

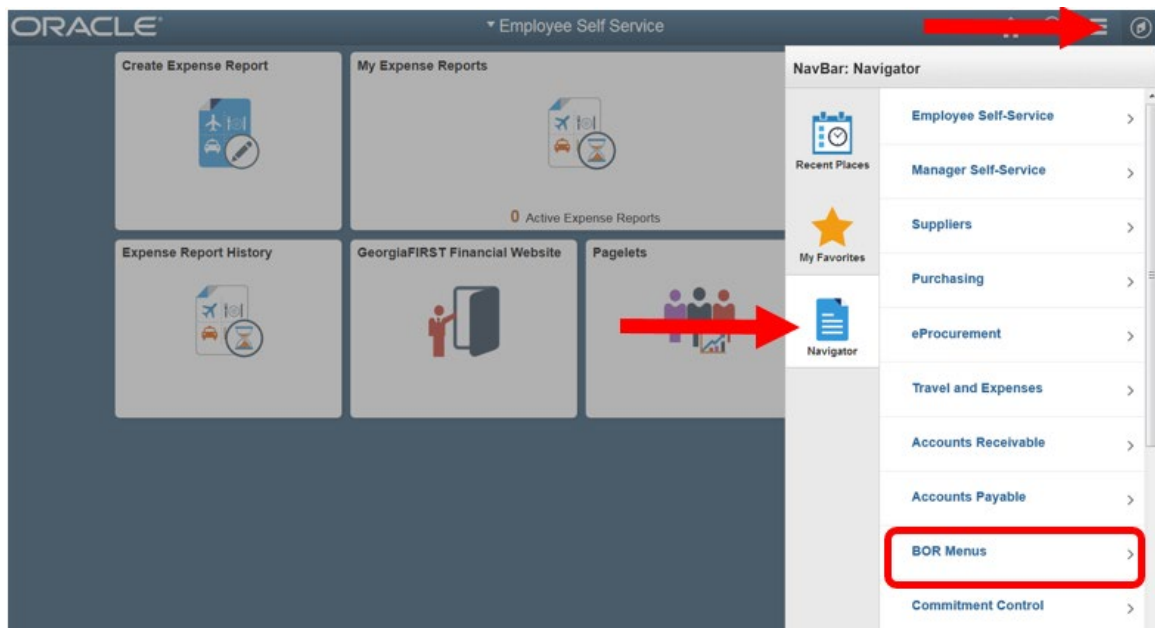


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Revenue Budget Activity Report Setup Instructions

This report will give you a detailed transactional listing of each deposit that makes up the revenue that has been earned and posted in the revenue account.

1. Navigate to the [GeorgiaFIRST Financials webpage](https://www.usg.edu/gafirst-fin/) (<https://www.usg.edu/gafirst-fin/>)
2. Select the **GeorgiaFIRST Financials** button (for Core Users)
3. If prompted, select the **GoWest** shield logo.
4. Login using your **UWG Username** and **Password**.
5. You will be prompted to dual authenticate using the OneLogin Protect authentication method previously established.
6. From the PeopleSoft Financials homepage, select the **NavBar** (compass) icon.
7. Click the **Navigator** icon.
8. Click **BOR Menus** from the menu listing.



9. Click **BOR General Ledger**.
10. Click **BOR GL Reports**.
11. Click **Revenue Budget Activity Report**.



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12. First time users of this report will need to set up a **Run Control ID** that will be used each time you run the report. Click on the **Add a New Value** tab.

Revenue Budget Activity Report

Find an Existing Value **Add a New Value**

Run Control ID

Add

13. Type in a name for the report, underscoring between words, as shown in the screenshot below. Click the **Add** button. For future reports, you will click on the **Find an Existing Value** tab to select the run control and run the report. You will not need to create it again for future reports.

Revenue Budget Activity Report

Find an Existing Value **Add a New Value**

Run Control ID

Add

14. The screen for the Revenue Budget Activity Report will appear. Complete the fields using the **Look Up** tool (magnifying glass) if needed. Tab to navigate between fields or click into each box. In PeopleSoft, the percent sign (%) is a wildcard and generally means *all*.
- Select the checkbox for either a Detail or Summary Report



- b. Business Unit: **54000**
 - c. Budget Reference: Enter the current **Budget Year**
 - d. From Account/To Account: Enter **percent (%)** in both fields.
 - e. From Fund Code/To Fund Code: Enter a specific **Fund Code** in both fields.
 - f. From Department/To Department: Enter your department's 7 digit **Department ID** in both fields.
 - g. From Program Code/To Program Code: Enter **percent (%)** in both fields.
 - h. From Class Field/To Class Field: Enter **percent (%)** in both fields.
 - i. From Project ID/To Project ID: Enter **percent (5)** in both fields.
15. Click the **Save** button.
16. Once all values are entered click the **Run** button.

