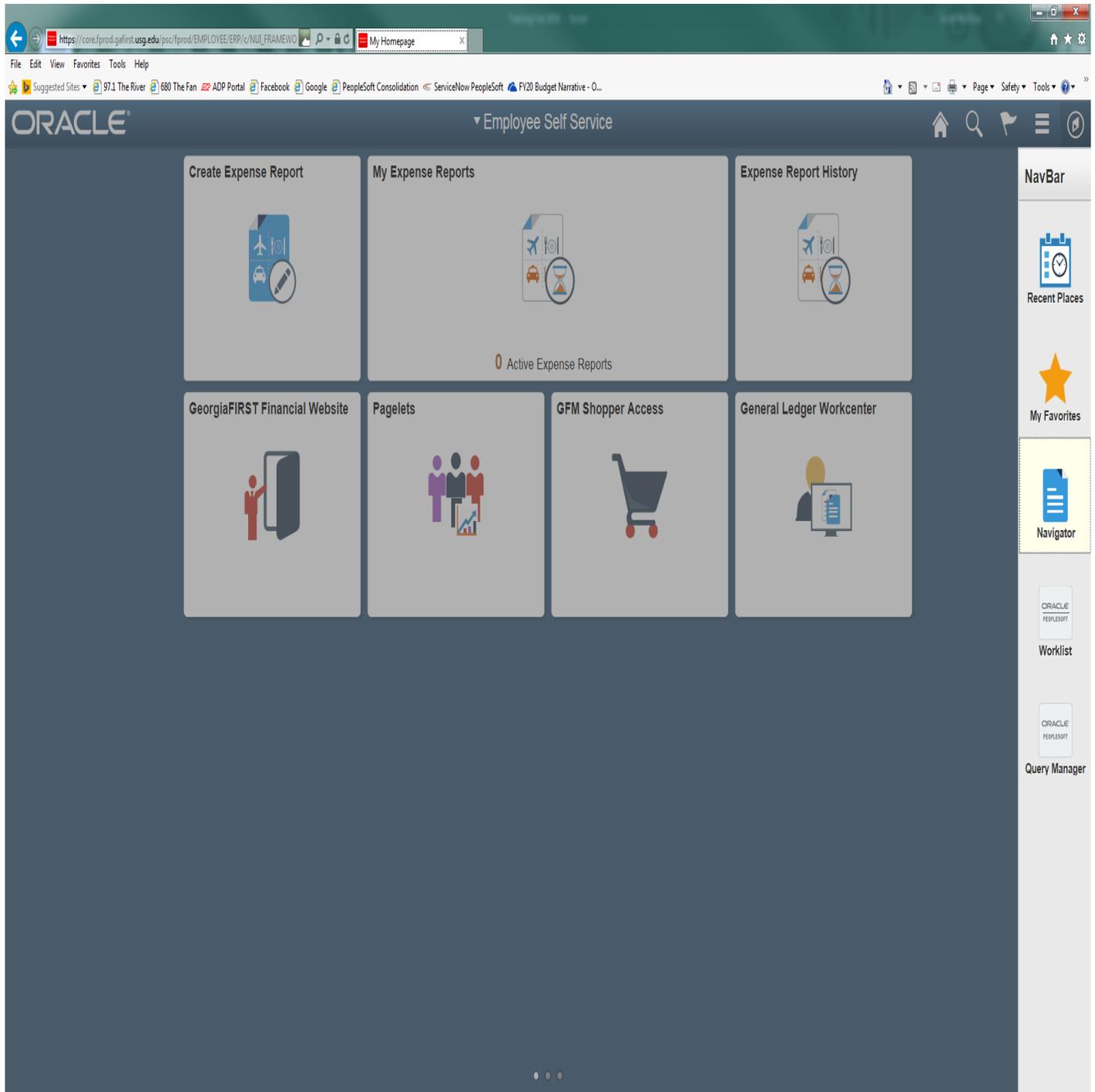


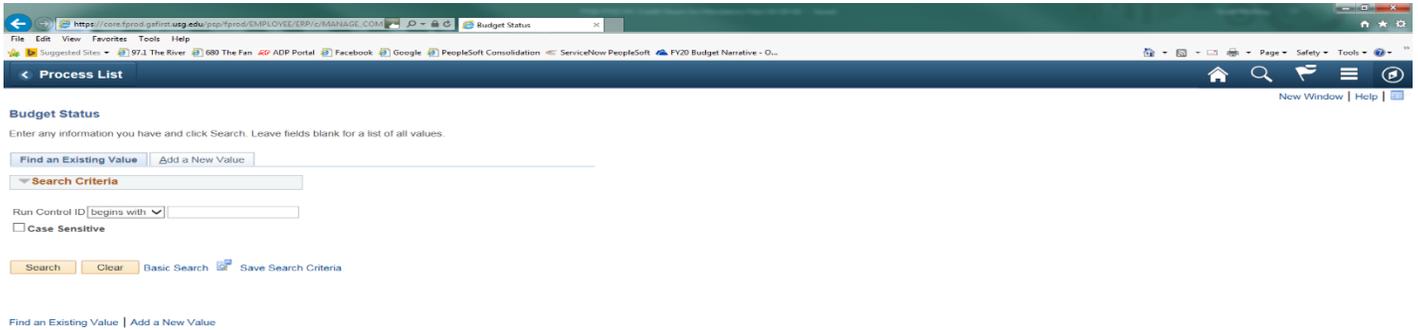
## BUDGET STATUS- ORG (ORGANIZATION) STATUS

The following screen shots will show you how to access the Budget Status Report for ORG summary. This report will give you a quick look at the summary of your Personal Services budget based on the Organization levels (511000-Regular Faculty; 512000-PT Faculty; 513000-Summer Faculty; 516000-Salaries-Other-Faculty; 