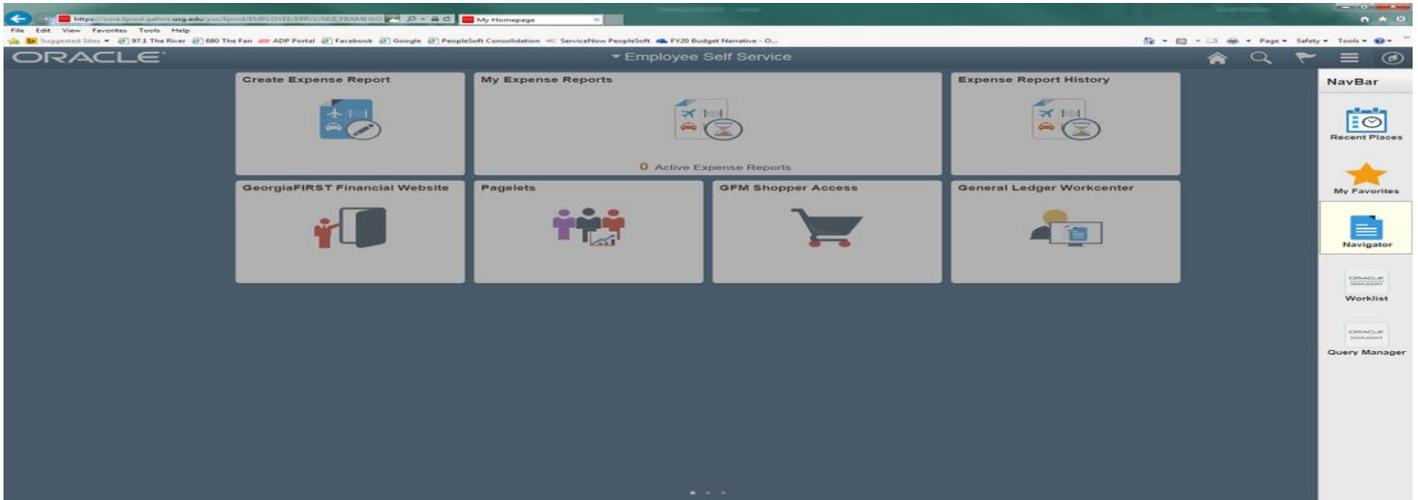


## GRANT BUDGET ACTIVITY REPORT

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.

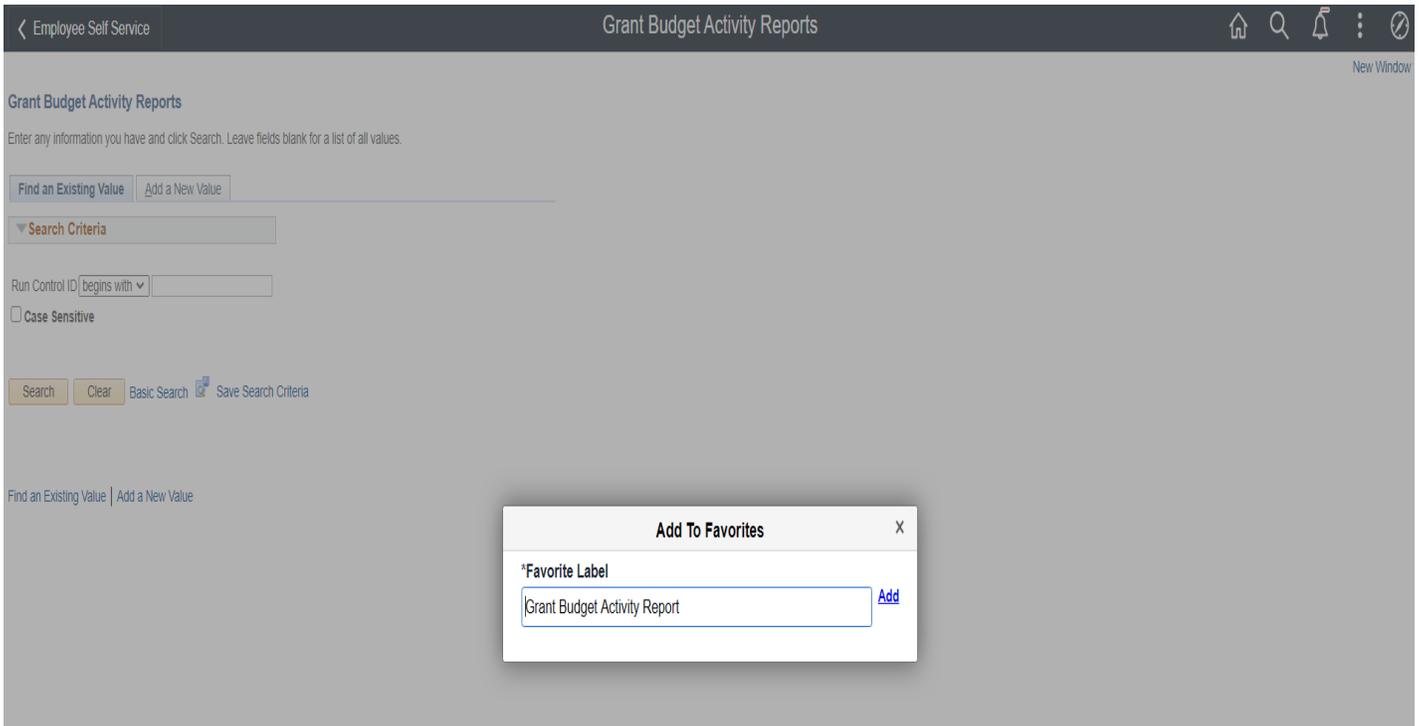
You will need to click on icon in the far upper right-hand corner of the panel which looks like a 'diamond inside a circle'. This will bring up your NavBar. Once you have NavBar pulled up, you will click on the Navigator link.



