptions** page and displays the budget error message.



The image below displays the **Budget Journal Exceptions - Budget Lines** page that displays the budget journal error. You can click on the error link to access the **Budget Journal Exceptions** page.



The image below shows the **Budget Journal Exceptions** page and displays the budget error message.



## Lesson 2: Performing Budget Transfers

### Lesson Overview

Authorized GEARS users in Judiciary courts and offices that are not employees of the Department of Budget and Finance (DBF) - Budget and Reports division have the authority to enter budget transfers at the account (sub-object) level.

### Lesson Objectives:

After completing this lesson, you will be able to:

- Perform a budget transfer using a budget journal
- Review and verify the budget impact of the transfer
- View budget journals that have been denied

### 2.1 Entering Budget Transfers

The **Enter Budget Transfer** page is used to perform budget transfers. Budget transfer journals must be posted in order to update the related spending authority.

In GEARS, employees that have the **Budget Analyst** role may perform budget transfers in the Operating Detail ledger group at the account (sub-object) level.

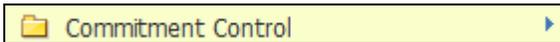
Budget transfers can be done within the same PCA.

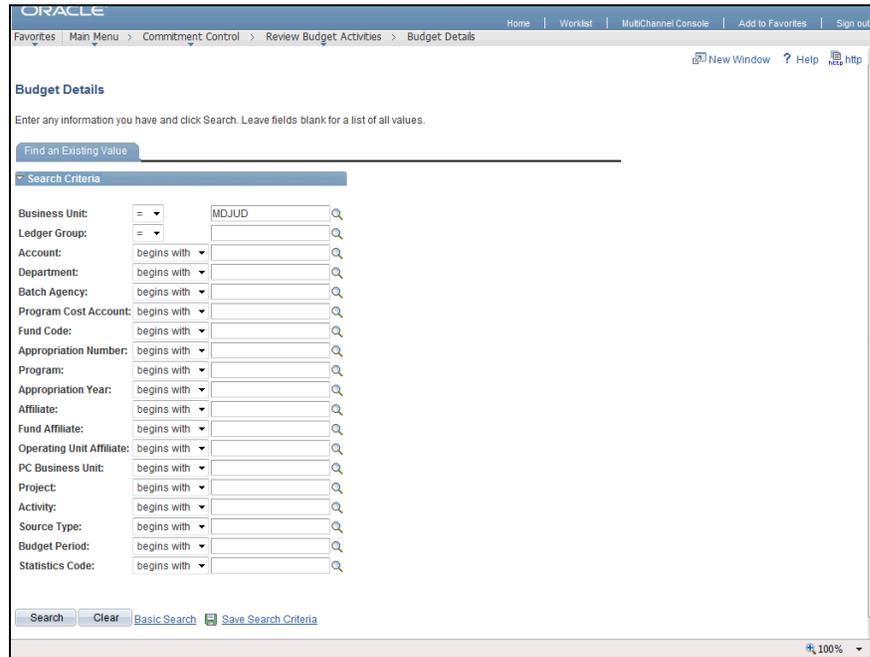
After completing this topic, you will be able to:

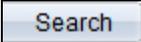
- Create a budget transfer journal
- Transfer funds from one sub-object class to another

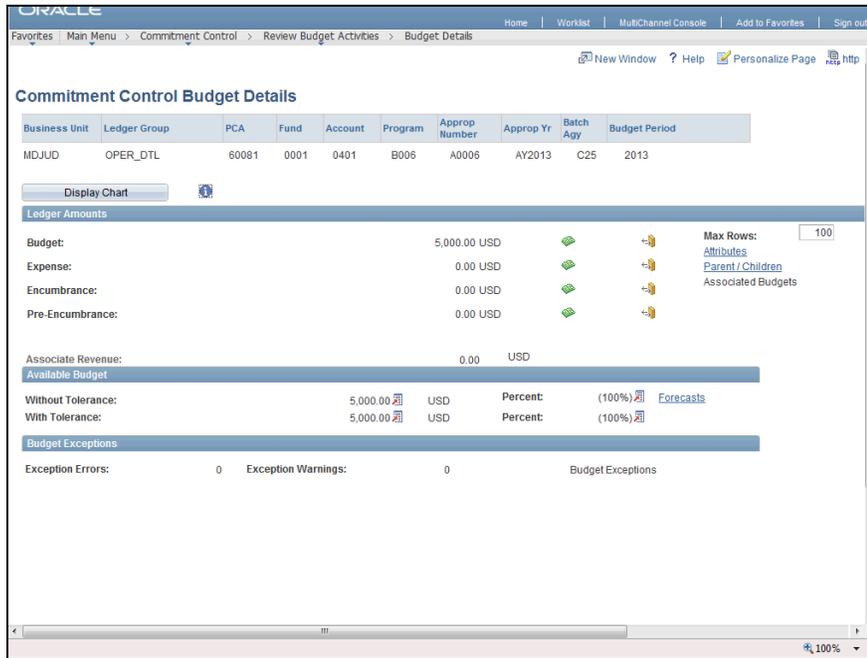
### Procedure

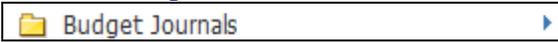
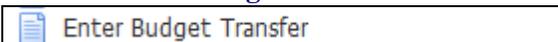
In this topic you will create a budget transfer journal to move funds from one operating budget to another.

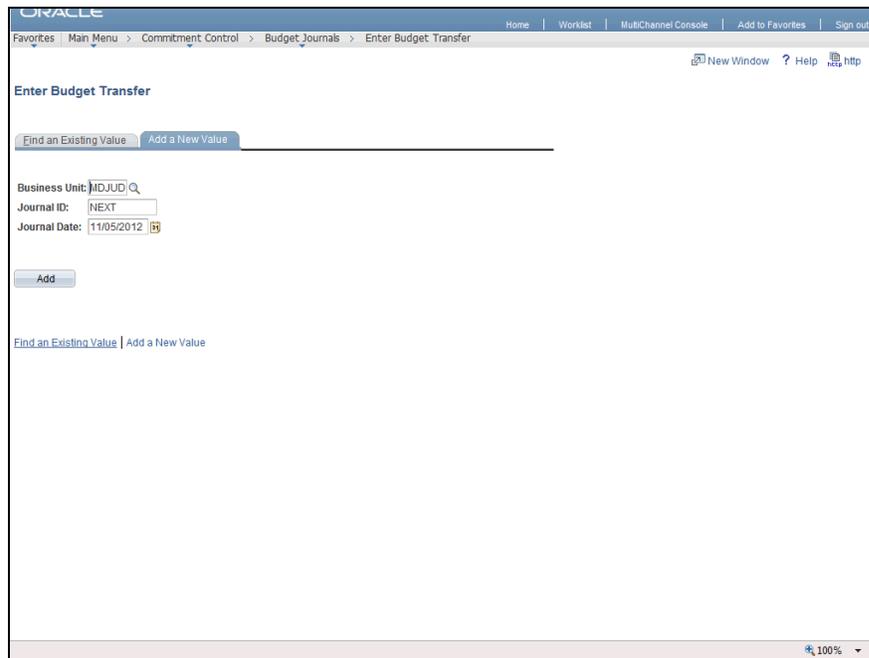
Step	Action
1.	Navigate to the <b>Budget Details</b> page.  Click the <b>Main Menu</b> button. 
2.	Click the <b>Commitment Control</b> menu. 
3.	Click the <b>Review Budget Activities</b> menu. 
4.	Click the <b>Budget Details</b> menu. 

