



## **Spectrum Plus 9.2**

# **Actuals Drilldown Report Training Guide**

**July 2015**

*Version 1*

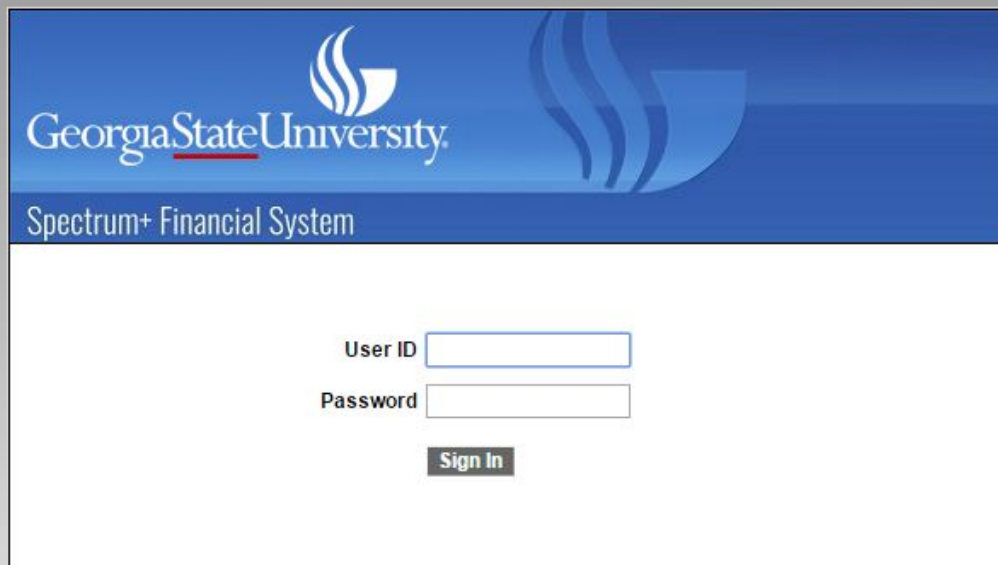
## Table of Contents

<b>REPORT BY PROJECT .....</b>	<b>5</b>
<b>REPORT BY NON-PROJECT .....</b>	<b>8</b>
<b>REPORT BY DEPARTMENT .....</b>	<b>11</b>

1. Go to Oracle Peoplesoft website (Known as spectrum plus at GSU). If you are not familiar with it here is the address: cut and paste then bookmark this page)

