

## Quick Reference Tip Sheet

**LAST REVISED DATE: 05/01/2017**

### General Information

Task	Process Information
<p><b>Commitment Control Budget Status Report</b></p> <p><b>Note:</b> If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>Use the Budget Status Report to display budget, pre-encumbrance, encumbrance, expense and the available budgeted expense balance for the chosen Chartfield criteria.</p>

### GEARS Navigation

<p><b>Commitment Control &gt; Budget Reports &gt; Budget Status</b></p>	
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	Select the "Add a New Value" Tab.	<p><b>Budget Status</b></p> <p>Find an Existing Value    Add a New Value</p> <p>Run Control ID <input type="text"/></p>
2.	<p>Enter a Run Control ID.</p> <p>This name can provide information about the type of criteria in the report. No spaces are allowed.</p>	<p>Run Control ID: <input type="text"/></p>
3.	Click the  button.	
4.	<p>In the  box, enter the following information:</p>	<ul style="list-style-type: none"> <li>• <b>Business Unit</b> – This value will always be 'MDJUD'.</li> <li>• <b>Ledger</b> – Select the Commitment Control ledger group from which you would like to report. (In most cases, you would use the ledger group of OPER_DTL.)</li> </ul> <p><b>Report Request Parameters</b></p> <p>*Unit <input type="text" value="MDJUD"/>  Administrative Office of Court</p> <p>*Ledger Group <input type="text"/> </p>
5.	Click on the  button to blow out the chartfield detail criteria.	

**6. Add criteria to the **ChartField Selection** area.**

- **Sequence** – Enter the sequence number for each included chartfield to designate the sequence number of the chartfield on the report.
- **Include CF** – Check the box on the line for each chartfield you want to view on the report.
- **Subtotal** – Check the box to subtotal for the chartfield on the report.
- **Value / To Value** – Add a From Value and a To Value range for each chartfield line to further define the report criteria. If left blank, all qualifying chartfield values will be included.

ChartField Selection					
Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
1	Batch Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	Program Cost Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60091	60091
3	Fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0001	3003
4	Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
5	Program Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
6	Appropriation Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
7	Approp Year	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AY2017	AY2017
	Department	<input type="checkbox"/>	<input type="checkbox"/>		
	Activity	<input type="checkbox"/>	<input type="checkbox"/>		
	Budget Period	<input type="checkbox"/>	<input type="checkbox"/>		
	PC Business Unit	<input type="checkbox"/>	<input type="checkbox"/>		
	Project	<input type="checkbox"/>	<input type="checkbox"/>		
	Source Type	<input type="checkbox"/>	<input type="checkbox"/>		
	Statistics Code	<input type="checkbox"/>	<input type="checkbox"/>		

**7. Save the run  parameters for the next time of use by clicking the **Save** button.**

**8. Click on the **Run** button to start the report.**

**9. Confirm the Budget Status Report line is selected (checked) and click on **OK**.**

**Process Scheduler Request**

User ID: lisa.gutierrez      Run Control ID: 123

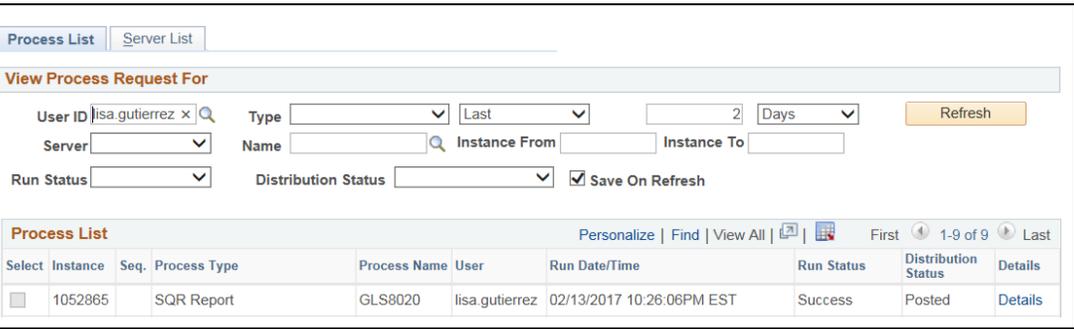
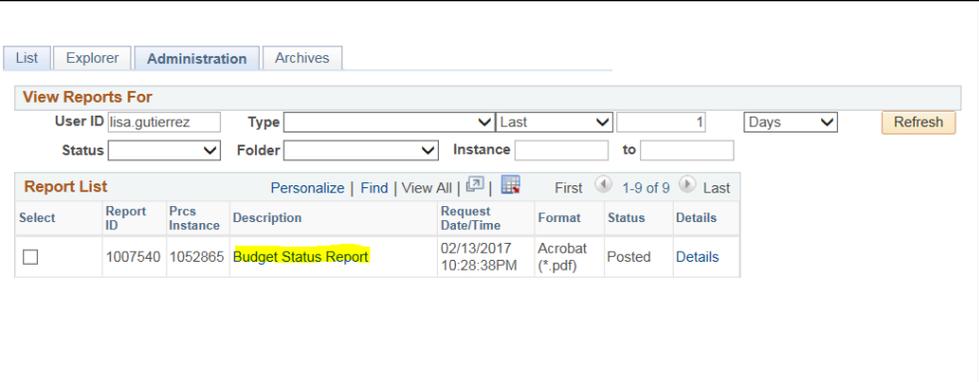
Server Name:       Run Date: 02/13/2017

