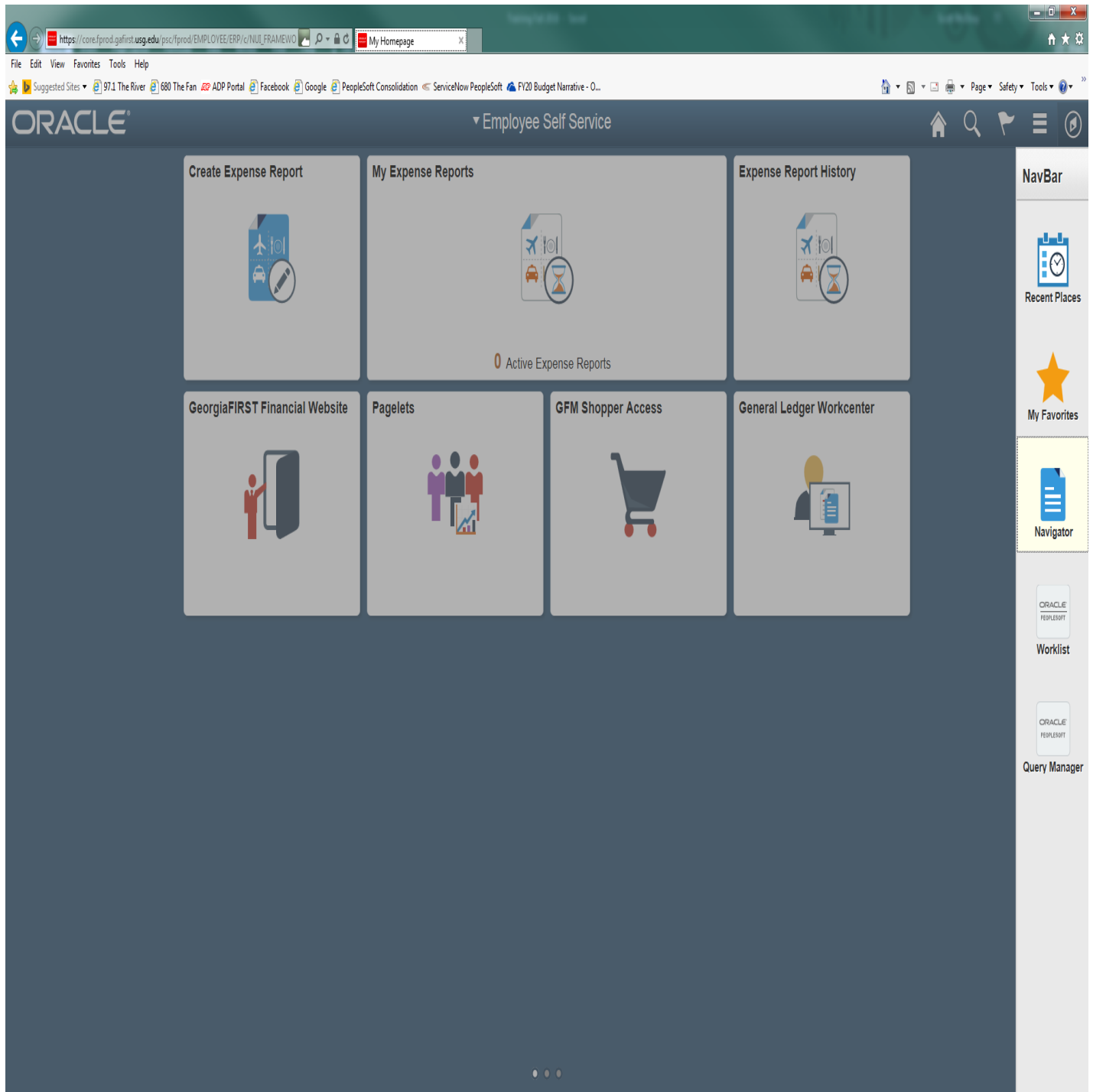


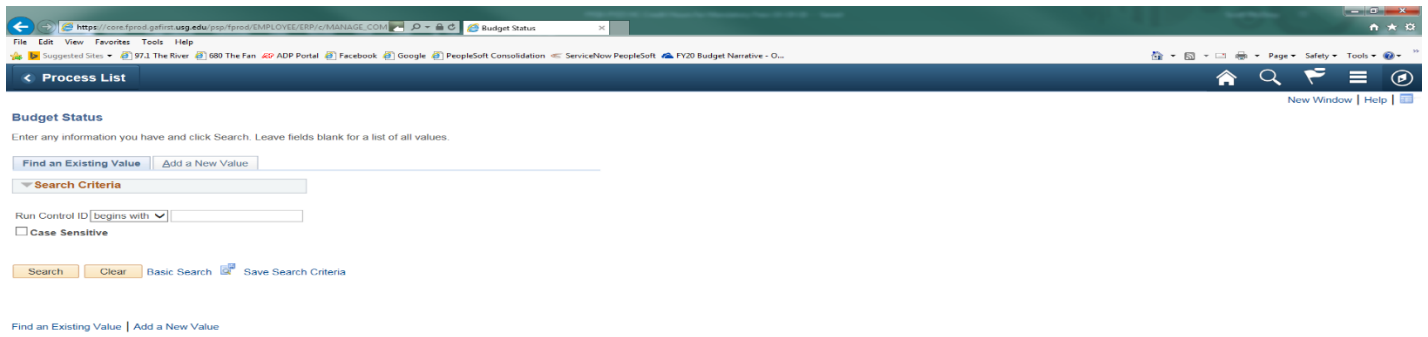
BUDGET STATUS- REVEST (REVENUE) STATUS

The following screen shots will show you how to access the Budget Status for REVEST summary. This report will show you a quick summary look at the departmental revenue collected at the budgetary level.

