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### Process 1: Financial Guideline Report

1. From the Main Menu page, select **Commitment Control > Budget Reports > SPPS Financial Guideline**
2. If this is the first time you are running the process you may need to create a run control ID. If you have already created one then you can search or type in the name previously used. You do not have to create a run control ID for each separate process and/or report you run; however, if you will run the same process or report repeatedly it is a good idea to have a dedicated run control for that process with the settings already set up
3. You will access the page with the Find an Existing Value tab displayed. Click on the Add a New Value tab if you are adding a new run control ID; otherwise, stay on the Find an Existing Value tab to use one previously created.

4. Enter a **Run Control ID** = BUD\_REPORT (ID cannot have any spaces in it so use the underscore instead of a space).
5. Click **Add** or **Search**. If you click Search you do not have to enter the run control ID first as you can select it from the search list that will appear at the bottom of the page.
6. The following page appears. Complete the run control page

7. Enter the range of ChartField values you want to run the report for. If you want all values for a ChartField enter % (wildcard) in both the 'from' and 'to' fields. Continue to step XX below to run and retrieve your report.

### Process 2: Financial Activity Report

8. From the Main Menu page, select **Commitment Control > Budget Reports > SPPS Financial Activity**
9. If this is the first time you are running the process you may need to create a run control ID. If you have already created one then you can search or type in the name previously used. You do not have to create a run control ID for each separate process and/or report you run; however, if you will run the same process or report repeatedly it is a good idea to have a dedicated run control for that process with the settings already set up
10. You will access the page with the Find an Existing Value tab displayed. Click on the Add a New Value tab if you are adding a new run control ID; otherwise, stay on the Find an Existing Value tab to use one previously created.

11. Enter a **Run Control ID** = BUD\_REPORT (ID cannot have any spaces in it so use the underscore instead of a space).

- Click **Add** or **Search**. If you click Search you do not have to enter the run control ID first as you can select it from the search list that will appear at the bottom of the page.
- The following page appears. Complete the run control page

**Financial Activity Report**

Run Control ID: BUD\_REPORT [Report Manager](#) [Process Monitor](#)

\*Fiscal Year  Accounting Period From  Accounting Period To

From Fund Code  To Fund Code

From Department  To Department

From Program Code  To Program Code

From Product  To Product

From Account  To Account

From Class Field  To Class Field

- Enter the range of ChartField values you want to run the report for. If you want all values for a ChartField enter % (wildcard) in both the 'from' and 'to' fields. Continue to step XX below to run and retrieve your report.

**Running and retrieving your report**

- After you complete the parameters, you can click **Save** and then click **Run**. Or you can just click **Run**, as the Run button will also save the changes you made to the page for future use. Clicking the Run button will retrieve the Process Scheduler Request page.

**Process Scheduler Request**

User ID: marianneh Run Control ID: BUD\_REPORT

Server Name:  Run Date:

Recurrence:  Run Time:

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Financial Activity Report	SDGL018	SQR Report	Web	PDF	Distribution

- The **Server Name** can be left blank and the process will run. You may also want to change the output type/format. This is optional as it usually defaults to the desired type/format.

- After clicking OK you will return to the **Run Control Parameter** page you were on previously. However, in the top right will display the process instance assigned to this request to run your report.

Financial Activity Report

Run Control ID: BUD\_REPORT [Report Manager](#) [Process Monitor](#)

Process Instance: 142098

\*Fiscal Year  Accounting Period From  Accounting Period To

From Fund Code  To Fund Code

From Department  To Department

From Program Code  To Program Code

From Product  To Product

From Account  To Account

From Class Field  To Class Field

- You would click on **Process Monitor** hyperlink next to see when the process completes and was successful. Details for this will be shown in a separate training quick reference guide called Process Monitor.
- Once the process is successful, return to the run control page and click on the **Report Manager** hyperlink.

View Reports For

User ID:  Type:  Last  Days

Status:  Folder:  Instance:  to:

Select	Report ID	Pracs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	136109	142098	<a href="#">Financial Activity Report</a>	19/11/2013 9:13:17AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	136037	142021	<a href="#">Comm. Cntrl. Budget Processor</a>	19/11/2013 8:21:56AM	Text Files (*.txt)	Posted	<a href="#">Details</a>

Select All  Deselect All

Click the delete button to delete the selected report(s)

- From the default **Report Manager List** page you are on, click on the **Administration** tab.
- Then find the desired report by the name or the process instance from the previous run control parameters page, and select the **Details** hyperlink to access the report output.