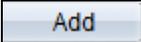


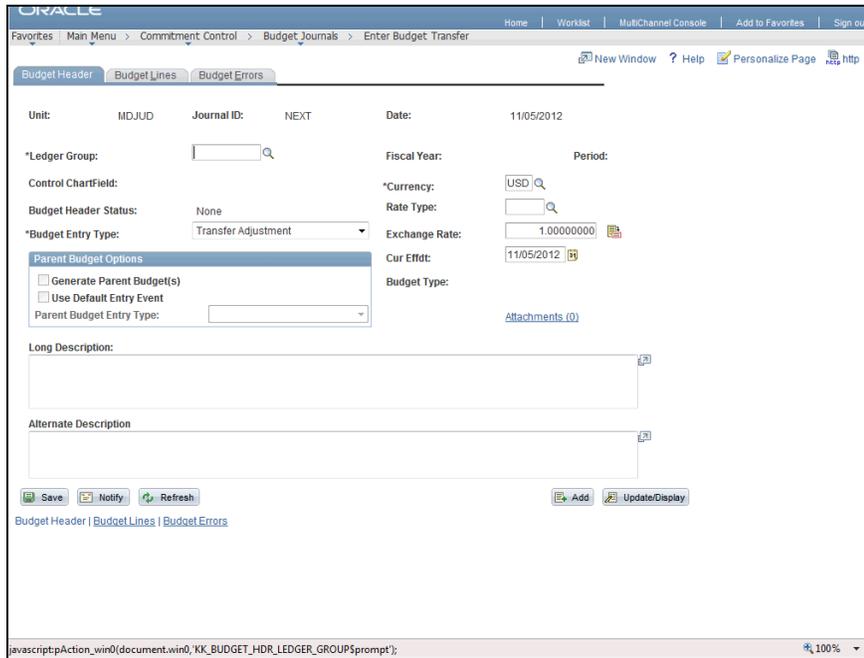
Step	Action
5.	The <b>Budget Details</b> search page displays. Enter the desired information into the <b>Ledger Group</b> field. Enter " <b>OPER_DTL</b> ".
6.	Enter the desired information into the <b>Account</b> field. Enter " <b>0401</b> ".
7.	Enter the desired information into the <b>Program Cost Account</b> field. Enter " <b>60081</b> ".
8.	Enter the desired information into the <b>Budget Period</b> field. Enter " <b>2013</b> ".
9.	Click the <b>Search</b> button. 



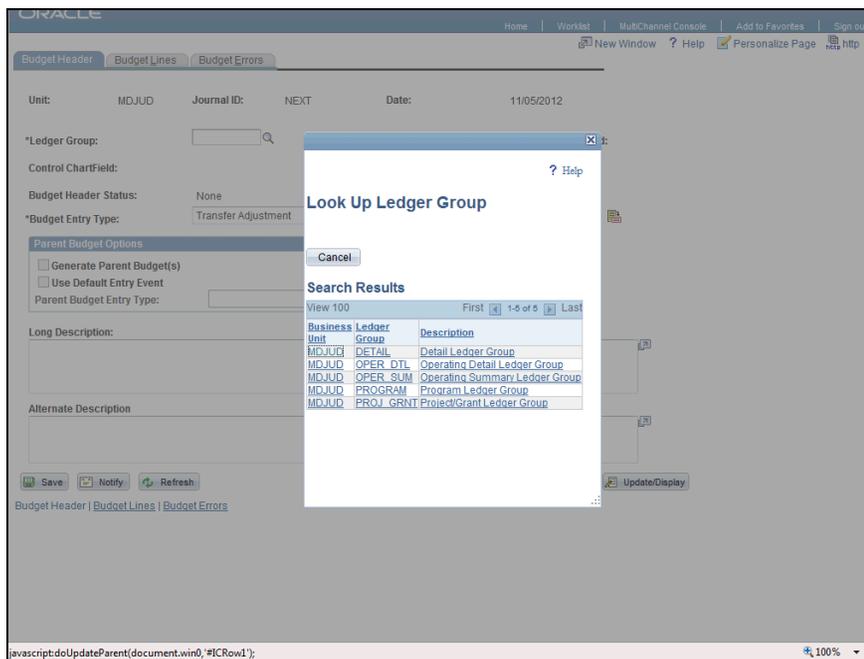
Step	Action
10.	The <b>Commitment Control Budget Details</b> page displays.  Note the Budget Amount.
11.	You will now enter a budget transfer.  Click the <b>Home</b> link. 
12.	Click the <b>Main Menu</b> button. 
13.	Click the <b>Commitment Control</b> menu. 
14.	Click the <b>Budget Journals</b> menu. 
15.	Click the <b>Enter Budget Transfer</b> menu. 



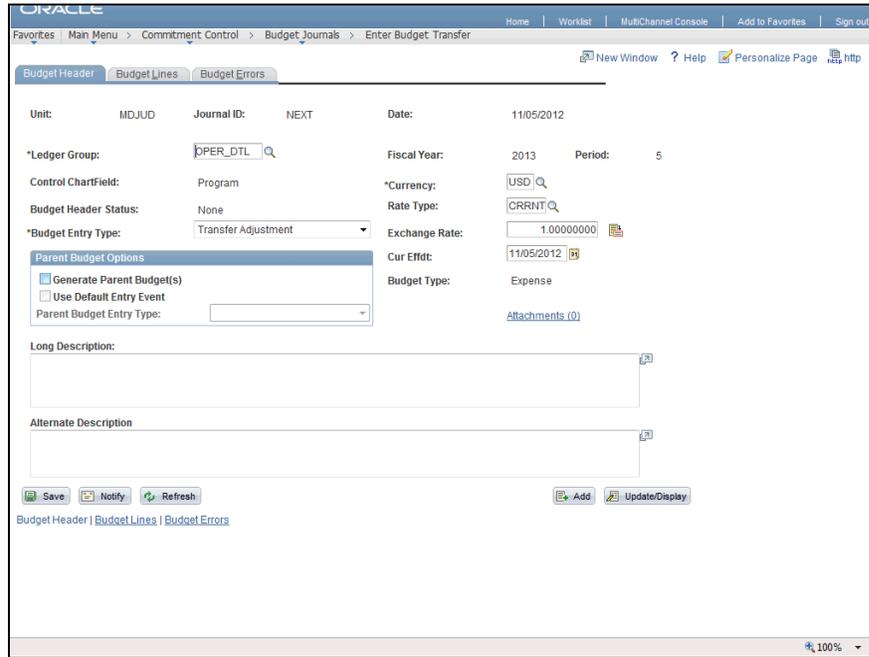
Step	Action
16.	<p>The <b>Enter Budget Transfer</b> search page displays.</p> <p>The fields on this page should automatically populate. Accept the defaults.</p> <p>Click the <b>Add</b> button.</p> 

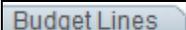


Step	Action
17.	<p>The <b>Budget Header</b> page displays.</p> <p>Click the <b>Look up Ledger Group (Alt+5)</b> button.</p> 

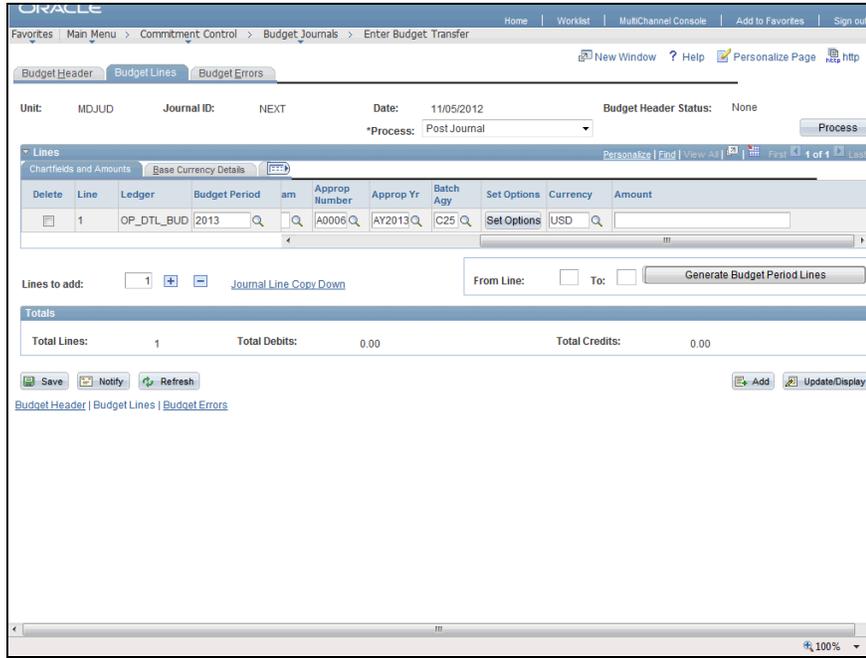


Step	Action
18.	Click the <b>OPER_DTL</b> link. 