521000-Professional/Admin; 522000-Staff; 523000-Graduate Assistant; 524000-Student Assistant; 525000-Casual Labor; 526000-Salaries-Other-Staff).

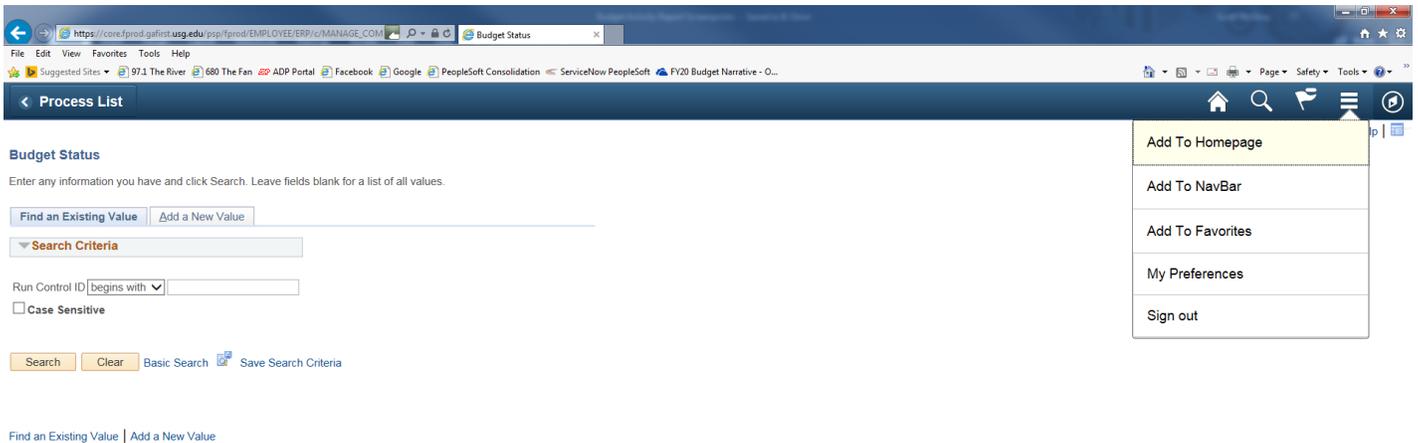
You will need to click on icon in the far upper right-hand corner of the panel which looks like a 'diamond inside a circle'. This will bring up your NavBar. Once you have the NavBar pulled up, you will click on the Navigator link.

