

Monthly Departmental Summary Reports


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.



PeopleSoft Financials Sign In

This system is available 7 days a week from 6am to 2am.

User ID: 

Password: 
(Email password)

Be sure to click the Sign Out link at the end of your session.

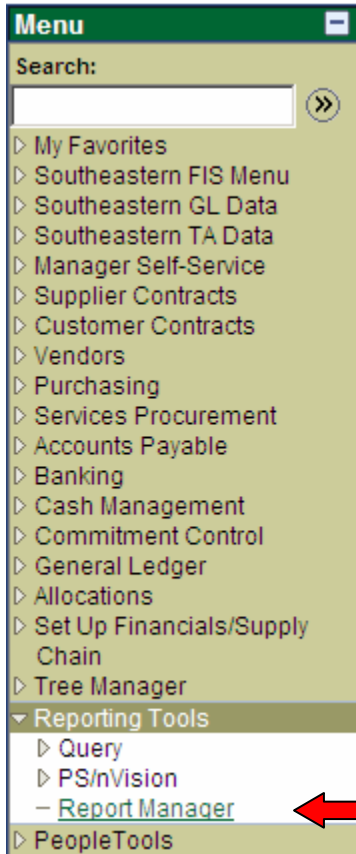
[Account Information and Password Change for Email and LEONet \(PeopleSoft\)](#)

[I forgot my password!](#)

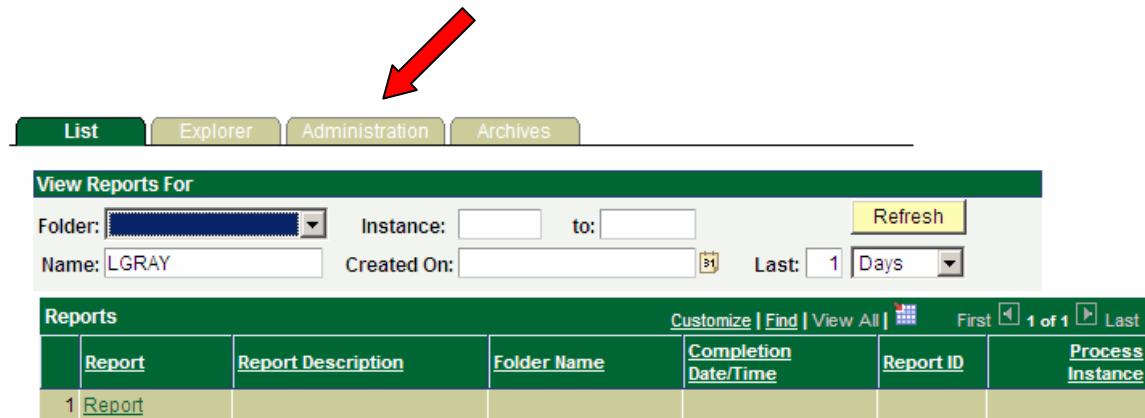
To set trace flags, click [here](#)

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

Navigate to the following: [Reporting Tools > Report Manager](#)



You will see the following panel. Click on the Administration tab.



The Administration panel will display the reports in which you are the Budget Unit Manager at the time the reports are run. If you are not the budget unit manager, using all capital letters, change the User ID to the budget unit manager of the department and click on Refresh.

The screenshot shows the 'Administration' tab selected. The 'View Reports For' section includes a 'User ID' field with 'LGRAY' entered, a 'Type' dropdown, a 'Last' field set to '5 Days', and a yellow 'Refresh' button. Below this is a 'Report List' table with two rows of report data.

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

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 on Refresh to update your view.

This screenshot is similar to the previous one, but the 'Refresh' button is highlighted with a yellow background. Red arrows point to the 'Last' field and the 'Refresh' button.

To open the report in Excel, click on the report link.

This screenshot shows the 'Report List' table with a red arrow pointing to the 'Description' column of the first row, specifically to the report link.

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<input type="checkbox"/>	48592	47315	DEPTSUM 2009-02-04 24247	02/04/2009 12:08:15PM	Microsoft Excel Files (*.xls)	Posted	Details

The report can then be printed or saved as normal using Excel.

Should you have any questions or problems, please contact Lori Gray in the Controller's Office at 549-3754.