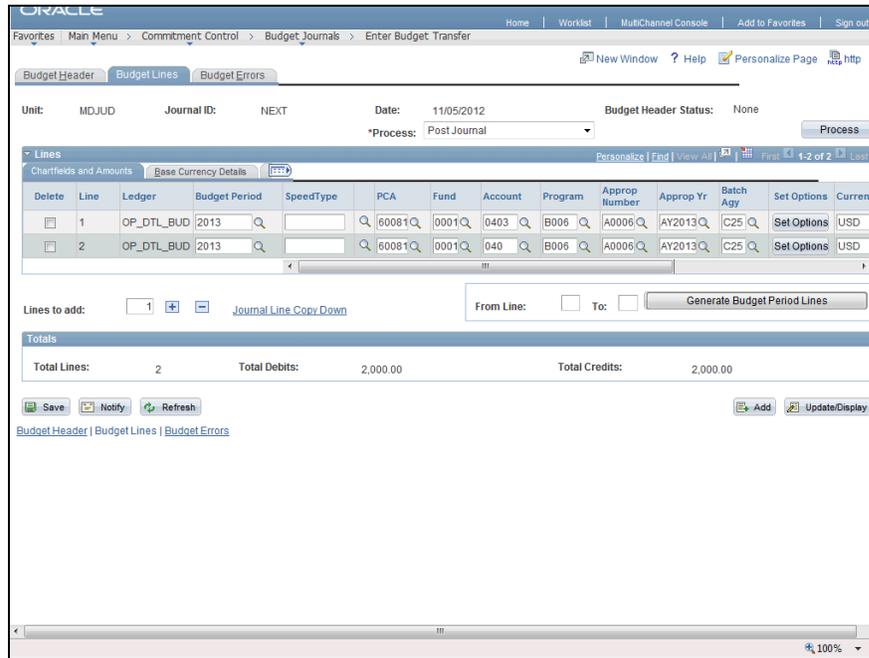


Step	Action
19.	Once you select the 'Ledger Group' click the 'Tab' key.  The <b>Generate Parent Budget(s)</b> checkbox should automatically be checked. (If not already checked, then click the checkbox.) 
20.	Click the <b>Budget Lines</b> tab. 
21.	The <b>Budget Lines</b> tab displays.  Enter the desired information into the <b>Budget Period</b> field. Enter " <b>2013</b> ".
22.	Enter the desired information into the <b>PCA</b> field. Enter " <b>60081</b> ".
23.	Enter the desired information into the <b>Fund</b> field. Enter " <b>0001</b> ".
24.	Enter the desired information into the <b>Account</b> field. Enter " <b>0403</b> ".
25.	Enter the desired information into the <b>Program</b> field. Enter " <b>B006</b> ".
26.	Enter the desired information into the <b>Approp Number</b> field. Enter " <b>A0006</b> ".
27.	Enter the desired information into the <b>Approp Yr</b> field. Enter " <b>AY2013</b> ".
28.	Enter the desired information into the <b>Batch Agy</b> field. Enter " <b>C25</b> ".

Step	Action
29.	Use the scrollbar to move to the right to reveal more fields.



Step	Action
30.	Enter the desired information into the <b>Amount</b> field. Enter <b>"-2000"</b> .
31.	Click the <b>Insert Lines</b> button. 
32.	Enter the desired information into the <b>Amount</b> field on the second line. Enter <b>"2000"</b> .
33.	Use the scrollbar to scroll to the left of the page.

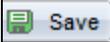
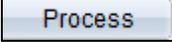


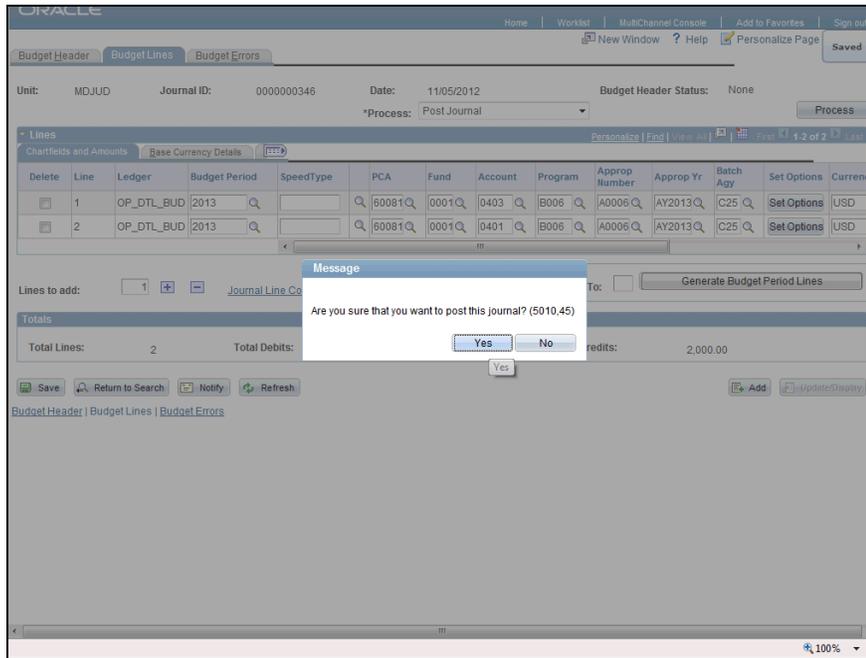
Oracle Budget Transfer interface showing budget lines and totals.

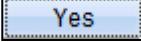
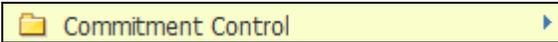
Delete	Line	Ledger	Budget Period	SpeedType	PCA	Fund	Account	Program	Approp Number	Approp Yr	Batch App	Set Options	Currency
<input type="checkbox"/>	1	OP_DTL_BUD	2013		60081Q	0001Q	0403	B006	A0006Q	AY2013Q	C25	Set Options	USD
<input type="checkbox"/>	2	OP_DTL_BUD	2013		60081Q	0001Q	040	B006	A0006Q	AY2013Q	C25	Set Options	USD

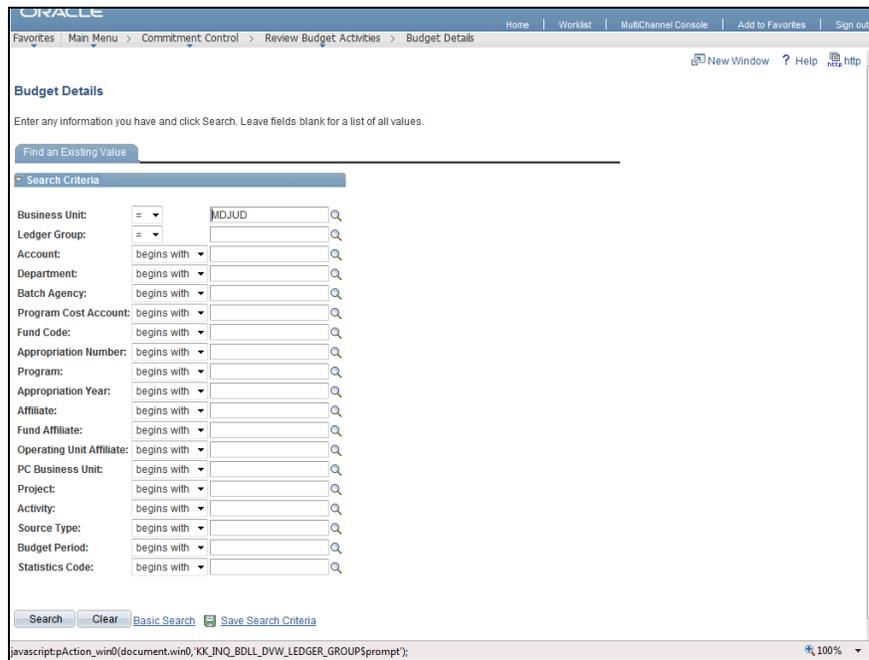
Totals:

