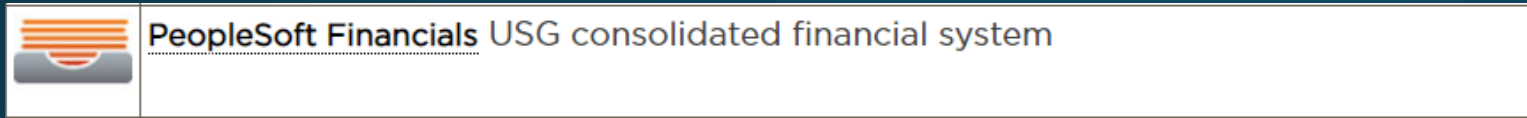


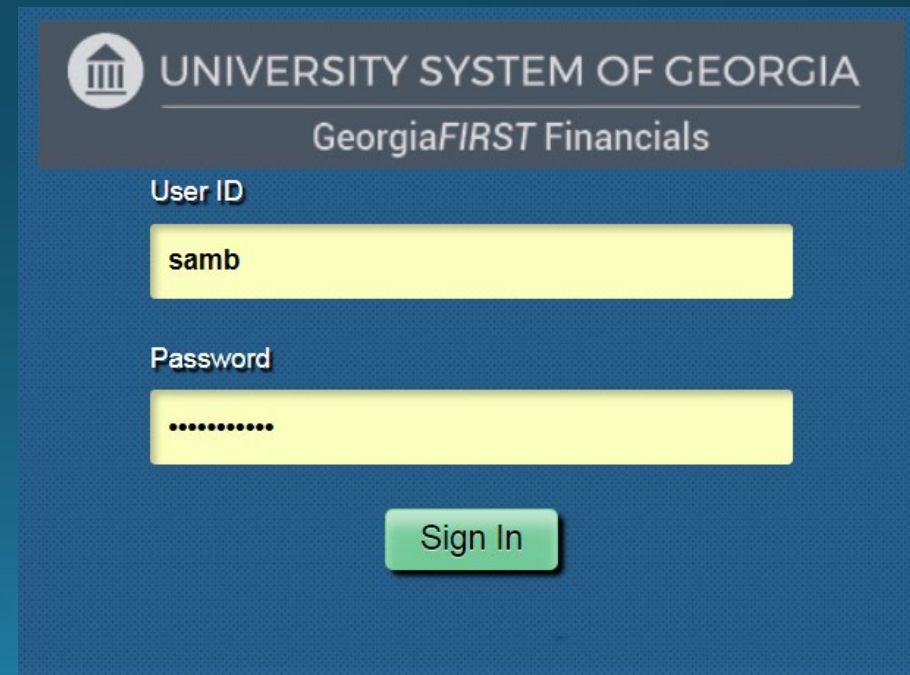
Running a Budget Activity Report in PeopleSoft

Step 1: Log into PeopleSoft

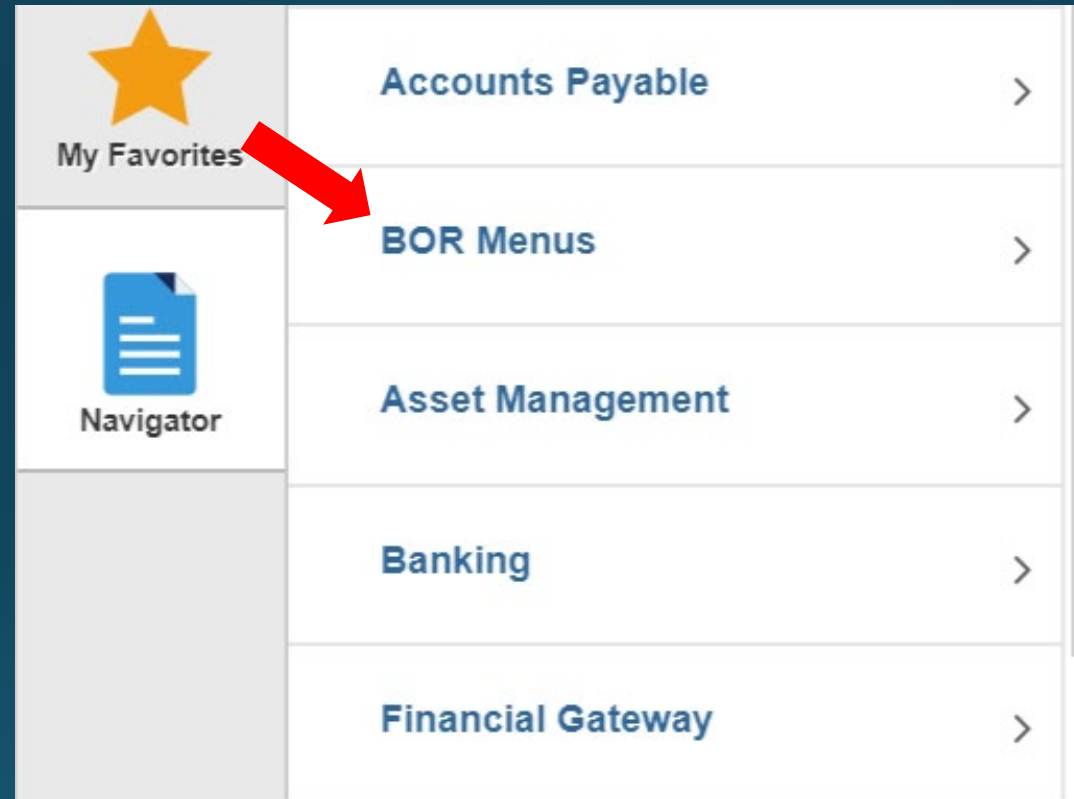
- The link to PeopleSoft is located on the Log-in Station page of the GSC website, as seen below:



- You will then use your login information.

A screenshot of a login page for the University System of Georgia. At the top, there is a dark blue header with the university's logo (a building icon) and the text "UNIVERSITY SYSTEM OF GEORGIA" and "GeorgiaFIRST Financials". Below the header, there are two input fields: "User ID" with the text "samb" entered, and "Password" with a series of dots entered. A green "Sign In" button is located at the bottom right of the form.

Step 2: Click on Navigator, and then BOR Menus



Step 3: Click on BOR General Ledger

BOR General Ledger



Step 4: Click BOR GL Reports

BOR GL Reports

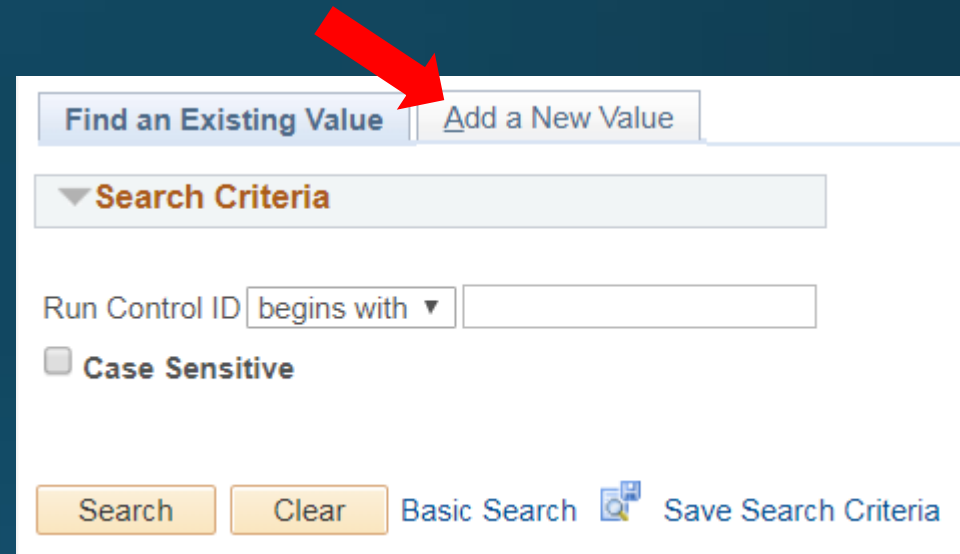


Step 5: Click Budget Activity Report

Budget Activity Report

Step 6: Creating a Run Control ID

- Click **Add a New Value**.

