

# REVENUE SUMMARY

The following screen shots will show you how to access the Revenue Summary Report. This report will give you a quick look at the summary of your revenue associated with your area.

BOR MENUS>BOR GENERAL LEDGER>BOR GL REPORTS>REVENUE SUMMARY REPORT

The screenshot shows a web browser window with the Oracle PeopleSoft interface. The browser's address bar displays the URL: <https://prod.gafirst.usg.edu/pspr/fprod/EMPLOYEE/ERF>. The browser tabs include "PeopleSoft - Budget Office - Cl...", "Budget Activity Report", "Revenue Summary Report", and "Academics - International Pro...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The browser's toolbar includes "Convert", "Select", "Suggested Sites", "Clayton State University", "crystalreports.clayton.edu", "Web Slice Gallery", and "Oracle PeopleSoft Enterpr...". The browser's status bar includes "Page", "Safety", "Tools", and "100%".

The Oracle PeopleSoft interface shows the breadcrumb navigation: "Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Revenue Summary Report". The "ORACLE" logo is visible in the top left corner. The "Revenue Summary Report" title is displayed in the top right corner. Below the title, there is a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." The search interface includes a "Find an Existing Value" button, an "Add a New Value" button, a "Search Criteria" dropdown menu, a "Run Control ID: begins with" dropdown menu, a "Case Sensitive" checkbox, a "Search" button, a "Clear" button, a "Basic Search" button, and a "Save Search Criteria" button. The "Find an Existing Value" and "Add a New Value" buttons are also visible at the bottom of the search area.

At this time you can save this process as a favorite for future reference. You just need to click on the Add to Favorites link at the top and enter a description before clicking OK.

The screenshot shows a web browser window displaying the Oracle PeopleSoft interface. The browser's address bar shows the URL: `https://fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERP/s/WEBLIB_PTIFRAME.ISCRPT1.FieldFormula.IScript_PT_Popup`. The browser tabs include "PeopleSoft - Budget Office - Cl...", "Budget Activity Report", "Revenue Summary Report", and "Academics - International Pro...".

The application page is titled "Revenue Summary Report" and features a breadcrumb trail: "Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Revenue Summary Report". The page includes a search section with the following elements:

- Buttons: "Find an Existing Value" and "Add a New Value".
- Search Criteria: A dropdown menu.
- Run Control ID: A dropdown menu with "begins with" selected.
- Case Sensitive: A checkbox.
- Buttons: "Search", "Clear", "Basic Search", and "Save Search Criteria".

An "Add to Favorites" dialog box is open in the center of the screen. It contains the following text and fields:

- Title: "Add to Favorites"
- Text: "Please Enter a Unique Description for this Favorite"
- Field: "\*Description" with the value "Revenue Summary Report" and a clear button (x).
- Buttons: "OK" and "Cancel".

The status bar at the bottom of the browser shows the URL and a zoom level of 100%.

You would then need to click on the tab for Add a New Value. It would then ask you to give the Run Control ID a name such as REVENUE\_SUMMARY then click the Add button.

The screenshot shows a web browser window with the following elements:

- Browser Tabs:** PeopleSoft - Budget Office - Cl..., Budget Activity Report, Revenue Summary Report (active), Academics - International Pro...
- Address Bar:** https://fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERF
- Navigation:** Home | Worklist | Add to Favorites | Sign out
- Page Header:** ORACLE
- Breadcrumbs:** Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Revenue Summary Report
- Page Title:** Revenue Summary Report
- Buttons:** Find an Existing Value | Add a New Value
- Form:** Run Control ID: Revenue\_Summary
- Action:** Add
- Footer:** Find an Existing Value | Add a New Value
- Zoom:** 100%

Revenue Summary Report New Window | Help | Personalize Page

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

Business Unit: 28000    Fiscal Year: 2015    Fund Code:

From Acctg Period:    To Acctg Period:

From Department: %    To Department: %

From Account: %    To Account: %

From Class: %    To Class: %

**Save**

**Add**    **Update/Display**

At this time you would enter all the revenue account information associated with your area. Then click on the Run button at the top to initiate the process.

The screenshot shows a web browser window displaying the Oracle PeopleSoft interface for a Revenue Summary Report. The browser's address bar shows the URL: [https://fprod.gafirst.usg.edu/psp/fprod\\_1/EMPLOYEE/E](https://fprod.gafirst.usg.edu/psp/fprod_1/EMPLOYEE/E). The browser tabs include "PeopleSoft - Budget Offic...", "Budget Activity Report", "Revenue Summary Report", "Revenue Summary Re...", and "Academics - International...".

