ADDY NOTE
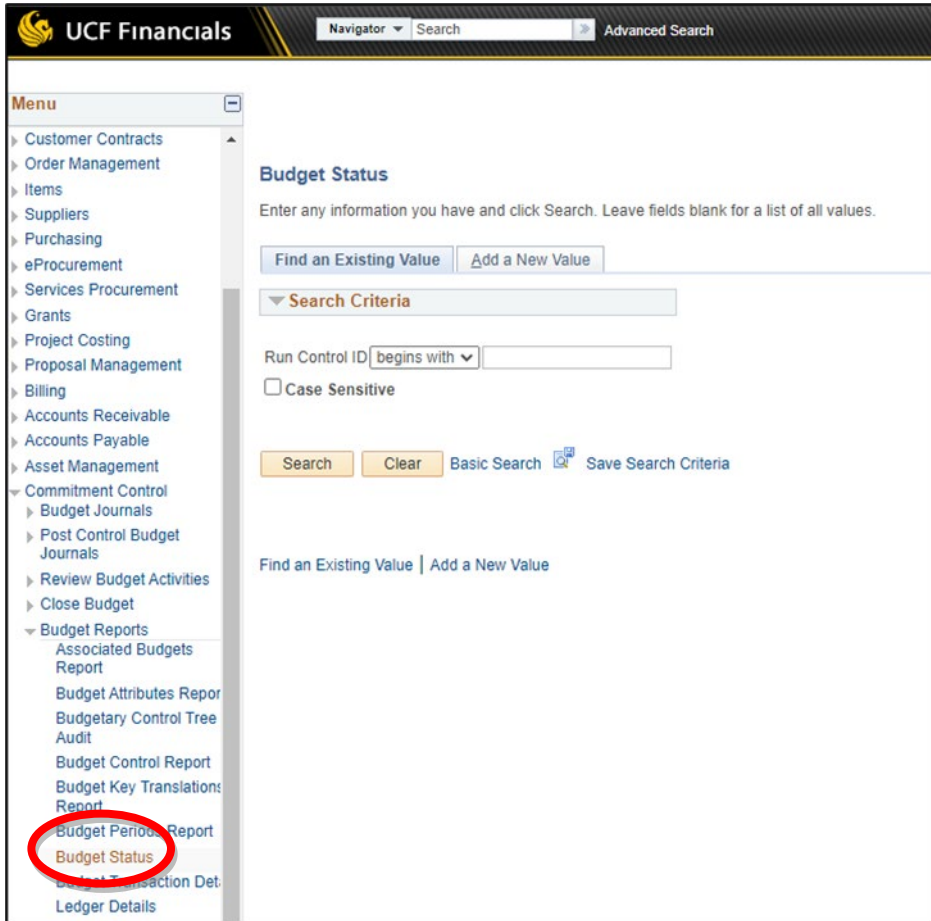
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Running a Budget Status Report

This Addy Note explains how to run a report to check the status of your department's or project's budget.

Step	Action
1.	Navigate to: **Main Menu > Commitment Control > Budget Reports > Budget Status.**

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Step	Action
	Note: If **you have never created a run control**, create one following Steps 2 through 4. You will only need to perform this process one time, and you can use the run control you create each subsequent time you want to run this report. **If you already have created a run control**: 1. Enter the name of your Run Control in the **Run Control ID** field. 2. Click **Search**. Proceed to Step 5 below.
2.	Click the **Add a New Value** tab. **Budget Status** Find an Existing Value | Add a New Value Run Control ID Add

