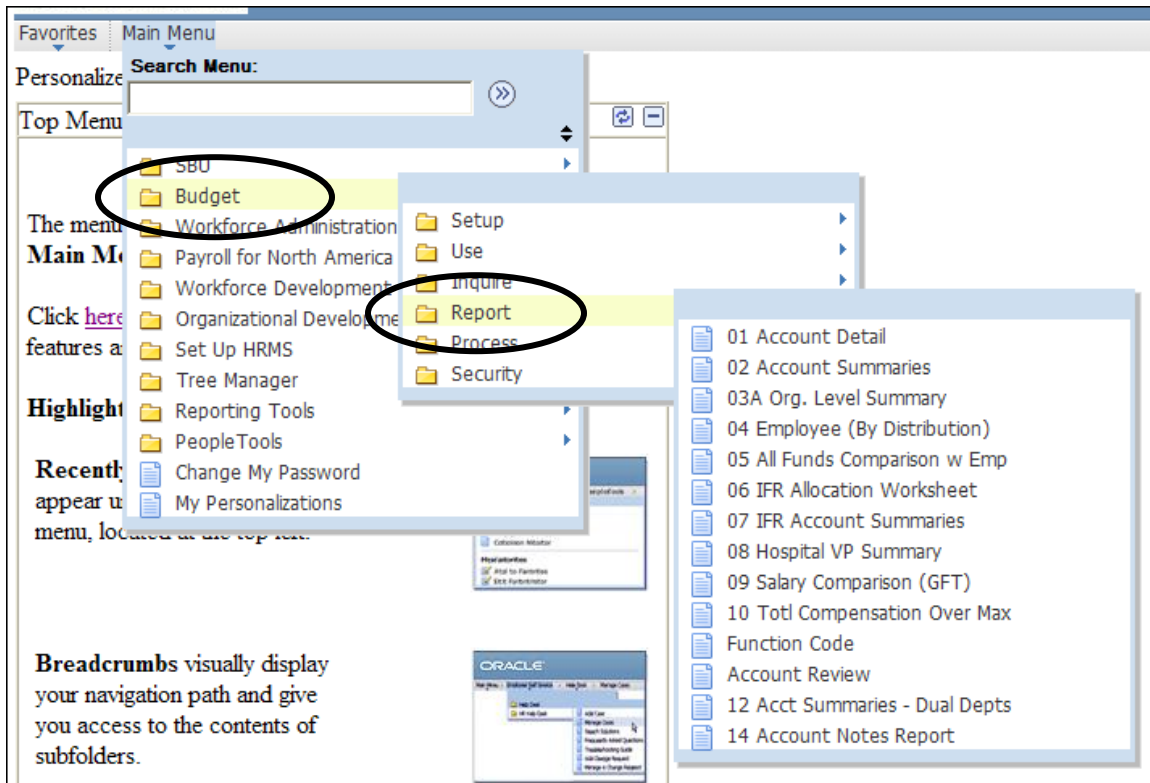


Printing CBM Reports in PeopleSoft Version 9.0 (Tools 8.55)

With the new version of PeopleTools 8.55, it was necessary to revise the reporting process to access a secure Crystal Reports server.

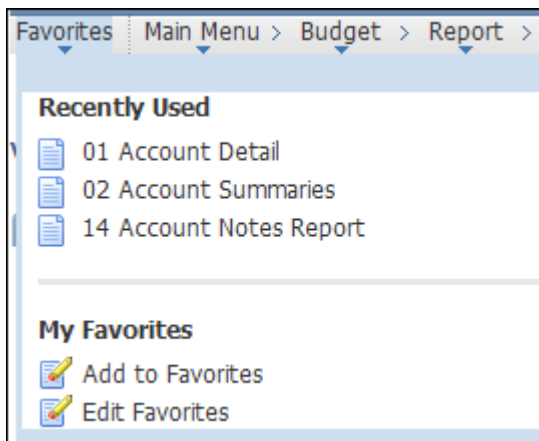
NOTE: REPORTS SHOULD NOT BE RUN IN INTERNET EXPLORER (IE).

To access the CBM Reports list, click Main Menu; then choose Budget – Report.



The list of CBM reports (based on your CBM security profile) will be displayed. Click on any report in the list.

An alternate way to access CBM reports is through Favorites. This shows reports you have recently used. Click on the report name link to access a report in the list.



After you choose a report, the Run Control ID Search page will be displayed. In order to print in PeopleSoft, at least one Run Control ID needs to be set up to hold the processing and print parameters.

