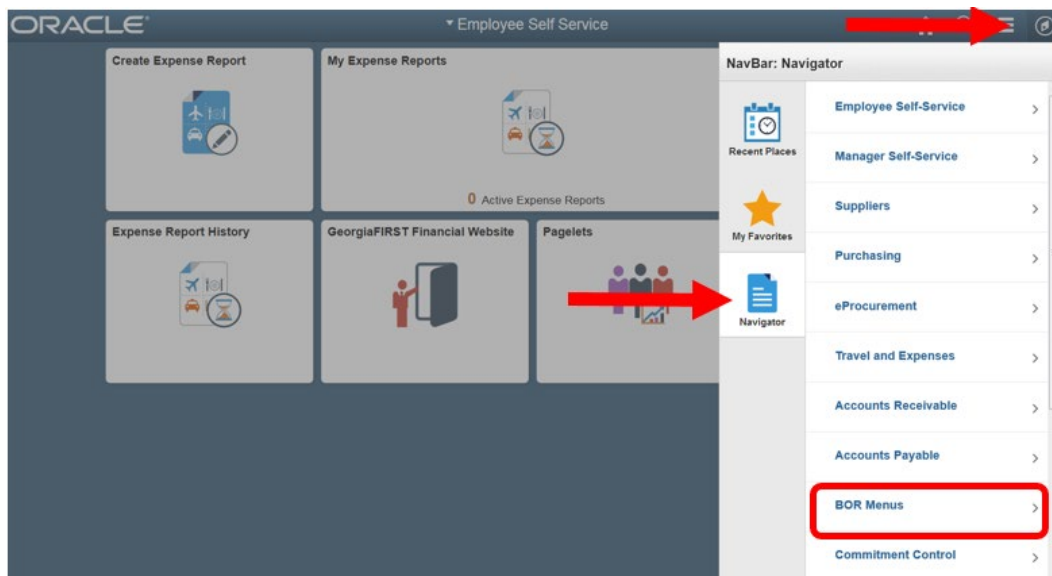




Revenue Summary Report Setup Instructions

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

1. Navigate to the [GeorgiaFIRST Financials webpage](https://www.usg.edu/gafirst-fin/) (<https://www.usg.edu/gafirst-fin/>)
2. Select the **GeorgiaFIRST Financials** button (for Core Users)
3. If prompted, select the **GoWest** shield logo.
4. Login using your **UWG Username** and **Password**.
5. You will be prompted to dual authenticate using the OneLogin Protect authentication method previously established.
6. From the PeopleSoft Financials homepage, select the **NavBar** (compass) icon.
7. Click the **Navigator** icon.
8. Click **BOR Menus** from the menu listing.



9. Click **BOR General Ledger**.
10. Click **BOR GL Reports**.
11. Click **Revenue Summary Report**.



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12. 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 **Add a New Value** tab.

Revenue Summary Report

Run Control ID

13. Type in a name for the report, underscoring between words, as shown in the screenshot below. Click the **Add** button. For future reports, you will click on the **Find an Existing Value** tab to select the run control and run the report. You will not need to create it again for future reports.

Revenue Summary Report

Run Control ID

14. 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 percent sign (%) is a wildcard and generally means *all*.
- Business Unit: **54000**
 - Fiscal Year: Enter the current **Budget Year**
 - Fund Code: Enter a single **Fund Code** or % for all fund codes.
 - From Accounting Period: Enter **1**
 - To Accounting Period: Enter **12**



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- f. From Department/To Department: Enter your department's 7 digit **Department ID** in both fields.
 - g. From Account/To Account: Enter **percent (%)** in both fields.
 - h. From Class/To Class: Enter **percent (%)** in both fields.
15. Click the **Save** button.
16. Once all values are entered click the **Run** button.

Revenue Summary Report

Run Control ID: Revenue_Summary_Report Report Manager Process Monitor **Run**

Business Unit: 54000 Fiscal Year: 2018 Fund Code: 10600

From Acctg Period: 1 To Acctg Period: 12

From Department: 1045103 To Department: 1045103

From Account: % To Account: %

From Class: % To Class: %

Save Return to Search Previous in List Next in List Add Update/Display

17. The **Process Scheduler Request** screen will appear. The identified format should be a PDF. This can be changed by using the dropdown to select a CSV file, if an Excel file is desired. Click the **OK** button to return to the Revenue Summary Report screen.

Process Scheduler Request

User ID: pdurroug Run Control ID: Revenue_Summary_Report

Server Name: Run Date: 01/09/2018 **Reset to Current Date/Time**

Recurrence: Run Time: 3:43:34PM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	istribution
☒	Revenue Summary Report	BORRG025	SQR Report	Web	PDF	istribution

OK Cancel



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18. Click on the **Process Monitor** link.

Revenue Summary Report

Run Control ID: Revenue_Summary_Report Report Manager: **Process Monitor** Run

Business Unit: 54000 Fiscal Year: 2018 Fund Code: 10600

From Acctg Period: 1 To Acctg Period: 12

From Department: 1045103 To Department: 1045103

From Account: % To Account: %

From Class: % To Class: %

Save Return to Search Previous in List Next in List Add Update/Display

19. This will take you to a window showing all reports you have run for a period of time. Click on the **Refresh** button until the Run Status reflects *Success* and the Distribution Status reflects *Posted*.

20. Click the **Details** link. Do not select specifics for server, run status, type, name or distribution status.

Process List Server List

View Process Request For

User ID: pdurroug Type: Last: 3 Days Refresh

Server: Name: Instance From: Instance To: Run Status: Distribution Status: Save On Refresh

Process List Personalize Find View All First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	10852547		SQR Report	BORRG025	pdurroug	01/09/2018 3:43:34PM EST	Success	Posted	Details

Go back to Revenue Summary Report

Save Notify



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

Process Detail

Process

Instance	10852547	Type	SQR Report
Name	BORRG025	Description	Revenue Summary Report
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	Revenue_Summary_Report	☐ Hold Request
Location	Server	☐ Queue Request
Server	PSUNX	☐ Cancel Request
Recurrence		☐ Delete Request
		☐ Re-send Content
		☐ Restart Request

Update Process

Date/Time

Request Created On	01/09/2018 3:45:04PM EST	Parameters	Transfer
Run Anytime After	01/09/2018 3:43:34PM EST	Message Log	
Began Process At	01/09/2018 3:45:30PM EST	Batch Timings	
Ended Process At	01/09/2018 3:45:44PM EST	View Log/Trace	

Actions

OK Cancel

22. Under the **File List**, click the file name with the **PDF** extension.

View Log/Trace

Report

Report ID	9695925	Process Instance	10852547	Message Log
Name	BORRG025	Process Type	SQR Report	
Run Status	Success			

Revenue Summary Report

Distribution Details

Distribution Node	DNODE	Expiration Date	04/09/2018
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File List

Name	File Size (bytes)	Datetime Created
SQR_BORRG025_10852547.log	1,825	01/09/2018 3:45:44.161646PM EST
borrg025_10852547.PDF	4,564	01/09/2018 3:45:44.161646PM EST
borrg025_10852547.out	329	01/09/2018 3:45:44.161646PM EST

Distribute To

Distribution ID Type	*Distribution ID
User	pdurroug

Return



23. This will take you to a PDF file with the requested report. Click the printer icon to print or the PDF file can be saved.
24. Once the report is reviewed, 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.