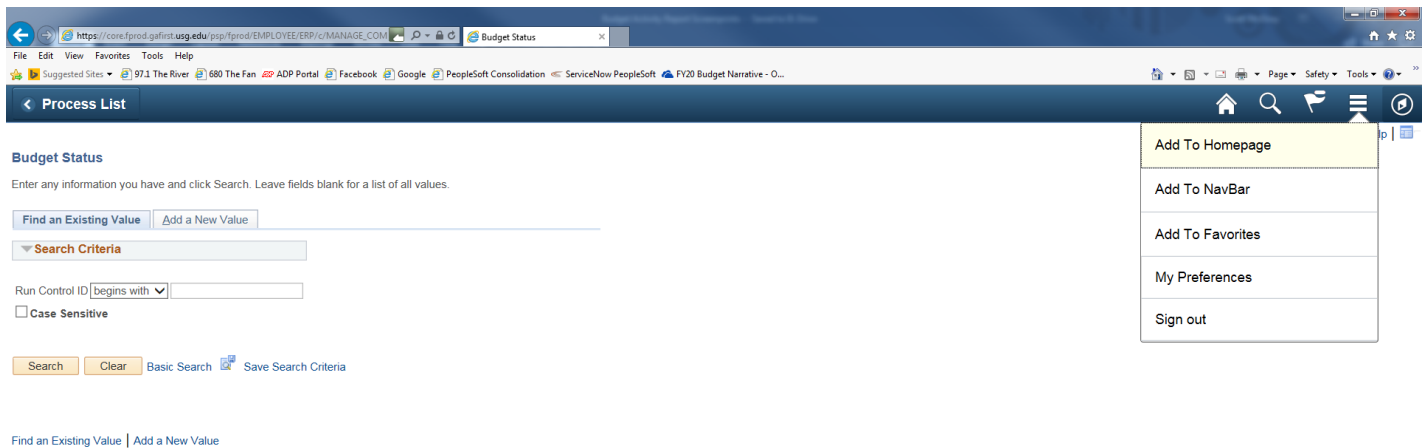
You will need to click on icon in the far upper right-hand corner of the panel which looks like a 'diamond inside a circle'. This will bring up your NavBar. Once you have the NavBar pulled up, you will click on the Navigator link.