22. Select the desired report output under the **File List** section of the page. The one circled above is the PDF output file, but if you select a different output format there will be a different extension on the end of the report. The **file name** is made up of the Process Name\_Process Instance\_format extension. Click on the **file name** hyperlink to view the report and print or save.

Favorites | Main Menu > Commitment Control > Budget Reports > SPPS Financial Activity

**Report**

Report ID: 136109      Process Instance: 142098      [Message Log](#)

Name: SDGL018      Process Type: SQR Report

Run Status: Success

Financial Activity Report

**Distribution Details**

Distribution Node: FNPRD      Expiration Date: 26/11/2013

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">Fin_Activity_file.csv</a>	3,697	19/11/2013 9:13:48.387093AM CST
<a href="#">SQR_SDGL018_142098.log</a>	1,812	19/11/2013 9:13:48.387093AM CST
<a href="#">sdgl018_142098.PDF</a>	5,064	19/11/2013 9:13:48.387093AM CST
<a href="#">sdgl018_142098.out</a>	380	19/11/2013 9:13:48.387093AM CST

**Distribute To**

Distribution ID Type	*Distribution ID		
User	marianne	+	-

Report ID: SDGL018      Independent School District 625      Page No. 1 of 2  
 Financial Activity Report      Run Date 11/19/2013  
 Run Time 09:13:33

Intraschool Fund      Period JUL-2013 Thru JUN-2014

Description / Vendor Name	Actual	Journal ID	Voucher ID	Invoice ID	PO ID	Check#	Accounting DT
19-230-291-000-6394-0000							
Beginning YTD Activity	0.00						
Accounts Payable/ MOORE, KAYLOR	500.00	AP00003240	00027877	moore-51613		605318	18-SEP-2013
Accounts Payable/ HEN, KA LIA	500.00	AP00003240	00027881	hen-51613		605295	18-SEP-2013
Accounts Payable/ VANG, SUNNY	500.00	AP00003124	00027875	vange-51613		605131	18-SEP-2013
Accounts Payable/ UNIVERSITY OF NORTH DAKOTA	500.00	AP00003538	00030033	bennett-91713		606054	24-SEP-2013
Accounts Payable/ WEST VIRGINIA STATE UNIVERSITY	500.00	AP00003371	00030085	mumtingham-080		605666	24-SEP-2013
Accounts Payable/ CAMBELLA, VANESSA	500.00	AP00003540	00030041	campbell-91213		605827	26-SEP-2013
Total Period Activity	3,000.00						
Ending YTD Activity	3,000.00						
19-230-291-000-6401-0000							
Beginning YTD Activity	0.00						
Accounts Payable/ SWANSON, KELLY	7085	13.43	AP00003490	00026341	walmart 8262013	605913	10-SEP-2013
Accounts Payable/ SWANSON, KELLY	7085	15.42	AP00003529	00026339	barnes & noble-	605913	10-SEP-2013
Accounts Payable/ WITTMANN, JOHN	212.39	AP00003968	00026480	microweststore-		606810	10-SEP-2013
Accounts Payable/ SWANSON, KELLY	7085	15.42	AP00003529	00026333	barnes & noble-	605913	10-SEP-2013
Accounts Payable/ FISHER, MARI	250.00	AP00003749	00022298	fisher-12313		606572	19-SEP-2013
Accounts Payable/ WHEELER, MANDY	43.08	AP00003978	00030358	Walgreens-09191		606985	25-SEP-2013
Accounts Payable/ GROTH MUSIC CO	19.45	AP00003543	00031181	2098498		605987	01-OCT-2013
Total Period Activity	569.19						
Ending YTD Activity	569.19						
19-230-291-000-6430-0000							
Beginning YTD Activity	0.00						
FY13 P-CARD Charges Accounting	787.54	0000001675					06-AUG-2013
FY13 P-CARD Charges Accounting	630.00	0000001675					06-AUG-2013
FY13 P-CARD Charges Accounting	998.41	0000001675					06-AUG-2013
AP Manual Closures/ US BANK	-787.54	AP00000874	00013531	BLOOMQUIST CATH			06-AUG-2013