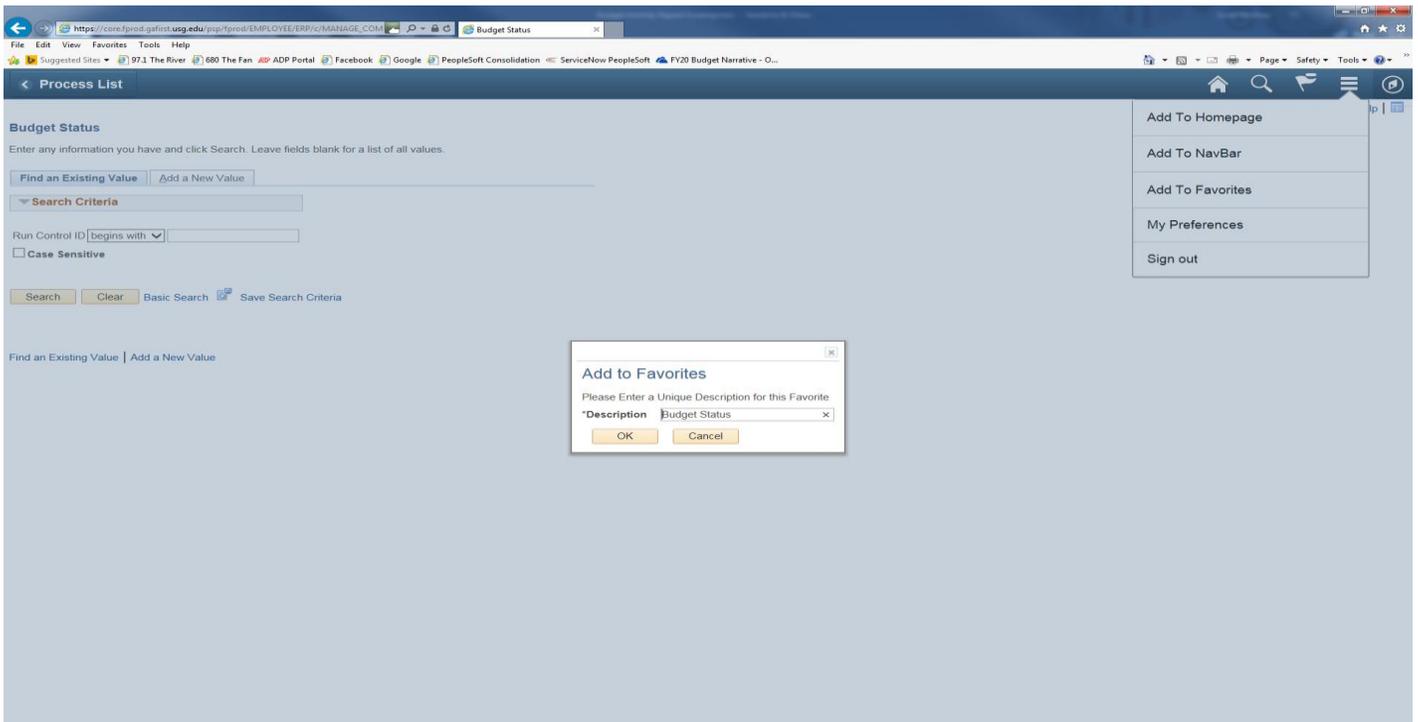


# COMMITMENT CONTROL>BUDGET REPORTS>BUDGET STATUS



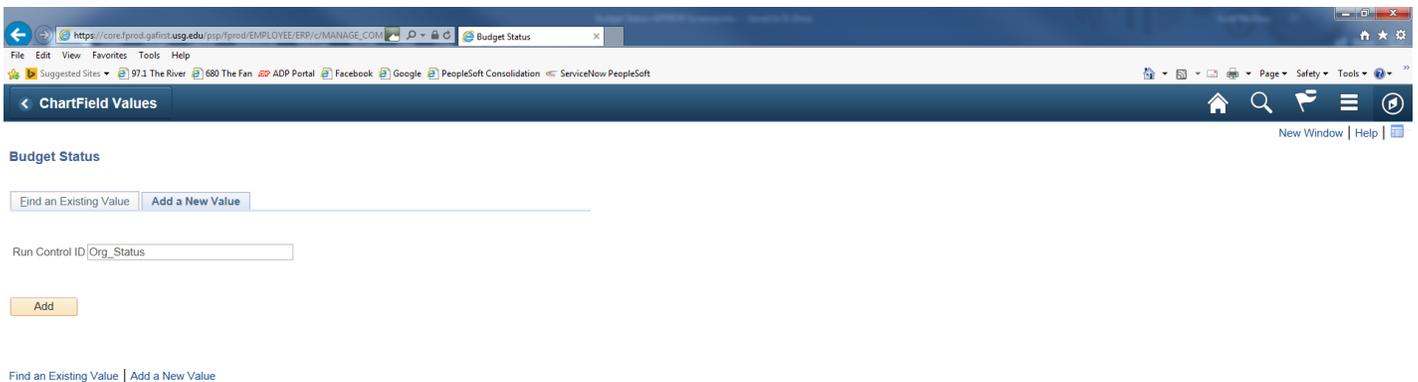
**At this time, you can save this process as a favorite for future reference. You just need to click on the icon that has 3 lines in the upper right-hand corner which has a drop-down menu. You will click on Add to Favorites link at the top and enter a description before clicking OK.**





**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 Org\_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 ORG 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 Org\_Status      Report Manager Process Monitor      Run

Language English

**Report Request Parameters**

\*Unit: 28000      Clayton State University  
 \*Ledger Group: ORG      Organization Budget Ledger

Refresh

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 Org\_Status      Report Manager Process Monitor      Run

Language English

**Report Request Parameters**

\*Unit: 28000      Clayton State University  
 \*Ledger Group: ORG      Organization Budget Ledger

Refresh

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 enter these numbers in the **Value 511000** and **To Value 553000** to get all the Personal Services for your department. 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 Org\_Status  
Language English

Report Manager Process Monitor Run

Report Request Parameters

\*Unit 28000 Clayton State University  
\*Ledger Group ORG Organization 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"/>	5510000	5510000
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"/>	511000	553000
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 Org\_Status  
Language English

Report Manager Process Monitor Run