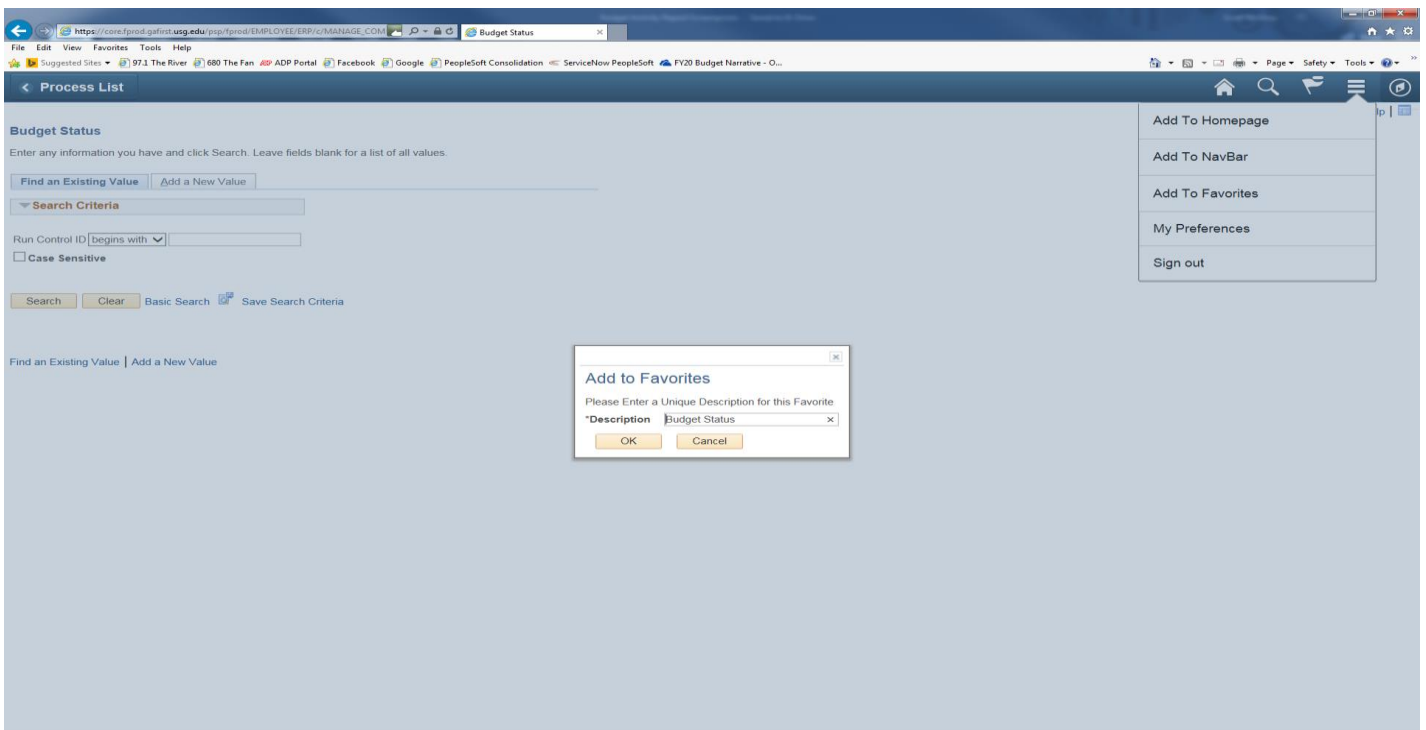


COMMITMENT CONTROL>BUDGET REPORTS>BUDGET STATUS



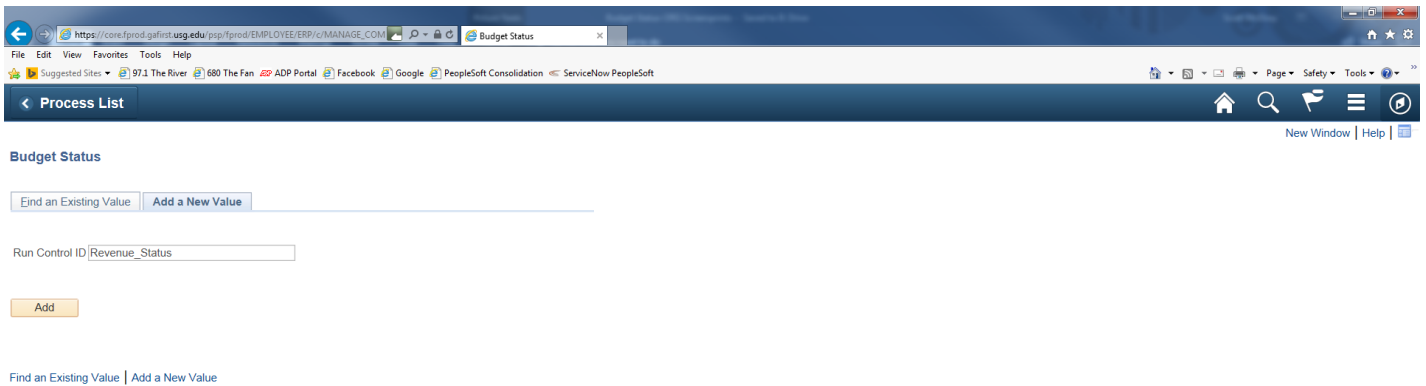
At this time, you can save this process as a favorite for future reference. You just need to click on the icon that has 3 lines in the upper right-hand corner which has a drop-down menu. You will click on Add to Favorites link at the top and enter a description before clicking OK.





Click on the tab for Add a New Value. You can enter a Run Control ID that you will remember for this report such as Revenue_Status then click the Add button.

Note: You can't have any spaces, so you must use underscore in place of any space you wish.



Be sure to indicate the REVEST Ledger Group, by clicking on the magnifying glass next to the Ledger Group box, then click on the Refresh button.

Commitment Control Budget Status Report

Run Control ID Revenue_Status Report Manager Process Monitor Run

Language English

Report Request Parameters

*Unit: 28000 Clayton State University

*Ledger Group: REVEST Revenue Estimate Budget Ledger

Refresh

ChartField Selection Personalize | Find | First 1 of 1 Last

Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
		<input type="checkbox"/>	<input type="checkbox"/>		

Save Add Update/Display

Commitment Control Budget Status Report

Run Control ID Revenue_Status Report Manager Process Monitor Run

Language English

Report Request Parameters

*Unit: 28000 Clayton State University

