

---

## Available Budget Report

---

# How to Request the Available Budget Report

## Contents

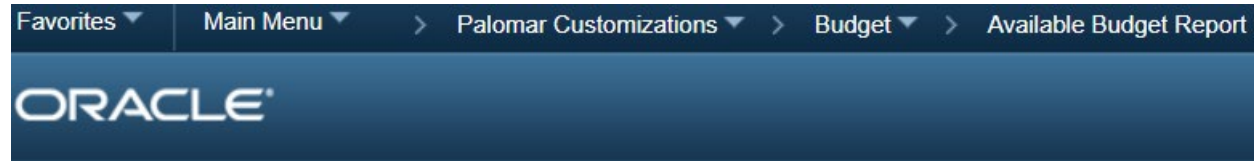
1.	GET STARTED .....	2
2.	RUN PARAMETERS .....	3
3.	SUBMITTING THE REPORT REQUEST .....	6
4.	FINDING YOUR REPORTS.....	8

# How to Request the Available Budget Report

## 1. GET STARTED

To request the Available Budget Report use the following navigation:

**Main Menu > Palomar Customizations > Budget > Available Budget Report**



### Available Budget Report

A screenshot of the 'Available Budget Report' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red box and a red number '1'. Below the tabs is a text input field for 'Run Control ID' containing the text 'Avail\_Budget\_BusDept', which is highlighted with a yellow background and a red number '2'. Below the input field is an 'Add' button, highlighted with a red box and a red number '3'.

[Find an Existing Value](#) | [Add a New Value](#)

A “Run Control ID” is required to request this report. If this is the first time you are requesting the report select the “Add a New Value” tab (see screen print above). In the “Run Control ID” field, enter an identifier that is meaningful to you and will remind you of what this report captures. For example, you might call this “Avail\_Budget\_BusDept,” and can come back to this Run Control ID the next time you need to run an Available Budget Report for the Business Department. This Run Control ID is tied to your personal PeopleSoft Financials account, and has no impact on the report itself, but allows you to save the parameters of the report so you don’t have to start from scratch every time. Once the identifier has been typed-in, click the “Add” button.

To find an existing Run Control ID select the “Find an Existing Value” tab and then click “Search.” You will be presented with a list of Run Controls IDs you have previously saved. If you have previously saved a single Run Control ID, you will be taken directly into the next page; this will contain the report parameters you saved under that Run Control ID.

# How to Request the Available Budget Report

Oracle Available Budget Report interface. The form includes the following sections:

- Budget Period (Fiscal Year):** From Fiscal Year (2021), To Fiscal Year, Use Cutoff Date (Applies to Three-Year Report Only), Month (05 - May), Date of the Month (31).
- Department Criteria:** \*\*Department (357100), Filter By Department Tree.
- Account Number Criteria:** \*\*Account, To Account, Discretionary Accounts Only.
- Other Criteria:** \*\*Fund Code, \*\*Program Code, \*\*Project ID, \*\*Class Field.

Email Address: salmaraz@palomar.edu

Notes:  
\*\* Use % for wildcard.  
All fields are optional and may be left blank.  
'Discretionary Accounts Only' means only these accounts are included:  
accounts beginning with '23', '24', '4', '5', '6'.

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display.

## 2. RUN PARAMETERS

The Available Budget Report has four sections for entering run parameters:

1. **Period** – enter a Budget Period (Fiscal Year) for which you would like information, or leave blank for the default present Fiscal Year.
  - Notice the option to use a specified **Cutoff Date**; this will compare three years of reports at the same cutoff date (i.e.: May 31st of year 1, 2 and 3)
2. **Account Number Criteria** – enter account number(s), wildcard (%) or leave blank.
  - Select the “Discretionary Accounts Only” check box if desired (see Notes section towards the bottom of the screen print above for details).
3. **Other Criteria** – enter appropriate values, wildcard (%) or leave blank.
4. **Department Criteria** – enter Department number, wildcard (%) or leave blank.

# How to Request the Available Budget Report

- Select the 'Filter By Department Tree' check box to select multiple departments, or if you simply prefer this navigation. If this option is selected the screen will appear as seen below.
5. **Optional Email address** – enter a single email address here and the report will be sent directly to that address.

