



Overview

The HR Expenditure Projection by Department Report lists budget amounts, actual expenditures and projected budget balances by department, fund code, program, class, project, account, and employee last name. This report is run from PeopleSoft Human Resources (HR), not from PeopleSoft Finance.

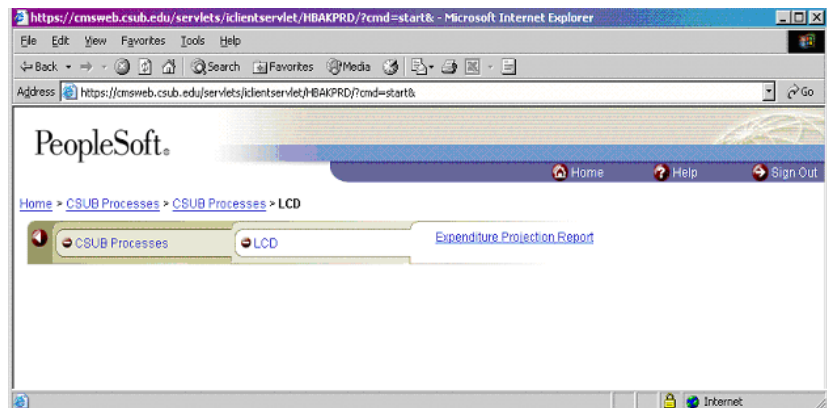
Predecessor Steps

- Log in to PeopleSoft HR at <https://cmsweb.csu.edu/servlets/iclientservlet/HBAKPRD/?cmd=login&languageCd=ENG>
- Be sure to change your password the first time you log in with your HR ID. Please note that your HR ID and password are maintained separately from you PeopleSoft Finance ID and password.

Detailed Steps

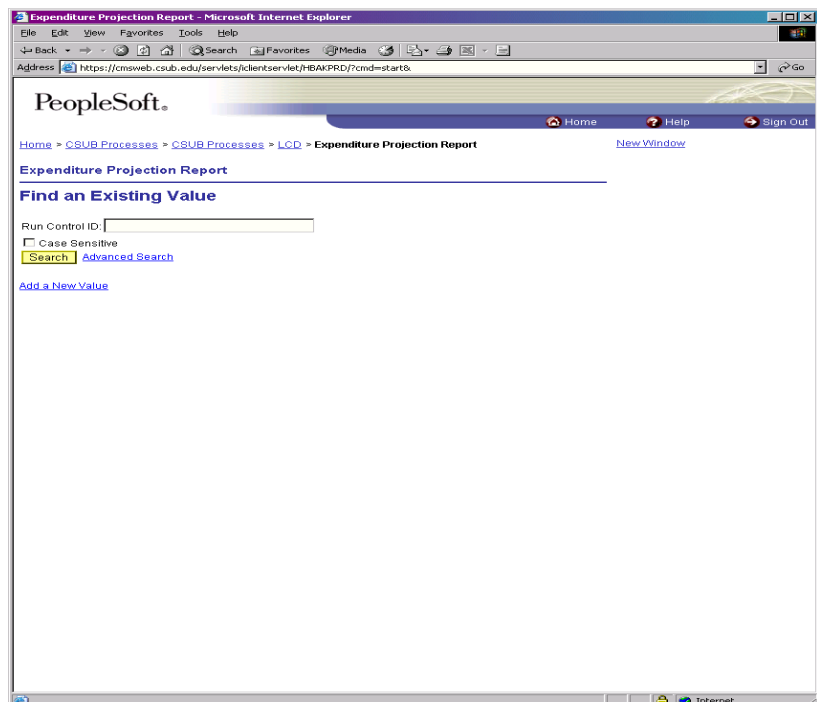
Navigation:

- 1) CSUB Processes
- 2) CSUB Processes
- 3) LCD
- 4) Expenditure Projection Report



- 5) Select, or add, a Run Control ID. The Run Control ID can be any value (e.g., an abbreviated report name, your initials, etc.).

You will use the same Run Control ID each time you run the report.