Report Request Parameters

\*Unit 28000 Clayton State University  
\*Ledger Group ORG Organization Budget Ledger

ChartField Selection

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

Save

Process Scheduler Request

User ID: SMCELROY Run Control ID: Org\_Status

Server Name: [dropdown] Run Date: 10/24/2018  
Recurrence: [dropdown] Run Time: 8:55:27AM  
Time Zone: [dropdown]

Reset to Current Date/Time

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 Org\_Status Report Manager Process Monitor **Run**

Language English [Process Instance: 11884376](#)

**Report Request Parameters**

\*Unit: 28000 Clayton State University  
 \*Ledger Group: ORG Organization Budget Ledger

**ChartField Selection**

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"/>	5510000	5510000
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"/>	511000	553000
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"/>		

Buttons: Save, Add, Update/Display, Refresh

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**

View Process Request For

User ID: SMCELROY Type: Last 3 Hours Refresh

Server: Name: Instance From: Instance To:

Run Status: Distribution Status:  Save On Refresh

**Process List**

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

Buttons: Save, Notify

Process List | Server List

View Process Request For

User ID: SMCELROY | Type: [Dropdown] | Last: [Dropdown] | [Input] Hours | Refresh

Server: [Dropdown] | Name: [Input] | Instance From: [Input] | Instance To: [Input]

Run Status: [Dropdown] | Distribution Status: [Dropdown] |  Save On Refresh

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

Go back to Budget Status

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.