The Oracle PeopleSoft interface features a breadcrumb trail: "Main Menu > BOR Menus > BOR General Ledger > BOR GL Reports > Revenue Summary Report". The page title is "Revenue Summary Report".

At the top of the report area, there is a "Run Control ID" field containing "revenuesummary", a "Report Manager" link, a "Process Monitor" link, and a yellow "Run" button.

The main form contains several input fields for search criteria:

- Business Unit: 28000
- Fiscal Year: 2015
- Fund Code: 10600
- From Acctg Period: 1
- To Acctg Period: 12
- From Department: 4710100
- To Department: 4710200
- From Account: 400000
- To Account: 499999
- From Class: 11000
- To Class: 11000

At the bottom of the form, there are several action buttons: "Save", "Return to Search", "Previous in List", "Next in List", "Add", and "Update/Display".

The bottom right corner of the browser window shows a zoom level of 100%.

When the Process Scheduler Request screen appears, you will need to click on OK in order to schedule the process.

Process Scheduler Request

User ID: nharris17      Run Control ID: revenuesummary

Server Name:       Run Date: 04/02/2015

Recurrence:       Run Time: 10:25:26AM      [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Revenue Summary Report	BORRG025	SQR Report	Web	PDF	Distribution

OK      Cancel

After clicking on OK, it will take you back to the report format screen. You will notice a Process Instance number just under the Run button at the top of the page. You need to make a note of this Process Instance number that will be used in the next section of the process. At this time, you will click on the Process Monitor link.

The screenshot shows a web browser window displaying the Oracle PeopleSoft Revenue Summary Report. The browser's address bar shows the URL: [https://fprod.gafirst.usg.edu/psp/fprod\\_1/EMPLOYEE/E](https://fprod.gafirst.usg.edu/psp/fprod_1/EMPLOYEE/E). The browser tabs include "PeopleSoft - Budget Offic...", "Budget Activity Report", "Revenue Summary Report", "Revenue Summary Re...", and "Academics - International...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The browser's address bar also shows "Convert" and "Select" options. The browser's suggested sites include "Clayton State University", "crystalreports.clayton.edu", "Web Slice Gallery", and "Oracle PeopleSoft Enterpr...". The browser's toolbar includes "Home", "Worklist", "Add to Favorites", and "Sign out". The browser's status bar shows "New Window", "Help", "Personalize Page", and "100%".

The Oracle PeopleSoft interface shows the "Revenue Summary Report" page. The page title is "Revenue Summary Report". The page includes a "Run" button and a "Process Instance: 7160841" label. The page also includes a "Run Control ID" field with the value "revenuesummary". The page includes a "Report Manager" link and a "Process Monitor" link. The page includes a "Business Unit" field with the value "28000", a "Fiscal Year" field with the value "2015", and a "Fund Code" field with the value "10600". The page includes a "From Acctg Period" field with the value "1" and a "To Acctg Period" field with the value "12". The page includes a "From Department" field with the value "4710100" and a "To Department" field with the value "4710200". The page includes a "From Account" field with the value "400000" and a "To Account" field with the value "499999". The page includes a "From Class" field with the value "11000" and a "To Class" field with the value "11000". The page includes a "Save" button, a "Return to Search" button, a "Previous in List" button, a "Next in List" button, an "Add" button, and an "Update Display" button.

If at this time the Run Status on your Process Instance doesn't show as Success or Distribution Status doesn't show as Posted, you will need to click on the Refresh button at the top until it reaches this status.

The screenshot shows the Oracle PeopleSoft Process Monitor interface. At the top, there are navigation tabs for 'Process List' and 'Server List'. Below this is a search area titled 'View Process Request For' with fields for 'User ID' (nharris17), 'Type', 'Last', and 'Days', along with a 'Refresh' button. There are also fields for 'Server', 'Name', 'Instance', and 'to'. Below the search area are dropdown menus for 'Run Status' and 'Distribution Status', and a checked 'Save On Refresh' option.

The main section is a table titled 'Process List' with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains four rows of process instances, all with a 'Run Status' of 'Success' and a 'Distribution Status' of 'Posted'.