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



**At this time you can save this process as a favorite for future reference. You just need to click on the 3 dots icon at the top and in the dropdown you will see Add to Favorites link. You click on that and enter a description before clicking OK.**



The screenshot shows the 'Grant Budget Activity Reports' page in the 'Employee Self Service' system. The page has a dark header with a back arrow, the text 'Employee Self Service', the title 'Grant Budget Activity Reports', and navigation icons (home, search, notifications, menu, refresh). Below the header, there's a search section with buttons for 'Find an Existing Value' and 'Add a New Value', a 'Search Criteria' dropdown, a 'Run Control ID' field with a 'begins with' dropdown, and a 'Case Sensitive' checkbox. At the bottom of the search section are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons. A dialog box titled 'Add To Favorites' is open in the center, containing a '\*Favorite Label' field with the text 'Grant Budget Activity Report' and an 'Add' button.

**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.**



The screenshot shows the 'Grant Budget Activity Reports' page with the 'Add a New Value' tab selected. The header is the same as in the previous screenshot. The search section now has the 'Add a New Value' button highlighted. Below the search section, the 'Run Control ID' field contains the text 'GRANT\_BUD\_ACTIVITY'. An 'Add' button is visible below the field. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

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 may want to check this box if you aren't running it for the quarterly review 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.] However for the quarterly review process, you need to leave this box unchecked.
- ✓ DO NOT CHECK 'ALL CHARTSTRINGS?' Enter the chart string for your Grants/Project.

Employee Self Service Grant Budget Activity Report

Grant Budget Activity Report

Run Control test20 ID Report Manager Process Monitor Run

Grant Budget Activity Detail Report:  Grant Budget Activity Summary Report:

Business Unit: 28000 Budget Reference:

All Fiscal Periods:

From Accounting Period: To Accounting Period:

From Fiscal Year: To Fiscal Year:

Grant From: % Grant To: % All ChartStrings?:

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

Save Add Update/Display

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.

Worklist Grant Budget Activity Report

Grant Budget Activity Report

Run Control 280\_GRT\_BUD\_ACTIVITY ID Report Manager Process Monitor Run

Grant Budget Activity Detail Report:  Grant Budget Activity Summary Report:

Business Unit: 28000 Budget Reference: 2021

All Fiscal Periods:

From Accounting Period: 4 To Accounting Period: 6

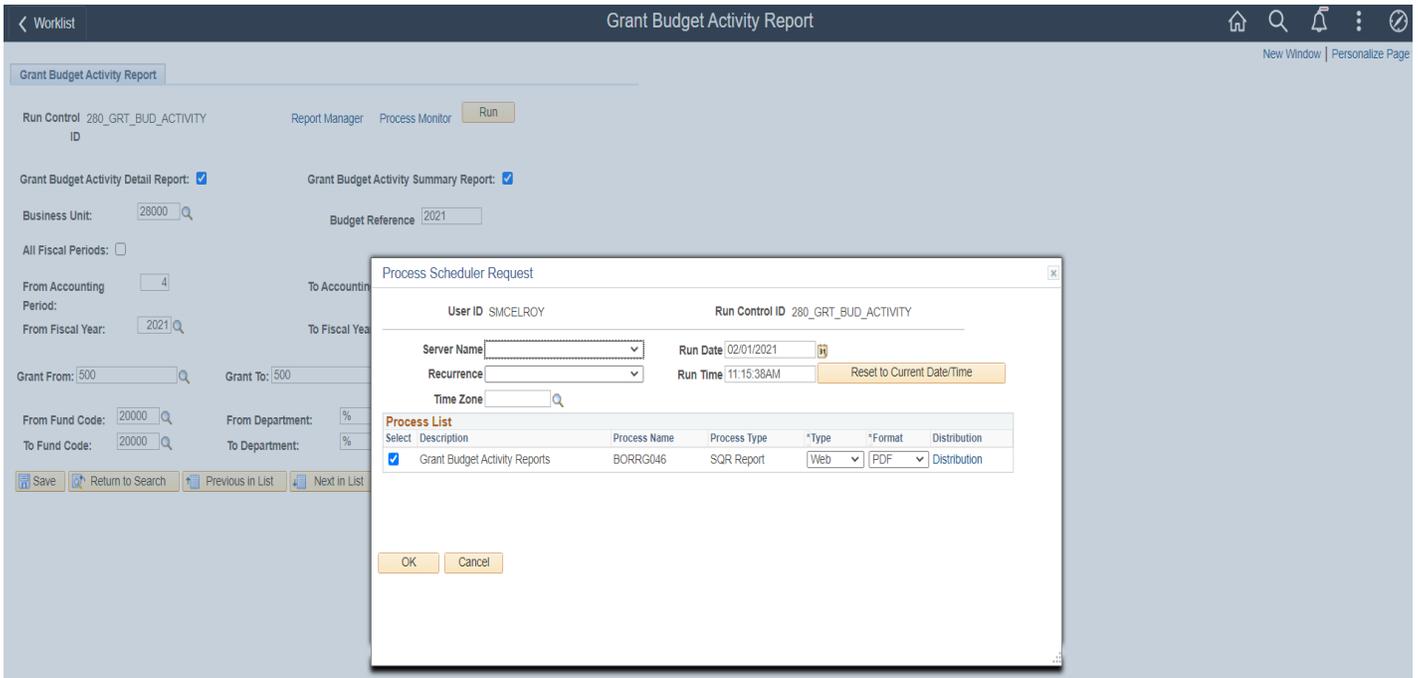
From Fiscal Year: 2021 To Fiscal Year: 2021

Grant From: 500 Grant To: 500 All ChartStrings?:

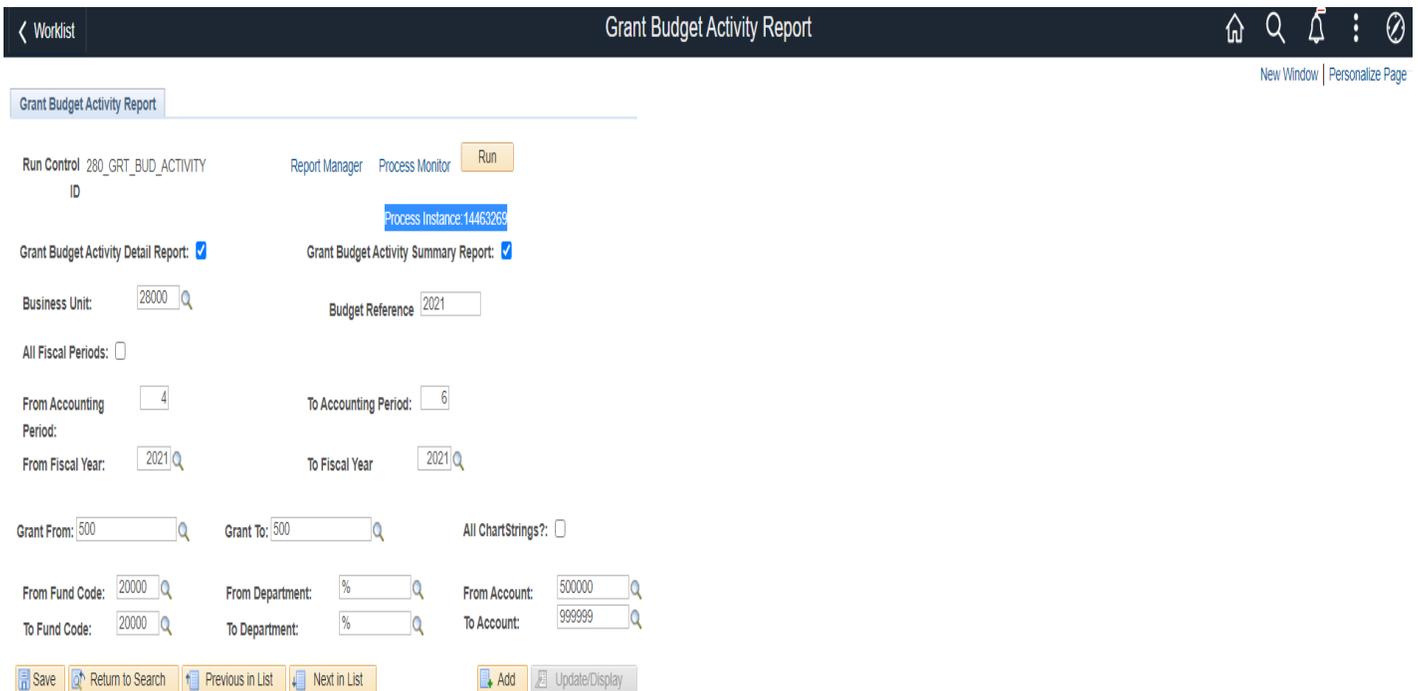
From Fund Code: 20000 To Fund Code: 20000 From Department: % To Department: % From Account: 500000 To Account: 999999