*Ledger Group: REVEST Revenue Estimate Budget Ledger

Refresh

ChartField Selection Personalize | Find | First 1-9 of 9 Last

Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
1	Account	<input type="checkbox"/>	<input type="checkbox"/>		
2	Fund Code	<input type="checkbox"/>	<input type="checkbox"/>		
3	Department	<input type="checkbox"/>	<input type="checkbox"/>		
4	Program Code	<input type="checkbox"/>	<input type="checkbox"/>		
5	Class Field	<input type="checkbox"/>	<input type="checkbox"/>		
6	Project	<input type="checkbox"/>	<input type="checkbox"/>		
7	Budget Reference	<input type="checkbox"/>	<input type="checkbox"/>		
8	Budget Period	<input type="checkbox"/>	<input type="checkbox"/>		
10	Statistics Code	<input type="checkbox"/>	<input type="checkbox"/>		

Save Add Update/Display

To set up your report, **reorder the Sequence** as follows: **1-Fund Code; 2-Department; 3-Program Code; 4-Class; 5-Account; 6-Budget Reference.**

After you reorder the Sequence, be sure to click on the **Include CF** button for each of these categories. Enter the numbers for your department in the **Value** and **To Value** fields at this point. You also will need to enter the numbers of the fiscal year in the **Value** and **To Value** fields at this point. Once you have input all the numbers for your department, you can click on the Save button and the correct sequence order will be shown. Then click on the Run button at the top to initiate the process.