Total Lines:	2	Total Debits:	2,000.00	Total Credits:	2,000.00
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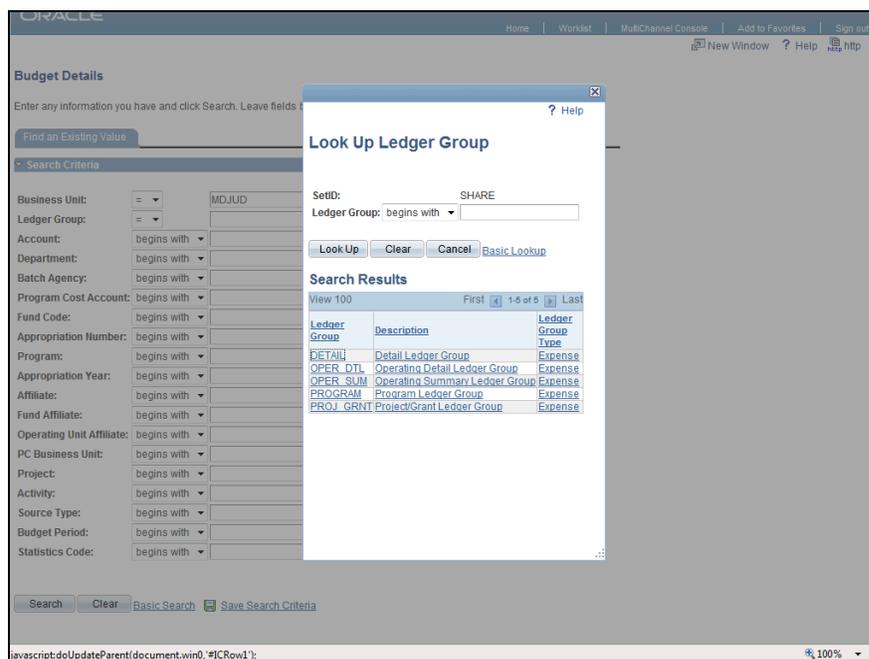
Step	Action
34.	Enter the desired information into the <b>Account</b> field. Enter " <b>0401</b> ".
35.	Click the <b>Save</b> button. 
36.	You will now post the budget transfer.  Click the <b>Process</b> button. 

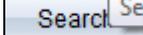


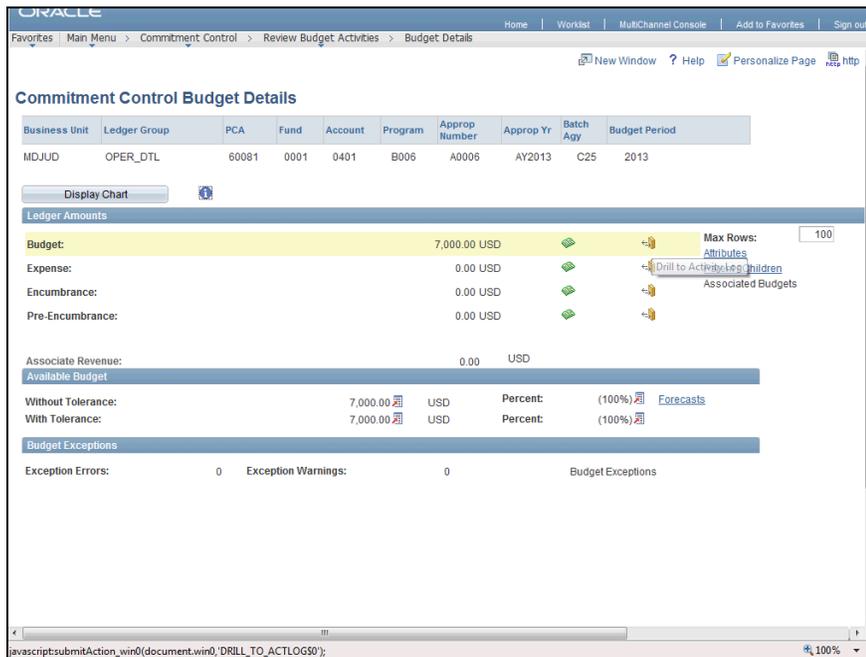
Step	Action
37.	Click the <b>Yes</b> button. 
38.	The transfer has now been posted. You will now review the transfer amount using the <b>Budget Details</b> page.  Click the <b>Home</b> link. 
39.	Navigate to the <b>Budget Details</b> page.  Click the <b>Main Menu</b> button. 
40.	Click the <b>Commitment Control</b> menu. 
41.	Click the <b>Review Budget Activities</b> menu. 
42.	Click the <b>Budget Details</b> menu. 



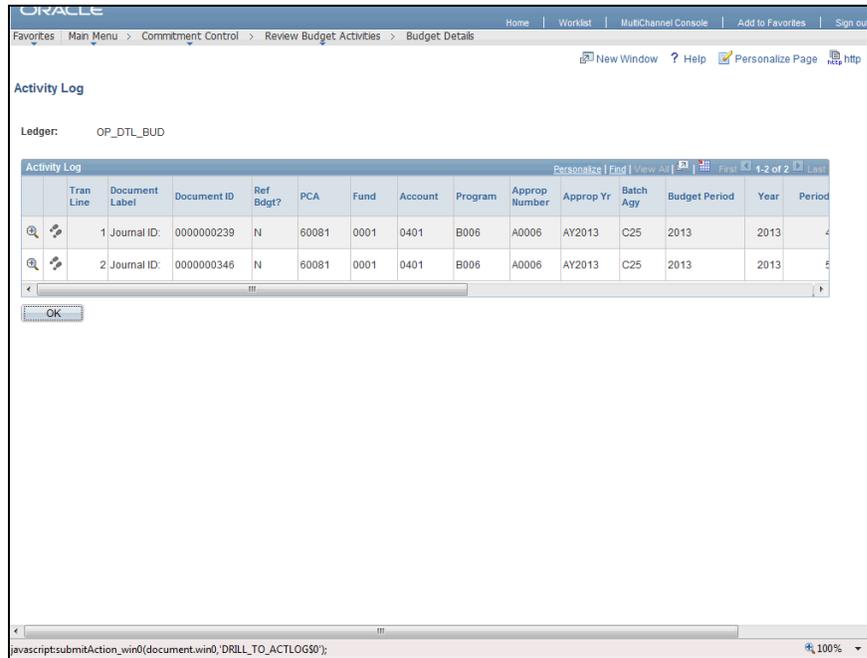
Step	Action
43.	<p>The <b>Budget Details</b> search page displays.</p> <p>Click the <b>Look up Ledger Group</b> button.</p> 