Oracle®

Avail Budget Rpt

Run Control ID Avail\_Budget\_BusDept      Report Manager      Process Monitor      **Run** <sup>4</sup>

**Budget Period (Fiscal Year)**  
From Fiscal Year 2021 To Fiscal Year  
☒ Use Cutoff Date (Applies to Three-Year Report Only)  
Month 05 - May Date of the Month 31

**Department Criteria**  
\*\*Department <sup>1</sup>  
☒ Filter By Department Tree  
Select All Select None

**Account Number Criteria**  
\*\*Account  
To Account  
☒ Discretionary Accounts Only

**Other Criteria**  
\*\*Fund Code  
\*\*Program Code  
\*\*Project ID  
\*\*Class Field

**2**

	VP	Division	Department
<input type="checkbox"/>	INSTRUCTIONAL	<<All Departments>>	
<input type="checkbox"/>	INSTITUTIONAL	INSTITUTIONL	INSTITUTIONAL ACTIV
<input type="checkbox"/>	INSTRUCTION	<<All Departments>>	
<input type="checkbox"/>	INSTRUCTION	AMBCS DIV	AMBCS DIV DEAN
<input type="checkbox"/>	INSTRUCTION	AMBCS DIV	ART DEPARTMENT
<input checked="" type="checkbox"/>	INSTRUCTION	AMBCS DIV	BUSINESS ADMIN DEPT
<input type="checkbox"/>	INSTRUCTION	AMBCS DIV	COMMUNICATIONS
<input type="checkbox"/>	INSTRUCTION	AMBCS DIV	COMPUTER SCI & IS
<input type="checkbox"/>	INSTRUCTION	AMBCS DIV	GRAPHIC COMMUN
<input type="checkbox"/>	INSTRUCTION	AMBCS DIV	PERFORMING ARTS
<input type="checkbox"/>	INSTRUCTION	ARTICULATION	
<input type="checkbox"/>	INSTRUCTION	CTEE DIV	COMMUNITY EDUCATION
<input type="checkbox"/>	INSTRUCTION	CTEE DIV	CONTINUING EDUCATION
<input type="checkbox"/>	INSTRUCTION	CTEE DIV	COOPERATIVE EDUC
<input type="checkbox"/>	INSTRUCTION	CTEE DIV	CTEE DIV DEAN
<input type="checkbox"/>	INSTRUCTION	CTEE DIV	DESIGN

Email Address salmaraz@palomar.edu

Notes  
\*\* Use % for wildcard.  
All fields are optional and may be left blank.  
  
'Discretionary Accounts Only' means only these accounts are included:  
accounts beginning with '23', '24', '4', '5', '6'.

**3**

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

# How to Request the Available Budget Report

The option to **Filter By Department Tree** reveals the Department listing as seen on the Chart of Accounts. For example, if the check box next to 'INSTRUCTION, LANG & LIT DIV, FOREIGN LANGUAGES' was selected, the resulting report will include data for the following departments (provided budget data exists for that department):

FOREIGN LANGS 326000			
	WORLD LANGUAGES DEPARTMENT	326100	FORLANG
	CHINESE	326200	CHINESE
	FRENCH	326300	FRENCH
	GERMAN	326400	GERMAN
	ITALIAN	326500	ITALIAN
	JAPANESE	326600	JAPANESE
	LATIN	326700	LATIN
	RUSSIAN	326800	RUSSIAN
	SPANISH	326900	SPANISH
	ARABIC	326920	ARABIC
	FILIPINO	326950	FILIPINO

Other features related to "Filter by Department Tree" is the ability to "Select All" or "Select None". "Select None" is a convenient way to clear any check boxes that you may have selected at one time.

Be sure to select "Discretionary Accounts Only," which will exclude salary and benefits figures.

Once you have your parameters selected click the "Save" button at the bottom of the screen to save these parameters to the Run Control ID. To submit the Run Control in order to create the report, click on the "Run" button at the top of the screen.

