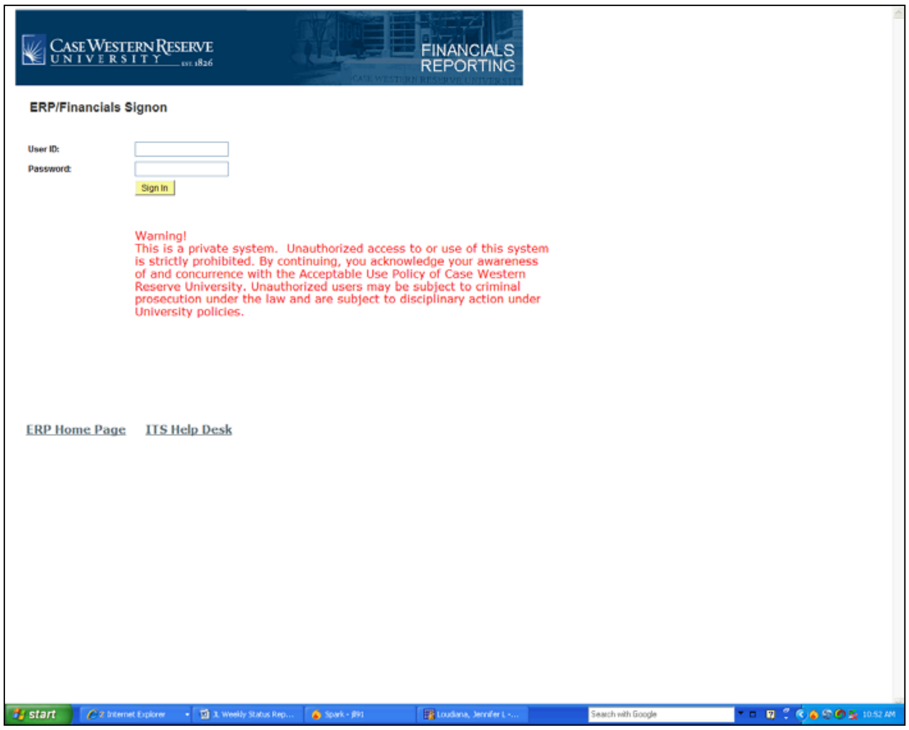
Running Reports

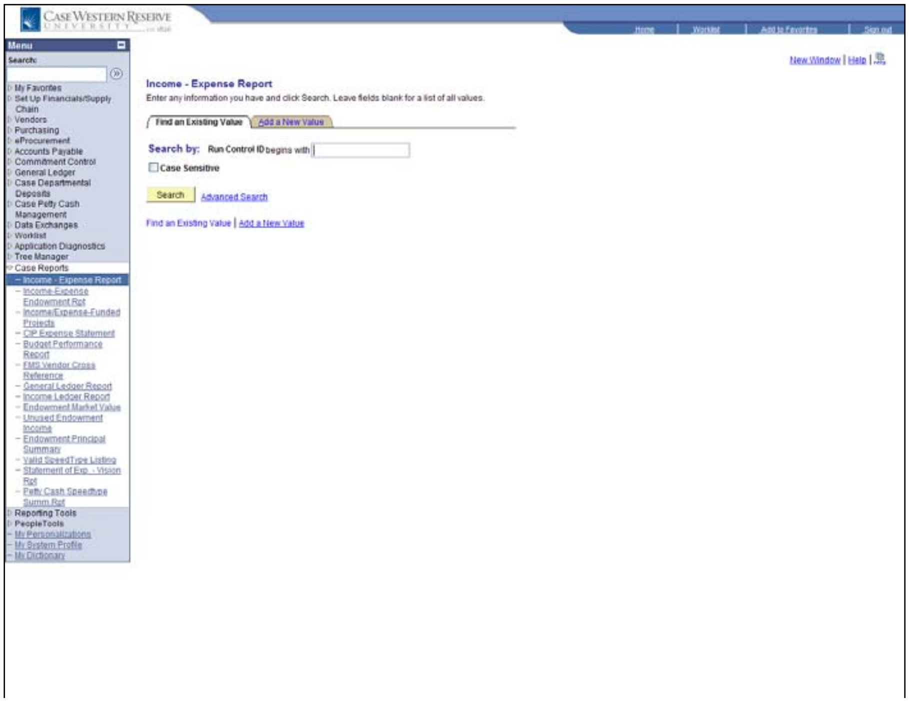
Procedure

Use the Financial Reports database to run ad hoc reports of your department financial information.