Notice there are two tabs: Find an Existing Value and Add a New Value.

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

Find an Existing Value **Add a New Value**

Search by: Run Control ID begins with

☐ Case Sensitive

Search [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

If you have an existing Run Control ID, click on **Search** in the Find an Existing Value tab. If you have multiple Run Control IDs, a list of your Run Control IDs will be displayed. Click a Run Control ID from the list and the Report page will be displayed.

Note that if you have only one Run Control ID, the Report page (where you input Model, Account, and other report parameters) will be displayed when you click the Search button.

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

Find an Existing Value **Add a New Value**

Search by: Run Control ID begins with

☐ Case Sensitive

Search [Advanced Search](#)

Search Results
View All First 1-2 of 2 Last

Run Control ID	Language Code
BUDGET	English
SK	English

[Find an Existing Value](#) | [Add a New Value](#)

If you do not have an existing Run Control ID, click on the tab Add a New Value. Enter a name for your Run Control ID that is no longer than 13 characters with no spaces. Click the Add button and the Report page will be displayed.

01 Account Detail

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Each CBM report has a page where you input Model, Account, Department, or Fund, and other specific report parameters.

Input the Model and other Parameters for the selected report. Click the Run button.

****Note that the Model ID shown in the following images may NOT represent the current model year.****

Account Detail Rpt

Run Control ID: DIANE [Report Manager](#) [Process Monitor](#) [Run](#)

Model ID: 2018 Fiscal Year 2017/2018 [Budget Documentation](#)

Department:

Account: 33130800 JC Continued Readiness

The Process Scheduler Request page will be displayed. This is where you will choose the specific report you want to run and set up the output parameters.

Make sure the Server Name is PSUNX.

Check off the report version you wish to run; i.e. Hospital Account Detail.

Click OK.

Process Scheduler Request

User ID DTHIDE Run Control ID DIANE

Server Name PSUNX Run Date 10/30/2017
Recurrence Name Run Time 12:33:23PM
Time Zone

Reset to Current Date/Time

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☐	Account Detail Report	SUBMS01	SQR Report	Web	PDF	Distribution
☒	Hospital Account Detail	SUBMS01A	SQR Report	Web	PDF	Distribution
☐	Account Detail (FTE/Title)	SUBMS1TF	SQR Report	Web	PDF	Distribution

OK Cancel

The Report page will again be displayed. Note that it now shows the Process Instance number for your print job under the Run button.

Account Detail Rpt

Run Control ID: DIANE

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

Process Instance: 10036540

Model ID: 2018 Fiscal Year 2017/2018 [Budget Documentation](#)

Department:
Account: 33130800 JC Continued Readiness

Click on Process Monitor.

The Process List page will be displayed. It shows the reports you have processed with the most recent report listed at the top.

Click the dropdown box to the left of the Refresh button and choose Days.

Make sure that the Type dropdown is blank.

Click the Refresh button to update the Run Status column in the grid.

The screenshot shows the 'Process List' page. At the top, there are tabs for 'Process List' and 'Server List'. Below them is a section titled 'View Process Request For' containing several search filters: 'User ID' (DTHIDE), 'Type' (blank), 'Last' (dropdown), '10 Days' (range), 'Refresh' (button), 'Server' (dropdown), 'Name' (text), 'Instance From' (text), 'Instance To' (text), 'Run Status' (dropdown), 'Distribution Status' (dropdown), and a 'Save On Refresh' checkbox. Below the filters 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 five rows of data, all with 'Run Status' as 'Success' and 'Distribution Status' as 'Posted'. The 'Details' link for the first row is circled.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	10036540		SQR Report	SUBMS01A	DTHIDE	10/30/2017 12:33:23PM EDT	Success	Posted	Details
☐	10036531		SQR Report	SUBMS4TS	DTHIDE	10/30/2017 12:18:06PM EDT	Success	Posted	Details
☐	10036521		SQR Report	SUBMS4TS	DTHIDE	10/30/2017 12:03:56PM EDT	Success	Posted	Details
☐	10036442		SQR Report	SUBMS14C	DTHIDE	10/30/2017 9:49:02AM EDT	Success	Posted	Details
☐	10036413		SQR Report	SUBMS02M	DTHIDE	10/30/2017 8:31:59AM EDT	Success	Posted	Details

Each print job that you have submitted will show on an individual line that begins with its Process Instance number.

Click the Refresh button until the print job in the grid shows Run Status of Success and Distribution Status of Posted; this means that your print job has completed processing.

When your report shows Run Status of Success and Distribution Status of Posted, click the link to the right of the report that says Details.

