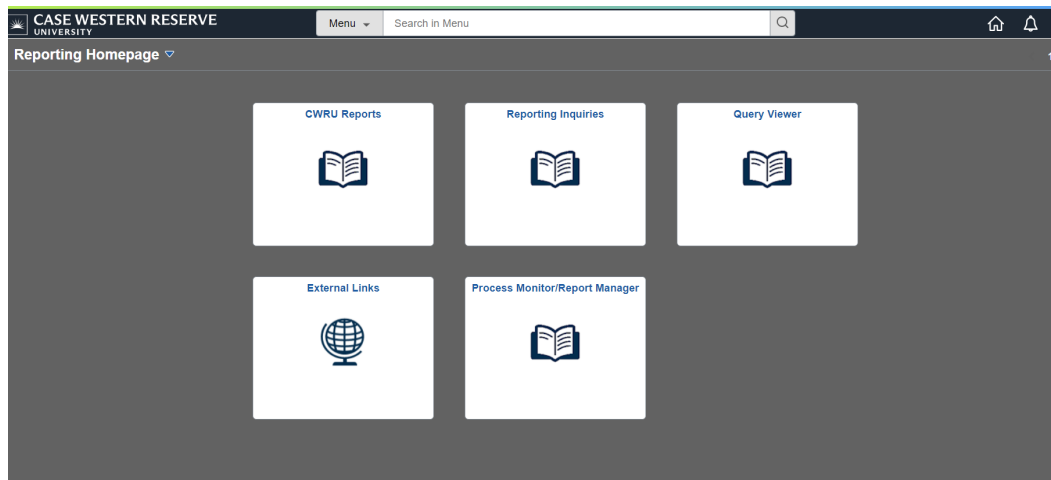


How to Find and Utilize Grant Expense Reports:

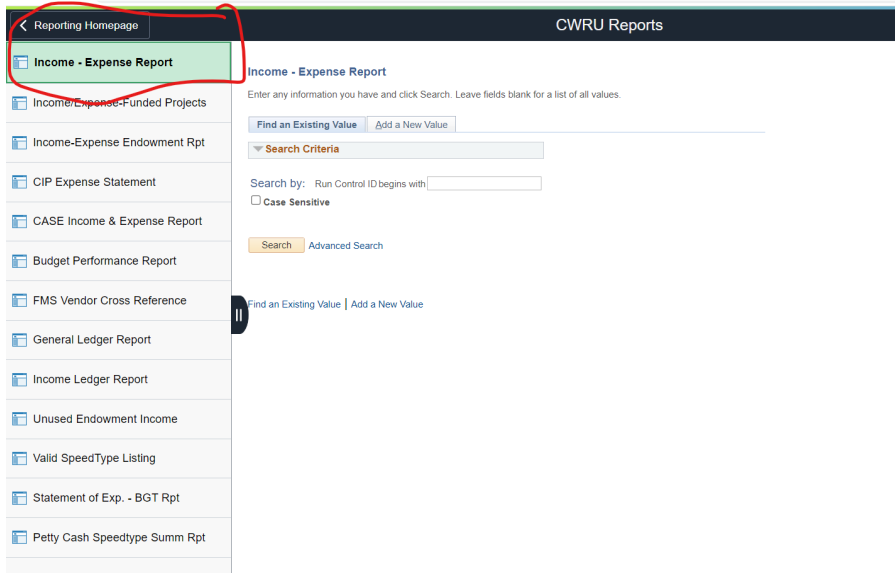
- Begin my typing “userservices.case.edu” into your Web Browser (Google Chrome is best)

