

GRANT BUDGET ACTIVITY REPORT

The following screen shots will show you how to access the Grant Budget Activity Report. The Grant Budget Activity Report will give you either a detailed version of your project/grant budget or a summary version of your project/grant budget depending on the amount of detail you wish to have at the time you run the report. This report will list the activity that hit your grant/project and give you remaining dollars according to what has been budgeted.

BOR MENUS>BOR GENERAL LEDGER>BOR GL REPORTS>GRANT BUDGET ACTIVITY REPORTS

The screenshot shows a web browser window with the URL <https://scitest.gafirst.usg.edu/psp/scitest/EMPLOYEE/EI>. The browser's address bar and tabs are visible at the top. The page content is displayed within a blue header bar that includes the Oracle logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the header, the breadcrumb trail reads: Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Grant Budget Activity Report. The main content area is titled "Grant Budget Activity Reports" and contains a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this instruction are two buttons: "Find an Existing Value" and "Add a New Value". A "Search Criteria" section follows, featuring a dropdown menu for "Run Control ID:" with the value "begins with" selected, and a checkbox for "Case Sensitive" which is currently unchecked. At the bottom of the search section are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". The page footer includes a zoom level indicator set to 100%.

https://scitest.gafirst.usg.edu/psp/scitest/EMPLOYEE/EI

msn - (New items)

Grant Budget Activity Report

File Edit View Favorites Tools Help

Convert Select

Suggested Sites Clayton State University crystalreports.clayton.edu Web Slice Gallery Oracle PeopleSoft Enterpr...

Home Worklist Add to Favorites Sign out

ORACLE

New Window Help

Grant Budget Activity Reports

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

100%

At this time you can save this process as a favorite for future reference. You just need to click on the Add to Favorites link at the top and enter a description before clicking OK.

The screenshot shows a web browser window displaying the Oracle PeopleSoft Enterprise interface. The address bar shows the URL <https://scitest.gafirst.usg.edu/psp/scitest/EMPLOYEE/EI>. The browser's address bar and tabs are visible at the top. The main content area is titled "Grant Budget Activity Reports" and includes a search section with the text "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this, there are buttons for "Find an Existing Value" and "Add a New Value". A "Search Criteria" section is visible, containing a dropdown menu for "Run Control ID:" set to "begins with", a checkbox for "Case Sensitive", and buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". A modal dialog box titled "Add to Favorites" is open in the center of the screen, prompting the user to "Please Enter a Unique Description for this Favorite". The dialog box contains a text input field labeled "*Description" with the value "Grant Budget Activity Report" and two buttons: "OK" and "Cancel". The Oracle logo is visible in the top left corner of the page, and the "Add to Favorites" link is in the top right corner. The bottom right corner of the browser window shows a zoom level of 100%.

File Edit View Favorites Tools Help

X Convert Select

Suggested Sites Clayton State University crystalreports.clayton.edu Web Slice Gallery Oracle PeopleSoft Enterpr...

Home Worklist Add to Favorites Sign out

ORACLE

New Window Help

Grant Budget Activity Reports

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

Add to Favorites

Please Enter a Unique Description for this Favorite

*Description Grant Budget Activity Report

OK Cancel

100%

Click on the tab for Add a New Value. It will ask you to give the Run Control ID a name such as GRANT_BUD_ACTIVITY, then click the Add button.

Browser window showing the Oracle Grant Budget Activity Reports page. The address bar displays `https://scitest.gafirst.usg.edu/psp/scitest/EMPLOYEE/EI`. The breadcrumb navigation path is: `Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Grant Budget Activity Report`. The page title is "Grant Budget Activity Reports".

Navigation links: [Home](#), [Worklist](#), [Add to Favorites](#), [Sign out](#)

Buttons: [Find an Existing Value](#), [Add a New Value](#)

Run Control ID:

[Add](#)

Footer: `javascript:submitAction_win0(document.win0,'#JCSwitchMode');` | 100%

You will then be taken to the screen to add the parameters for running your reports. When completing this screen, please be sure to:

- ✓ **check the box requesting a Grant Budget Activity Detail Report and/or a Summary Report;**
- ✓ **Budget Reference- is the current fiscal year**
- ✓ **All Fiscal Periods- you want to check this box since grant/project dates differ from our fiscal periods. Checking this box will display all transactions. [Once you check this box, From/To Accounting Period and From/To Fiscal Year is grayed out.]**
- ✓ **DO NOT CHECK 'ALL CHARTSTRINGS?' Enter the chart string for your Grants/Project.**

The screenshot shows a web browser window with the URL <https://scitest.gafirst.usg.edu/psp/scitest/EMPLOYEE/EI>. The browser's address bar shows the page title "Grant Budget Activity Report". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The browser's toolbar includes a search icon, a "Convert" button, and a "Select" button. The browser's status bar shows "Suggested Sites" with links to Clayton State University, crystalreports.clayton.edu, Web Slice Gallery, and Oracle PeopleSoft Enterpr... The browser's address bar shows the breadcrumb navigation: Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Grant Budget Activity Report. The browser's status bar shows "Home", "Worklist", "Add to Favorites", and "Sign out".