Revenue Budget Activity Report

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

Revenue Activity Detail Report: ☒ Revenue Activity Summary Report: ☐

Business Unit: 54000 Budget Reference: 2018

From Account: % To Account: % From Fund Code: 10600 To Fund Code: 10600

From Department: 1045103 To Department: 1045103 From Program Code: % To Program Code: %

From Class Field: % To Class Field: % From Project ID: % To Project ID: %

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

17. The **Process Scheduler Request** screen will appear. The identified format should be a PDF. This can be changed by using the dropdown to select a CSV file, if an Excel file is desired. Click the **OK** button to return to the Revenue Budget Activity Report screen.



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Process Scheduler Request

User ID pdduroug Run Control ID Revenue_Budget_Activity_Report

Server Name Run Date 01/09/2018

Recurrence Run Time 4:29:50PM

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Revenue Budget Progress Report	BORRG037	SQR Report	Web	PDF	Distribution

18. Click on the **Process Monitor** link.

Revenue Budget Activity Report

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

Revenue Activity Detail Report: ☒ Revenue Activity Summary Report: ☐

Business Unit: 54000

Budget Reference: 2018

From Account: % From Fund Code: 10600

To Account: % To Fund Code: 10600

From Department: 1045103 From Program Code: %

To Department: 1045103 To Program Code: %

From Class Field: % From Project ID: %

To Class Field: % To Project ID: %



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19. This will take you to a window showing all reports you have run for a period of time. Click on the **Refresh** button until the Run Status reflects *Success* and the Distribution Status reflects *Posted*.
20. Click the **Details** link. Do not select specifics for server, run status, type, name or distribution status.

Process List | Server List

View Process Request For

User ID: pdurroug | Type: | Last: | Days: | 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
☐	10852996		SQR Report	BORRG037	pdurroug	01/09/2018 4:29:50PM EST	Success	Posted	Details
☐	10852547		SQR Report	BORRG025	pdurroug	01/09/2018 3:43:34PM EST	Success	Posted	Details

Go back to Revenue Budget Activity Report

[Save](#) [Notify](#)

Process List | Server List

21. Click the **View/Log Trace** link.

Process Detail

Process

Instance: 10852996 | Type: SQR Report

Name: BORRG037 | Description: Revenue Budget Progress Report

Run Status: Success | Distribution Status: Posted

Run | **Update Process**

Run Control ID: Revenue_Budget_Activity_Report

Location: Server

Server: PSUNX3

Recurrence: | ☐ Hold Request

☐ Queue Request

☐ Cancel Request

☐ Delete Request

☐ Re-send Content | ☐ Restart Request

Date/Time | **Actions**

Request Created On: 01/09/2018 4:30:55PM EST | [Parameters](#) | Transfer

Run Anytime After: 01/09/2018 4:29:50PM EST | [Message Log](#)

Began Process At: 01/09/2018 4:31:17PM EST | Batch Timings

Ended Process At: 01/09/2018 4:32:03PM EST | [View Log/Trace](#)

[OK](#) [Cancel](#)



22. Under the **File List**, click the file name with the **PDF** extension.

View Log/Trace

Report

Report ID 9696388 **Process Instance** 10852996 [Message Log](#)
Name BORRG037 **Process Type** SQR Report
Run Status Success

Revenue Budget Progress Report

Distribution Details

Distribution Node DNODE **Expiration Date** 04/09/2018

File List

Name	File Size (bytes)	Datetime Created
SQR_BORRG037_10852996.log	1,841	01/09/2018 4:32:03.282400PM EST
borrr037_10852996.out	372	01/09/2018 4:32:03.282400PM EST
borrr037_10852996_Detail.pdf	5,520	01/09/2018 4:32:03.282400PM EST

Distribute To

Distribution ID Type	*Distribution ID
User	pdurroug

[Return](#)

23. This will take you to a PDF file with the requested report. Click the printer icon to print or the PDF file can be saved.

24. Once the report is reviewed, printed or saved locally, you can close the PDF window, and you'll be back at the **View/Log Trace** window. You can click the **Return** button to return to the process detail page, and click the **OK** button to return to the Process List.