<https://www.spectrum.gsu.edu/>

2. Login with your campusID and password.



GeorgiaStateUniversity

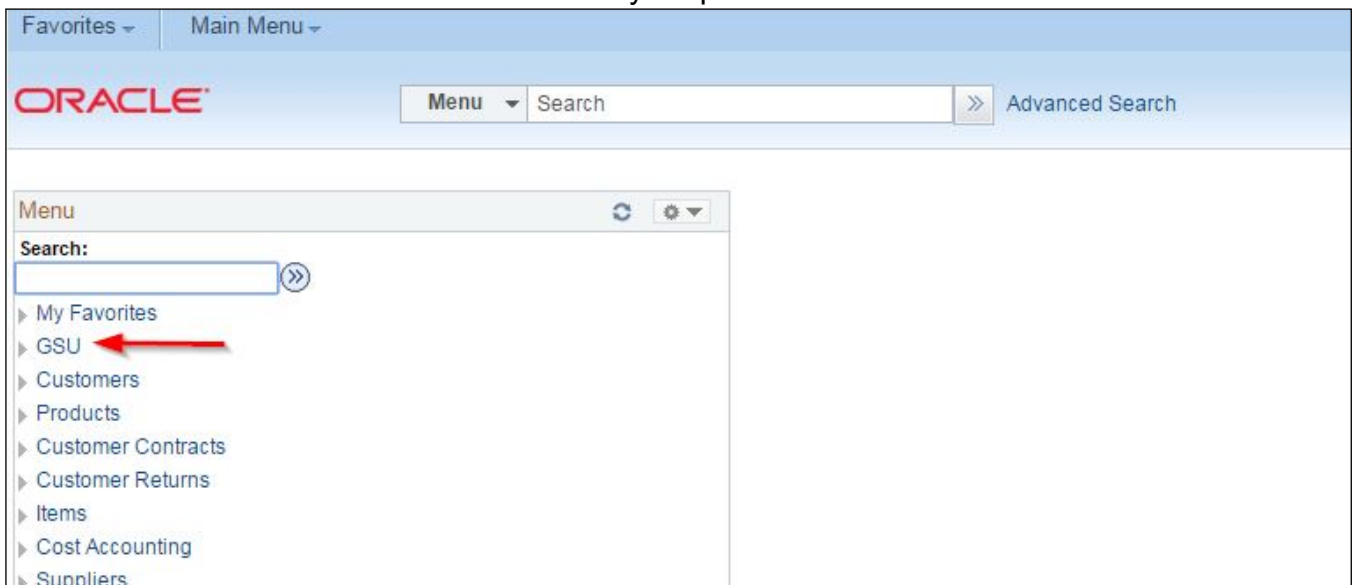
Spectrum+ Financial System

User ID

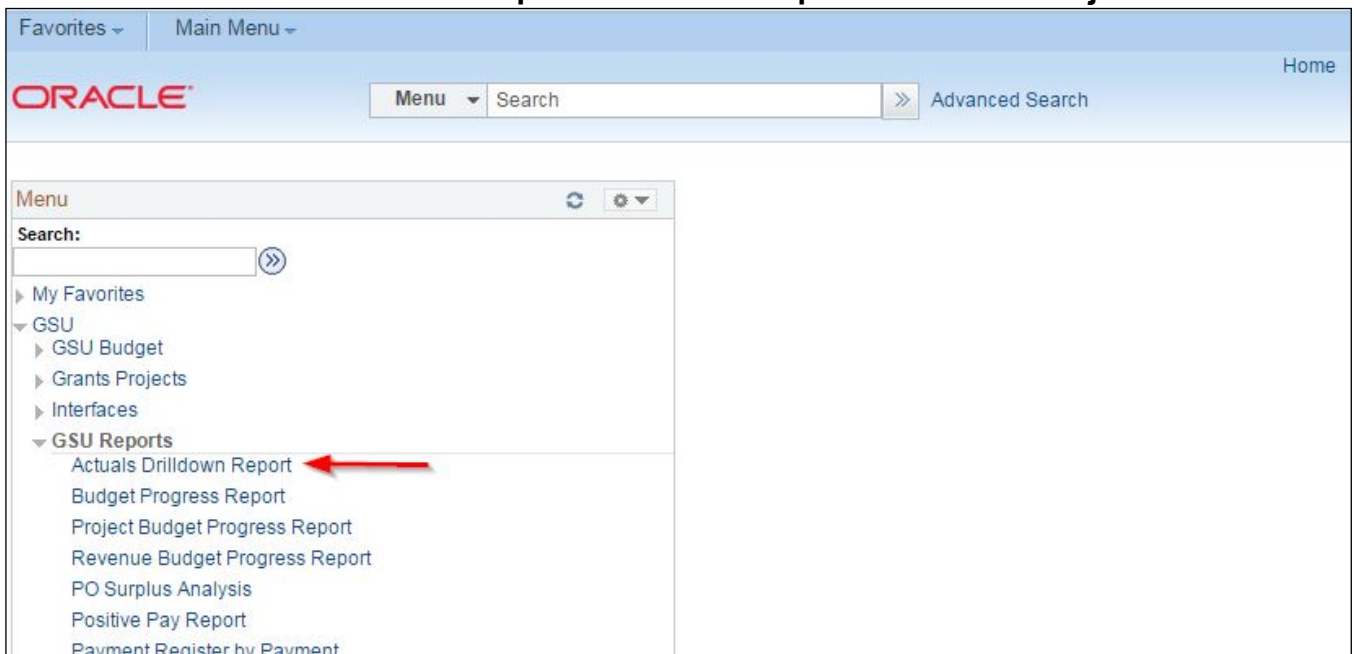
Password

Sign In

3. On the left hand side of the screen is your portal menu. Select **GSU**.

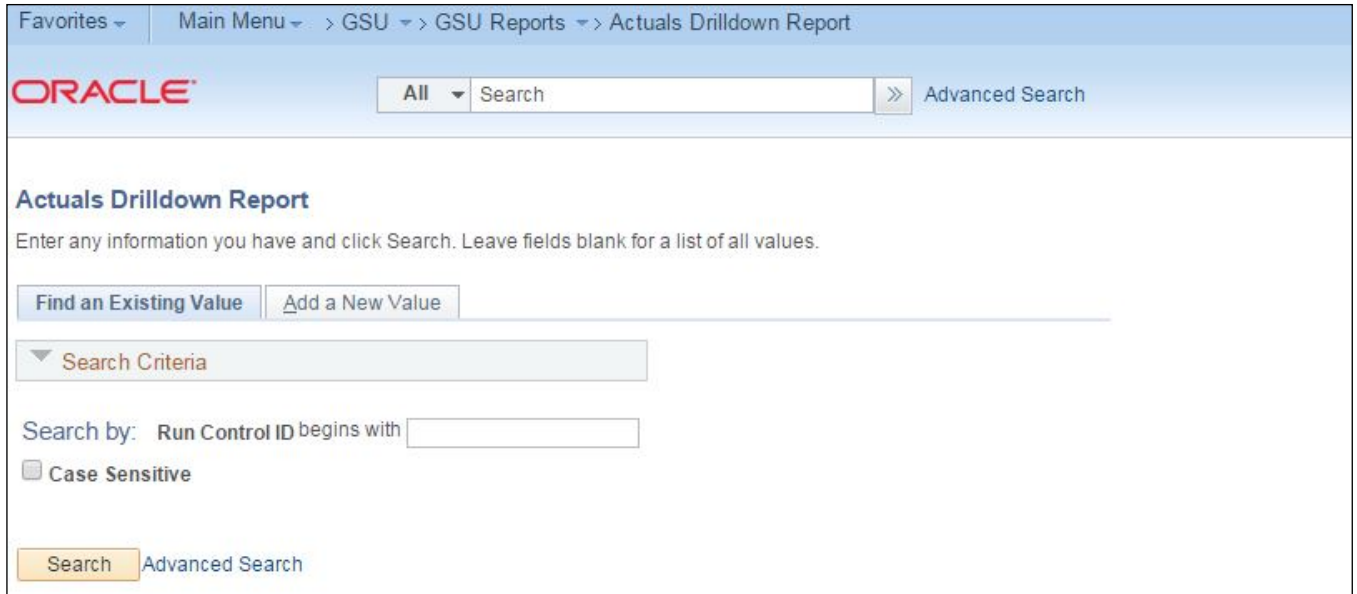


4. Select **Actuals Drilldown Report** under **GSU Reports** or **Grants Projects**



## REPORT BY PROJECT

Navigation: **GSU > GSU Reports > Actuals Drilldown Report**



Step	Action
1.	<b>Find an Existing Value</b> – If you have previously run this report. Click <b>Search</b> to see all the run control ids (names of reports) that you have previously used. Click on the run control that you want to use. Any reports you have created will be available <b>Skip step 2 and 3.</b>
2.	<b>Add a New Value</b> – If you have never run this report or want to run this report with different projects or criteria click on Add a New Value to create a run control Id.

Step	Action
3.	<div data-bbox="451 363 979 655"><p><b>Actuals Drilldown Report</b></p><p>Find an Existing Value <b>Add a New Value</b></p><p>Run Control ID: <input type="text"/></p><p>Add</p></div> <p><b>Run Control ID:</b> What you enter here will be the name of your report. Any name will do but we suggest you name your report with your project ID (short speedtype) if conducting a report for a specific project. Click <b>Add</b></p>

Actuals Drilldown Rpt

Run Control ID Actual\_Drilldown Report Manager Process Monitor Run

Business Unit:   Period Date:   Fiscal Year: 2015 Period: 12

Report Desired:  Grant/Project  General Accounting Fiscal YTD Override:

Number of projects:  Single  Multiple

Single Project Options

- Summary only
- Summary Plus Detail Options
- Current Period
- Year to Date
- All Activity
- Prior Years