Save Return to Search Previous in List Next in List Add Update/Display

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



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.



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.

The screenshot shows the 'Process Monitor' interface. At the top, there is a navigation bar with 'Grant Budget Activity Report' and 'Process Monitor'. Below this, there are tabs for 'Process List' and 'Server List'. The 'View Process Request For' section contains several input fields: 'User ID' (SMCELROY), 'Type' (dropdown), 'Last' (dropdown), '2' (input), 'Hours' (dropdown), and a 'Refresh' button. Below these are 'Server' (dropdown), 'Name' (input), 'Instance From' (input), 'Instance To' (input), and a 'Report Manager' link. At the bottom of this section are 'Run Status' (dropdown), 'Distribution Status' (dropdown), and a checked 'Save On Refresh' checkbox.

The 'Process List' section shows a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	14278344		SQR Report	BORRG046	SMCELROY	11/12/2020 9:13:24AM EST	Success	Posted	<a href="#">Details</a>

Below the table, there are 'Save' and 'Notify' buttons, and a link to 'Go back to Grant Budget Activity Reports'. At the bottom, there are 'Process List' and 'Server List' tabs.

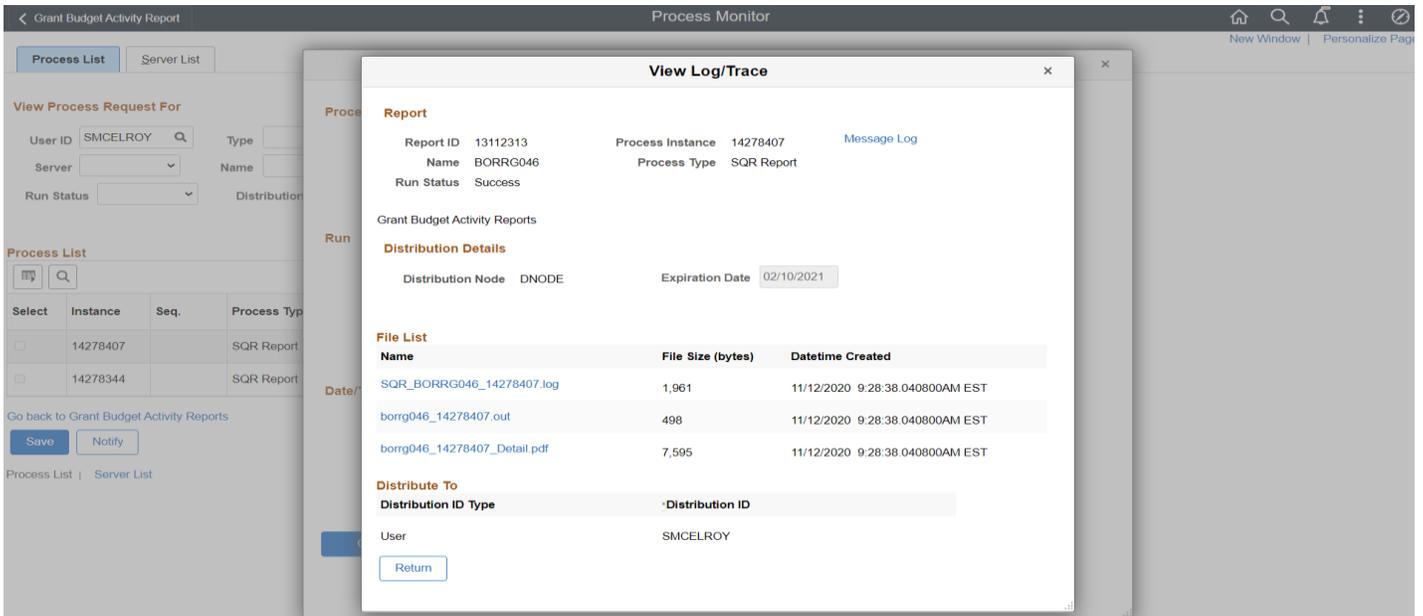
In order to access the report that you just ran, you will need to click on the **Details** link in the line for your Process Instance number.