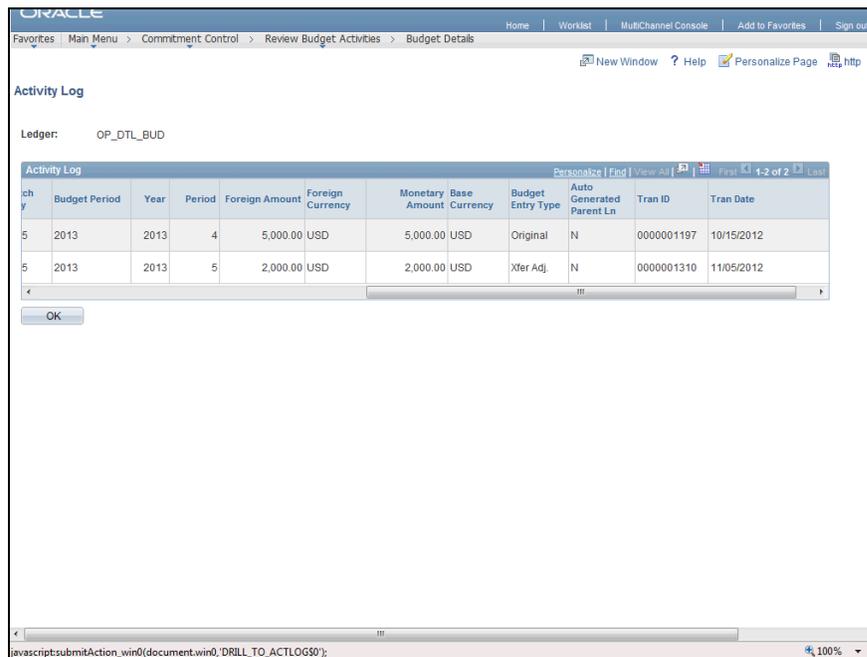
Step	Action
44.	Click the <b>OPER_DTL</b> link. 
45.	Enter the desired information into the <b>Account</b> field. Enter " <b>0401</b> ".
46.	Enter the desired information into the <b>Program Cost Account</b> field. Enter " <b>60081</b> ".
47.	Enter the desired information into the <b>Appropriation Number</b> field. Enter " <b>A0006</b> ".
48.	Enter the desired information into the <b>Appropriation Year</b> field. Enter " <b>AY2013</b> ".
49.	Enter the desired information into the <b>Budget Period</b> field. Enter " <b>2013</b> ".
50.	Click the <b>Search</b> button. 

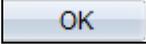


Step	Action
51.	The Commitment Control Budget Details page displays. <b>NOTE:</b> The budget amount has been increased by \$2000.
52.	Click the <b>Drill to Activity Log</b> button. 



Step	Action
53.	The <b>Activity Log</b> page displays.  Use the scrollbar to reveal the fields on the right side of the page.



Step	Action
54.	<b>NOTE:</b> You can see the Original and transfer budget transactions.
55.	Click the <b>OK</b> button. 
56.	You have successfully completed the Entering Budget Transfers topic.  You have learned how to: - Enter and review a budget transfer <b>End of Procedure.</b>

## 2.2 Reviewing Notifications for Denied Budget Journals

After a budget journal is denied you will receive an email notification informing you of the denial. Denied journal notifications are sent to your personal worklist which can be accessed from the email notification or by logging into GEARS directly. **NOTE:** You may have to log into GEARS after clicking on the link provided in the email notification if you are not already logged into the system. Also, when accessing your worklist from the email link you will be transferred directly to the worklist item.

Journal approvers are required to provide comments explaining why the journal was denied. You can view these comments when you access your worklist. If required, you can access the budget journal to make updates as necessary. The updated journal entry must be posted and will go through approval again.

In this topic, you learn how to access your worklist from the GEARS Homepage.

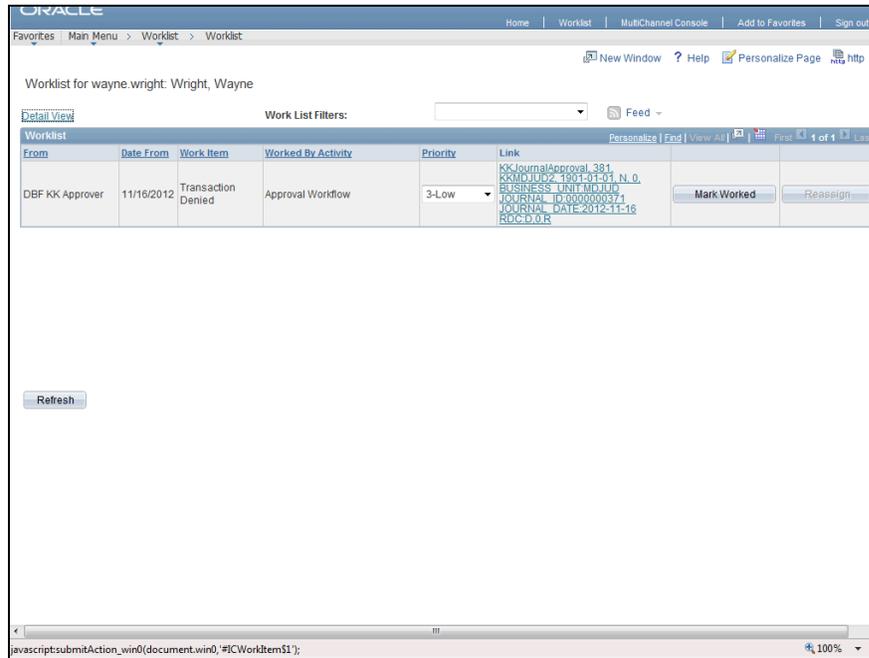
After completing this topic, you will be able to:

- Access your personal worklist to view denied budget journals

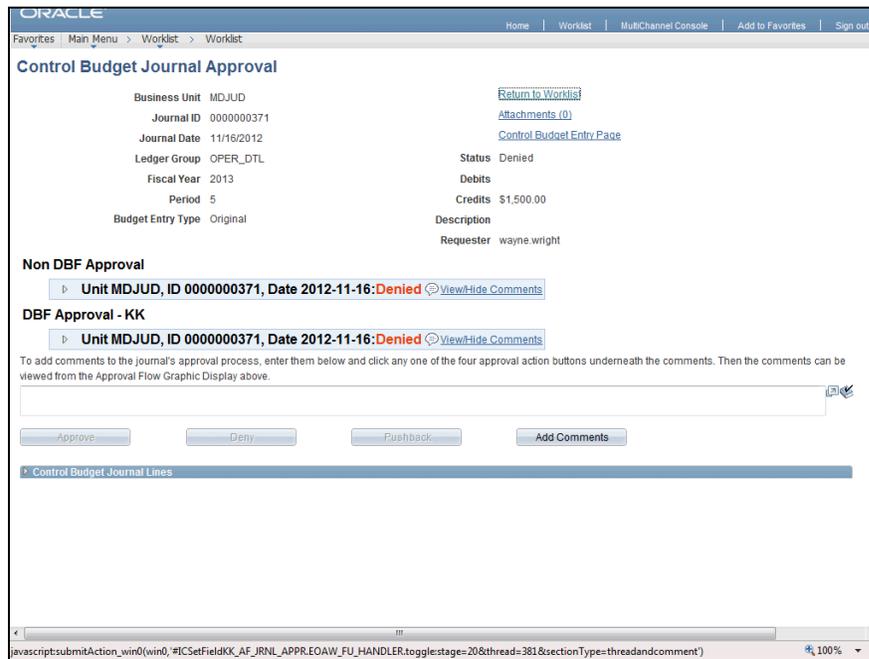
### Procedure

In this topic you will review notifications for denied budget journals.

Step	Action
1.	Click the <b>Worklist</b> link. 



Step	Action
2.	Click the <b>KKJournalApproval, 381, KKMDJUD2, 1901-01-01, N, 0, BUSINESS_UNIT</b> link.



Step	Action
3.	The <b>Control Budget Journal Approval</b> page displays.  Click the <b>View/Hide Comments</b> link under " <b>DBF Approval - KK</b> ". <a href="#">View/Hide Comments</a>
4.	Click the <b>View/Hide Comments</b> link under " <b>Non DBF Approval</b> ". <a href="#">View/Hide Comments</a>
5.	Use the scrollbar to see all information on the page.  Review the comments on the denial.
6.	Click the <b>Return to Worklist</b> link to view other items in your worklist. <a href="#">Return to Worklist</a>
7.	You have successfully completed the <i>Reviewing Notifications for Denied Budget Journals</i> topic.  You have learned how to: - review budget journal notifications from your worklist <b>End of Procedure.</b>

## Lesson 3: Reviewing Budget Activity

### Lesson Overview

In this lesson, you learn how to review budgetary activity including the establishment of an authorized spending authority for a budget, as well as transactional activity against a budget (i.e., requisitions, purchase orders and vouchers). GEARS Commitment Control provides online budget inquiry pages to authorized users to view budget activity, when needed.