Process Detail

**Process**

Instance: 11884376 | Type: SQR Report

Name: GLS8020 | Description: Budget Status Report

Run Status: Success | Distribution Status: Posted

**Run** | Update Process

Run Control ID: Org\_Status |  Hold Request

Location: Server |  Queue Request

Server: PSUNX |  Cancel Request

Recurrence: |  Delete Request

|  Re-send Content |  Restart Request

**Date/Time** | Actions

Request Created On: 10/24/2018 8:57:07AM EDT | Parameters | Transfer

Run Anytime After: 10/24/2018 8:55:27AM EDT | Message Log

Began Process At: 10/24/2018 8:57:37AM EDT | Batch Timings

Ended Process At: 10/24/2018 8:57:50AM EDT | View Log/Trace

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

The screenshot shows a web browser window with the URL [https://core.fprod.gafirst.usg.edu/psp/PROD/EMPLOYEE/ERP/c/MANAGE\\_COM](https://core.fprod.gafirst.usg.edu/psp/PROD/EMPLOYEE/ERP/c/MANAGE_COM). The browser tabs include 'Process Monitor'. The application interface has a top navigation bar with 'Budget Status' and a search icon. Below this, there are tabs for 'Process List' and 'Server List'. The main content area is titled 'View Process Request For' and contains search filters for 'User ID' (SMCELROY), 'Type', 'Last', '3 Hours', and 'Refresh'. There are also fields for 'Server', 'Name', 'Instance From', and 'Instance To'. Below the filters is a 'Process List' table with columns 'Select', 'Instance', 'Seq', 'Process Type', and 'Process Name'. One row is visible with Instance '11884376' and Process Type 'SQR Report'. Below the table are buttons for 'Save' and 'Notify', and a link 'Go back to Budget Status'. The 'Process Detail' screen is partially visible, showing a 'Run' button and a 'View Log/Trace' link. The 'View Log/Trace' dialog box is open, displaying the following information:

**View Log/Trace**

**Report**

Report ID	10721853	Process Instance	11884376	Message Log
Name	GLS8020	Process Type	SQR Report	

**Run Status** Success

Budget Status Report

**Distribution Details**

Distribution Node	DNODE	Expiration Date	01/22/2019
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**File List**

Name	File Size (bytes)	Datetime Created
SQR_GLS8020_11884376.log	1,823	10/24/2018 8:57:50.047510AM EDT
gls8020_11884376.PDF	3,399	10/24/2018 8:57:50.047510AM EDT
gls8020_11884376.out	17,808	10/24/2018 8:57:50.047510AM 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.

https://core.fprod.gafirst.usg.edu/psreports/fprod/10721853/gls8020\_11884376.f  
 Process Monitor core.fprod.gafirst.usg.edu

File Edit Go to Favorites Help

Suggested Sites 97.1 The River 680 The Fan ADP Portal Facebook Google PeopleSoft Consolidation ServiceNow PeopleSoft

Page No. 1  
 Run Date 10/24/2018  
 Run Time 08:57:39

Report ID: GLS8020  
 Bus. Unit: 28000--Clayton State University  
 Ledger Grp: ORG -- Organization Budget Ledger  
 Currency : USD  
 Chartfields Criteria  
 Fund: All values Dept: 5510000 Program: All values Class: All values Account: 511000 to 553000  
 Bud Ref: 2019

PeopleSoft GL  
 BUDGET STATUS REPORT

Fund	Dept	Program	Class	Account	Bud Ref	Budget	Assoc Revenue	PreEncumbrance	Encumbrance	Expense	Remaining
10600	5510000	16200	11000	521000	2019	327,209.00	0.00	0.00	209,406.01	82,302.02	35,500.97
10600	5510000	16200	11000	522000	2019	23,057.00	0.00	0.00	24,069.96	7,176.00	-8,188.96
10600	5510000	16200	11000	524000	2019	0.00	0.00	0.00	0.00	5,739.60	-5,739.60
10600	5510000	16200	11000	551000	2019	26,864.00	0.00	0.00	17,195.60	6,409.34	3,259.06
10600	5510000	16200	11000	552000	2019	73,384.00	0.00	0.00	50,363.99	18,737.17	4,282.84
10600	5510000	16200	11000	553000	2019	34,994.00	0.00	0.00	32,323.42	10,636.00	-7,965.42
Grand Total :						485,508.00	0.00	0.00	333,358.98	131,000.13	21,148.89

End of Report

1 / 1