SALISBURY UNIVERSITY
## PROCEDURES: RUNNING CONTROL BUDGET SUMMARY REPORT

The **Control Budget Summary Report** will provide the control budget for every department and project to which you are assigned.

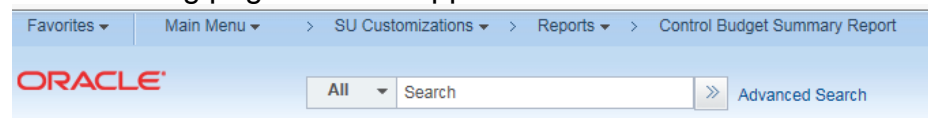Log in to Peoplesoft Financials using your normal GullNet username and password.

Link: finance.salisbury.edu

The navigation for this report is as follows:

SU Customizations > Reports > Control Budget Summary Report
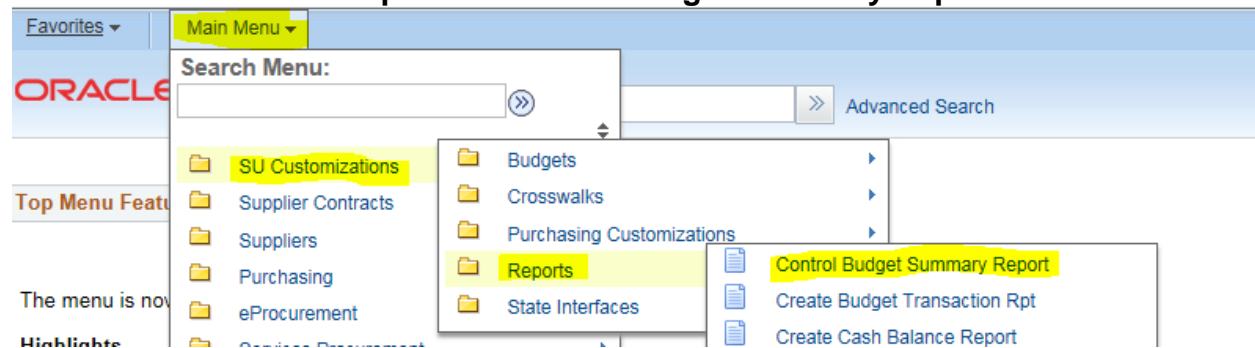
The following page will then appear:

Select [Search] to select the appropriate Run Control ID. If you have never created a Run Control ID, please select the ADD A NEW VALUE tab (or link) and create one called "REPORTS".

Once you either select or create a Run Control ID, the following page appears:

Enter the appropriate Business Unit (SALIS or SUFND) and the Budget Period (i.e., fiscal year) that you need. Note that if you have any projects assigned to your security, the project results will be reported since project inception.

If you would like to exclude the information for the 01 Budget Pool associated with PINs, click the box 'Exclude Budget Pool 01 (Acct 010001)'.

If you would like to exclude departments or projects to which you are assigned but have no control budget, click the box 'Exclude depts./projs without a control budget'.

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Select [Run] in the upper right hand corner of the page and the following page appears:

| Favorites ▾ | Main Menu ▾ | > | SU Customizations ▾ | > | Reports ▾ | > | Control Budget Summary Report |

ORACLE | All ▾ | Search | ≫ | Advanced Search

Process Scheduler Request

User ID jaoneal   Run Control ID REPORTS

Server Name	▾	Run Date 07/25/2018 📅
Recurrence	▾	Run Time 9:06:47AM [Reset to Current Date/Time]
Time Zone	🔍	

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Budget Summary Report	SUGL0018	SQR Report	Email ▾	PDF ▾	Distribution

[OK]   [Cancel]

Enter Email in the type field and a format of PDF.

Select [OK] and the system will return you to the prior page.   The report will be emailed to you.

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Below is an example of the report. Note that the department numbers and names has been deleted from this example.

```
                                              PeopleSoft
Report ID:        SUGL0018                 BUDGET SUMMARY REPORT                          Page No.  1
                                                                                          Run Date   07/25/2018
                                                                                          Run Time   08:41:13


OVERALL CONTROL BUDGET STATUS FOR UNIT:  SALIS   DEPT:                      LEDGER GROUP:  CC_DEPT   BUDGET PERIOD:  2019


ACCOUNT                              BUDGET              EXPENSE              ENCUMBRANCE              REMAINING
020001  Object 02 Control Budget     $40,239.00          $0.00                $0.00                   $40,239.00
030001  Objects 03-13 Control Budget  $3,517.00          $0.00                $0.00                    $3,517.00

Grand Total:                         $43,756.00          $0.00                $0.00                   $43,756.00

OVERALL CONTROL BUDGET STATUS FOR UNIT:  SALIS   DEPT:                      LEDGER GROUP:  CC_DEPT   BUDGET PERIOD:  2019


ACCOUNT                              BUDGET              EXPENSE              ENCUMBRANCE              REMAINING
020001  Object 02 Control Budget     $150,500.00         $0.00                $0.00                   $150,500.00
030001  Objects 03-13 Control Budget  $14,931.00         $0.00                $0.00                    $14,931.00

Grand Total:                         $165,431.00         $0.00                $0.00                   $165,431.00
```