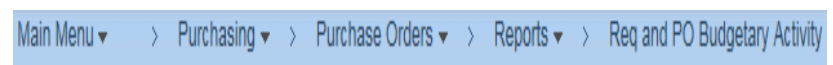


LAST REVISED DATE: 02/26/2018

General Information

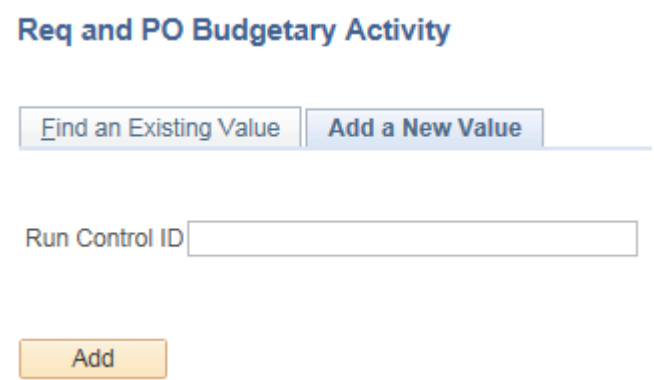

Task	Process Information
<p>Running the Requisition Budgetary Activity Report</p> <p>Note: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>The <i>Requisition Budgetary Activity Report</i> provides budgetary amount information for requisitions according to report request parameters.</p>

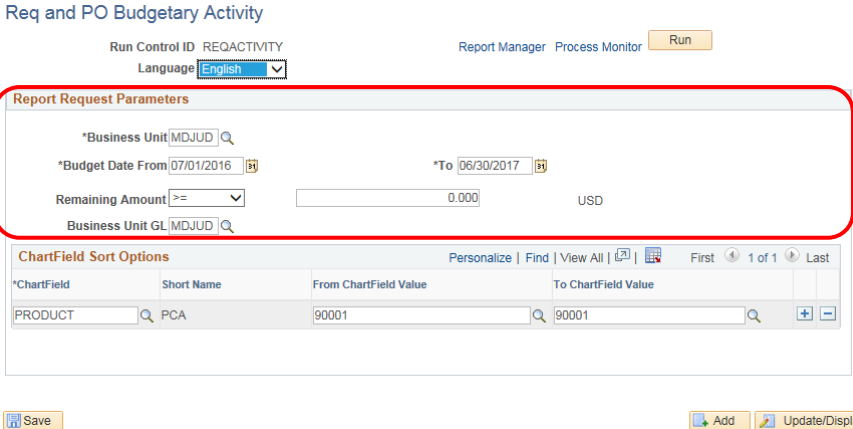
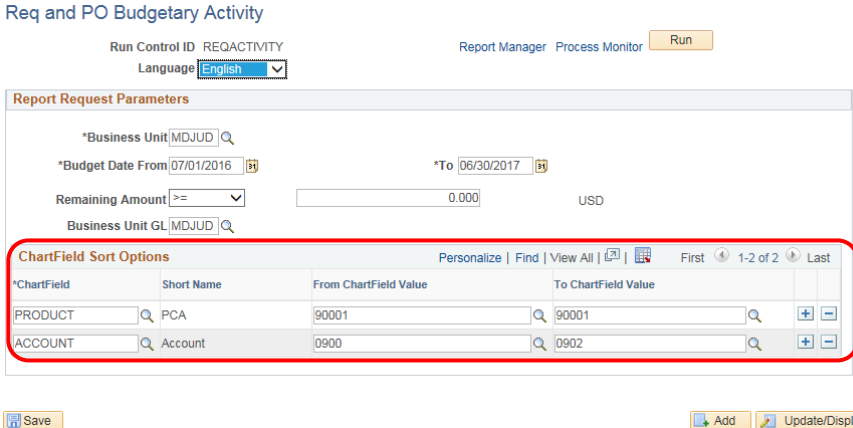
GEARS Navigation


