PeopleSoft 9.0 Reports – Web Interface

Requirements: Before using the web-reporting interface, make sure you have installed one of the supported browsers from the list in step one below. You will also need Adobe Acrobat Reader (http://www.adobe.com/products/acrobat/readstep2.html).

1. Open your browser; in the address bar enter https://finreport.brandeis.edu

   - Internet Explorer 6, 7 & 8, Firefox v3.6 and Safari 4 and 5 are supported browsers for web report distribution. If you're using any other browser and find you are having problems, you should try again using one of the browsers listed above.

   - Enter your UNet username and password

NOTE: If you enter your password incorrectly 5 times, your account will be locked out; you will need to call Lida Bensman (64564), Gail Wine (64652) or Richard Trudel (64532) to have it unlocked

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Navigate to the Run Reports/Run Control ID page:

1. In the Menu (located on the left side of the page) select the following hyperlinks; **Brandeis Reports** > **Brandeis Reports** > **Web Distribution Reporting** > **Run Reports**

If you've already created your ***MyReports*** *Run Control ID, skip to* ***Find an Existing ID (Page 3)***

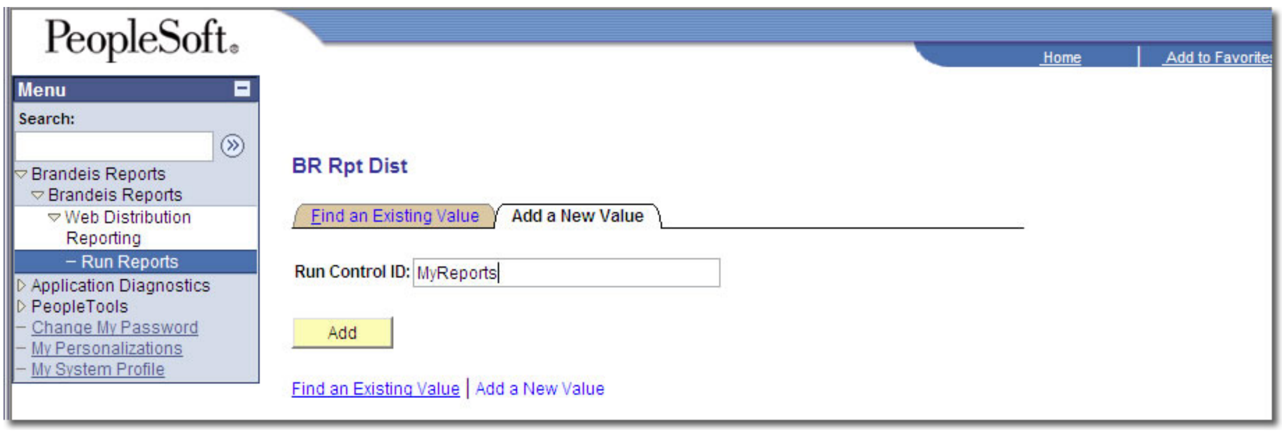
Create a run Control ID: Only to be done the first time you run reports

