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Overview

The sponsored inquiries can be run from either the production or the reporting instance. Use this inquiry to view budget, expense, and encumbrance information.
Step 1: Enter Ledger Criteria

1. After logging in to the production or reporting instance, navigate to: Commitment Control > Review Budget Activities > Budgets Overview.

2. Click the Add a New Value tab.

3. Enter the Inquiry Name. This is also known as the Run Control ID. Tip: Name the inquiry using all capitals. It can contain underscores but may not contain dashes or spaces. Once the inquiry name is saved, it will be available for future use.

4. Click <Add>. The Budget Overview page is displayed.
Step 1: Enter Ledger Criteria (cont.)

5. In Description, enter a description for the inquiry.

6. In Business Unit, enter “UMN01.”

7. In Ledger Group, enter “KK_CHILD.”

8. Leave From Budget Period and To Budget Period as they default.

9. Continue to step 2.
Step 2: Enter ChartField Criteria

Enter the specific ChartField criteria in this section to limit the search.

1. Set the ChartField criteria by either entering the data or using the lookup feature for each of the fields that will be used to limit the search. For example:

   - **Project:** Enter or look up the eight-digit Project value.

   *Note: the default value of “%” is used as a wildcard. If data is entered in a field, the “%” should be removed.*

2. Once all the ChartField information is entered, scroll to the bottom of the page and click <Save>.
Step 3: Run the Search

Once the criteria has been established, run the search to return the results.

1. Scroll to top of Budget Overview page and click <Search>. The search results are displayed. The first half of the page displays totals for the inquiry.

The second half of the page displays by account the budget, expense, and encumbrance information, including available budget.

2. Click the column title to sort the data based on that particular column. For example, click <Account> to sort numerically. Click the title again to sort the results in reverse order. Note: To drill down to more detailed information, click on the icons or hyperlinks within the results section.
Optional: Edit the Search Criteria

Follow these steps to make modifications to the search.

1. Click <Return to Criteria> to return to the Budget Inquiry Criteria and Chartfield Criteria sections.
2. Make changes as necessary.
3. Click <Search>. 
Optional: Export the Data to Excel

Once the results have been returned, the data can then be downloaded to an Excel file for further analysis and manipulation.

1. Click the download icon.

2. The **File Download** dialog box is displayed. Click **<Open>** to open the file in Excel, or click **<Save>** to save a copy of the file on your computer.

*Note: If the Excel file opens in a Web browser, review the system requirements page on the EFS Web site for more information on how to configure your computer.*