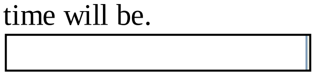
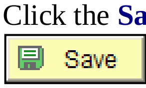


Step	Action
1.	Log into the Financials Reporting database. Use your Case ID and password to sign in. **NOTE**: The data is 24 hours old.

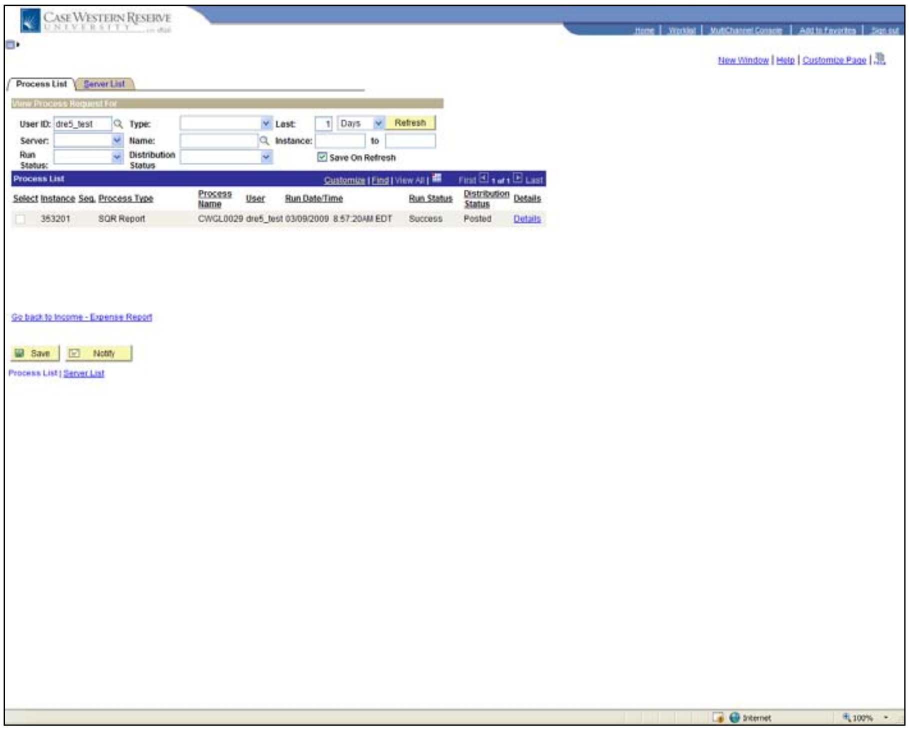
Step	Action
2.	From the left-hand navigation menu, click the **Case Reports** link. Case Reports
3.	Select the report you would like to run from the choices on the left-hand menu.



Step	Action
4.	The Report search screen appears. The page defaults to the **Find an Existing Value** tab. Click the **Add a New Value** tab. Add a New Value
5.	The Run Control ID field appears. Enter a name for the Run Control in the **Run Control ID**. For example, enter "**train**". **NOTE:** When choosing a **Run Control ID**, name it something that will help you remember what report you are running. No spaces are permitted in the name. Each report type you run will require a different Run Control.
6.	Click the **Add** button. Add

Step	Action
7.	The Report page appears. Select the parameters for your report under Accounting Period information. For example, in the **Fiscal Year** field. Enter "**2008**". **NOTE:** Enter the full four digit fiscal year. If you enter only 2 digits your report will not be viewable when it runs.
8.	For example, enter a number in the **From Accounting Period** field, such as, "**1**".
9.	For example, enter a number in the **To Accounting Period** field, such as "**6**".
10.	Enter the SpeedType starting range the report is for, or click the looking glass to look it up. **NOTE:** The more SpeedTypes you add in each report the longer your processing time will be. 
11.	Enter the ending SpeedType. If you have more SpeedType ranges, enter them by clicking the **Add a new row** button. 
12.	Click the **Save** button. 

Step	Action
13.	Click the **Run** button. Run
14.	The Process Scheduler Request screen appears. Click the **OK** button. OK
15.	Click the **Process Monitor** link to view the status of your report and get the PDF file. Process Monitor



Step	Action
16.	The Process Monitor Page appears. Click the **Refresh** button until the Run Status is Success and the Distribution Status is Posted. Refresh
17.	Click the **Details** hyperlink in the **Details** column. Details

Step	Action
18.	The Process Detail page appears. Click the link **View Log/Trace** in the Action section in the bottom right corner. View Log/Trace
19.	An underlined hyperlink file will show. The file name will contain your report ID and end in PDF. Click on the hyperlink file name to open your report. **NOTE:** If no report is created contact ERP Security to see if you have access to the SpeedType(s) you are using. **End of Procedure.**