1. Click the tab labeled **Add a New Value**

2. In the **Run Control ID** box enter the following: **MyReports**

3. Click the **Add** button (skip to page 4 to continue)

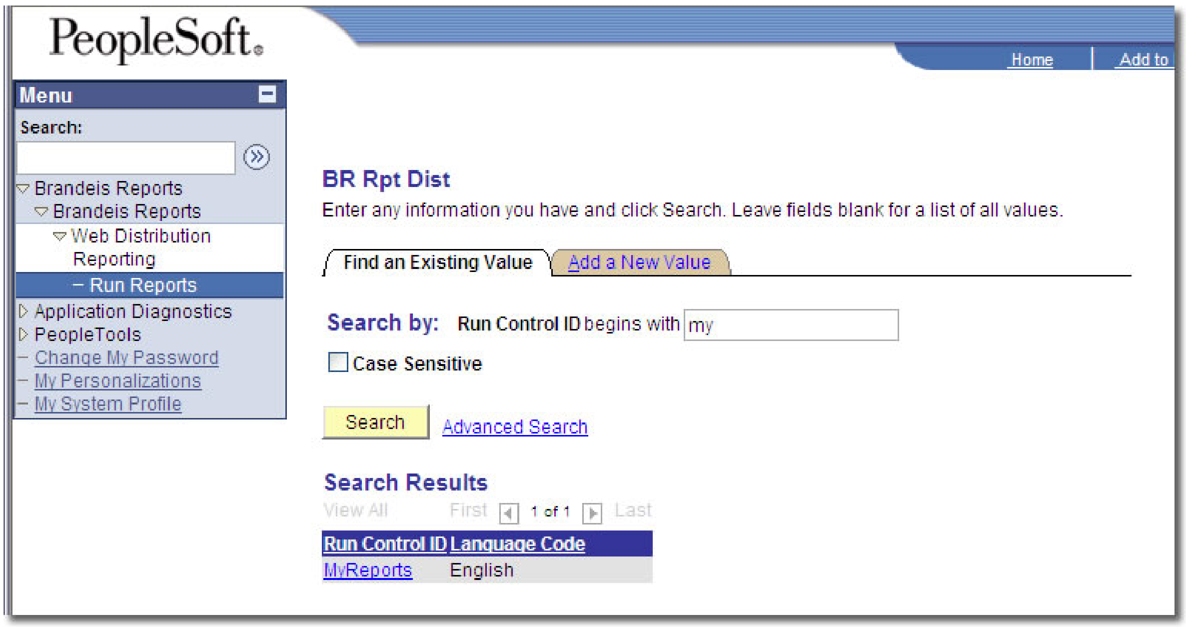
Create A Run Control ID:



Find an Existing Run Control ID:

1. Click the tab labeled **Find an Existing Value**
2. In the **Run Control ID Begins With** box enter the following: **my**
3. Click the **Search** button
4. In the resulting **Search Results** table click **My Reports**

Find An Existing Run Control ID:



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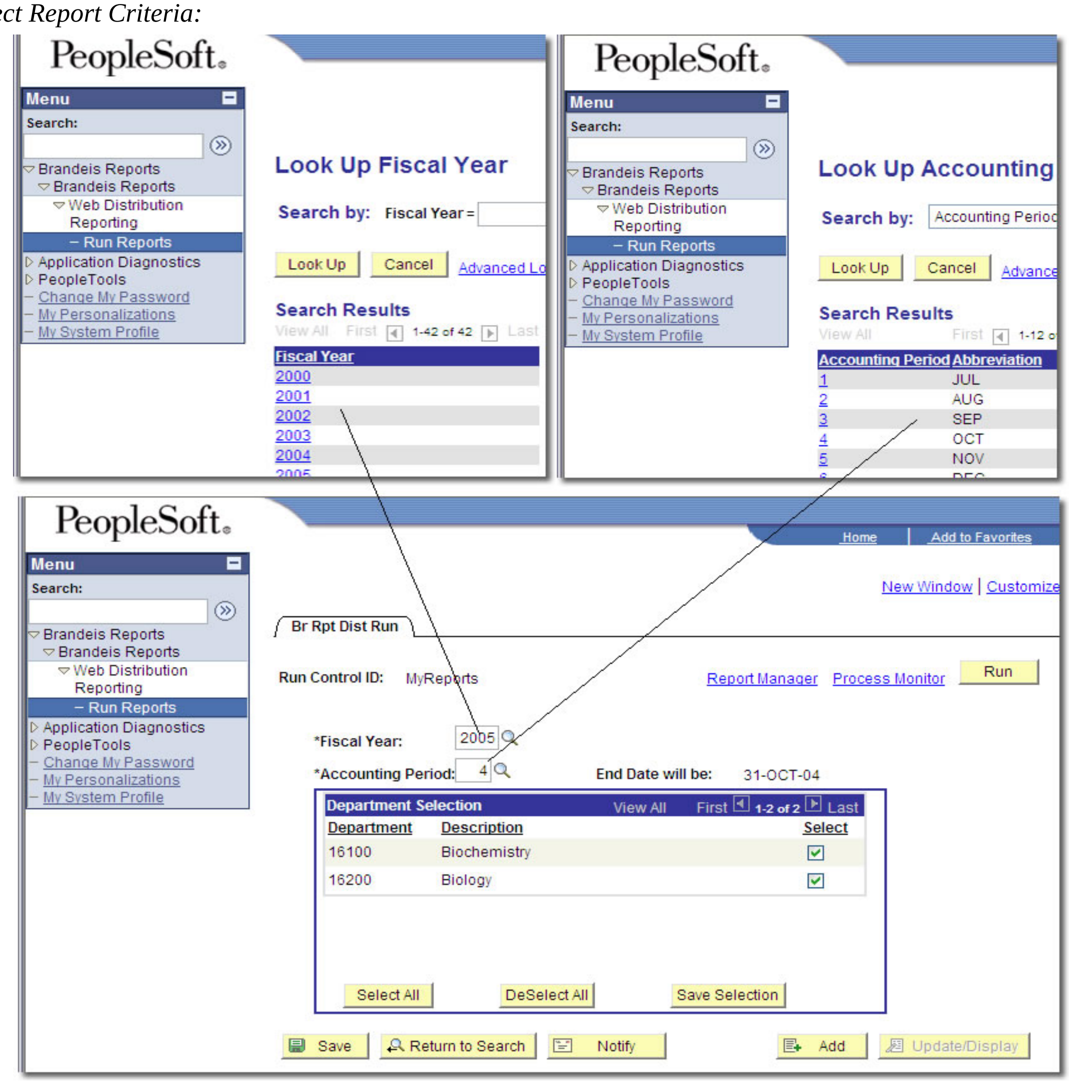
This example will run all reports available for all department IDs available. The selected fiscal year is 2005, and the budget period will be October 2004 (period 4).

> **NOTE:** Fiscal years run July – June
> *Example:* Fiscal year 2011: July 01, 2010 – June 30, 2011

Select Report Criteria: Each of the steps are illustrated in the image below

1. Select your fiscal year; you may click the spyglass icon to see available years
2. Select your Accounting Period; you may click the spyglass icon to see available periods
3. Select the Dept Ids; click the **Select All** button (you may also run reports individually)
4. Save your selection; click the **Save Selection** button
5. Proceed to the process scheduler request; Click **Run**

Select Report Criteria:



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Configure Process Scheduler Request/Run report:

1. Set the server name to **PSUNX**

2. Select the reports you want (see below for report names/descriptions)

3. Click the **OK** button (you will be returned to the select report criteria page)

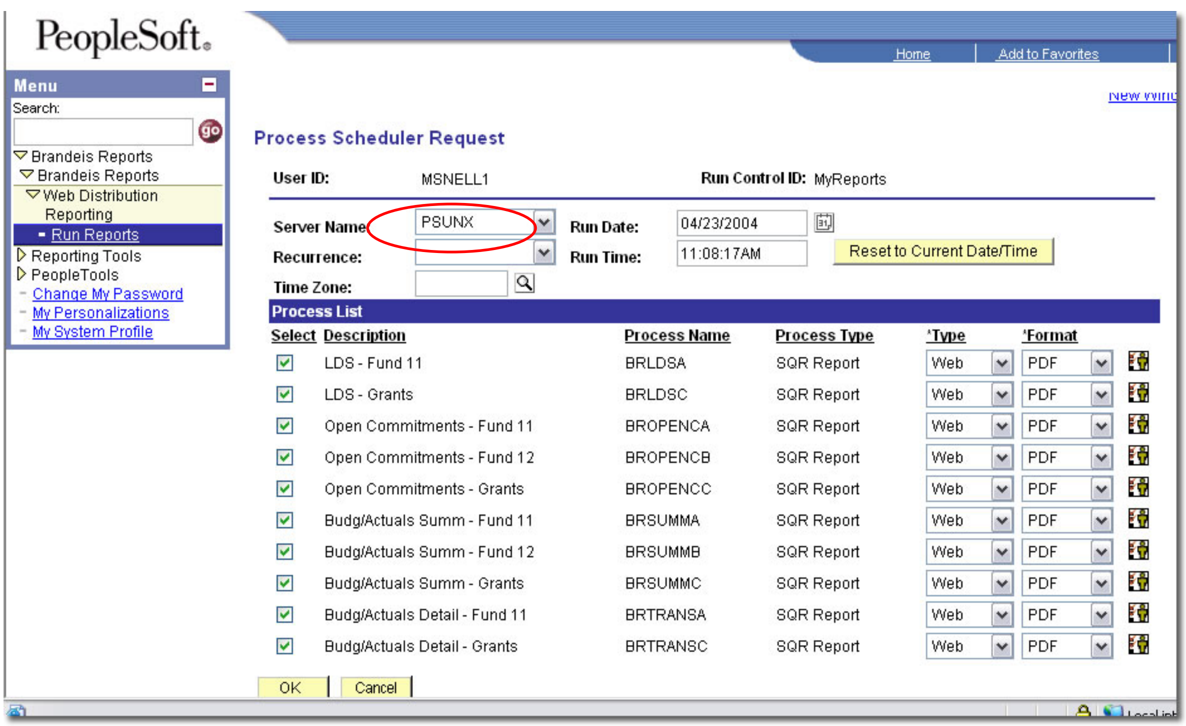
Report names/descriptions:

Budg/Actuals Summ - Fund 11 – Non-grants summary report
Budg/Actuals Detail - Fund 11 – Non-grants transaction (detail) report
Open Commitments - Fund 11 – Non-grants open commitment report
LDS - Fund 11 – Non-grants labor distribution report

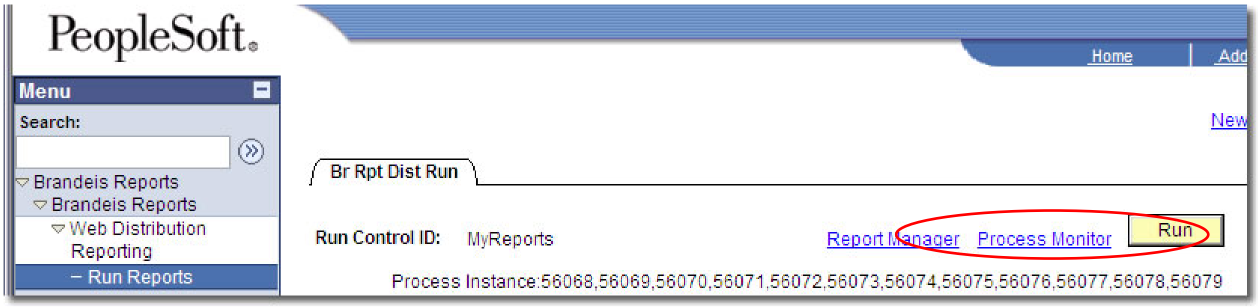
Budg/Actuals Summ - Fund 12 – Projects summary report
Budg/Actuals Detail - Fund 12 – Projects transaction (detail) report
Open Commitments - Fund 12 – Projects open commitment report
LDS - Fund 12 – Projects labor distribution report

Budg/Actuals Summ - Grants – Grants summary report
Budg/Actuals Detail - Grants – Grants transaction (detail) report
Open Commitments - Grants – Grants open commitment report
LDS - Grants – Grants labor distribution report

Configure Process Scheduler Request:



After clicking the **OK** button you are returned to the page where you selected your report criteria. Your reports have been submitted to the process scheduler, the system will run your reports in the order in which they were received, only 3 reports can run at any one time and there may be other people ahead of you. You can use the Process Monitor to see what state your reports are in.