Project

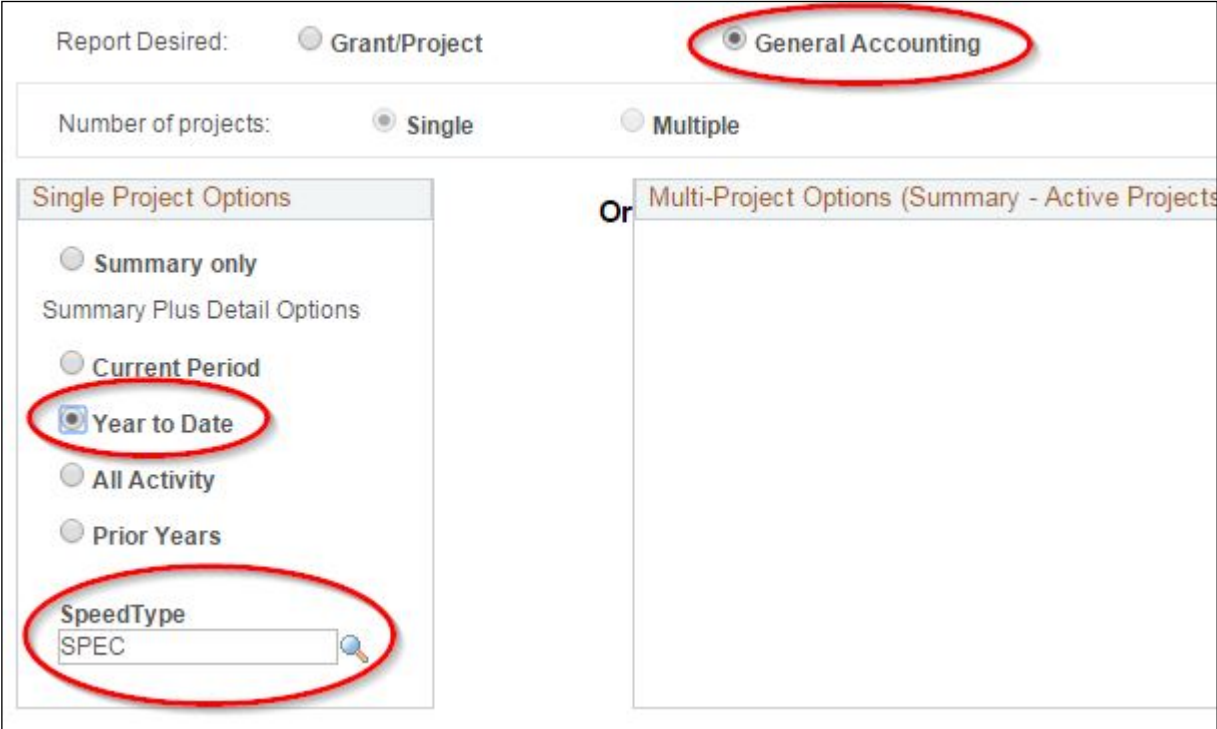
Or Multi-Project Options (Summary - Active Projects Only)

Step	Action
1.	<b>Report Desired:</b> Check Grant/Project
2.	<b>Number of Projects:</b> Check Single
3.	<b>Single Project Option:</b> Check type of report you want. (e.g., all Activity)
4.	<b>Project-</b> Enter project ID for new reports. If you don't know the prefix of the project, Enter % and the last 5 digits of your project and then click on the lookup icon on the right of the field and select your project. For instance %FLU13 and then lookup
5.	<b>Click Run</b>

Step	Action
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### REPORT BY NON-PROJECT

To run the report for a non-project, select **General Accounting** instead of Grant/Project (Step 1). In step 4, you will see a textbox entitled “**SpeedType**”, enter the Department SpeedType. Follow Steps 6 - 9 to view report.