### Lesson Objectives:

After completing this lesson, you will be able to:

- Use Commitment Control budget inquiry pages
- View budgetary and transaction activity for specified budgets

### 3.1 Reviewing Budget Activity on the Budget Overview Inquiry

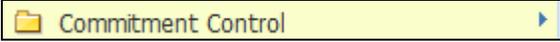
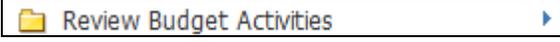
The **Budgets Overview** inquiry pages are used to review budgets established for your Batch Agency, the activity against the budget, and remaining balances.

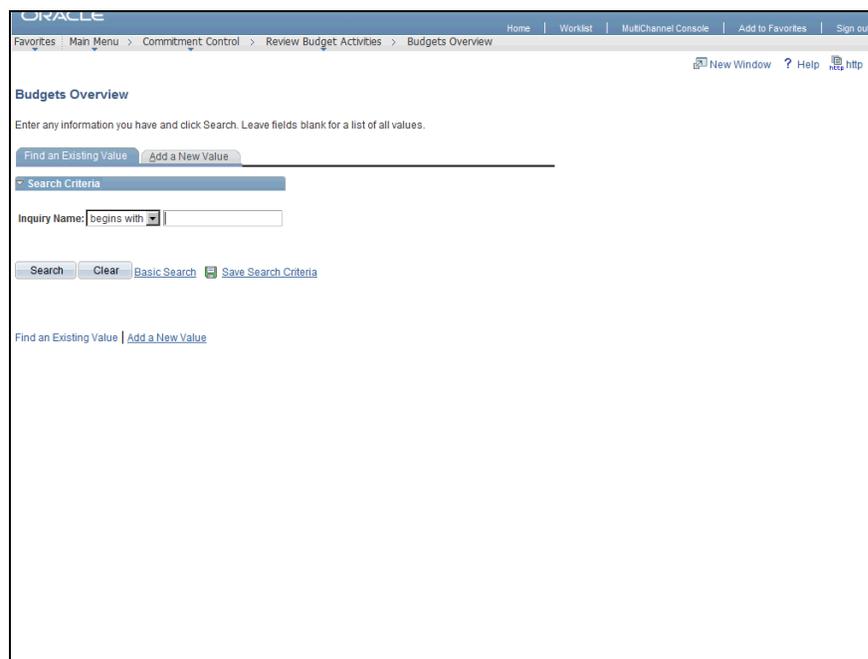
After completing this topic, you will be able to:

- Review the existing Operating budget amounts for a budget period

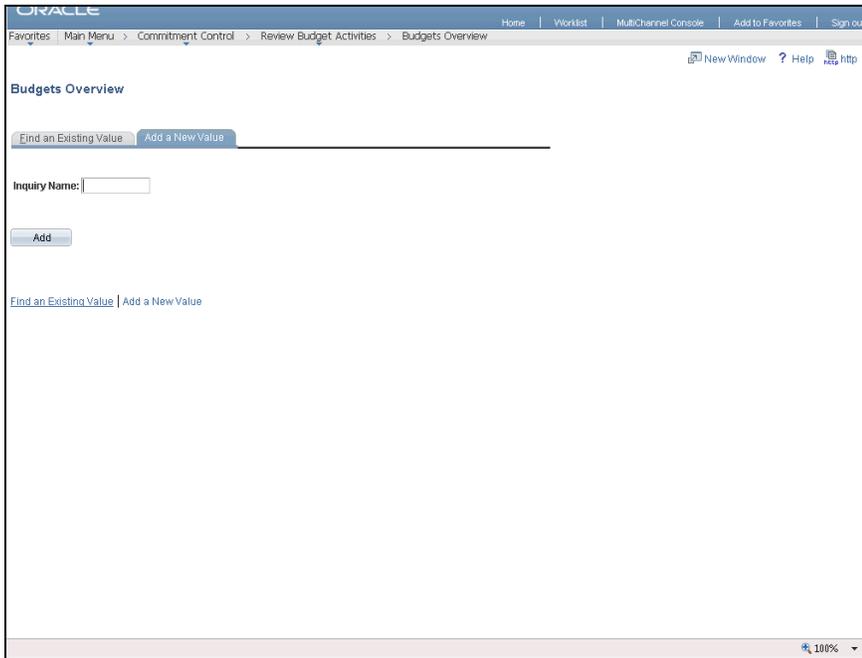
### Procedure

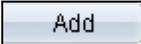
In this topic, you will create a Budget Inquiry for Operating Budgets for budget period 2013.

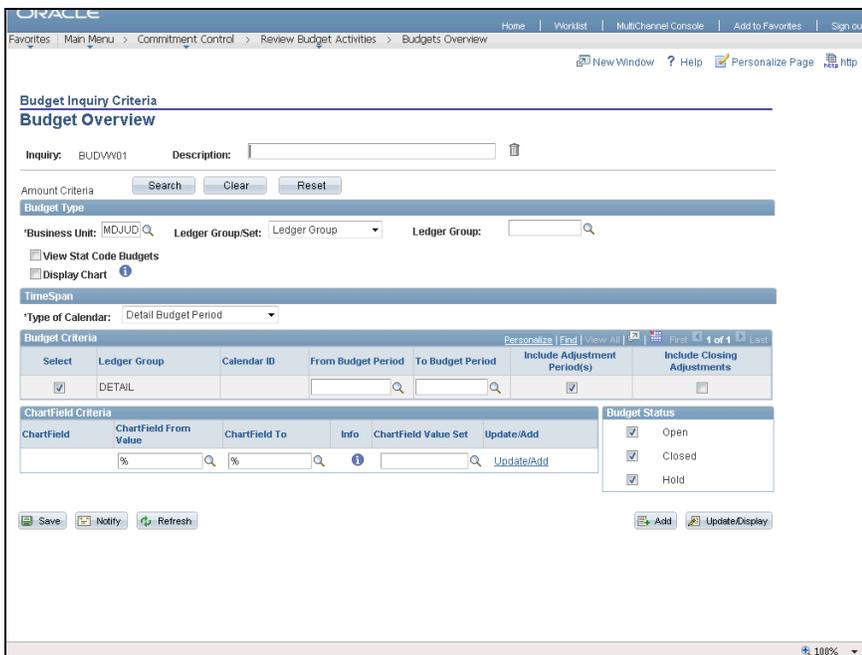
Step	Action
1.	Navigate to the <b>Budgets Overview</b> page.  Click the <b>Main Menu</b> button. 
2.	Click the <b>Commitment Control</b> menu. 
3.	Click the <b>Review Budget Activities</b> menu. 
4.	Click the <b>Budgets Overview</b> menu. 



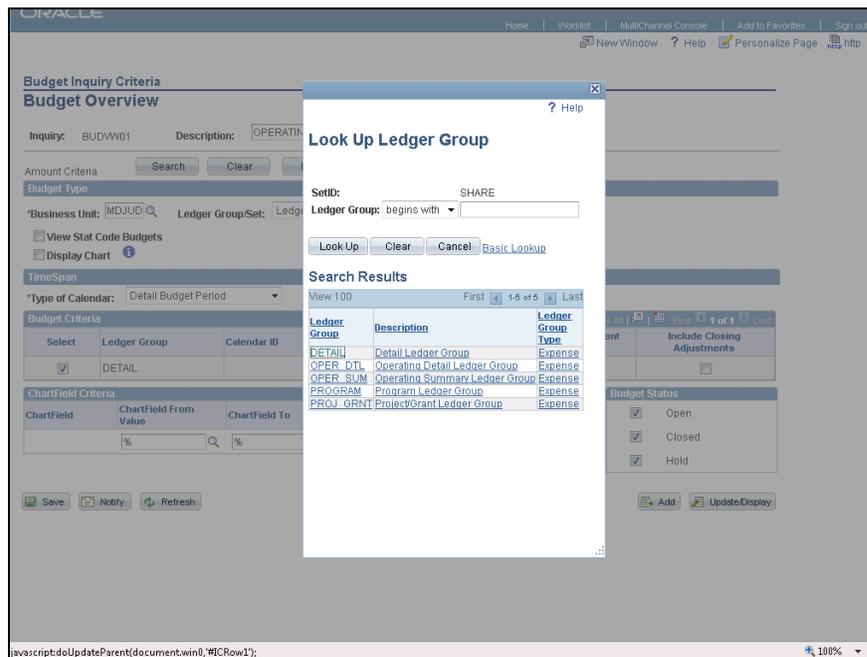
Step	Action
5.	The <b>Budgets Overview</b> search page displays.  Click the <b>Add a New Value</b> tab. 

