PeopleSoft

Revenue Summary Report

This report will give the amount of revenue that has been earned and posted in the revenue account that you request in the parameters of the report.

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Revenue Summary Report Setup Instructions

The following URL will take you to the core PeopleSoft Financial system. You will log in using your PeopleSoft login and password.

https://fprod.gafirst.usg.edu

1. Once you’ve logged in, you’ll see some basic menu commands. To navigate to the Budget Activity Report, click on BOR Menus > BOR General Ledger > BOR GL Reports

2. Click on Revenue Summary Report.
3. First time users of this report will need to set up a run control ID that will be used each time you run the report. Click on the tab.

4. Type in a name for the report, underscoring between words, as shown in the screenshot below. Click the button. After the Run Control is initially created, you will click on the tab to select the run control and run the report in the future. You will not need to create it again for future reports.

5. The screen for the Revenue Summary Report will appear.

   Complete the fields using the look up tool (magnifying glass) if needed. Tab to navigate between fields or click into each box. In PeopleSoft, the “%” sign is a wildcard and generally means “all.”
   - Business Unit: 54000
   - Fiscal Year: Current or previous budget year
   - Fund Code: You can enter a single fund code or % for all fund codes.
   - From Accounting Period: Enter 1
   - To Accounting Period: Enter 12
• From Department/To Department: Enter your department’s 7 digit department ID in both fields if you want to run report for all revenue accounts in your department.
• From Account/To Account: Enter your revenue account in both fields to see the report for a specific revenue account or enter % for all revenue accounts.
• From Class/To Class: Enter % sign

Click the [Save] button.

6. Once all values are entered click the [Run] button.
7. The screen Process Scheduler Request will appear. Click the **OK** button to be taken back to the Revenue Summary Report screen.

8. Click on “Process Monitor.”

9. This will take you to a screen showing all reports you have run for a period of time. Click on the **Refresh** button until the Run Status shows “Success” and the Distribution Status shows “Posted.” Click “Details.” Do not select specifics for server, run status, type, name or distribution status. Use 8 hours, or 1 day for “Last.”
10. Click “View Log/Trace.”
11. Under the File List, click the file name that is a PDF document.

12. This will take you to a PDF file with the requested report. Click the printer button to print or save as a PDF file.

13. Once the report is printed or saved locally, you can close the PDF window, and you’ll be back at the View/Log Trace window. You can click the Return button to return to the process detail page, and click the OK button to return to the Process List.