PeopleSoft ERP

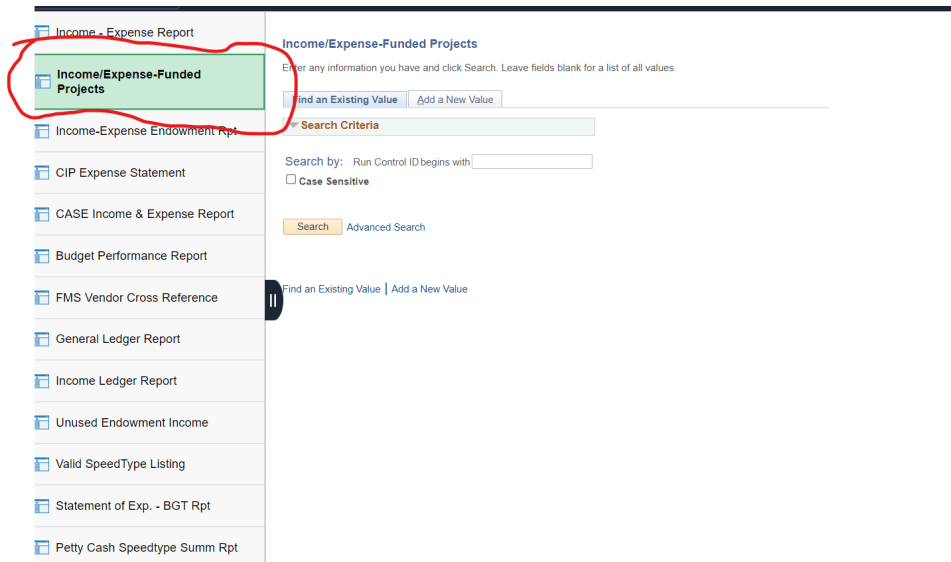
- Financials 9.2
 - **Financials Reporting 9.2**
 - Financials Monthly Reports
 - Human Capital Management 9.2
 - Employment Opportunities (Internal)
 - Employment Opportunities (Public)
 - Student Information System 9.2
 - Schedule of Classes
- Choose Financial Reporting 9.2
 - You will be brought to the Home Page Below (which will look different depending on one’s access)



- Click into the “CWRU Reports” tile.
- You will then be brought to the below screen.



- You will automatically be placed into the “Income – Expense Report” tab, so it is **IMPORTANT** that you click on the “Income/Expense-Funded Projects” to find Expense Reports for Federally funded Research, Training, and other special projects.



- You will more than likely have to establish a report template for your project unless you have already done so, in which case please disregard the next few steps and move forward with submitting your request.

Income/Expense-Funded Projects

Find an Existing Value **Add a New Value**

*Run Control ID

Add

Find an Existing Value | Add a New Value

- Click on the “Add Value” tab on the main page.
- Choose a “Control ID”, which can be thought of as a label or category you would like your report to represent.
 - For instance, for NSF would be a simple heuristic that indicates this report is for the Fellowship program.
- After assigning the report a “Control ID” the ledger details need to be selected.
- You will have to select the fiscal year, the fiscal periods, and the speed type(s) that are to be examined.
 - One can add several speed types they wish to examine either by using a range method (ex. TRN515429 to TRN515445 would include every speed type between those within the report.) or they can simply add another line by clicking the “+” icon within the speed type information box.

Income/Expense-Funded Projects

Run Control ID NSF Report Manager Process Monitor Run

Accounting Period Information:

*From Fiscal Year: *Accounting Period:

*To Fiscal Year: *Accounting Period:

From SpeedType	To SpeedType	
1 <input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Save Notify Add Update/Display

- Be sure to “Save” the report before running.
- After saving the report click “Run” in the top right-hand corner.

Income/Expense-Funded Projects

Run Control ID nsf Report Manager Process Monitor **Run**

Accounting Period Information:

*From Fiscal Year: *Accounting Period:

*To Fiscal Year: *Accounting Period:

Personalize | Find | View All | | First ◀ 1 of 1 ▶ Last

From SpeedType To SpeedType

1

- Once clicked a pop-up window will appear asking you to verify the details and format you wish. Unless otherwise specified it will default to PDF, which is generally the most used and accessible.

Process Scheduler Request X

Help

User ID sxx1930 Run Control ID GRFP

Server Name Run Date 11/30/2023

Recurrence Run Time 1:59:11PM

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	CWGL0030	CWGL0030	SQR Report	Web	PDF	Distribution

- Click “OK” once you have confirmed your details.