Report Desired:  Grant/Project  **General Accounting**

Number of projects:  Single  Multiple

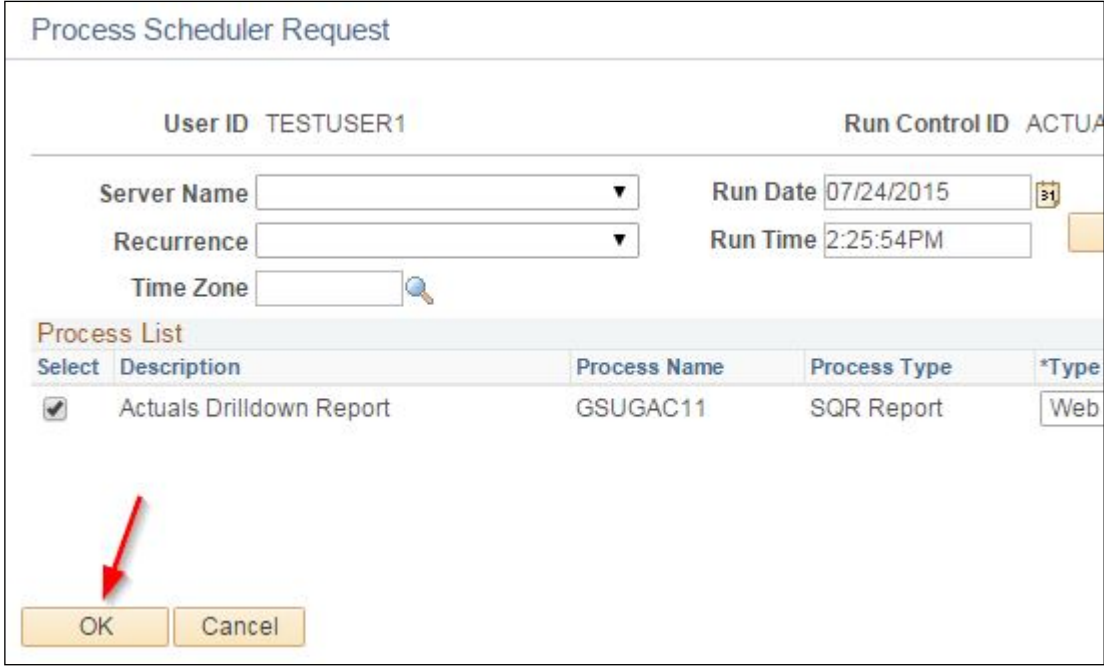
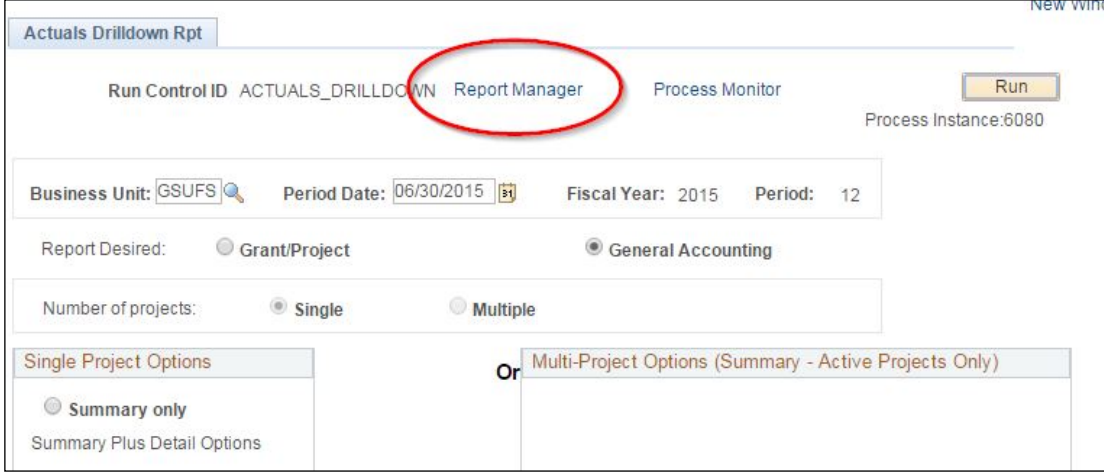
Single Project Options

