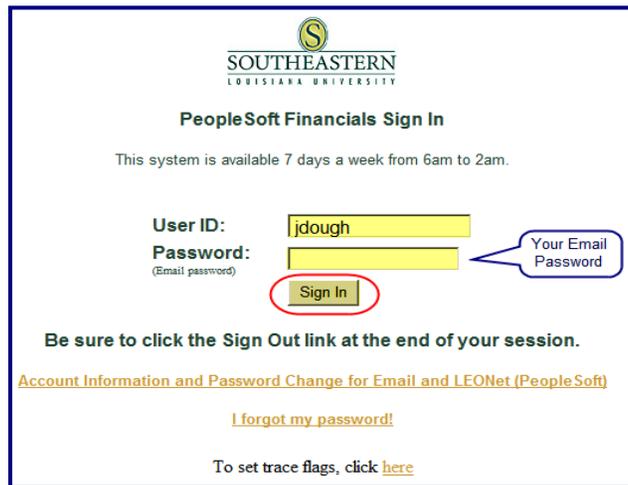


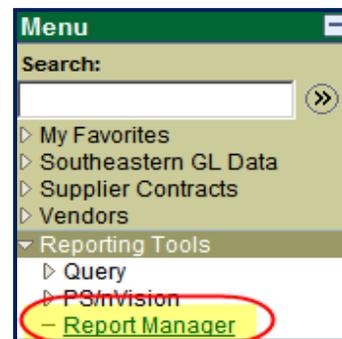
## ACCESSING MONTHLY DEPARTMENTAL SUMMARY REPORTS *In PeopleSoft Financials*

- To view your **Monthly Departmental Summary**, log into the PeopleSoft Financial system through the PeopleSoft icon on your desktop or through LEONet. Enter your PeopleSoft **User ID** (not your W#) and **your email password** to gain access to the system.

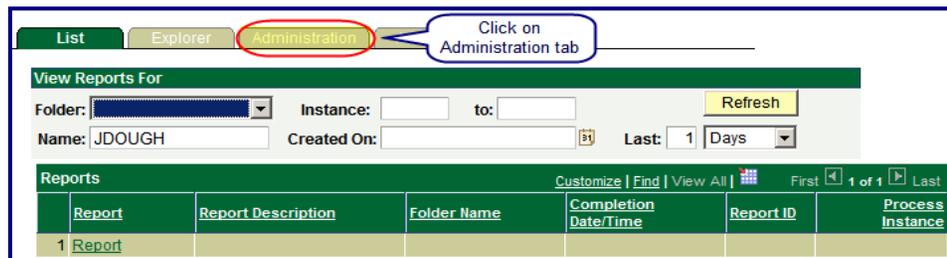
*If you have problems or questions regarding logging into the system, contact the PeopleSoft Financials team at extension 3243.*



- In the **Menu** list, select **Reporting Tools > Report Manager**.



- In the next screen, click on the **Administration** tab.



Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Report					

## Monthly Departmental Summary Reports

4. The **Administration** screen will display the reports which you have access to as *Budget Unit Manager*.

The screenshot shows the Administration screen with the following elements:

- Navigation tabs: List, Explorer, **Administration**, Archives
- View Reports For** section:
  - User ID: JDOUGH
  - Type: [Dropdown]
  - Last: 5 Days
  - Refresh button
  - Status: [Dropdown]
  - Folder: [Dropdown]
  - Instance: [Text] to: [Text]
- Report List** section:
  - Customize | Find | View All | [Grid Icon]
  - First | 1-2 of 2 | Last
  - Table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, Details
  - Table data:

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	49395	47315	<a href="#">DEPTSUM 2009-02-04 53213</a>	02/04/2009 12:17:34PM	Microsoft Excel Files (*.xls)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	48592	47315	<a href="#">DEPTSUM 2009-02-04 24247</a>	02/04/2009 12:08:15PM	Microsoft Excel Files (*.xls)	Posted	<a href="#">Details</a>

5. If no reports appear, you may need to change the default number of days that the panel will display to cover the last date the reports were run. Click the **Refresh** button.

This screenshot is similar to the previous one but includes callouts:

- A callout bubble pointing to the '5 Days' dropdown: "You can change the number of default days"
- A callout bubble pointing to the 'Refresh' button: "Click Refresh"

6. To open the report, click on the **Report Link**. It will open automatically in an *Excel* format. (If it does not open, see "Configuring Your System for Excel.") The report can then be printed and/or saved as a normal Excel file.

This screenshot is similar to the previous ones but includes a callout:

- A callout bubble pointing to the 'Report Link' in the first row of the Report List table: "Click on Report Description"

For questions or problems concerning the Summary Reports, contact **Lori Gray** in the Controller's Office, ext. **3754**.