The Process Detail page will be displayed.

For all reports except Report 05, click the View Log/Trace link.

Process Detail

Process	
Instance 10036540	Type SQR Report
Name SUBMS01A	Description Hospital Account Detail
Run Status Success	Distribution Status Posted
Run	Update Process
Run Control ID DIANE	☐ Hold Request
Location Server	☐ Queue Request
Server PSUNX	☐ Cancel Request
Recurrence	☒ Delete Request
	☐ Re-send Content ☐
Date/Time	Actions
Request Created On 10/30/2017 12:46:42PM EDT	Parameters Transfer
Run Anytime After 10/30/2017 12:33:23PM EDT	Message Log
Began Process At 10/30/2017 12:46:57PM EDT	Batch Timings
Ended Process At 10/30/2017 12:47:11PM EDT	View Log/Trace
OK Cancel	

Clicking on the link will open up the View Log/Trace page.

Click on your report listed under the URL Links.

View Log/Trace

Report			
Report ID	6915993	Process Instance	10036540 Message Log
Name	SUBMS01A	Process Type	SQR Report
Run Status	Success		
Hospital Account Detail			
Distribution Details			
Distribution Node	psnsrepos2	Expiration Date	11/29/2017
File List			
Name	File Size (bytes)	Datetime Created	
SQR SUBMS01A 10036540.log	1,852	10/30/2017 12:47:11.002565PM EDT	
subms01a 10036540.out	5,052	10/30/2017 12:47:11.002565PM EDT	
Distribute To			
Distribution ID Type	*Distribution ID		
User	DTHIDE		
URL Links			
Hospital FTE			

NEW: SECURE CRYSTAL REPORTS SERVER

All reports are accessible via the secure Crystal Reports server. From the Log On screen, make sure the CMS Name is set to CRWPROD:6400. (You should only need to set this up once.)

Input your NETID password and click the Log On button.

(Note if your PeopleSoft USERID and your NETID are different, you will need to update to your NETID as the default will be your PeopleSoft USERID.)

BusinessObjects Enterprise Log On

CMS Name:	CRWPROD:6400
User Name:	DTHIDE
Password:	
Authentication:	Windows AD
	Log On

Your report will open in a separate window in Crystal Reports Viewer.

Crystal Reports Viewer

+

13/BOE/CMC/variable/CrystalReports/viewrpt.cwr?wid=94f68132fb18c6ef&promptex-processinstance=10036541&tid=13

Stony Brook Universit... Suggested Sites Web Slice Gallery Citrix Access Gateway

Per Diem	0.40	50,000
Sub-Total		50,000
Sub-Total		50,007
Other Than Personnel Services		
Contractual Services		20,000
Consulting		
Contractual Services		20,000
Spec Contractual Serv.		
Other Expense		21,812
Books, Subcrip, Memberships		
Other Expense		84,950
Other Fees		
Other Expense		6,050
Outside Training Registr Fees		
Sub-Total		152,812
Total Expenses		462,914

Printed On: 10/30/2017 1:11:22PM

Report SUBMC01A

Page 1 of 3

Budget Model Id: 2018

Campus Budget Module Report
Hospital Account Detail Report

OPRID: DTHIDE
PRCS#: 10036541

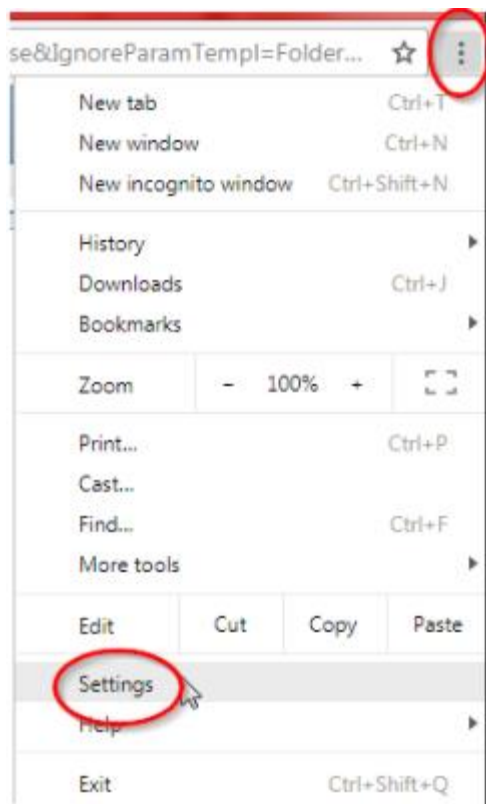
33130800 - JC Continued Readiness

Title	F.T.E.	Model Year 2017/2018
Balance		-462,914
Total FTE Instructional	0.00	
Total FTE Non Instructional	2.00	
Total Overtime FTE	0.00	
Total Contract Labor FTE	0.00	
Total Per Diem FTE	0.40	