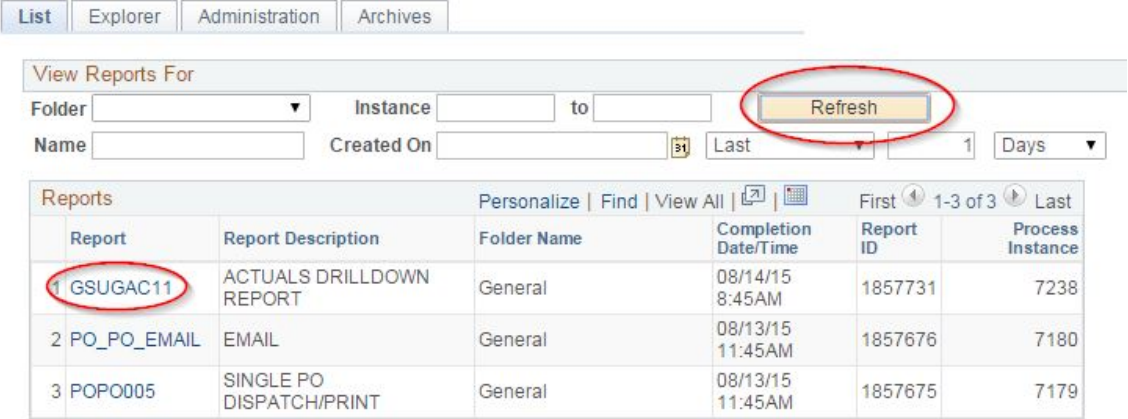
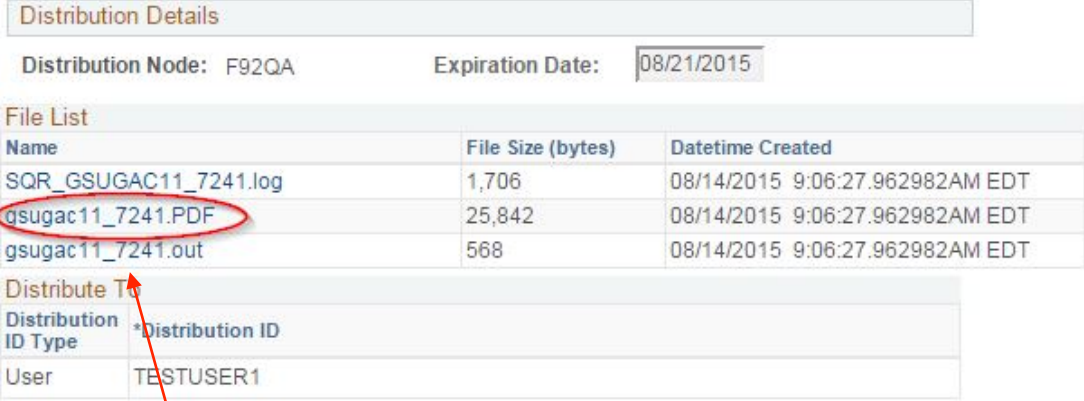
- Summary only
- Summary Plus Detail Options
- Current Period
- Year to Date**
- All Activity
- Prior Years

SpeedType  
SPEC

Or Multi-Project Options (Summary - Active Projects)



Step	Action
6.	<p><b>This screen appears</b></p>  <p>Click Ok. (Note: Always leave Server Name blank.)</p>
7.	 <p>After you run the report, Click on <b>Report Manager</b> Hyperlink to view your report. Note that it might take up to a minute for the report to show up under your report manager.</p>