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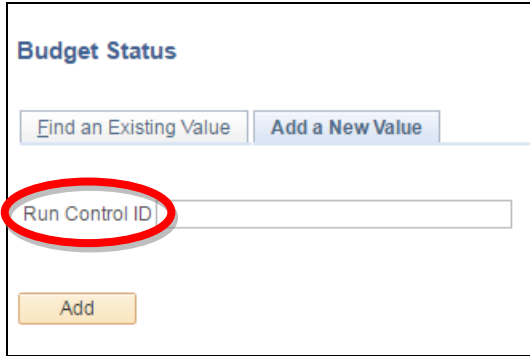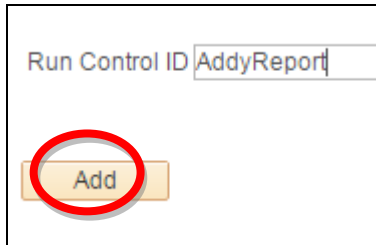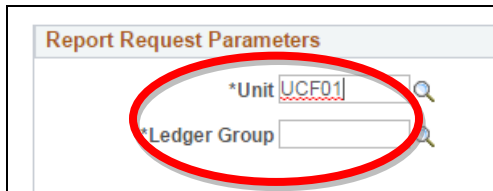
Step	Action
3.	Name your Run Control in the **Run Control ID** field. **Budget Status** Find an Existing Value **Add a New Value** Run Control ID [＿＿＿＿＿＿＿＿＿＿] [Add] **Note**: Run Control IDs are case-sensitive and should be entered without using spaces. Choose a name for your Run Control carefully, because the system will not allow you to change or delete the name after it is saved.
4.	Click **Add**. Run Control ID AddyReport [Add]
5.	In the **Unit** field, enter **UCf01**; in the **Ledger** field, enter **CC_DEPT** or **CC_PROJ_CH** depending if you're looking for a department or project budget. **Report Request Parameters** *Unit UCF01 *Ledger Group [＿＿＿＿]
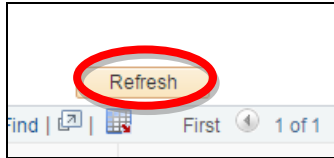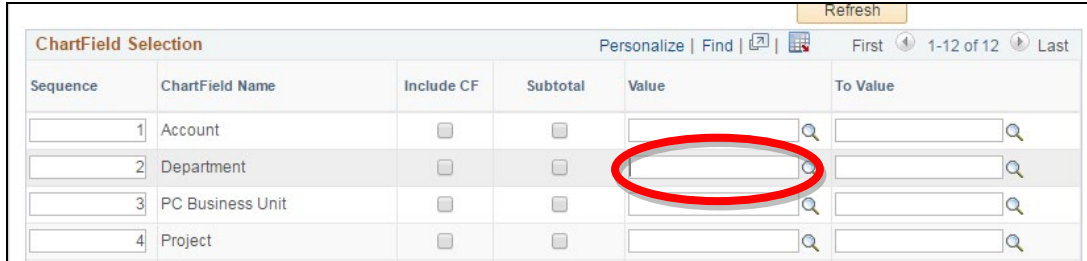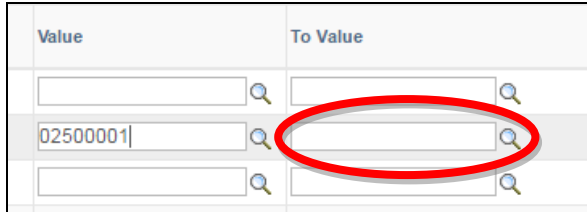
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Step	Action
6.	Click **Refresh**. Refresh ind | 🗗 | 🔣 First ◀ 1 of 1
7.	Enter the beginning **Project** or **Department** number in the associated **Value** field. **Note**: If you're running a report for only one department or project, simply enter that number in the **Value** field.
8.	Enter the ending project or department number in the **Project** or **Department's** associated **To Value** field. Note: **If you're running a report for** one **department or project, leave the** To Value **field blank.**