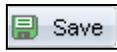


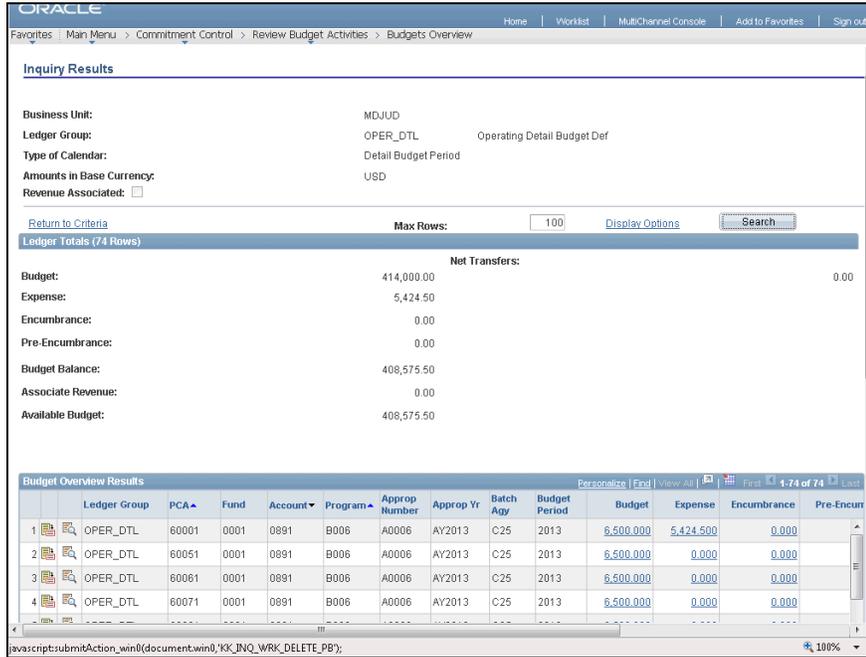
Step	Action
6.	The Add a New Value tab displays.  Enter the desired information into the <b>Inquiry Name</b> field. Enter " <b>BUDVW01</b> ".
7.	Click the <b>Add</b> button. 



Step	Action
8.	The <b>Budget Overview</b> page displays.  Enter the desired information into the <b>Description</b> field. Enter " <b>OPERATING BUDGET OVERVIEW</b> ".
9.	Click the <b>Look up Ledger Group</b> button. 



Step	Action
10.	Click the <b>OPER_DTL</b> link. 
11.	Use the <b>scrollbar</b> to scroll down to the Chartfield Criteria Section of the page.
12.	Enter the desired information into the <b>Chartfield From Value Program</b> field. Enter " <b>B006</b> ".
13.	Enter the desired information into the <b>Chartfield To Program</b> field. Enter " <b>B006</b> ".
14.	Enter the desired information into the <b>Chartfield From Fund</b> field. Enter " <b>0001</b> ".
15.	Enter the desired information into the <b>Chartfield To Fund</b> field. Enter " <b>0001</b> ".
16.	Click the <b>Save</b> button. 
17.	Click the <b>Search</b> button. 



**ORACLE**  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

**Inquiry Results**

Business Unit: MDJUD  
 Ledger Group: OPER\_DTL Operating Detail Budget Def  
 Type of Calendar: Detail Budget Period  
 Amounts in Base Currency: USD  
 Revenue Associated:

[Return to Criteria](#) Max Rows: 100 [Display Options](#) [Search](#)

**Ledger Totals (74 Rows)**

Net Transfers: 0.00

Budget: 414,000.00  
 Expense: 5,424.50  
 Encumbrance: 0.00  
 Pre-Encumbrance: 0.00  
 Budget Balance: 408,575.50  
 Associate Revenue: 0.00  
 Available Budget: 408,575.50

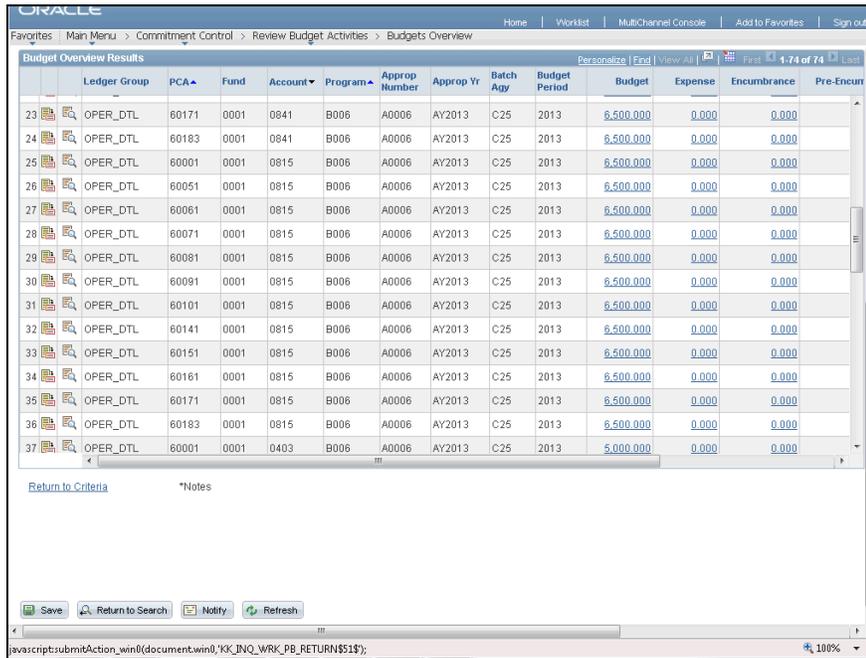
**Budget Overview Results**

	Ledger Group	PCA	Fund	Account	Program	Approp Number	Approp Yr	Batch Agy	Budget Period	Budget	Expense	Encumbrance	Pre-Encur
1	OPER_DTL	60001	0001	0891	B006	A0006	AY2013	C25	2013	6,500.000	5,424.500	0.000	
2	OPER_DTL	60051	0001	0891	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
3	OPER_DTL	60061	0001	0891	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
4	OPER_DTL	60071	0001	0891	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	

Personalize | Find | View All | First 1-74 of 74 | Last

javascript:submitAction\_win@document.win@'KK\_INQ\_WRK\_DELETE\_PB'; 100%

Step	Action
18.	Use the <b>scrollbar</b> to reveal the Budget Overview page fields.