- 6) Enter Report Parameter Values:
- **Business Unit: BKCMP**
 - **Fiscal Year: 2004 (or appropriate value)**
 - **Department:**
Enter the PeopleSoft Department ID (D99999)

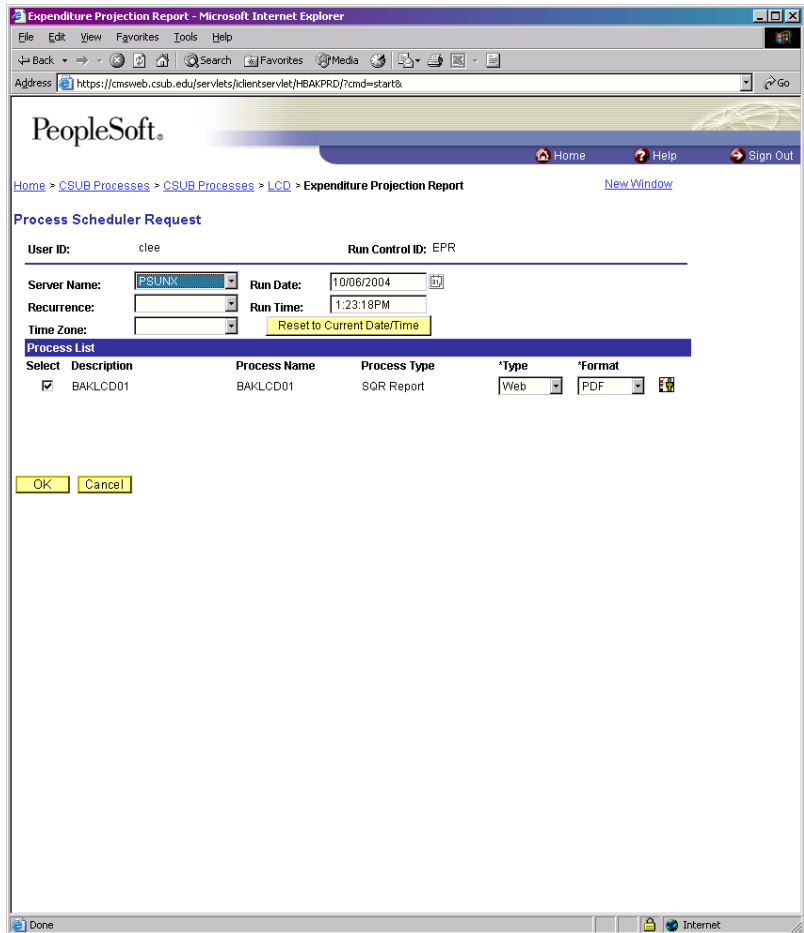
These values will be saved on exit and will not need to be changed unless the report is run for a different Fiscal Year and/or Department.

- 7) Click the **Run** button.

- 8) Enter the Job Parameters:
- Server Name: PSUNX
 - Type: Web
 - Format: PDF



- 9) Click the **OK** button to submit the report. After clicking **OK** to submit the report, you will be taken back to the initial run control page.