Commitment Control Budget Status Report

Run Control ID Revenue_Status Report Manager Process Monitor **Run**

Language English

Report Request Parameters

*Unit: 28000 Clayton State University
*Ledger Group: REVEST Revenue Estimate Budget Ledger

Refresh

Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
1	Fund Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4000000	4000000
3	Program Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
4	Class Field	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
5	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
6	Budget Reference	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2019	2019
	Project	<input type="checkbox"/>	<input type="checkbox"/>		
	Budget Period	<input type="checkbox"/>	<input type="checkbox"/>		
	Statistics Code	<input type="checkbox"/>	<input type="checkbox"/>		

Save Add Update/Display

When the Process Scheduler Request screen appears, click on OK to schedule the process.

Commitment Control Budget Status Report

Run Control ID Revenue_Status Report Manager Process Monitor **Run**

Language English

Report Request Parameters

*Unit: 28000 Clayton State University
*Ledger Group: REVEST Revenue Estimate Budget Ledger

Refresh

Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
1	Fund Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4000000	4000000
3	Program Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
4	Class Field	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
5	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
6	Budget Reference	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2019	2019
	Project	<input type="checkbox"/>	<input type="checkbox"/>		
	Budget Period	<input type="checkbox"/>	<input type="checkbox"/>		
	Statistics Code	<input type="checkbox"/>	<input type="checkbox"/>		

Save Add Update/Display

Process Scheduler Request

User ID: SMCELROY Run Control ID: Revenue_Status

Server Name: Run Date: 10/24/2018
Recurrence: Run Time: 9:37:34AM Reset to Current Date/Time
Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Budget Status Report	GLS8020	SQR Report	Web	PDF	Distribution

OK Cancel

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.

Commitment Control Budget Status Report

Run Control ID: Revenue_Status Report Manager: Process Monitor Run

Language: English Process Instance: 11884661

Report Request Parameters

*Unit: 28000 Clayton State University

*Ledger Group: REVEST Revenue Estimate Budget Ledger

Refresh

Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
1	Fund Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4000000	4000000
3	Program Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
4	Class Field	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
5	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
6	Budget Reference	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2019	2019
	Project	<input type="checkbox"/>	<input type="checkbox"/>		
	Budget Period	<input type="checkbox"/>	<input type="checkbox"/>		
	Statistics Code	<input type="checkbox"/>	<input type="checkbox"/>		

Save Add Update/Display

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.

Process Monitor

Process List Server List

View Process Request For

User ID: SMCELROY Type: Last: Hours: Refresh

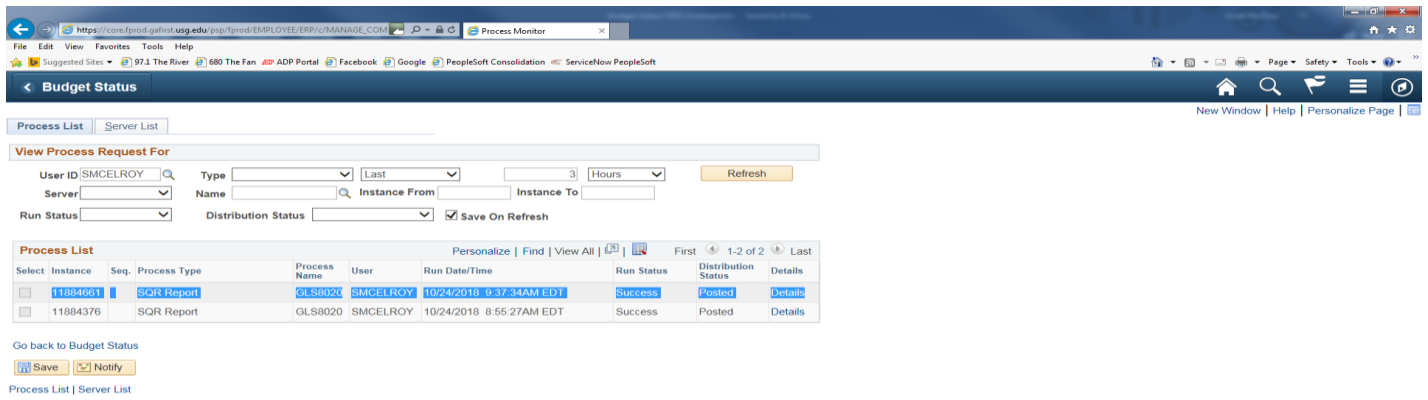
Server: Name: Instance From: Instance To: Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	11884661		SQR Report	GLS8020	SMCELROY	10/24/2018 9:37:34AM EDT	Queued	N/A	Details
<input type="checkbox"/>	11884376		SQR Report	GLS8020	SMCELROY	10/24/2018 8:55:27AM EDT	Success	Posted	Details