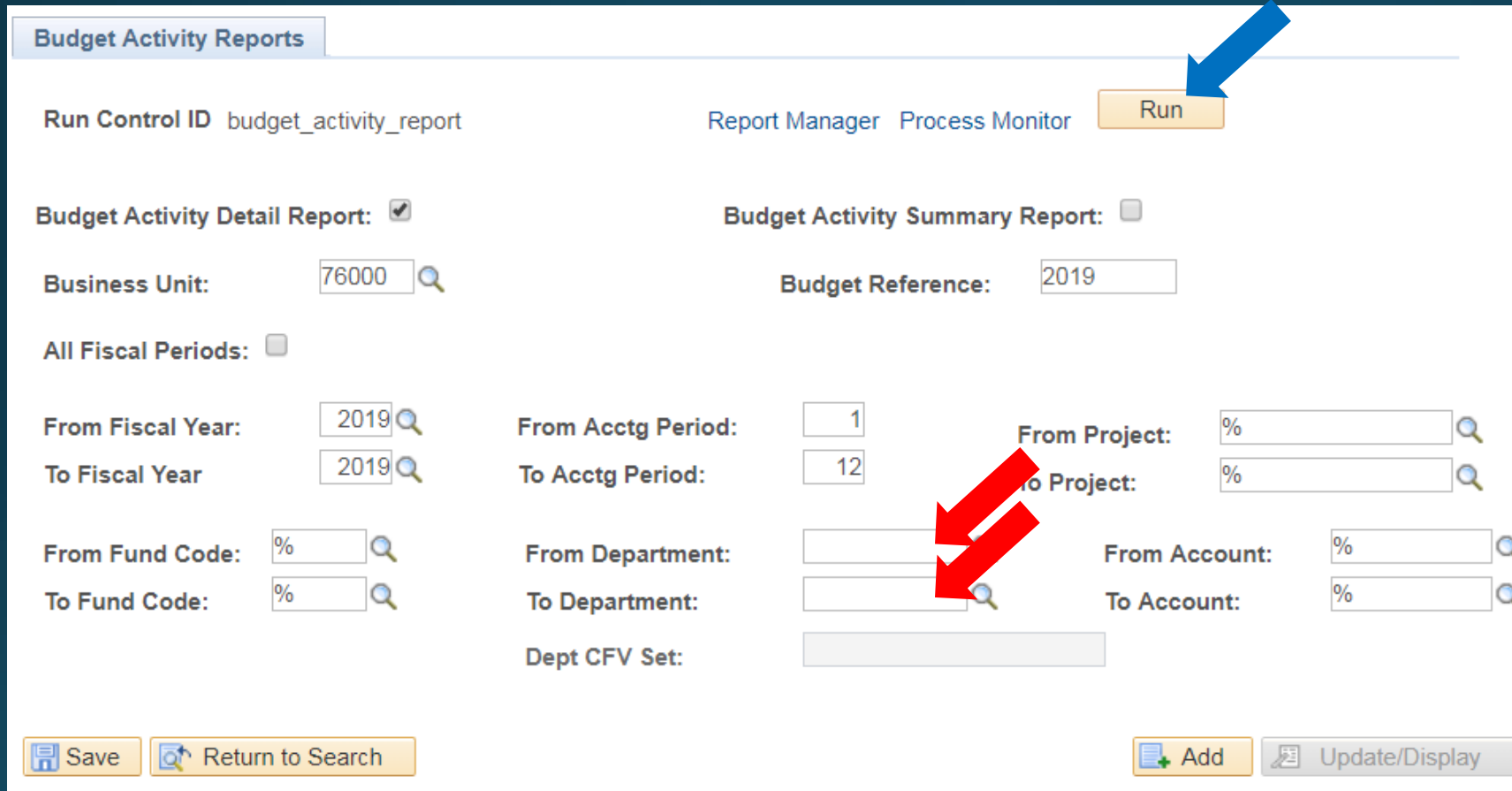


The screenshot shows a web interface with two tabs: 'Find an Existing Value' (active) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with a dropdown menu set to 'begins with' and an empty text input field. There is also a checkbox labeled 'Case Sensitive'. At the bottom, there are 'Search' and 'Clear' buttons, followed by a 'Basic Search' link with a magnifying glass icon, and a 'Save Search Criteria' link.

- Enter your own run control ID
(Cannot have spaces).

Run Control ID
budget_activity_report

Step 7: Running the report



The screenshot shows the 'Budget Activity Reports' form. At the top, there is a 'Run Control ID' field with the value 'budget_activity_report'. To the right of this field are links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. A blue arrow points to the 'Run' button. Below the 'Run Control ID' field, there are two checkboxes: 'Budget Activity Detail Report:' (checked) and 'Budget Activity Summary Report:' (unchecked). The form contains several input fields with magnifying glass icons: 'Business Unit:' (76000), 'Budget Reference:' (2019), 'All Fiscal Periods:' (unchecked), 'From Fiscal Year:' (2019), 'To Fiscal Year:' (2019), 'From Acctg Period:' (1), 'To Acctg Period:' (12), 'From Project:' (%), 'To Project:' (%), 'From Fund Code:' (%), 'To Fund Code:' (%), 'From Department:' (empty), 'To Department:' (empty), 'From Account:' (%), 'To Account:' (%), and 'Dept CFV Set:' (empty). Two red arrows point to the 'From Department:' and 'To Department:' fields. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'.