- 10) Once the report has been submitted,

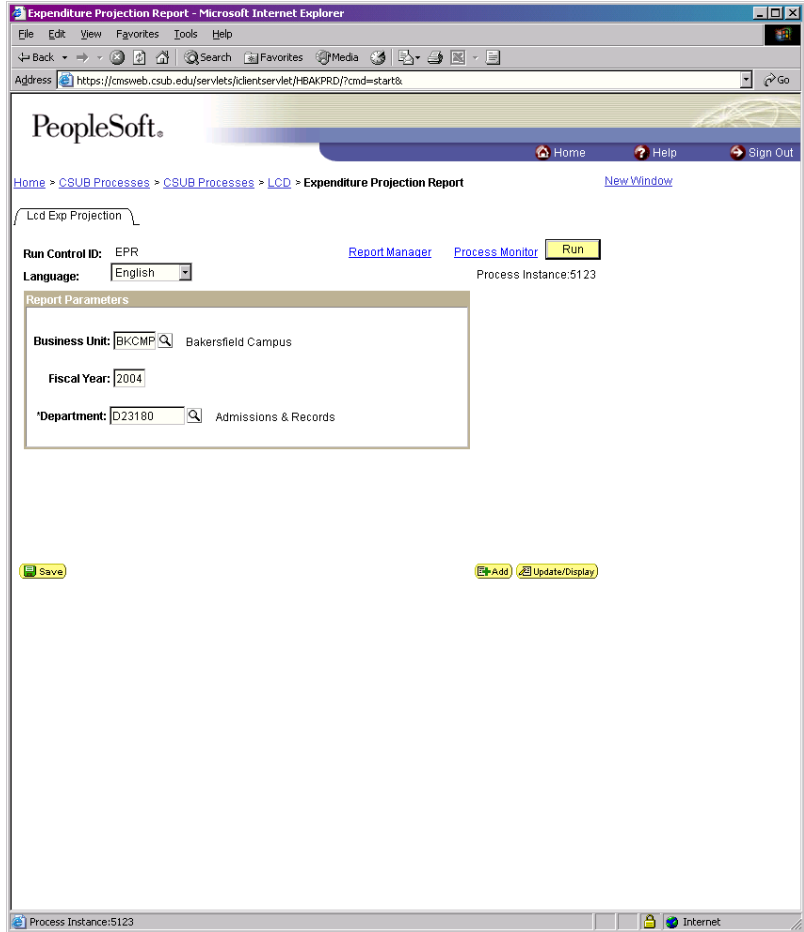


you will be taken back to this original run control page.

To access the report output, click on the Process Monitor hyperlink.

Notes

- There are no fields to populate on this page. Under the **Run** button, note that a Process Instance has been assigned; in this case it is 5123. Typically, you need not be concerned with this. However, should the report error out and you need to report the problem to technical staff, they will often ask for this value.



11) Click the [Details](#) hyperlink beside the report you wish to view output from.



The screenshot shows the PeopleSoft Process Monitor interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: https://cnsweb.csu.edu/servlets/identServlet?HBAKPRD/?cmd=start&. The page title is "Process Monitor - Microsoft Internet Explorer". The breadcrumb navigation is: Home > PeopleTools > Process Monitor > Inquire > Process Requests. There are links for Home, Help, and Sign Out. Below the breadcrumb is a "Process List" tab and a "Server List" tab. A "View Process Request For" section contains several filters: UserID (cle), Process Type (dropdown), Last (checkbox), None (dropdown), Refresh button, Server Name (dropdown), Process (dropdown), Instance (dropdown), to (dropdown), View Job Items checkbox, and Save On Refresh checkbox. Below the filters is a table with the following data:

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
5123	SQR Report	BAKLCD01	cle	10/06/2004 1:23:18PM PDT	Success	Details

Below the table are links for "Go back to Expenditure Projection Report", a "Save" button, and "Process List | [Server List](#)". The status bar at the bottom shows "Process Instance: 5123".

12) Click the View Log/Trace hyperlink to access the report output files.



The screenshot shows the PeopleSoft Process Monitor interface in a Microsoft Internet Explorer browser window. The browser address bar shows the URL: https://cnsweb.csu.edu/services/clientervlet/MBAKPRD/?cmd=start&. The page title is "Process Monitor - Microsoft Internet Explorer".

The main content area displays the following information:

- Process Detail:**
 - Process:**
 - Instance: 5123
 - Name: BAKLCD01
 - Type: SQR Report
 - Description: BAKLCD01
- Run:**
 - Run Control ID: EPR
 - Location: Server
 - Server: PSUNIX
 - Recurrence:
- Update Process:**
 - Hold Request
 - Queue Request
 - Cancel Request
 - Delete Request
 - Restart Request
- Date/Time:**
 - Request Created On: 10/06/2004 1:23:41PM PDT
 - Run Anytime After: 10/06/2004 1:23:18PM PDT
 - Began Process At: 10/06/2004 1:23:45PM PDT
 - Ended Process At: 10/06/2004 1:24:03PM PDT
- Actions:**
 - [Parameters](#) Transfer
 - [Message Log](#)
 - Batch Timings
 - [View Log/Trace](#)

At the bottom of the main content area, there are two buttons: "OK" and "Cancel".

The status bar at the bottom of the browser window shows "Process Instance:5123" and "Internet".

- Click the field ending “.PDF” as that contains the actual report output. The Message Log and Trace File output are standard items that contain no



report output. To view the output file, click on the file with the “.PDF” ending (in this example it is “baklcd01_5123.PDF”).

- 14) Adobe Acrobat will open and you will see the output. If you do not receive output, you may need to review the Message Log to determine why.

NOTE: You will only be able to run the report for selected departments. If you do not have access to a department, no output will be generated.

Instance: 5123 Type: SQR Report
 Name: BAKLCD01 Run Cnd ID: EPR
 Status: Success Submitted By: clec
 Server: PSUNX Recurrence:

Name	Size	CreationDate
Message Log	1136 bytes	2004-10-06 13:23:50
Trace File	155569 bytes	2004-10-06 13:23:50
baklcd01_5123.PDF	155239 bytes	2004-10-06 13:23:50