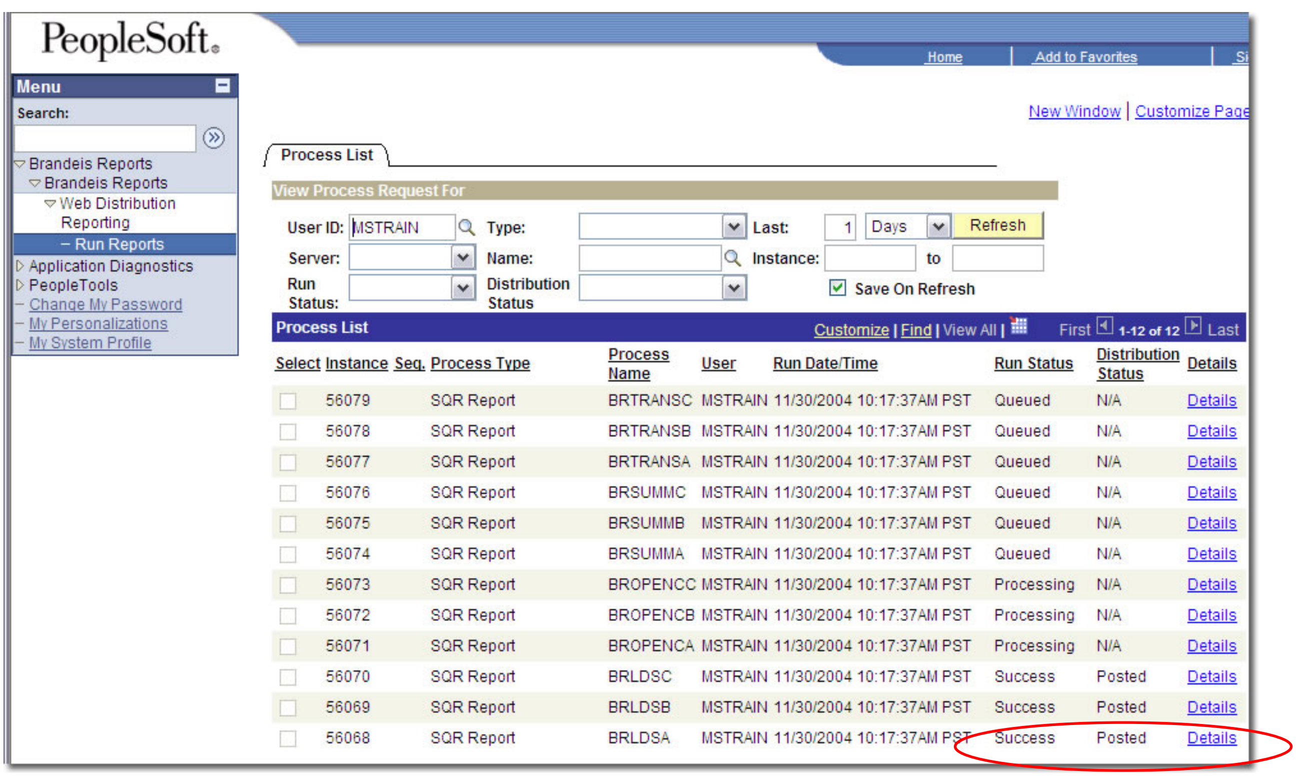


1. Click the Process Monitor Link

The image below shows all of the reports submitted within the last one day (you can change amount of days in your view by changing the number in the **Last:** field and clicking refresh).

Your reports may take some time to complete; this all depends on how many people are using the system and how large the reports are. To update the **Run Status** of your reports click the refresh button.

