Connect Carolina

Budget Inquiries

Budget Inquiries

Budget inquiries let you view budget balances in the system and are useful to:

- confirm the available balance
- determine if funds are available before requesting budget transfers
- verify if funds were moved
- investigate a budget check exception

The budget inquiries include:

These inquiries contain links to budget summaries, as well as the ability to drill down to transaction details or view the source transaction, such as a voucher, purchase order, journal entry, or requisition.

Note: Inquiries results can be downloaded to Excel for further analysis and are associated with your system ID.

Name	Description
Budget Overview Inquiry	This inquiry displays ledger totals across all selected budgets, for example, all department trusts, as well as detailed ledger amounts for each budget, summarized by a selected budget period or by a range of chartfields.
Budget Detail Inquiry	Use this inquiry to view a particular combination of chartfields, for example, to view the budget for a particular cost code.
Activity Log	Use this inquiry to display budget transaction details and to view the associated transaction in the source system, such as a voucher, a requisition, a journal entry and so on.

Budget Overview Inquiry results and Budget Detail Inquiry results allow you to view:

- available budget
- budget checking activity lines
- actual source transactions
- budget exceptions
- associated budgets
- parent-child relationships

To run any of these inquiries:

1. Either create and name a new inquiry, or choose an existing inquiry.
2. Enter the inquiry criteria or confirm the criteria for the existing inquiry.
3. Run the inquiry.

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