The Oracle PeopleSoft interface displays the "Grant Budget Activity Report" configuration screen. The "Run Control ID" is "GRANT_BUD_ACTIVITY". The "Report Manager" and "Process Monitor" buttons are visible. The "Run" button is highlighted. The "Grant Budget Activity Detail Report" checkbox is checked. The "Grant Budget Activity Summary Report" checkbox is unchecked. The "Business Unit" is "28000". The "Budget Reference" is empty. The "All Fiscal Periods" checkbox is checked. The "From Accounting Period" and "To Accounting Period" fields are empty. The "From Fiscal Year" and "To Fiscal Year" fields are empty. The "Grant From" and "Grant To" fields are empty. The "All ChartStrings?" checkbox is unchecked. The "From Fund Code" and "To Fund Code" fields are empty. The "From Department" and "To Department" fields are empty. The "From Account" and "To Account" fields are empty. The "Save", "Add", and "Update/Display" buttons are visible. The status bar shows "100%" zoom.

Once you have entered your project/grant information, click on the Save button to save the parameters for the next time you access this report. Click on the Run button at the top to initiate the process.

Browser window: <https://fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERF> Grant Budget Activity Report

File Edit View Favorites Tools Help

Convert Select

Suggested Sites Clayton State University crystalreports.clayton.edu Web Slice Gallery Oracle PeopleSoft Enterpr...

Favorites Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Grant Budget Activity Report

Home Worklist Add to Favorites Sign out

ORACLE

New Window Help Personalize Page

Grant Budget Activity Report

Run Control ID Grant_Status_Report Report Manager Process Monitor Run

Grant Budget Activity Detail Report: ☒ Grant Budget Activity Summary Report: ☐

Business Unit: 28000 Budget Reference: 2015

All Fiscal Periods: ☒

From Accounting Period: To Accounting Period:

From Fiscal Year: To Fiscal Year:

Grant From: 28420 Grant To: 28420 All ChartStrings?: ☐

From Fund Code: 20000 From Department: % From Account: %

To Fund Code: 20000 To Department: % To Account: %

Save Return to Search Add Update/Display

100%

Once you hit ‘Run’ the Process Scheduler Request screen will appear. Just click ‘OK’ on the left-hand side of the box.

https://tprod.gafirst.usg.edu/psp/tprod/EMPLOYEE/ERF

Grant Budget Activity Report

File Edit View Favorites Tools Help

Convert Select

Suggested Sites Clayton State University crystalreports.clayton.edu Web Slice Gallery Oracle PeopleSoft Enterpr...

Favorites Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Grant Budget Activity Report

Home Worklist Add to Favorites Sign out

ORACLE

New Window Help Personalize Page

Grant Budget Activity Report

Run Control ID Grant_Status_Report Report Manager Process Monitor Run

Grant Budget Activity Detail Report: ☒
Business Unit: 28000
All Fiscal Periods: ☒
From Accounting Period:
From Fiscal Year:
Grant From: 28420 Grant To: 2
From Fund Code: 20000 From Depart:
To Fund Code: 20000 To Depart:
Save Return to Search

Process Scheduler Request

User ID nharris17 Run Control ID Grant_Status_Report

Server Name Run Date 03/31/2015
Recurrence Run Time 12:35:26PM Reset to Current Date/Time
Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Grant Budget Activity Reports	BORRG046	SQR Report	Web	PDF	Distribution

OK Cancel

100%

After clicking on OK, it will take you back to the report format screen. You will notice a Process Instance number just under the Run button at the top of the page. You need to make a note of this Process Instance number that will be used in the next section of the process. At this time, you will click on the Process Monitor link.

https://fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERF

Grant Budget Activity Report

File Edit View Favorites Tools Help

Convert Select

Suggested Sites Clayton State University crystalreports.clayton.edu Web Slice Gallery Oracle PeopleSoft Enterpr...

Favorites Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Grant Budget Activity Report

Home Worklist Add to Favorites Sign out

ORACLE

Grant Budget Activity Report

New Window Help Personalize Page

Run Control ID Grant_Status_Report Report Manager Process Monitor Run

Process Instance:7152094

Grant Budget Activity Detail Report: ☒ Grant Budget Activity Summary Report: ☐

Business Unit: 28000 Budget Reference: 2015

All Fiscal Periods: ☒

From Accounting Period: To Accounting Period:

From Fiscal Year: To Fiscal Year:

Grant From: 28420 Grant To: 28420 All ChartStrings?: ☐

From Fund Code: 20000 From Department: % From Account: %

To Fund Code: 20000 To Department: % To Account: %

Save Return to Search Add Update/Display

100%

If, at this time the **Run Status** on your Process Instance doesn't show as **Success** or **Distribution Status** doesn't show as **Posted**, you will need to click on the Refresh button at the top until it reaches this status.

https://fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERF...msnGrant Budget Activity Report

File Edit View Favorites Tools Help

Convert Select

Suggested Sites Clayton State University crystalreports.clayton.edu Web Slice Gallery Oracle PeopleSoft Enterpr...