# How to Request the Available Budget Report

Process Scheduler Request

User ID SALMARAZ Run Control ID Avail\_Budget\_BusDept

1 Server Name PSNT Run Date 09/29/2020  
Recurrence Run Time 11:10:08AM Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Avl Bud Rpt With PDFs	PALAVR1	PSJob	(None)	(None)	Distribution
<input checked="" type="checkbox"/>	Three Year Budget Report	PALAVR2	PSJob	(None)	(None)	Distribution

2

3 OK Cancel

## 3. SUBMITTING THE REPORT REQUEST

When you click on the “Run” button a “Process Scheduler Request” pop-window will appear. Set the Server Name to “PSNT,” check the “Three Year Budget Report,” and then click the “OK” button; once the button is clicked, you will be taken back to the report parameter screen, and the request is submitted to the processor and will be assigned a “Process Instance” number (see screen print below). This number is used to track your request, within the Process Scheduler.

Avail Budget Rpt

Run Control ID Avail\_Budget\_BusDept

Report Manager Process Monitor Run

Process Instance: 1413699

**Budget Period (Fiscal Year)**  
From Fiscal Year 2021 To Fiscal Year  
☒ Use Cutoff Date (Applies to Three-Year Report Only)  
Month 05 - May Date of the Month 31

**Department Criteria**  
\*\*Department  
☒ Filter By Department Tree  
Select All Se

Clicking on the ‘Process Monitor’ link (above) will take you to another screen that will allow you to see the status of your request. Notice the Process Instance number prior to clicking “Process Monitor.”

# How to Request the Available Budget Report

Process List | Server List

**View Process Request For**

User ID: SALMARAZ | Type: | Last: | 1 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
<input type="checkbox"/>	1413699		PSJob	PALAVR2	SALMARAZ	09/29/2020 11:12:52AM PDT	Processing	N/A	<a href="#">Details</a>
<input type="checkbox"/>	1413696		PSJob	PALAVR2	SALMARAZ	09/29/2020 11:10:08AM PDT	Success	Posted	<a href="#">Details</a>

Here we can see that our process instance 1413699 is processing. This screen does not refresh automatically so it is necessary to click on the “Refresh” button occasionally.

In the screen print below we can see that the request has run to “Success.” Click the “Go back to Available Budget Report” link to return to report parameter screen.

Favorites | Main Menu | Palomar Customizations | Budget | Available Budget Report | Process Monitor

ORACLE

Process List | Server List

**View Process Request For**

User ID: SALMARAZ | Type: | Last: | 1 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
<input type="checkbox"/>	1413699		PSJob	PALAVR2	SALMARAZ	09/29/2020 11:12:52AM PDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	1413696		PSJob	PALAVR2	SALMARAZ	09/29/2020 11:10:08AM PDT	Success	Posted	<a href="#">Details</a>

**Go back to Available Budget Report**

Please note, “Process Monitor” is a feature that allows users to see the status of their request within the Process Scheduler, and to check if it ran to success. It is not a necessary for users to look at the “Process Monitor.”



# How to Request the Available Budget Report

Run Control ID Avail\_Budget\_BusDept

**Report Manager** Process Monitor Run

**Budget Period (Fiscal Year)**  
From Fiscal Year 2021 To Fiscal Year  
☒ Use Cutoff Date (Applies to Three-Year Report Only)  
Month 05 - May Date of the Month 31

**Department Criteria**  
\*\*Department  
☒ Filter By Department Tree  
Select All Select

## 4. FINDING YOUR REPORTS

To retrieve the report, click on the “Report Manager” link found on the report parameter screen (see above).

Once in “Report Manager” you need to make sure that you are in the “Administration” tab. Notice the two reports listed in the screen print below. The bottom link is a system report that is not useful to us. Click the top link, as seen below.

List Explorer **Administration** Archives

**View Reports For**  
User ID SALMARAZ Type Last 1 Days  
Status Folder Instance to

**Report List** Personalize Find View All First 1-2 of 2 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1223250	1413701	<b>Three Year Budget Report</b>	09/29/2020 11:12:56AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	1223249	1413700	Three Year Budget Report	09/29/2020 11:12:56AM	Text Files (*.txt)	Posted	Details

Note: If after a few minutes, your report does not appear in “Report Manager,” check “Process Monitor” and make sure the “Process Instance” ran to “Success.”