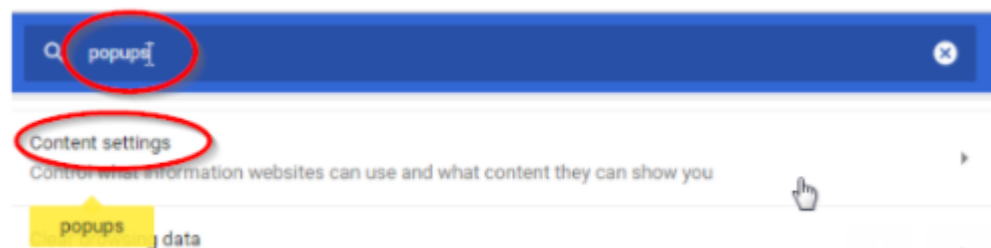
If your report does not open in a new window, then you will need to allow pop-ups in your browser. You will only need to do this once.

If you are using **Google Chrome**:

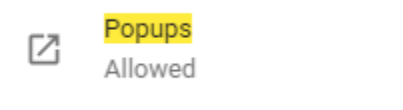
Click on the three dots in the upper right-hand corner and select Settings from the dropdown.



Type “popups” in the search bar and select Content settings.



Select Popups from the Content settings list.

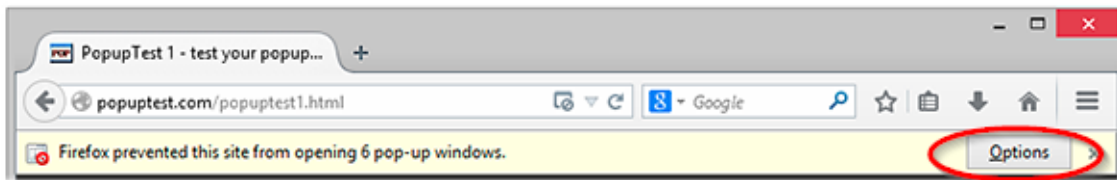


Click on the circle so that it moves to the right and turns blue. This action will allow popups in your Chrome browser.



If you are using **Mozilla Firefox**:

Select the Options button in the info bar.



Select “Allow/Block pop-ups for this site” from the menu.

Your report will open in a separate window in the Crystal Reports Viewer.

In the upper left area of the Crystal Reports Viewer, you will see this icon:



To print your report: Click on the Printer icon.

To download your report to Excel or PDF or Crystal Reports (if you have this software installed on your machine): Click on the Download icon.

In both cases, the Export box will open; click Export to open a file for printing or downloading. Note that even though the report presents as Landscape in Crystal Reports Viewer, you will need to select Landscape when you print from the file you export to.

Print to PDF

Page Range:

☒ All Pages
☐ Select Pages

From:

To:

Print to PDF:

The viewer must export to PDF to print. Choose the Print option from the PDF reader application once the document is opened. Note: You must have a PDF reader installed to print. (eg. Adobe Reader)

Export

Note: If you have any difficulty exporting your file from the Crystal Reports Viewer, please contact Client Support so they can address the issue which may be related to your computer setup or how Adobe is installed on your machine.

To view Report 05, click on Process Name SUBMR05.

Process List

Server List

View Process Request For

User ID

KRCAPPELLINI

Type

Last

10

Days

Refresh

Server

Name

Instance From

Instance To

Run Status

Distribution Status

Save On Refresh

Process List

Personalize | Find | View All

First 1-49 of 49 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	10036604		PSJob	SUBMR05	KRCAPPELLINI	10/30/2017 3:16:48PM EDT	Success	Posted	Details

Clicking on the Process Name will open the Process Detail page.

Select the second link on the Process Detail page.

Process Detail

Process Name SUBMR05 Refresh

Main Job Instance 10036604

Left | Right

 [10036604 - SUBMR05 Success](#)

 [10036605 - SUBMS05 Success](#)

Click on the View Log/Trace link to open the View Log/Trace page.