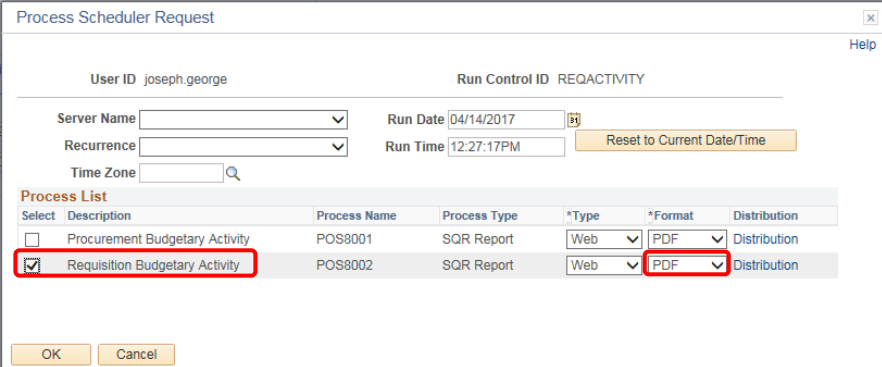
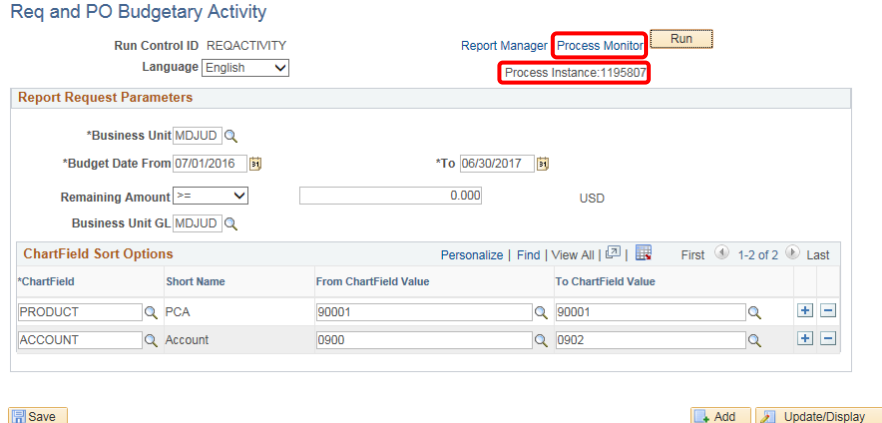
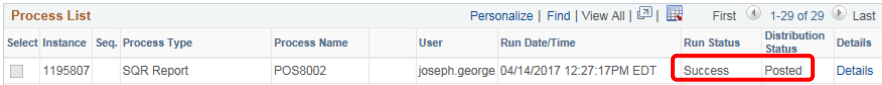
<p>Main Menu > Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity</p>	
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1.0 Process

This document is intended to provide a quick reference to running the Requisition Budgetary Activity Report in GEARS.

STEP	ACTION	DETAILS
1.	<p>Create the Run Control ID. The first time you run the PO and Req Budgetary Activity Report, you must create a new Run Control ID. Click on the Add a New Value tab.</p> <p>NOTE: A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the <i>Find an Existing Value</i> tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.</p>	 <p>Control ID that you created, click the Search button. A list of Run Control IDs appear.</p>
2.	<p>Enter a Run Control ID. In this example, "REQACTIVITY" is used as the Run Control ID.</p>	

<p>3.</p>	<p>Click the Add button.</p>											
<p>4.</p>	<p>Specify the Report Parameters. The Report Selection Parameters page displays. The report parameters determine what information appears in the report.</p> <p>Notes: Fields with an asterisk (*) must be completed.</p>	 <table border="1" data-bbox="662 730 1510 1255"> <thead> <tr> <th>Report Request Parameters Fields</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Business Unit</td> <td>Business Unit will always be MDJUD.</td> </tr> <tr> <td>Budget Date From / To</td> <td>Enter the budget period of the fiscal year (e.g., From: 07/01/XX/ To: 07/31/XX).</td> </tr> <tr> <td>Remaining Amount</td> <td>Enter the desired remaining amount. NOTE: (optional) use the dropdown box to limit results based on operator parameters (e.g., greater '>' /less '<' than or equal to '=' a desired remaining amount). If you are attempting to view all transactions with remaining balances, you should select the '<>' (Not Equal to) dropdown and 0.000 amount. This selection will allow open POs with either positive or negative balances to display.</td> </tr> <tr> <td>Business Unit GL</td> <td>Business GL Unit will always be MDJUD.</td> </tr> </tbody> </table>	Report Request Parameters Fields	Description	Business Unit	Business Unit will always be MDJUD.	Budget Date From / To	Enter the budget period of the fiscal year (e.g., From: 07/01/XX/ To: 07/31/XX).	Remaining Amount	Enter the desired remaining amount. NOTE: (optional) use the dropdown box to limit results based on operator parameters (e.g., greater '>' /less '<' than or equal to '=' a desired remaining amount). If you are attempting to view all transactions with remaining balances, you should select the '<>' (Not Equal to) dropdown and 0.000 amount. This selection will allow open POs with either positive or negative balances to display.	Business Unit GL	Business GL Unit will always be MDJUD.
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<p>4a.</p>	<p>Specify ChartField Sort Options. Select the ChartField Sort Options Name criteria for your report (<i>by a selection or range of selections you wish to be included in your report</i>).</p> <p>As an example, you can report on any single or combination of the following fields:</p> <ul style="list-style-type: none"> Account (e.g., 0902 – Office Supplies) Product (PCA, e.g., 40821) Budget Ref (Appropriation Year, e.g., AY2015) Class Fld (Appropriation Number, e.g., A0006 – Admin Office of the Courts) Fund Code (Fund, e.g., 0001 – General Fund) 	 <p>NOTE: The more selection criteria entered, the more granular your results will be. You can select multiple field names. Add/delete field names as needed by using the “+” and “-” buttons to the right of the line.</p>										

