## How to Run a Budget Performance Report GL 324A/B

- 1. Navigate to GW GL Entry and select Reports > Request > Run Standard Requests.
- 2. Select Single Request (default) and click OK.
- 3. In Name field, click the ellipsis (...) and select GL-324 BPR (A) Summary or (B) Detail (CSV or PDF), then OK.

🗢 Submit Request		×	
─ Run this Request ─		Сору	
Name			
Operating Unit	Reports	l	× _ ×
Parameters			
Language	Find %		
	Name Accounts Payable Invoice Inquiry Report [AP-255] [XML]	Applicati≜ GWU Ci	
At these Times	Budget Modification Report [GL-054][XML] Chart of Accounts Segment Value Listing [GL-055][XML]	GWU CL . GWU CL	
Run the Job	GL-324A Budget Performance Report - Summary (CSV format) GL-324A Budget Performance Report - Summary (PDF format)	GWU CL GWU CL	
Upon Completion	GL-324B Budget Performance Report - Detail (CSV format) GL-324B Budget Performance Report - Detail (PDF format) GWU Account Detail Report - CSV (Secured Version) [GL-329]	GWU CL GWU CL GWU CL	
Layout Notify Print to	GWU Cost Analysis Report CSV Format [GM-121] Secured GWU Find Journal by Category [GL-345][/ML] GWU GL Journals - Batch and Header Extract (GL-338) [/ML] GWU SC Workflow Roles Matrix Report [PO-261] Secured [/ML] Grants Direct Costs on Cost Sharino Awards CSV [/GM-382] - Secured	GWU CL GWU CL GWU CL GWU CL GWU CL	
Help ( <u>C</u> )	Eind QK Cancel		
			Open

4. Next, select your parameters.

- Budget Name: Select the fiscal year you want; be sure to select the "approved" budget
- **Period Name**: Select the month you want
- From Organization & To Organization: Select one org # or a range of org #s
- From Funding Source & To Funding Source: Select one fund or a range of funds
- Show Annual Budget and Prior YTD Actuals: Select either yes or no

O Parameters				×
Ledger Id	Ledger Id George Washington University			
Budget Name	FY18 APPROVED		FY18 Approved Budget	
Period Name	Jul-17			
From Organization	15 01	ORGANIZATIONA	AL SCIENCES AND COMMUNI	CATION
To Organization	15 04 ORG SCIENCES START UP			
From Funding Source	C100001	CURRENT OP	ERATIONS	
To Funding Source	RG00070	RESEARCH E	NHANCEMENT INCENTIVE AV	VARD
Show Annual Budget & Prior YTD Actuals	Yes ···			
	<u>ر ا</u>			Þ
		I	QK Cancel Cle	ear Help

5. Once the parameters are set how you want them, click **OK**. Then to submit request, click **Submit**.

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✤ Refr	resh Data Find Re	equests	Sub <u>m</u> it a New Request	
Request ID	Paren Name	t Phase	Status	Parameters
3952262	GWU Account Detail Repo	Pending	Normal	1, 101, 1, Y, N, .53111.155601 📤
947911	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .41163.153712
3905040	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .53411.153712
3904556	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .52431.153712
879329	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .41153.153712
3864633	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .53101.153712
864597	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .53411.153712
859662	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .58959.122049
856679	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .52612.153712
856592	GWU Account Detail Repo	Completed	Normal	1, 101, 1, Y, N, .52721.153712 📼
Hold	I Request View D	etail <u>s</u>		View Output

6. Refresh Data until the Phase is "Completed" and the Status is "Normal".

## 7. Then View Output and Save the file;

File > Save As > Select folder/location > Name file > Save

8. *IF you selected the CSV format*: **Convert** the saved text file to an Excel document and **save Excel doc**;

Open up Excel > File > Open > Browse for folder/location > Select the saved text file > Open In the wizard pop up box > select "Delimited" > Next > "Comma" > Finish

	2 \		 Text Import Wizard - Step 2 of 3	Text Import Wizard - Step 2 of 3 ?
rext import wizara – step 1 or 3 The Text Wizard has determined that your data is Delimited. If this is correct, choose Next, or choose the data type that best describes your data.	r )	`	This screen lets you set the delimiters your data contains. You can see how your text is affected preview below. Delimiters	This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below. Delimiters
Original data type Choose the file type that best describes your data:			✓ Iab     Semicolon     Comma     Space     Text gualifier:     -     ✓	Iab     Sepicion     Space     Text gualifier:     Space
Start import at row: 1 🔄 File origin: 437 : OEM United States		~	gther:	Qther:
<u>My</u> data has headers.     Preview of file C:\Users\elee\Desktop\GL 324A Budget Performance Rep 210917.txt.			Data greview	Data greview
1 "The George Washington University" 2 "GL-324A Budget Performance Report - Summary (CSV format)" 3 4 "Period: Jul-17" 5 "Run Date: 21-Sep-2017" <	>	~	The George Washington University SL-324A Budget Performance Report - Summary (CSV format) Period: Jul-17 Run Date: 21-Sep-2017 <	The George Washington University DL-324A Budget Performance Report - Summary (CSV format) Period: Jul-17 Run Date: 21-Sep-2017 <
Cancel < Back Next >	Einish		Cancel < <u>B</u> ack <u>Next</u> >	Cancel < Back Next > Fir

The data will populate in Excel. Format the file how you'd like. **Save** file but remember to **change type from Text to Excel**.