Process Scheduler Request X

[Help](#)

User ID: Run Control ID:

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	CWGL0030	CWGL0030	SQR Report	Web	PDF	Distribution

- After clicking "OK" you will be brought back to the "Accounting Period Information" homepage

Run Control ID: Report Manager:

Process Instance: 6682889

Accounting Period Information:

*From Fiscal Year: *Accounting Period: May

*To Fiscal Year: *Accounting Period: October

Personalize		Find	View All	First	1-2 of 4	Last
From SpeedType	To SpeedType					
1 <input type="text" value="TRN515429"/>	<input type="text" value="TRN515430"/>	<input type="button" value="Search"/>	<input type="button" value="Search"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	
2 <input type="text" value="TRN516580"/>	<input type="text" value="TRN516585"/>	<input type="button" value="Search"/>	<input type="button" value="Search"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	

- To check on the status of your report click on the "Process Monitor" button to be directed to your process list page as seen below. This page will show any reports that you have processed recently.

[Process List](#) | [Server List](#)

View Process Request For

User ID Type Last 1 Days
Server Name Instance From Instance To
Run Status Distribution Status Save On Refresh [Report Manager](#)

▼ **Process List**

1-1 of 1

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	6682889		SQR Report	CWGL0030	sxk1930	11/30/2023 1:59:11PM EST	Success	Posted	Details

[Go back to Income/Expense-Funded Projects](#)

[Process List](#) | [Server List](#)

- You must wait until the "Run Status" column shows as "Success".

[Process List](#) | [Server List](#)

View Process Request For

User ID Type Last 1 Days
Server Name Instance From Instance To
Run Status Distribution Status Save On Refresh [Report Manager](#)

▼ **Process List**

1-1 of 1

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	6682889		SQR Report	CWGL0030	sxk1930	11/30/2023 1:59:11PM EST	Success	Posted	Details

[Go back to Income/Expense-Funded Projects](#)

[Process List](#) | [Server List](#)

- To access the report once in "Success" status you must click on the "details" hyperlink.

View Process Request For

User ID Type Last 1 Days
Server Name Instance From Instance To
Run Status Distribution Status Save On Refresh [Report Manager](#)

▼ **Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	6682889		SQR Report	CWGL0030	skx1930	11/30/2023 1:59:11PM EST	Success	Posted	Details

[Go back to Income/Expense-Funded Projects](#)

- It will prompt a "Process Details" pop-up window to appear, and under the "Actions" Header you will want to click on the "View Log/Trace" hyperlink in order to get a PDF version of the report you ran.

Process Detail [X] Help

Process

Instance	6682889	Type	SQR Report
Name	CWGL0030	Description	CWGL0030
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	GRFP	Update Process	
Location	Server	<input type="radio"/> Hold Request	
Server	PSUNX	<input type="radio"/> Queue Request	
Recurrence		<input type="radio"/> Cancel Request	
		<input type="radio"/> Delete Request	
		<input type="radio"/> Re-send Content	<input type="radio"/> Restart Request

Date/Time

Request Created On	11/30/2023 2:03:28PM EST	Parameters	Transfer
Run Anytime After	11/30/2023 1:59:11PM EST	Message Log	
Began Process At	11/30/2023 2:03:57PM EST	Batch Timing	
Ended Process At	11/30/2023 2:04:09PM EST	View Log/Trace	

- After clicking on the “View Log/Trace” hyperlink a more detailed window will appear. In this window you will find a PDF version of your report.

View Log/Trace [X] [Message Log](#)

Report ID	4889161	Process Instance	6682889
Name	CWGL0030	Process Type	SQR Report
Run Status	Success		

CWGL0030

Distribution Details

Distribution Node	R92FCWR	Expiration Date	03/08/2024
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File List

Name	File Size (bytes)	Datetime Created
APPSRV.LOG	146	11/30/2023 2:04:09.075424PM EST
SQR_CWGL0030_6682889.log	0	11/30/2023 2:04:09.075424PM EST
cwg0030_6682889.out	793	11/30/2023 2:04:09.075424PM EST
cwg0030_6682889_3.PDF	58,593	11/30/2023 2:04:09.075424PM EST

Distribute To

Distribution ID Type	Distribution ID
User	sxx1930

- Download the PDF to begin your examination.