

# Printing Monthly Research Statements By Researcher

Sign in to PeopleSoft Financials

*Navigate: UWO Menu*

*UWO Research*

*Grant Detail by Researcher*

*i) Add a new Value (first time only, set up run control by naming your print job)*

*Click on 'Add'*

*OR*

*ii) Find an existing Value (not first time), select the name of our print job  
Click on 'Search'*

Enter the Fiscal Year and Accounting Period for the reports that you want to print.

2009 = May 1 2008 to April 30 2009

2010 = May 1 2009 to April 30 2010, etc...

Period 1 = May

Period 2 = June

Period 3 = July ....

Period 11 = March

Period 12 = April

- **If printing the statements for one researcher enter the first 5 characters of a researcher's grant number (RXXX) in the \*Researcher Profile From and To boxes.**
- If printing statements for more than one researcher enter the first 5 characters of the first researcher in the \*Researcher Profile From box and the first 5 characters of the last researcher in the \*Researcher Profile To box. Note: This may take some time to run depending on the number of statements you are running.
- You will only be able to print statements for those accounts you have been given access to.

# Printing Monthly Research Statements By Researcher

## Grant Detail by Researcher

Run Control ID: PrintReport

[Report Manager](#) [Process Monitor](#)

Run

Process Instance:1482086

### Research Grant Report (UFSRA101)

\*Fiscal Year:

2009

\*Accounting Period:

7

#### Researcher Profile

\*Researcher Profile From:

R1492

\*Researcher Profile To:

R1492

Exclude Closed Grants (Unchecked will print both Active and Inactive Grants)

Save

Return to Search

Notify

Add

Update/Display

Click on 'Save'.

Click on 'Run'.

## Process Scheduler Request

User ID: DBABCOCK

Run Control ID: PrintReport

Server Name:

PSNT

Run Date:

11/24/2008

Recurrence:

Run Time:

4:33:24PM

Reset to Current Date/Time

Time Zone:

### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Grant Detail by Researcher	UFSRA101	Crystal	Window	PDF	<a href="#">Distribution</a>

OK

Cancel

You may see a warning message about your pop-up blocker settings. Ensure that pop-ups are allowed for all web urls from [finance.uwo.ca](http://finance.uwo.ca).

# Printing Monthly Research Statements By Researcher

Monthly statements can be run directly to your computer when printing statements for only one researcher.

Ensure the \*Type Window says 'Window' and \*Format Window says 'PDF'.

Click on 'OK'

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If printing all the research statements for one or more department code (orgs) it is suggested that these be run to the Web (i.e. the \*Type Window = 'Web'). **Processing time is dependent on the volume of users on the system at a particular time.** You will be able to continue using/processing in PeopleSoft and you can retrieve your report by navigating through 'Reporting Tools' (see below for instructions) at a later time. Once triggered to run, you can even shut down your computer. Your report will be waiting for you when you re-boot your system, by navigating through 'Reporting Tools' (see below for instructions).

## A. Retrieving your report using the Process Monitor:

When running a report to the Web, PS will flip back to the previous screen, but the report **is** processing. Click on 'Process Monitor' (top right) to determine the status of your report (i.e. queued, processing, success). Ensure the report name listed is UFSRA101. Click on 'Refresh' (top right) periodically, until the 'Run Status' indicates 'Success'. Click on 'Details', which takes you to the 'Process Detail' screen. Click on 'View Log/Trace' (bottom right) and then select the UFSRA101 report.

## B. Retrieving your report using Reporting Tools:

*Reporting Tools*

*Report Manager*

*Open*

 General

Select the GRANT DETAIL BY RESEARCHER – YYYY-MM-DD report

Select the UFSRA101 PDF file