Recurrence:       Run Time: 10:26:06PM     

Time Zone:

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Budget Status Report	GLS8020	SQR Report	Web	PDF	Distribution

<p><b>10.</b></p>	<p>Click on the <a href="#">Process Monitor</a> link.</p>
<p><b>11.</b></p>	<p>Click on the  button until the process is listed with a Run Status of 'Success' and a Distrib Status of 'Posted'.</p> 
<p><b>12.</b></p>	<p>Click on the <a href="#">Go back to Budget Status</a> link.</p>
<p><b>13.</b></p>	<p>Click on the <a href="#">Report Manager</a> link.</p>
<p><b>14.</b></p>	<p>Click on the  tab.</p>
<p><b>15.</b></p>	<p>Click on the <a href="#">Budget Status Report</a> link that corresponds to the process date and time that was run.</p> <p>The report will open as PDF in a new window.</p> 

16.



Your report may look slightly different depending on the criteria you selected to include on the report.

Report ID: GLS8020  
 Bus. Unit: MJUD--Administrative Office of Court  
 Ledger Grp: OPER\_DTL -- Operating Detail Ledger Group  
 Currency : USD  
 Chartfields Criteria  
 Batch Agy: All values PCA: 60091 Fund: 0001 to 3003 Account: All values Program: All values  
 Approp Number: All values Approp Yr: AY2017

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 Run Date 02/13/2017  
 Run Time 22:40:03

Batch Agy	PCA	Fund	Program	Budget	Assoc Revenue	PreEncumbrance	Encumbrance	Expense	Remaining
<u>Account</u>			<u>Program</u>						
<u>Approp Number</u>	<u>Approp Yr</u>								
C25	60091	0001							
0102			Additional Assistance B006						
A0006	AY2017	2017 Approp Year		2,000.00	0.00	0.00	0.00	0.00	2,000.00
C25	60091	0001							
0104			Overtime B006						
A0006	AY2017	2017 Approp Year		2,500.00	0.00	0.00	0.00	0.00	2,500.00
C25	60091	0001							
0301			Postage B006						
A0006	AY2017	2017 Approp Year		21,000.00	0.00	0.00	0.00	134.19	20,865.81
C25	60091	0001							
0302			Telephone B006						
A0006	AY2017	2017 Approp Year		0.00	0.00	0.00	0.00	0.63	-0.63
C25	60091	0001							
0306			Cell Phones B006						
A0006	AY2017	2017 Approp Year		2,000.00	0.00	0.00	0.00	370.72	1,629.28
C25	60091	0001							
0401			In State Operations B006						
A0006	AY2017	2017 Approp Year		4,650.00	0.00	0.00	0.00	170.00	4,480.00
C25	60091	0001							
0403			Out of State Operations B006						
A0006	AY2017	2017 Approp Year		100.00	0.00	0.00	0.00	0.00	100.00
C25	60091	0001							
0801			Advertising & Legal Publication B006						
A0006	AY2017	2017 Approp Year		2,700.00	0.00	0.00	0.00	0.00	2,700.00
C25	60091	0001							
0804			Printing/Reproduction B006						
A0006	AY2017	2017 Approp Year		1,450.00	0.00	0.00	0.00	0.00	1,450.00
C25	60091	0001							
0809			Equipment Maint, Repair & Rent B006						
A0006	AY2017	2017 Approp Year		27,600.00	0.00	0.00	4,107.32	3,357.77	20,134.91



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