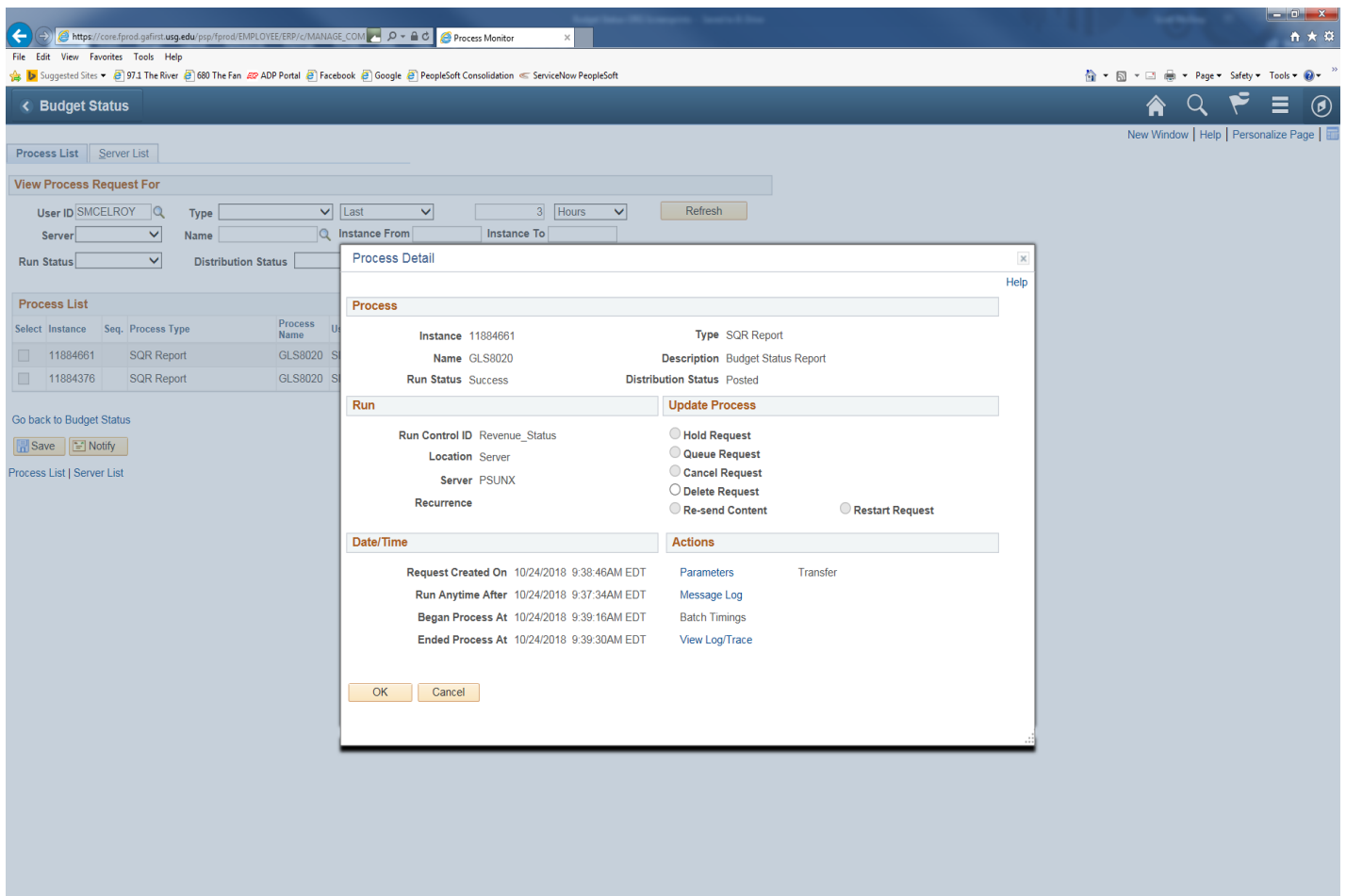
Go back to Budget Status

Save Notify

Process List | Server List



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.