Below the table, there are buttons for 'Save' and 'Notify', and a link to 'Go back to Revenue Summary Report'. At the bottom, there are links for 'Process List' and 'Server List', and a zoom level of 100%.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	7160841		SQR Report	BORRG025	nharris17	04/02/2015 10:25:26AM EDT	Success	Posted	Details
<input type="checkbox"/>	7160766		SQR Report	BORRG025	nharris17	04/02/2015 10:17:35AM EDT	Success	Posted	Details
<input type="checkbox"/>	7160427		SQR Report	BORRG045	nharris17	04/02/2015 9:39:03AM EDT	Success	Posted	Details
<input type="checkbox"/>	7156467		SQR Report	GLS7002	nharris17	04/01/2015 11:51:48AM EDT	Success	Posted	Details



In order to access the report that you just ran, you will need to click on the Details link in the line for your Process Instance number.

The screenshot shows the Oracle PeopleSoft interface. A 'Process Detail' window is open, displaying information for process instance 7160841. The window includes fields for Instance, Name, Type, Run Status, and Distribution Status. Below these are sections for 'Run' and 'Date/Time' with various actions and logs.

**Process Detail**

Process

Instance 7160841      Type SQR Report  
Name BORRG025      Description Revenue Summary Report  
Run Status Success      Distribution Status Posted

Run      Update Process

Run Control ID revenuesummary       Hold Request  
Location Server       Queue Request  
Server PSUNX3       Cancel Request  
Recurrence       Delete Request  
    Restart Request

Date/Time      Actions

Request Created On 04/02/2015 10:26:14AM EDT      Parameters      Transfer  
Run Anytime After 04/02/2015 10:25:26AM EDT      Message Log  
Began Process At 04/02/2015 10:26:24AM EDT      Batch Timings  
Ended Process At 04/02/2015 10:26:39AM EDT      View Log/Trace

OK      Cancel

From the Process Detail screen, click on the link [View Log/Trace](#).

The screenshot shows the Oracle PeopleSoft Enterprise interface. The browser address bar displays the URL: [https://fprod.gafirst.usg.edu/psp/fprod\\_1/EMPLOYEE/E](https://fprod.gafirst.usg.edu/psp/fprod_1/EMPLOYEE/E). The breadcrumb navigation path is: [Main Menu](#) > [BOR Menus](#) > [BOR General Ledger](#) > [BOR GL Reports](#) > [Revenue Summary Report](#) > [Process Monitor](#). The Oracle logo is visible in the top left corner. The main content area is divided into two panes: 'Process List' and 'Server List'. The 'Process List' pane contains a table with the following data:

Select	Instance	Seq.	Process Type	Process Name
<input type="checkbox"/>	7160041		SQR Report	BORRG025
<input type="checkbox"/>	7160766		SQR Report	BORRG025
<input type="checkbox"/>	7160427		SQR Report	BORRG045
<input type="checkbox"/>	7156467		SQR Report	GLS7002

The 'Server List' pane is currently empty. A 'View Process Request For' section is visible, containing fields for User ID (nharris17), Type, Server, Name, Run Status, and Distribution Status. A 'Process Detail' dialog box is open, titled 'View Log/Trace'. It displays the following information:

**Report**

Report ID: 6438645      Process Instance: 7160841      Message Log  
Name: BORRG025      Process Type: SQR Report  
Run Status: Success

Revenue Summary Report

**Distribution Details**

Distribution Node: DNODE      Expiration Date: 07/01/2015

**File List**

Name	File Size (bytes)	Datetime Created
SQR_BORRG025_7160841.log	1,794	04/02/2015 10:26:39.798431AM EDT
borrg025_7160841.PDF	5,491	04/02/2015 10:26:39.798431AM EDT
borrg025_7160841.out	315	04/02/2015 10:26:39.798431AM EDT

**Distribute To**

Distribution ID Type: \*Distribution ID  
User: nharris17

The dialog box includes a 'Return' button and 'OK'/'Cancel' buttons at the bottom. The status bar at the bottom of the browser window shows the JavaScript code: `javascript:submitAction_win1(document.win1,'PMN_DERIVED_MESSAGELOG_BTN');` and the zoom level is set to 100%.

From the View Log/Trace screen, you will click on the link for the PDF file in the File List. This will bring up the Budget Status Report that you just ran. You can then either Save As or Print the report.

REVENUE SUMMARY REPORT  
Clayton State University

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Business Unit: 28000  
Fiscal Year: 2009                      From Acct. Period: 1    To Acct. Period: 12

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Fund: 10600                      Department: 4710100    Transcript Fee

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Class: 11000    Gen Opns - General                      Project/Grant:

<u>409000 - Other Fees</u>		
409601    #Transcript Fee		-60,610.50
		-----
	Class Sub-Total	-60,610.50
		-----
	Dept Total	-60,610.50