**ORACLE**  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

**Budget Overview Results**

	Ledger Group	PCA	Fund	Account	Program	Approp Number	Approp Yr	Batch Agy	Budget Period	Budget	Expense	Encumbrance	Pre-Encur
23	OPER_DTL	60171	0001	0841	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
24	OPER_DTL	60183	0001	0841	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
25	OPER_DTL	60001	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
26	OPER_DTL	60051	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
27	OPER_DTL	60061	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
28	OPER_DTL	60071	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
29	OPER_DTL	60081	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
30	OPER_DTL	60091	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
31	OPER_DTL	60101	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
32	OPER_DTL	60141	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
33	OPER_DTL	60151	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
34	OPER_DTL	60161	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
35	OPER_DTL	60171	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
36	OPER_DTL	60183	0001	0815	B006	A0006	AY2013	C25	2013	6,500.000	0.000	0.000	
37	OPER_DTL	60001	0001	0403	B006	A0006	AY2013	C25	2013	5,000.000	0.000	0.000	

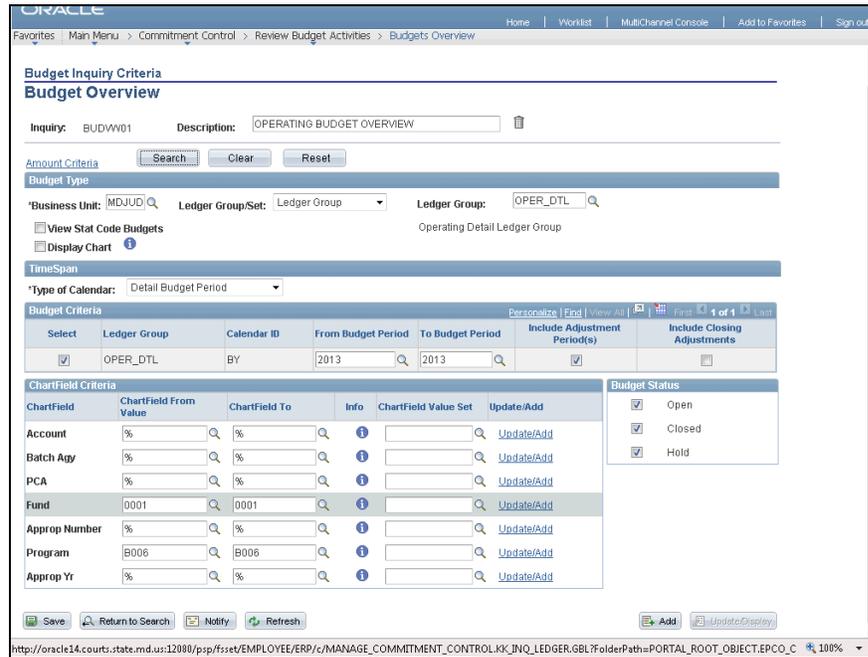
Personalize | Find | View All | First 1-74 of 74 | Last

[Return to Criteria](#) \*Notes

Save | Return to Search | Notify | Refresh

javascript:submitAction\_win@document.win@'KK\_INQ\_WRK\_PB\_RETURN\$51\$'; 100%

Step	Action
19.	These are the detail Operating budgets.
20.	Click the <b>Return to Criteria</b> link. <a href="#">Return to Criteria</a>



ORACLE  
Favrites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

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

Inquiry: BUDW01 Description: OPERATING BUDGET OVERVIEW

Amount Criteria Search Clear Reset

Budget Type

\*Business Unit: MDJUD Ledger Group/Set: Ledger Group Ledger Group: OPER\_DTL

View Stat Code Budgets Operating Detail Ledger Group

Display Chart

TimeSpan

\*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"/>	OPER_DTL	BY	2013	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Batch App	%	%	i		Update/Add
PCA	%	%	i		Update/Add
Fund	0001	0001	i		Update/Add
Approp Number	%	%	i		Update/Add
Program	B006	B006	i		Update/Add
Approp Yr	%	%	i		Update/Add

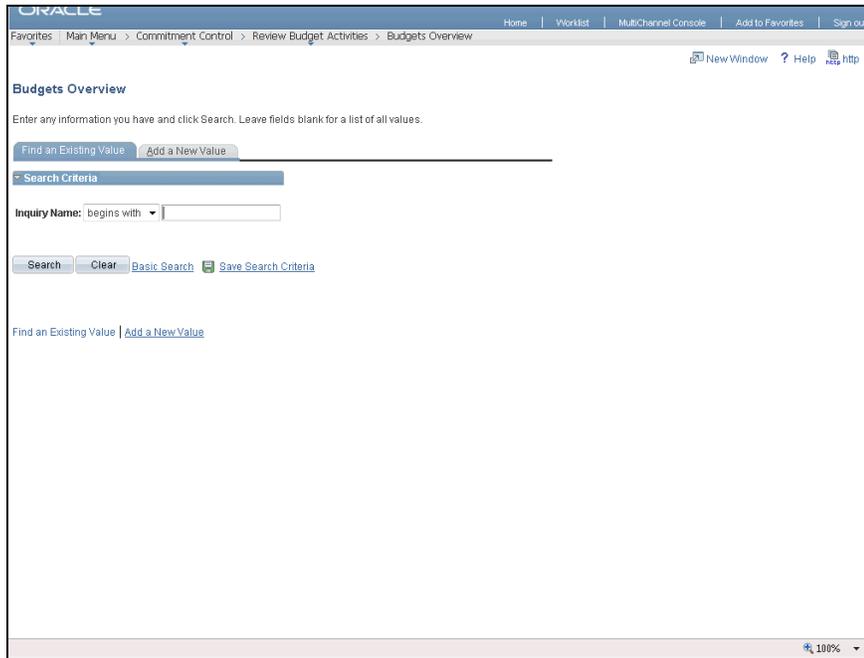
Budget Status

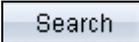
Open  
 Closed  
 Hold

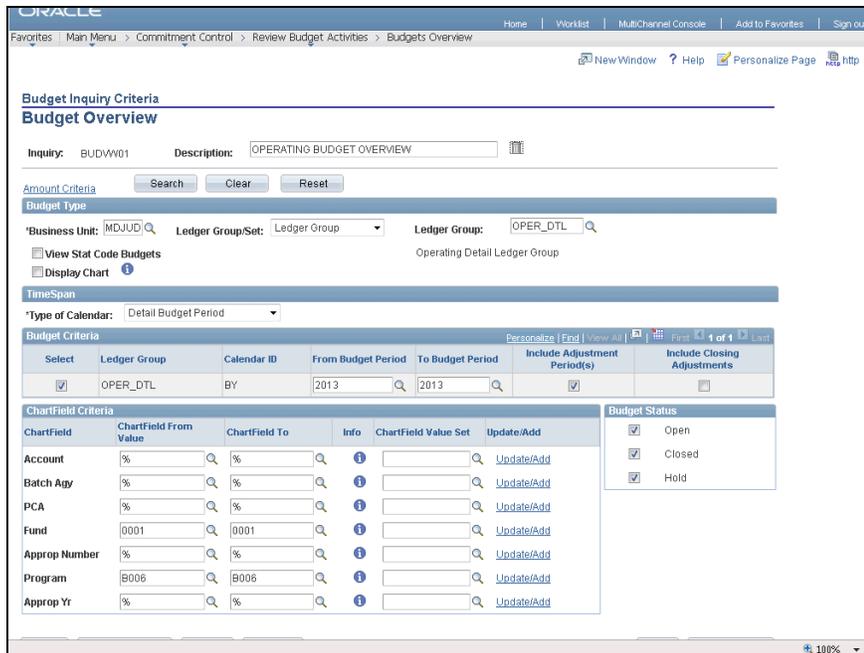
Save Return to Search Notify Refresh Add Update/Display

http://oracle14.courts.state.md.us:12088/pspp/psse/EMPLOYEE/ERP/c/MANAGE\_COMMITMENT\_CONTROL\_KK\_INQ\_LEDGER.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPCO\_C 100%

Step	Action
21.	Next you will use the budget inquiry to view the budget criteria you just created. Click the <b>Budgets Overview</b> menu link. <a href="#">Budgets Overview</a>



Step	Action
22.	The <b>Budgets Overview</b> search page displays.  Enter the desired information into the <b>Inquiry Name</b> field. Enter " <b>BUDVW01</b> ".
23.	Click the <b>Search</b> button.  



Step	Action
24.	<p>The <b>Budget Overview</b> page displays.</p> <p><b>NOTE:</b> The budget inquiry you created has been saved and is available for future use.</p>
25.	<p>You have successfully completed the Reviewing Budget Activity via the Budget Overview Inquiry topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Review budget activity, using the budget overview inquiry</li> </ul> <p><b>End of Procedure.</b></p>

## Course Summary



### **Congratulations!**

You have successfully completed the *KK210 Managing Budgets* course. In this course, you have learned how to:

- Identify budget journal statuses
- Enter budget transfer journals
- Post a budget journal
- Review the established budget and monitor budget activity

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at [gearstraining@mdcourts.gov](mailto:gearstraining@mdcourts.gov) (<mailto:gearstraining@mdcourts.gov>).