Step	Action																								
8.	<div data-bbox="337 365 1458 781">  <p>View Reports For</p> <p>Folder <input type="text"/> Instance <input type="text"/> to <input type="text"/> <b>Refresh</b></p> <p>Name <input type="text"/> Created On <input type="text"/> Last <input type="text"/> 1 Days</p> <table border="1"> <thead> <tr> <th>Report</th> <th>Report Description</th> <th>Folder Name</th> <th>Completion Date/Time</th> <th>Report ID</th> <th>Process Instance</th> </tr> </thead> <tbody> <tr> <td>1 <b>GSUGAC11</b></td> <td>ACTUALS DRILLDOWN REPORT</td> <td>General</td> <td>08/14/15 8:45AM</td> <td>1857731</td> <td>7238</td> </tr> <tr> <td>2 PO_PO_EMAIL</td> <td>EMAIL</td> <td>General</td> <td>08/13/15 11:45AM</td> <td>1857676</td> <td>7180</td> </tr> <tr> <td>3 POPO005</td> <td>SINGLE PO DISPATCH/PRINT</td> <td>General</td> <td>08/13/15 11:45AM</td> <td>1857675</td> <td>7179</td> </tr> </tbody> </table> </div> <p>The report manager keeps reports for about 10 days before deleting them from the Report list. Click <b>Refresh</b> until the report that you have just ran show on the list. Refer to the completion date/time on the right to distinguish between your reports.</p> <p>Click on the <b>GSUGAC11</b> hyperlink to open the next window (shown below).</p>	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance	1 <b>GSUGAC11</b>	ACTUALS DRILLDOWN REPORT	General	08/14/15 8:45AM	1857731	7238	2 PO_PO_EMAIL	EMAIL	General	08/13/15 11:45AM	1857676	7180	3 POPO005	SINGLE PO DISPATCH/PRINT	General	08/13/15 11:45AM	1857675	7179
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9.	<div data-bbox="337 1106 1414 1503">  <p>Distribution Details</p> <p>Distribution Node: F92QA Expiration Date: 08/21/2015</p> <p>File List</p> <table border="1"> <thead> <tr> <th>Name</th> <th>File Size (bytes)</th> <th>Datetime Created</th> </tr> </thead> <tbody> <tr> <td>SQR_GSUGAC11_7241.log</td> <td>1,706</td> <td>08/14/2015 9:06:27.962982AM EDT</td> </tr> <tr> <td><b>gsugac11_7241.PDF</b></td> <td>25,842</td> <td>08/14/2015 9:06:27.962982AM EDT</td> </tr> <tr> <td>gsugac11_7241.out</td> <td>568</td> <td>08/14/2015 9:06:27.962982AM EDT</td> </tr> </tbody> </table> <p>Distribute To</p> <table border="1"> <thead> <tr> <th>Distribution ID Type</th> <th>Distribution ID</th> </tr> </thead> <tbody> <tr> <td>User</td> <td>TESTUSER1</td> </tr> </tbody> </table> </div> <p>Click on the PDF file and the report will open in a new window.</p>	Name	File Size (bytes)	Datetime Created	SQR_GSUGAC11_7241.log	1,706	08/14/2015 9:06:27.962982AM EDT	<b>gsugac11_7241.PDF</b>	25,842	08/14/2015 9:06:27.962982AM EDT	gsugac11_7241.out	568	08/14/2015 9:06:27.962982AM EDT	Distribution ID Type	Distribution ID	User	TESTUSER1								
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Distribution ID Type	Distribution ID																								
User	TESTUSER1																								

## REPORT BY DEPARTMENT

Navigation: **GSU> GSU Reports> Actuals Drilldown Report**

**Actuals Drilldown Report**

Enter any information you have and click Search. Leave fields blank for a list of all values.

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▼ Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Step	Action
4.	<b>Find an Existing Value</b> – If you have previously run this report. Click <b>Search</b> to see all the run control id's that you have previously used. Click on the run control that you want to use. <b>Skip step 2 and 3.</b>
5.	<b>Add a New Value</b> – If you have never run this report or want to run this report with different criteria's click on Add a New Value to create a run control Id.
6.	<p><b>Actuals Drilldown Report</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <hr/> <p>▼ Search Criteria</p> <p>Search by: Run Control ID begins with <input type="text" value="Dept_Report"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p><b>Run Control ID:</b> Enter the Dept ID for which you want to run this report in order to recollect the run control for further reports run. Note that this is not required and you can enter whichever value you choose. Click <b>Add</b></p>

**Actuals Drilldown Rpt**

Run Control ID Dept\_Report Report Manager Process Monitor Run

Business Unit:  Period Date:  Fiscal Year: 2016 Period: 2

Report Desired:  Grant/Project  General Accounting Fiscal YTD Override:

Number of projects:  Single  Multiple

**Single Project Options**

- Summary only
- Summary Plus Detail Options
- Current Period
- Year to Date
- All Activity
- Prior Years