	<p>Operating Unit (Batch Agency, e.g., C50 Maryland District Court) Program (e.g., B005 – Maryland Judicial Conference) Project ID (NOTE: this field is primarily used with Grants)</p>															
<p>5.</p>	<p>Run the Report. Click the Run button.</p>															
<p>6.</p>	<p>Schedule the Process. The Process Scheduler Request page displays.</p> <p>Select/Enter the appropriate criteria:</p> <ol style="list-style-type: none"> Click the checkbox <input checked="" type="checkbox"/> next to the Procurement Budgetary Activity. Ensure the report Format is 'PDF'. 															
<p>7.</p>	<p>Click the OK button.</p>															
<p>8.</p>	<p>Make Sure The Process Runs. The Report Selection Parameters page displays.</p> <p>Make note of your Process Instance Number. In this example, the Process Instance Number is 1195807.</p> <p>Click the Process Monitor link.</p>															
<p>9.</p>	<p>Check the Process Status. The Process List page displays.</p> <p>Click the Refresh button and continue clicking the <i>Refresh</i> button until the Run Status = Success and Distribution Status = Posted.</p>	 <table border="1" data-bbox="662 1671 1539 1944"> <thead> <tr> <th>Run Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Queued</td> <td>The process is waiting to run.</td> </tr> <tr> <td>Initiated</td> <td>The process has started.</td> </tr> <tr> <td>Processing</td> <td>The process is running.</td> </tr> <tr> <td>No Success</td> <td>The process did not run, call the Help Desk.</td> </tr> <tr> <td>Warning</td> <td>The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.</td> </tr> <tr> <td>Success</td> <td>The process ran successfully.</td> </tr> </tbody> </table>	Run Status	Description	Queued	The process is waiting to run.	Initiated	The process has started.	Processing	The process is running.	No Success	The process did not run, call the Help Desk.	Warning	The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.	Success	The process ran successfully.
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Distribution Status	Description
Queued	The process is waiting to run.
NA	The process is still running.
Posted	The report has posted.
Not Posted	The report did not post, call the Help Desk.

10. Retrieve the Report. Click the [Go back to Req and PO Budgetary Activity](#) link to return to the [Report Selection Parameters](#) page.

11. The Req and PO Budgetary Activity page displays.

Click the [Report Manager](#) link.

12. Click the [Administration](#) tab.

13. View the Report. The View Reports page displays.

Click the link of the report you wish to view that corresponds to the Process Instance Number that was run.

The report will open as a PDF file in a separate window. See below for sample output.

***NOTE:** The report will only include Reqs that are Approved and have been budget checked with no errors.

14.

Report ID: POS8002

Business Unit: MDJUD
Account From 0900 To 0902

PeopleSoft Purchasing
REQUISITION BUDGETARY ACTIVITY REPORT

Budget Date From 01-JUL-2016 To 30-JUN-2017 Remaining Amount >= 0.00
PCA From 90001 To 90001

Page No. 1
Run Date: 04/14/2017
Run Time: 12:58:06

REQ ID	Line\Sched\Dist	Original REQ Amount	Liquidated Amount	Remaining Amount	PO Amount	Account	PCA
0000005464	10\1\1	305.00	305.00	0.00	274.40	0902	90001
0000005519	1\1\1	2,616.72	2,616.72	0.00	2,616.72	0902	90001
0000005520	10\1\1	1,220.00	1,220.00	0.00	1,090.00	0902	90001
0000005520	11\1\1	1,220.00	1,220.00	0.00	1,091.60	0902	90001
0000005520	17\1\1	176.00	176.00	0.00	136.48	0902	90001
0000005520	20\1\1	60.00	60.00	0.00	44.40	0902	90001
0000005524	10\1\1	732.00	732.00	0.00	654.00	0902	90001
0000005524	11\1\1	732.00	732.00	0.00	654.96	0902	90001
0000006053	1\1\1	100.00	100.00	0.00	100.00	0902	90001
Totals:		7,161.72	7,161.72	0.00	6,662.56		



End of Document