The screenshot shows the 'Process Monitor' interface with a 'Process Detail' modal window open. The modal window has a title bar with 'Process Detail' and a close button. It contains the following sections:

- Process**: Instance 14278344, Type SQR Report, Name BORRG046, Description Grant Budget Activity Reports, Run Status Success, Distribution Status Posted.
- Run**: Run Control ID test20, Location Server, Server PSUNX3, Recurrence.
- Update Process**: Radio buttons for Hold Request, Queue Request, Cancel Request, Delete Request, Re-send Content, and Restart Request.
- Date/Time**: Request Created On 11/12/2020 9:15:06AM EST, Run Anytime After 11/12/2020 9:13:24AM EST, Began Process At 11/12/2020 9:15:13AM EST, Ended Process At 11/12/2020 9:16:43AM EST.
- Actions**: Parameters, Message Log, Batch Timings, View Log/Trace, Transfer.

At the bottom of the modal window, there are 'OK' and 'Cancel' buttons.

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



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

<b>Grant:</b> 28420	CSU Fdn-Pres. Scholarship	<b>Grant Manager:</b> Momayezi, Betty	<b>Grant End Date:</b> 30-JUN-2021	<b>ALL ChartStrings?</b> NO
<b>Department:</b> 8500000	Scholarships-Privately Funded	<b>Budget Ref:</b> 2021	<b>From Fiscal Year:</b> ALL	<b>To Fiscal Year:</b> ALL
<b>Fund Code:</b> 20000	Restricted Education & General	<b>All Fiscal Periods:</b> Yes	<b>Acct Period From:</b> 1 ALL	<b>Acct Period To:</b> 12 ALL
<b>Overall Grant Budget:</b> 1,027,000.00				

Account	Jrnl/Tran	Date	Type	DocumentID	Line	Description	Program/Class	Vendor	PROJ_GRT Budgeted	Pre-Encum	Encumbrance	Expended	Remaining	
<b>700000</b>			<b>Operating Supplies &amp; Expenses</b>				18100 / 64000							
781000			Scholarships						155,000.00					
781100			Scholarships											
	07/06/20	JE		B000841816	92	Banner Journal			0.00	0.00		-178.60		
	08/07/20	JE		B000851760	355	Banner Journal			0.00	0.00		14,058.00		
	08/24/20	JE		B000856139	370	Banner Journal			0.00	0.00		3,000.00		
	08/24/20	JE		B000856139	372	Banner Journal			0.00	0.00		5,500.00		
	<b>Totals</b>								<b>0.00</b>	<b>0.00</b>		<b>22,379.40</b>	<b>132,620.60</b>	
<b>Operating Supplies &amp; Expenses Total</b>									<b>155,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>22,379.40</b>	<b>132,620.60</b>	
<b>Totals for Dept/Fund/Program/Class:</b>									<b>8500000 / 20000 / 18100 / 64000</b>	<b>155,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>22,379.40</b>	<b>132,620.60</b>
<b>Totals for Dept/Fund:</b>									<b>8500000 / 20000</b>	<b>155,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>22,379.40</b>	<b>132,620.60</b>
Prior Budget Ref(s)									872,000.00	0.00	0.00	815,722.07	56,277.93	
<b>Totals for Dept/Fund - All Budget Refs:</b>									<b>8500000 / 20000</b>	<b>1,027,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>838,101.47</b>	<b>188,898.53</b>

Report ID: BORRG046 Date: 11/12/2020 @ 09:15:13 DB=FPROD Version#: 5.30 Page: 1