Process Monitor:



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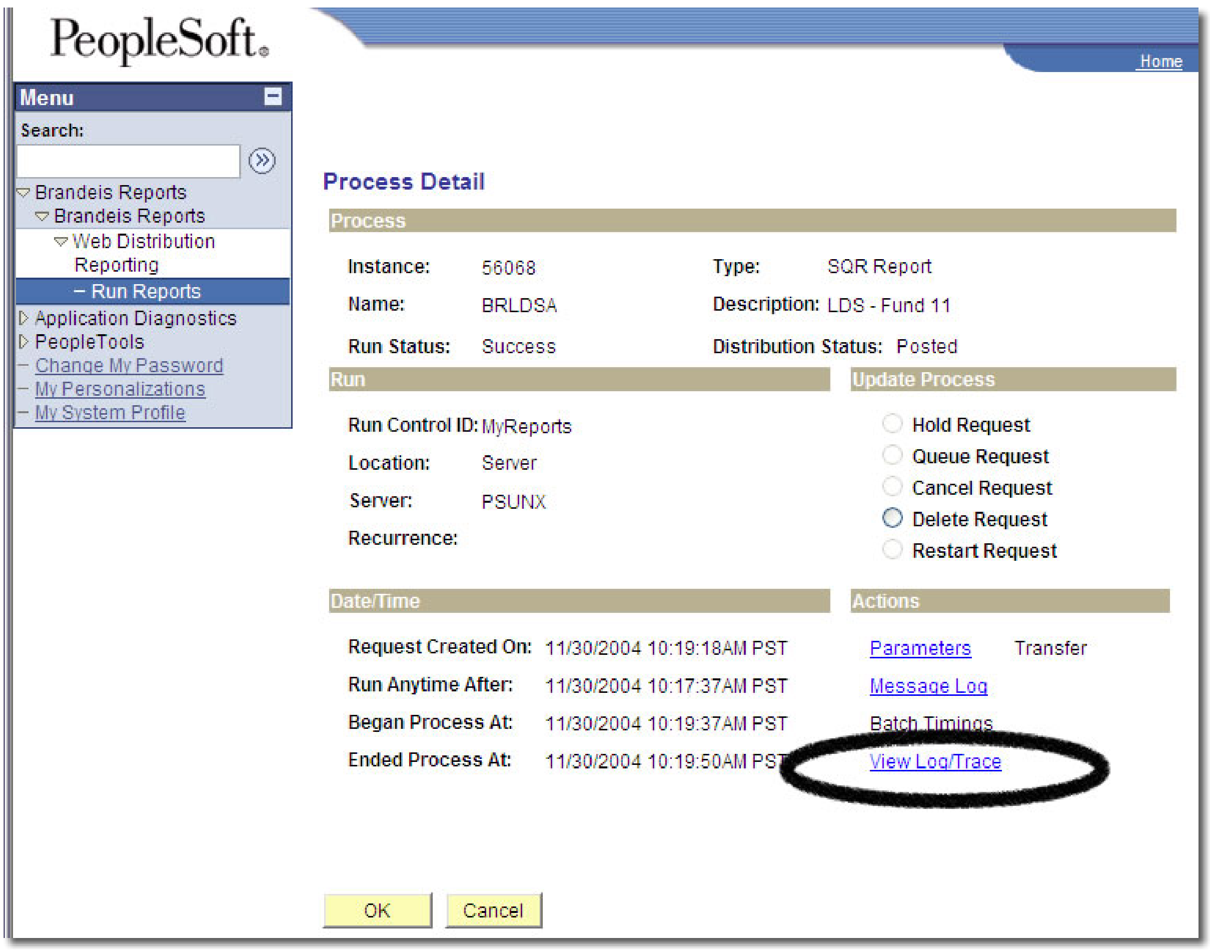
Viewing your reports:

1. Locate a report with a **Run Status** reading **Success**
2. Click the **Details** link next to that report (in this example I'm using LDS – Fund 11)

   The process detail screen contains information about the run process

3. Click the **View Log/Trace** link

Process Detail:



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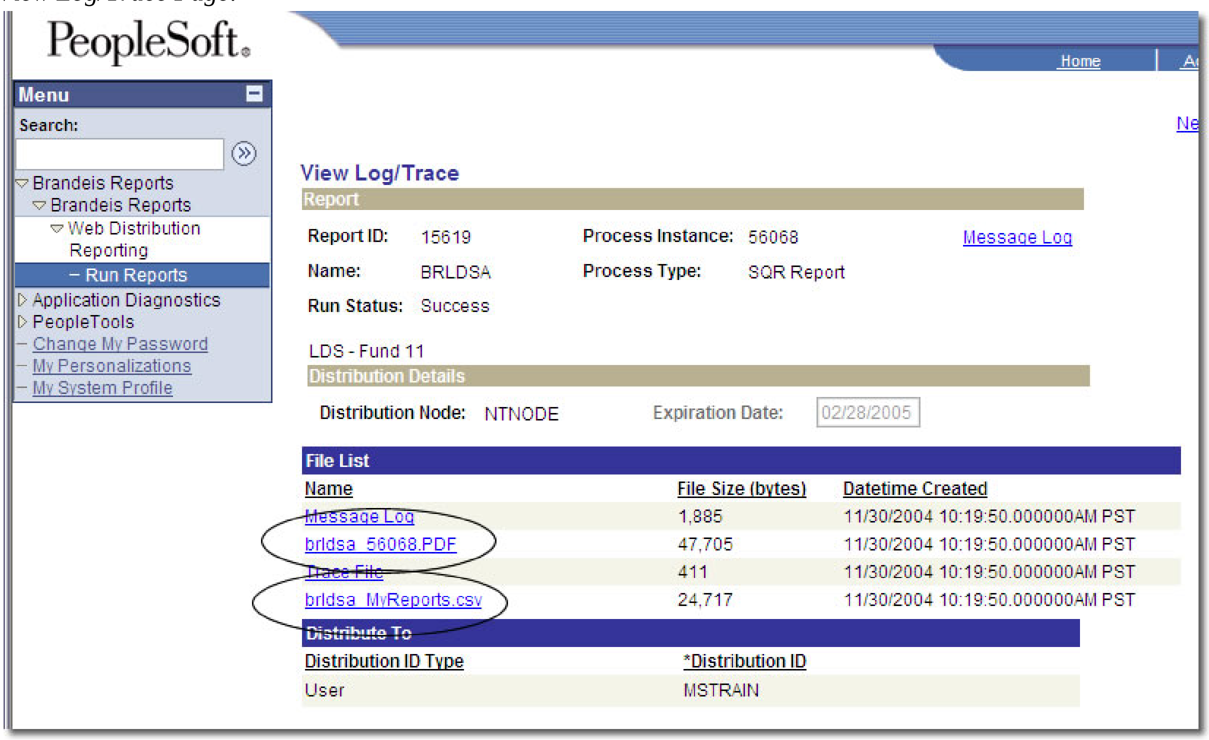
The View Log/Trace page contains 4 links:

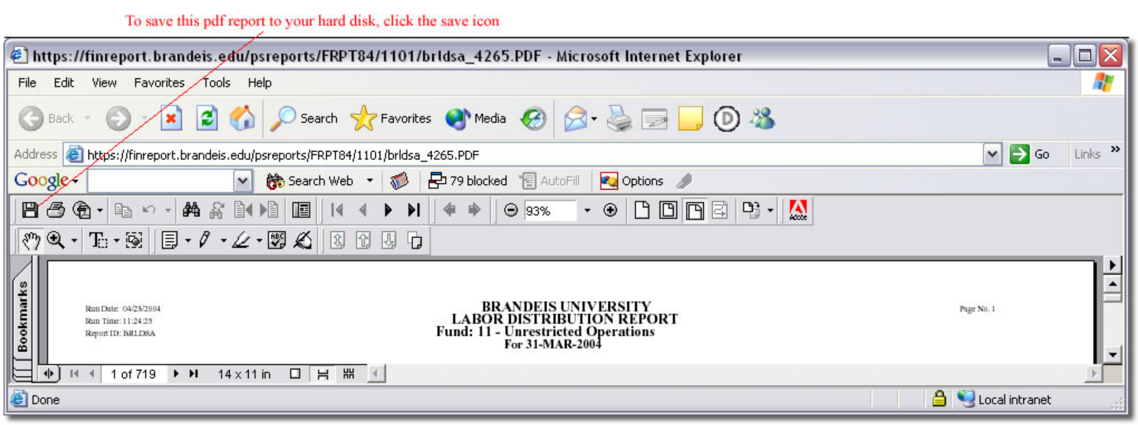
- Message.log – Information about the completed process
- **Brldsa_56068.PDF – Your report in PDF format**
- Trace File – Information about the completed process
- **Brldsa_MyReports.csv – Your Report in CSV format**

IMPORTANT: If there is no PDF file in View Log/Trace, there is no activity in the Dept ID for the period you selected. In cases such as this, you'll find that the CSV file is empty as well.

View Log/Trace Page:

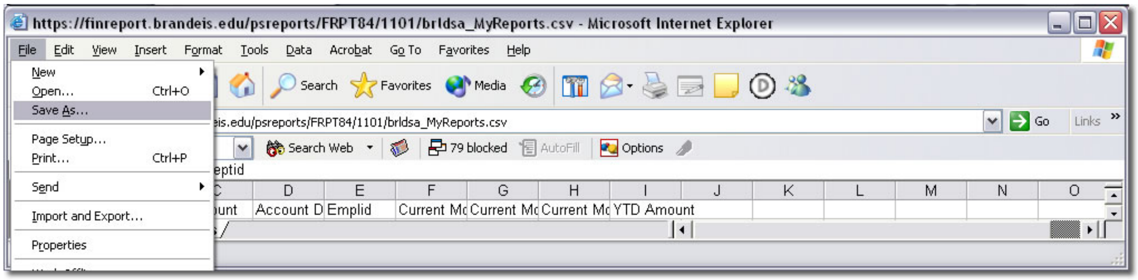


6. Once open, you can save the report to your hard disk by clicking the Save icon



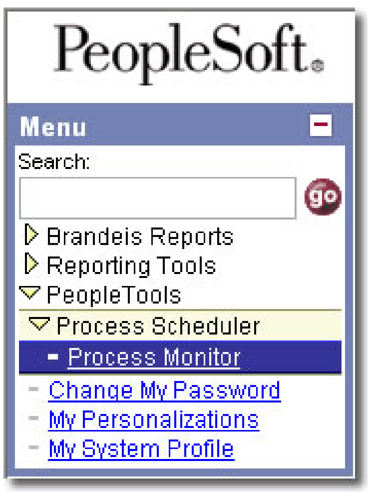
7. To view your CSV report, click on its link (in the example it would be **Brldsa_MyReports.csv**)

8. Once open, you can save the report to your hard disk by Choosing **File** and **Save As**



Once the files are saved to your disk you can view them at will, and manipulate the CSV file in Excel.

Retrieving Reports Later:



If you haven't the time to wait for your reports to finish, or if you walk away and your session times out (30 minutes) you can always go back and retrieve your reports using the process monitor.

1. In the Menu (located on the left side of the page) select the following hyperlinks; **People Tools > Process Scheduler > Process Monitor**

2. Return to **Viewing your reports (Page 7)** for further instruction (page 6 has more information the process monitor for your reference)

- If you know of somebody that needs access to the web-reporting interface, ask his/her department head to visit http://www.brandeis.edu/controller/forms/webaccess.html and complete the request form on-line.

- If you want to receive a monthly email notifying you that an accounting period has closed, send a blank email to join-psreportnotification@lists.brandeis.edu or visit http://www.brandeis.edu/controller/forms/reportnotify.html.