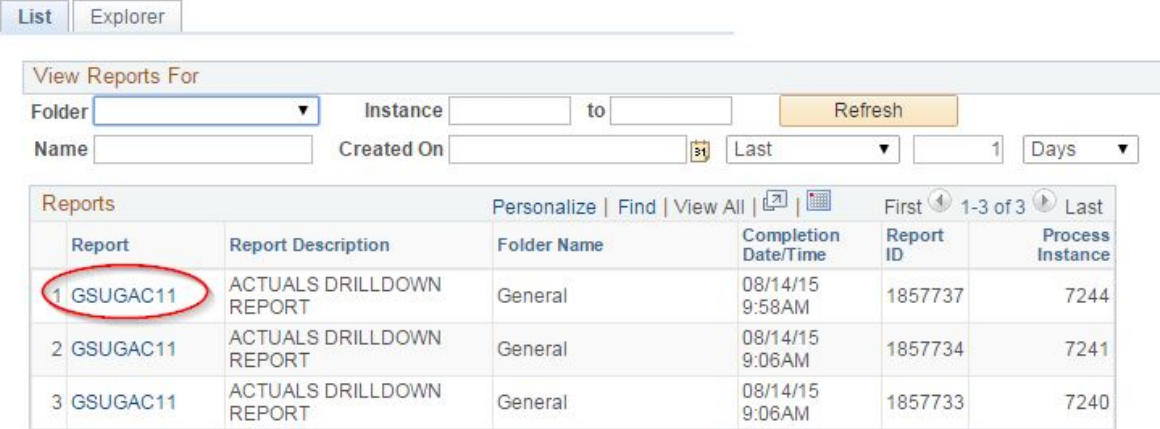

Project

Or **Multi-Project Options (Summary - Active Projects Only)**

- For Department
- For Accountant
- For Sponsor
- For Director
- For Frequency

Step	Action
1.	<b>Report Desired:</b> Click on radio button “ <b>Grant/Project</b> ”
2.	<b>Number of Projects-</b> Click on radio button “ <b>Multiple</b> ”
3.	<b>Multi Project Option:</b> Click on radio button “ <b>For Department</b> ”
4.	<b>Department-</b> Enter the <b>Department ID</b> for which you want to run this report
5.	<b>RUN.</b> Click <b>Run</b>

Step	Action								
10.	<p><b>A new window will open</b> Process Scheduler Request</p> <hr/> <p>User ID TESTUSER1 <span style="float: right;">Run Cont</span></p> <p>Server Name <input type="text"/> Run Date 08/14/2015</p> <p>Recurrence <input type="text"/> Run Time 9:33:24AM</p> <p>Time Zone <input type="text"/></p> <p>Process List</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Actuals Drilldown Report</td> <td>GSUGAC11</td> <td>SQR Report</td> </tr> </tbody> </table> <p>OK Cancel</p> <p>Click <b>OK</b> to “run” the report. Wait a few minutes before clicking on the Report Manager. It will take a little while for the report to finish running.</p>	Select	Description	Process Name	Process Type	<input checked="" type="checkbox"/>	Actuals Drilldown Report	GSUGAC11	SQR Report
Select	Description	Process Name	Process Type						
<input checked="" type="checkbox"/>	Actuals Drilldown Report	GSUGAC11	SQR Report						
11.	<p>Actuals Drilldown Rpt</p> <p>Run Control ID Dept_Report <b>Report Manager</b> Process Monitor <input type="button" value="Run"/></p> <p>Business Unit: GSUFS <input type="text"/> Period Date: 08/31/2015 <input type="text"/> Fiscal Year: 2016 Period: 2</p> <p>Report Desired: <input checked="" type="radio"/> Grant/Project <input type="radio"/> General Accounting Fiscal YTD Override: <input type="checkbox"/></p> <p>Number of projects: <input type="radio"/> Single <input checked="" type="radio"/> Multiple</p> <p>Single Project Options <span style="margin-left: 20px;">Or</span> Multi-Project Options (Summary - Active Projects Only)</p> <p><input checked="" type="radio"/> Summary only <input type="radio"/> For Department 110600000 <input type="text"/></p> <p>Summary Plus Detail Options <span style="margin-left: 20px;">Biology</span></p> <p>Click on <b>Report Manager</b> Hyperlink to view your report. Note that it might take up to a minute for the report to show up under your report manager.</p>								

Step	Action
12.	<div data-bbox="332 367 1485 793">  <p>The report manager keeps reports for about 10 days before deleting them from the Report list. Click <b>Refresh</b> until the report that you have just run shows on the list. Refer to the completion date/time on the right to distinguish between your reports. Click on the GSUGAC11 hyperlink to go to the window shown below.</p> </div>
13.	<div data-bbox="332 1108 1437 1411">  <p>Click on the PDF and your report will open as a pdf file.</p> </div>