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Step	Action
9.	Select the **Include CF** check box. As you will see in Step 12, you will need to select this check box for _any other values_ that you use for your report (i.e., the Fund Code row, the Class Field row, etc.). 	Sequence	ChartField Name	Include CF	Subtotal	Value
---	---	---	---	---
1	Account	☐	☐	
2	Department	☑	☐	02500001	 **Note**: CF stands for "ChartField."
10.	In the budget period **Value** field, enter the beginning fiscal year for the report you want to run. | Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
---	---	---	---	---	---
1	Account	☐	☐		
2	Department	☑	☐	02500001	
3	PC Business Unit	☐	☐		
4	Project	☐	☐		
5	Activity	☐	☐		
6	Source Type	☐	☐		
7	Fund Code	☐	☐		
8	Program Code	☐	☐		
9	Budget Reference	☐	☐		
10	Operating Unit	☐	☐		
11	Budget Period	☐	☐		
13	Statistics Code	☐	☐			

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Step	Action
11.	In the budget period **To Value** field, enter the ending fiscal year for the report you want to run.

Step	Action
12.	Select the **Include CF** check box for the **Budget Period** line.

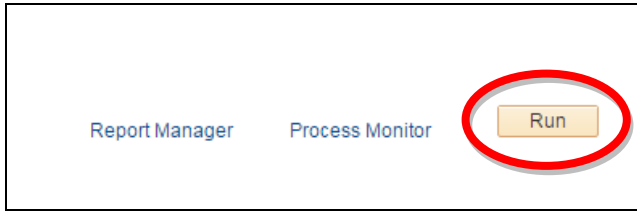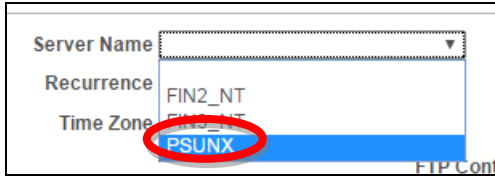# ADDY NOTE

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Step	Action
	Note: **Do Not** select the **Subtotal** check box unless you entered multiple fiscal years in the date **Value** and **To Value** fields (ex: 2011-2013).
13.	Click **Run**.
14.	Click the **Server Name** drop-down arrow and select **PSUNX.**
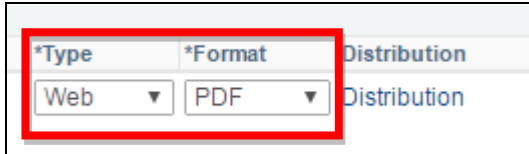
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Step	Action
15.	Verify that the **Type** is **Web** and the **Format** is **PDF**. **Note**: In the **Format** drop-down list, you can select **CSV** instead to download the report into Excel.
16.	Click **OK**.
17.	Click the **Process Monitor** link.
18.	If necessary, click **Refresh** repeatedly until the **Run Status** displays **Success** and the **Distribution Status** is **Posted**.

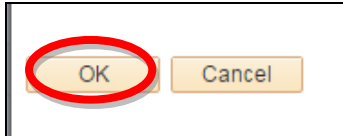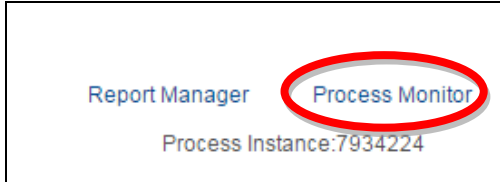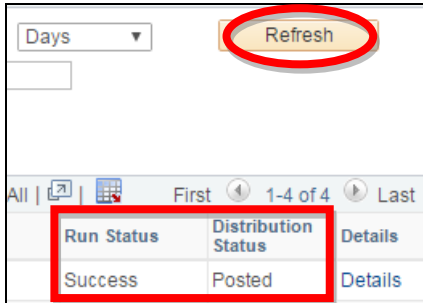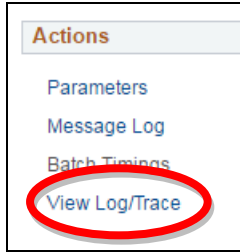# ADDY NOTE

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Step	Action
19.	Click the **Details** link.
20.	Click the **View Log/Trace** link.
21.	Click the link for the file ending in **.PDF** to open your report.