# How to Request the Available Budget Report



## Report

Report ID 1223250

Process Instance 1413701

[Message Log](#)

Name PAL\_TR\_BIP01

Process Type Application Engine

Run Status Success

## Three Year Budget Report

### Distribution Details

Distribution Node ReportNode

Expiration Date 11/28/2020

### File List

Name		Datetime Created
AE_PAL_TR_BIP01_1413701.stdout		09/29/2020 11:13:31.494374AM PDT
AE_PAL_TR_BIP01_1413701.trc		09/29/2020 11:13:31.494374AM PDT
Three_Year_1413701.pdf	4,867	09/29/2020 11:13:31.494374AM PDT
Three_Year_1413701.xlsx	9,994	09/29/2020 11:13:31.494374AM PDT
Three_Year_Detail_Only_1413701.xlsx	8,537	09/29/2020 11:13:31.494374AM PDT

Choose your preference

### Distribute To

Distribution ID Type	*Distribution ID
User	SALMARAZ

Confirm you have the correct Report ID and Process Instance. You will notice a list of files. Select one or both, the .pdf or .xlsx report. Once the file has opened, you are free to save it any way you like.

Acct	FD	Department	Pgm	CL	Project	Budg	Expen	Encum	PreEn	Avail	2020 Budg	2020 Expen	2020 Avail	2019 Budg	2019 Expen	2019 Avail
<b>Three Year Budget Report</b> <b>Cutoff Date: May 31st</b> <b>Report Run: Tuesday, September 29, 2020 11:13:16 AM</b>																
400010	11	357100 BUSINESS	05010	10	0000000 UNRESTRIC	0	0	0	0	0						
400010	11	357100 BUSINESS	05140	10	0000000 UNRESTRIC	0	0	0	0	0						
400010	11	357100 BUSINESS	60100	10	0000000 UNRESTRIC	0	0	0	0	0						
500010	11	357100 BUSINESS	05010	10	0000000 UNRESTRIC	0	0	0	0	0						
500010	11	357100 BUSINESS	14010	10	0000000 UNRESTRIC	0	0	0	0	0						
500010	11	357100 BUSINESS	60100	10	0000000 UNRESTRIC	0	0	0	0	0						
		357100 BUSINESS ADMINISTRATION DEPT				0	0	0	0	0						
		0000000 UNRESTRICTED				0	0	0	0	0						
400010	11	357100 BUSINESS	60100	10	0811493 GO-PRINT -	0	0	0	0	0						
		357100 BUSINESS ADMINISTRATION DEPT				0	0	0	0	0						
		0811493 GO-PRINT - BUSINESS EDUCAT				0	0	0	0	0						
400010	11	357100 BUSINESS	60100	10	0811644 TESTING FE	0	0	0	0	0						
		357100 BUSINESS ADMINISTRATION DEPT				0	0	0	0	0						
		0811644 TESTING FE/SIMOUS				0	0	0	0	0						
		11 GENERAL UNRESTRICTED SUBFUND				0	0	0	0	0						
400010	12	357100 BUSINESS	05010	10	1612025 LOTTERY (P	0	0	0	0	0						
400010	12	357100 BUSINESS	05140	10	1612025 LOTTERY (P	0	0	0	0	0						
400010	12	357100 BUSINESS	14010	10	1612025 LOTTERY (P	0	0	0	0	0						
500010	12	357100 BUSINESS	05140	10	1612025 LOTTERY (P	0	0	0	0	0						
500010	12	357100 BUSINESS	14010	10	1612025 LOTTERY (P	0	0	0	0	0						
		357100 BUSINESS ADMINISTRATION DEPT				0	0	0	0	0						
		1612025 LOTTERY (PROP 20)				0	0	0	0	0						
500010	12	357100 BUSINESS	60200	10	1812328 GIG ECONO	0	0	0	0	0						
		357100 BUSINESS ADMINISTRATION DEPT				0	0	0	0	0						
		1812328 GIG ECONOMY SOLANO COLLEGE				0	0	0	0	0						
		12 GENERAL RESTRICTED SUBFUND				0	0	0	0	0						
		INSTRUCTION				0	0	0	0	0						
		Report Total				0	0	0	0	0						

Above is a sample report with a 3 year comparison ending May 31<sup>st</sup>, 2021, as established in step 2, Run Parameters.