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

The screenshot shows a web application interface with a 'Process Monitor' window. The main page is titled 'Budget Status' and contains a 'View Process Request For' section with search filters for User ID (SMCELROY), Type, Last, and Hours. Below this is a 'Process List' table with columns for Select, Instance, Seq., Process Type, and Process Name. Two rows are visible, both for 'SQR Report' with instance numbers 11884661 and 11884376. A 'Process Detail' dialog box is open, showing details for instance 11884661. The dialog has tabs for 'Report', 'Run', and 'Data'. The 'Report' tab is active, displaying 'Report ID 10722140', 'Process Instance 11884661', 'Name GLS8020', and 'Process Type SQR Report'. The 'Run Status' is 'Success'. Below this is a 'Distribution Details' section with 'Distribution Node DNODE' and 'Expiration Date 01/22/2019'. A 'File List' table shows three files: 'SQR_GLS8020_11884661.log' (1,831 bytes), 'gls8020_11884661.PDF' (3,295 bytes), and 'gls8020_11884661.out' (17,807 bytes). A 'Distribute To' section shows 'Distribution ID Type *Distribution ID' and 'User SMCELROY'. A 'Return' button is at the bottom of the dialog.

Process List

Select	Instance	Seq.	Process Type	Process Name	User
<input type="checkbox"/>	11884661		SQR Report	GLS8020	SMCELROY
<input type="checkbox"/>	11884376		SQR Report	GLS8020	SMCELROY

Process Detail

View Log/Trace

Report

Report ID 10722140 Process Instance 11884661 Message Log

Name GLS8020 Process Type SQR Report

Run Status Success

Budget Status Report

Distribution Details

Distribution Node DNODE Expiration Date 01/22/2019

File List

Name	File Size (bytes)	Datetime Created
SQR_GLS8020_11884661.log	1,831	10/24/2018 9:39:30.455926AM EDT
gls8020_11884661.PDF	3,295	10/24/2018 9:39:30.455926AM EDT
gls8020_11884661.out	17,807	10/24/2018 9:39:30.455926AM EDT

Distribute To

Distribution ID Type *Distribution ID

User SMCELROY

Return

From the View Log/Trace screen, you will click on the link for the PDF file in the File List. This will bring up the Budget Status Report that you just ran. You can then either Save As or Print the report.

PeopleSoft GL
 BUDGET STATUS REPORT

Report ID: GLS8020
 Bus. Unit: 28000--Clayton State University
 Ledger Grp: REVBST -- Revenue Estimate Budget Ledger
 Currency : USD
 Chartfields Criteria
 Fund: All values Dept: 4000000 Program: All values Class: All values Account: All values
 Bud Ref: 2019

Page No. 1
 Run Date 10/24/2018
 Run Time 09:39:17

<u>Fund</u>	<u>Dept</u>	<u>Program</u>	<u>Class</u>	<u>Account</u>	<u>Bud Ref</u>	<u>Budget</u>	<u>Recognized</u>	<u>Collected</u>	<u>Uncollected</u>	<u>Remaining</u>
12230	4000000	23100	42100	422000	2019	0.00	232,310.50	232,310.50	0.00	-232,310.50
12230	4000000	23100	42100	442000	2019	0.00	168.65	168.65	0.00	-168.65
12230	4000000	23100	42100	452000	2019	3,073,474.00	1,232,507.78	1,232,507.78	0.00	1,840,966.22
12230	4000000	23100	42100	470000	2019	0.00	127.20	127.20	0.00	-127.20
12230	4000000	23100	42185	452000	2019	0.00	0.00	0.00	0.00	0.00
Grand Total :						3,073,474.00	1,465,114.13	1,465,114.13	0.00	1,608,359.87

End of Report