- Type your department number into both boxes marked by the red arrows.
- Click Run (blue arrow).
- Enter account numbers as desired.

(4 accounts are revenue, 5-8 accounts are expense)

Step 8: Click OK...

Process Scheduler Request

User ID samb Run Control ID budget_activity_report

Server Name Run Date 09/18/2018

Recurrence Run Time 8:22:53AM

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Budget Activity Reports	BORRG045	SQR Report	Web	PDF	Distribution

... and Process
Monitor

Budget Activity Reports

Run Control ID budget_activity_report Report Manager Process Monitor

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

Business Unit: 76000 Budget Reference: 2019

All Fiscal Periods: ☐

From Fiscal Year: 2019 From Acctg Period: 1 From Project: %

To Fiscal Year: 2019 To Acctg Period: 12 To Project: %

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

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

Dept CFV Set:

Step 9: Report Running...

Run status will initially say "Queued..."

Process List						Personalize Find View All   First  1-17 of 17  Last			
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	11766509		SQR Report	BORRG045	samb	09/18/2018 8:42:25AM EDT	Queued	N/A	Details

... Which will then change to "Processing..."

Process List						Personalize Find View All   First  1-17 of 17  Last			
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	11766509		SQR Report	BORRG045	samb	09/18/2018 8:42:25AM EDT	Processing	N/A	Details

... Which will then change to "Success" with a Distribution Status of "Posted."

Process List						Personalize Find View All   First  1-17 of 17  Last			
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	11766509		SQR Report	BORRG045	samb	09/18/2018 8:42:25AM EDT	Success	Posted	Details

(May take up to 15 minutes for report to run to completion)

"Error"

If your report receives a Run Status of "Error," as seen below (red arrow), then it is most likely an issue with the run parameters. Make sure that the Fiscal Year and Accounting Periods are correct (blue arrows).

☐	11756576	SQR Report	BORRG045	samb	09/14/2018 9:01:51AM EDT	Error	Posted	Details
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Budget Activity Reports

Run Control ID budget_activity_report [Report Manager](#) [Process Monitor](#) [Run](#)

Budget Activity Detail Report: ☒

Budget Activity Summary Report: ☐

Business Unit: 76000

Budget Reference: 2019

All Fiscal Periods: ☐

From Fiscal Year: 2019

From Acctg Period: 1

From Project: %

To Fiscal Year: 2019

To Acctg Period: 12

To Project: %

From Fund Code: %

From Department:

From Account: %

To Fund Code: %

To Department:

To Account: %

Dept CFV Set:

[Save](#) [Return to Search](#)

[Add](#) [Update/Display](#)

Step 10: Viewing the report

Click Details...

Process List										Personalize Find View All  	First  1-17 of 17  Last
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details		
☐	11766509		SQR Report	BORRG045	samb	09/18/2018 8:42:25AM EDT	Success	Posted	Details		

View Log/Trace...

Process Detail

Help

Process

Instance 11766509

Type SQR Report

Name BORRG045

Description Budget Activity Reports

Run Status Success

Distribution Status Posted

Run

Update Process

Run Control ID budget_activity_report

Location Server

Server PSUNIX

Recurrence

Hold Request

Queue Request

Cancel Request

Delete Request

Re-send Content

Restart Request

Date/Time

Actions

Request Created On 09/18/2018 8:42:27AM EDT

Run Anytime After 09/18/2018 8:42:25AM EDT

Began Process At 09/18/2018 8:42:46AM EDT

Ended Process At 09/18/2018 8:44:18AM EDT

Parameters

Transfer

Message Log

Batch Timings

View Log/Trace

OK

Cancel

... And then Detail.pdf

View Log/Trace

Help

Report

Report ID 10604500

Process Instance 11766509

Message Log

Name BORRG045

Process Type SQR Report

Run Status Success

Budget Activity Reports

Distribution Details

Distribution Node DNODE

Expiration Date 12/17/2018

File List

Name	File Size (bytes)	Datetime Created
SQR_BORRG045_11766509.k	1,821	09/18/2018 8:44:18.637551AM EDT
borrg045_11766509.out	4,388	09/18/2018 8:44:18.637551AM EDT
borrg045_11766509_Detail.pdf	27,267	09/18/2018 8:44:18.637551AM EDT

Distribute To

Distribution ID Type

*Distribution ID

User samb

Return

Thank you!

If you have any additional questions or need help running a report,
please feel free to email budgets@gordonstate.edu