Favorites Main Menu BOR Menus BOR General Ledger BOR GL Reports Grant Budget Activity Report Process Monitor

Home Worklist Add to Favorites Sign out

ORACLE

New Window Help Personalize Page

Process List Server List

View Process Request For

User ID nharris17 Type Last 1 Days Refresh

Server Name Instance to

Run Status Distribution Status Save On Refresh

Process List

Personalize Find View All First 1-2 of 2 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	7152094		SQR Report	BORRG046	nharris17	03/31/2015 12:37:23PM EDT	Success	Posted	Details
<input type="checkbox"/>	7150525		SQR Report	GLS7002	nharris17	03/31/2015 9:05:08AM EDT	Success	Posted	Details

Go back to Grant Budget Activity Reports

Save Notify

Process List | Server List

100%

In order to access the report that you just ran, you will need to click on the Details link in the line for your Process Instance number.

The screenshot displays the Oracle PeopleSoft Grant Budget Activity Report interface. The main window shows a 'Process List' with columns for Select, Instance, Seq, Process Type, and Process Name. Two processes are listed: 7152094 (BORRG046) and 7150525 (GLS7002). A 'Process Detail' window is open, showing details for instance 7152094. The detail window includes fields for Instance (7152094), Name (BORRG046), Type (SQR Report), Description (Grant Budget Activity Reports), Run Status (Success), and Distribution Status (Posted). It also has a 'Run' button and an 'Update Process' button. Below these are radio buttons for 'Hold Request', 'Queue Request', 'Cancel Request', 'Delete Request', and 'Restart Request'. The 'Date/Time' section shows 'Request Created On' (03/31/2015 12:40:06PM EDT), 'Run Anytime After' (03/31/2015 12:37:23PM EDT), 'Began Process At' (03/31/2015 12:40:25PM EDT), and 'Ended Process At' (03/31/2015 12:40:39PM EDT). The 'Actions' section includes links for 'Parameters', 'Message Log', 'Batch Timings', and 'View Log/Trace'. The window has 'OK' and 'Cancel' buttons at the bottom.

From the Process Detail screen, you will click on the link View Log/Trace.

The screenshot shows the Oracle Process Detail screen with the 'View Log/Trace' dialog box open. The dialog box contains the following sections:

- Report**: Report ID: 6431849, Process Instance: 7152094, Name: BORRG046, Process Type: SQR Report, Run Status: Success. A 'Message Log' link is visible.
- Distribution Details**: Distribution Node: DNODE, Expiration Date: 04/07/2015.
- File List**: A table with columns Name, File Size (bytes), and Datetime Created.
- Distribute To**: Distribution ID Type: *Distribution ID, User: nharris17.
- Buttons**: Return, OK, Cancel.

The background screen shows the 'Process List' tab with a table of process instances:

Select	Instance	Seq.	Process Type	Process Name
<input type="checkbox"/>	7152094		SQR Report	BORRG046
<input type="checkbox"/>	7150525		SQR Report	GLS7002

The bottom status bar shows the URL: javascript:submitAction_win0(document.win0,'PMN_DERIVED_MESSAGELOG_BTN');

From the View Log/Trace screen, you will click on the link for the PDF file in the File List.

You can then either Save As or Print the report.

GRANT BUDGET ACTIVITY REPORT - DETAIL Clayton State University											
Grant:	28420	CSU Fdn-Pres. Scholarship	Grant Manager:		Grant End Date:	30-JUN-2015					
Department:	8500000	Scholarships-Privately Funded	Budget Ref:	2015	From Fiscal Year:	ALL	To Fiscal Year:	ALL			
Fund Code:	20000	Restricted Education & General	All Fiscal Periods:	Yes	Acct Period From:	1 ALL	Acct Period To:	12 ALL			
Account	Program/Class		PRMT	PROJ	GET	Pre-Bncm	Bncmbrnce	Expended	Remaining		
Jrnl/Txn Data	Type	DocumentID	Line	Description	Vendor	Check					
700000	Operating Supplies & Expenses		18100	/ 64000							
781000	Scholarships				70,000.00						
781141	#CSU Foundation Scholarship										
08/25/14	JR	8001105172	299	Banner Journal			0.00	0.00	34,500.00		
08/25/14	JR	8001105172	298	Banner Journal			0.00	0.00	500.00		
01/20/15	JR	8001152316	336	Banner Journal			0.00	0.00	11,000.00		
01/20/15	JR	8001152316	335	Banner Journal			0.00	0.00	500.00		
01/20/15	JR	8001152316	337	Banner Journal			0.00	0.00	22,500.00		
Totals							0.00	0.00	69,000.00	1,000.00	
Operating Supplies & Expenses Total					70,000.00	0.00	0.00	69,000.00	1,000.00		
Totals For Dept/Fund/Program/Class:					8500000 / 20000 / 18100 / 64000	70,000.00	0.00	0.00	69,000.00	1,000.00	
Totals For Dept/Fund:					8500000 / 20000	70,000.00	0.00	0.00	69,000.00	1,000.00	