Infoporte OSR Ledger Rollup

1. Navigate to Infoporte>Finance>Dept Accounting>Ledger Rollups>OSR Ledger. Then follow the steps below:
   a. Leave the current Fiscal Year(s) that default. All years of the project will pre-select automatically.
   b. Enter in the Project ID
   c. Enter in the Bus Unit
   d. Click Search

2. Contract & Grant funds are budgeted by account groupings, so the budget and available balance information is broken down for each account group, as well as an overall total which is displayed at the bottom of the page.

Note: The Actuals LTD column shows the sum of the actual transaction balance from start of the budget year. The Actuals MTD column shows the sum of the actual transactions for the current month.
ConnectCarolina Budget Overview

1. Navigate to ConnectCarolina>Navigator>Finance Menu>Commitment Control>Review Budget Activities>Budgets Overview

2. If you have not already done so, create a Contract & Grant Inquiry. To do this, click on Add a New Value, name your inquiry, and click Add.

3. Once you click Add this will bring you to the Budget Inquiry Criteria page where you will enter in your search criteria.
   a. Select “Ledger Group” from Ledger Group/Set
   b. Select “OSR” from the Ledger Group lookup icon to see your Contract/Grants expense child budget
   c. Enter in your Project ID (or additional chartfields depending on what you want to see)
   d. Click Save in order for this budget inquiry to be used with the same search criteria in the future
   e. Click Search
4. Under *Ledger Totals* you will see a snapshot of your budget, expenses, encumbrances, and the available budget. Under *Budget Overview Results* your budget will display based on the Account the funds are budgeted at.

*Note:* Budget Overview will show you your life-to-date budget thru the current day.