Process Detail

Process	
Instance 10036605	Type SQR Report
Name SUBMS05	Description All Funds Comparison Report
Run Status Success	Distribution Status Posted

Run	Update Process
Run Control ID KRC	☐ Hold Request
Location Server	☐ Queue Request
Server PSUNX	☐ Cancel Request
Recurrence	☐ Delete Request
	☐ Re-send Content
	☐ Restart Request

Date/Time	Actions
Request Created On 10/30/2017 3:16:50PM EDT	Parameters Transfer
Run Anytime After 10/30/2017 3:16:48PM EDT	Message Log
Began Process At 10/30/2017 3:17:00PM EDT	Batch Timings
Ended Process At 10/30/2017 3:17:14PM EDT	View Log/Trace

OK Cancel

Once the View Log/Trace page is opened, select the second link in the File List.

The second link will have the file extension, indicating the format of the report (i.e. PDF).

View Log/Trace

Report

Report ID 6916053 **Process Instance** 10036605 [Message Log](#)
Name SUBMS05 **Process Type** SQR Report
Run Status Success

All Funds Comparison Report

Distribution Details

Distribution Node psnsrepos2 **Expiration Date** 11/29/2017

File List

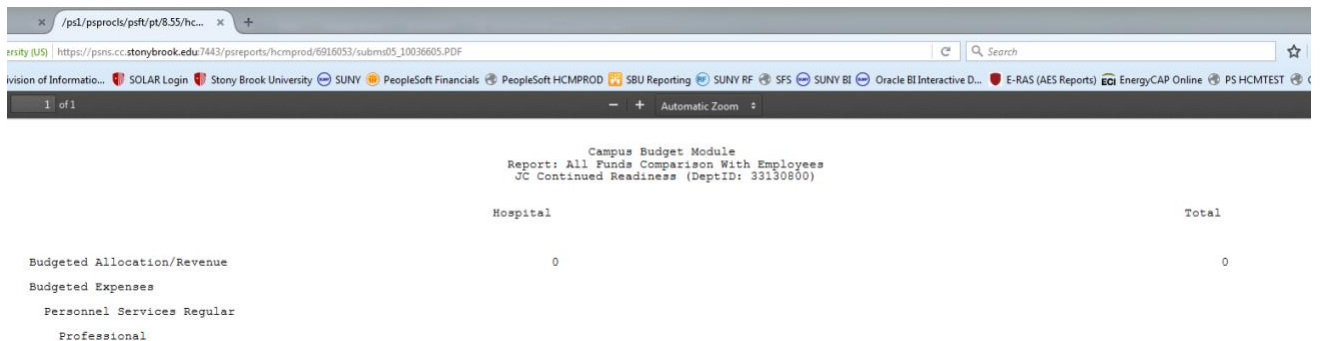
Name	File Size (bytes)	Datetime Created
SQR_SUBMS05_10036605.log	1,839	10/30/2017 3:17:14.049317PM EDT
subms05_10036605.PDF	3,124	10/30/2017 3:17:14.049317PM EDT
subms05_10036605.out	799	10/30/2017 3:17:14.049317PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	KRCAPPELLINI

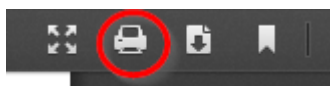
[Return](#)

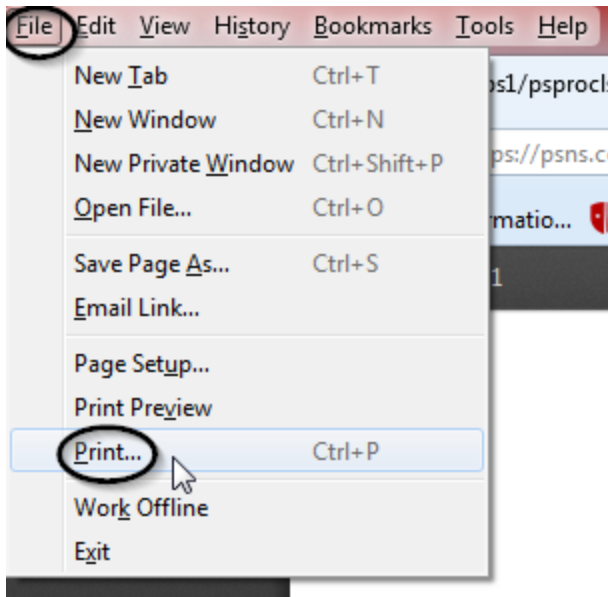
Your report will open in a new window in your browser.



To print your report: select the print icon on the tool bar, or go to File, then Print in the left-hand corner of your screen.

Remember to format your report as Landscape before printing. Even though the report is shown as Landscape in your browser, you will need to specify the orientation in the print properties setting.





To download your report: select the download icon on the tool bar.

