

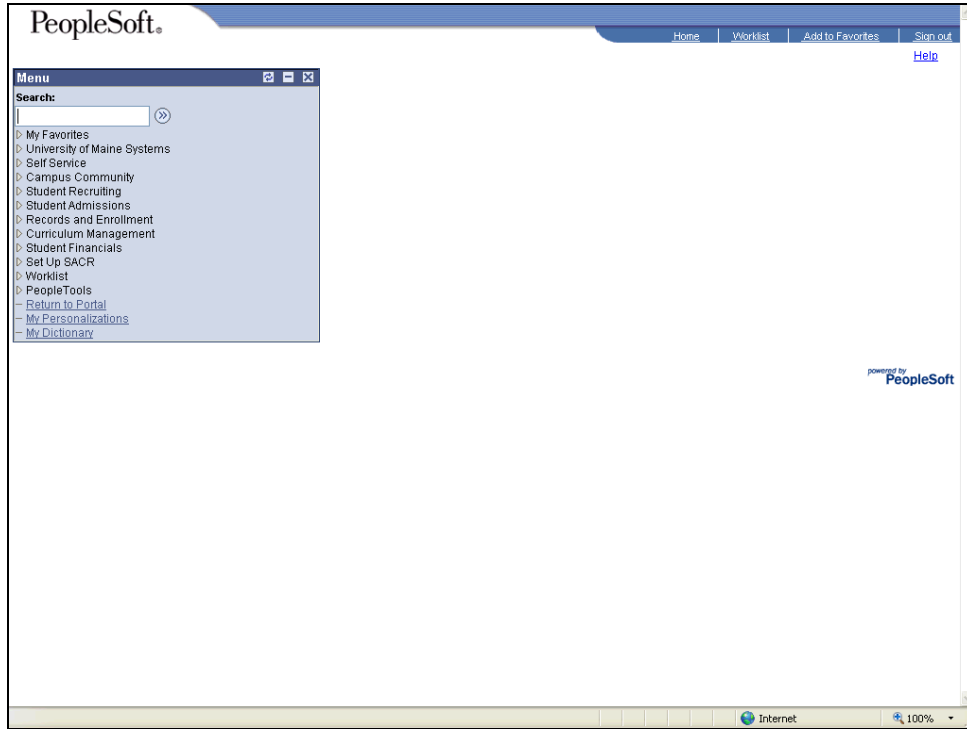
File Name	Group Detail Report_ Enrollment Deposit.doc
Version	8.9
Date Modified	1/10/2008
Last Changed by	ASDS
Status	Final

Group Detail Report_Enrollment Deposit

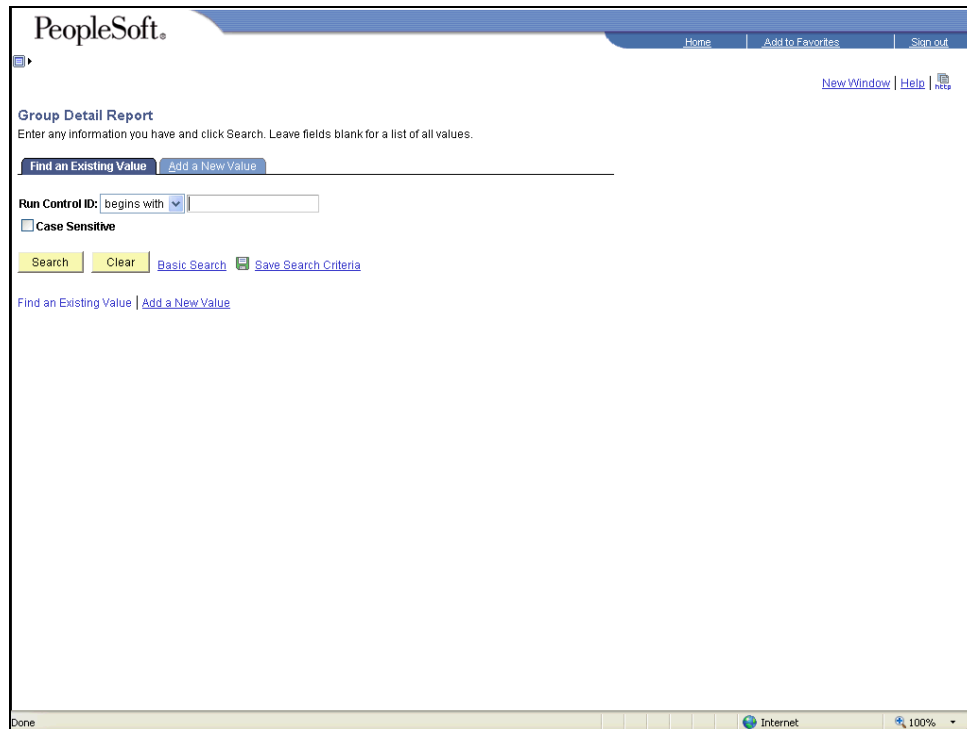
Process Document


Group Detail Report_Enrollment Deposits

Procedure



Step	Action
1.	Click the <i>Student Financials</i> link.
2.	Click the Charges and Payments link.
3.	Click the Group Processing link.
4.	Click the Group Detail link.



PeopleSoft. Home Add to Favorites Sign out
[New Window](#) | [Help](#) | 

Group Detail Report
 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](#)

Run Control ID: begins with
 Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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


Done Internet 100%

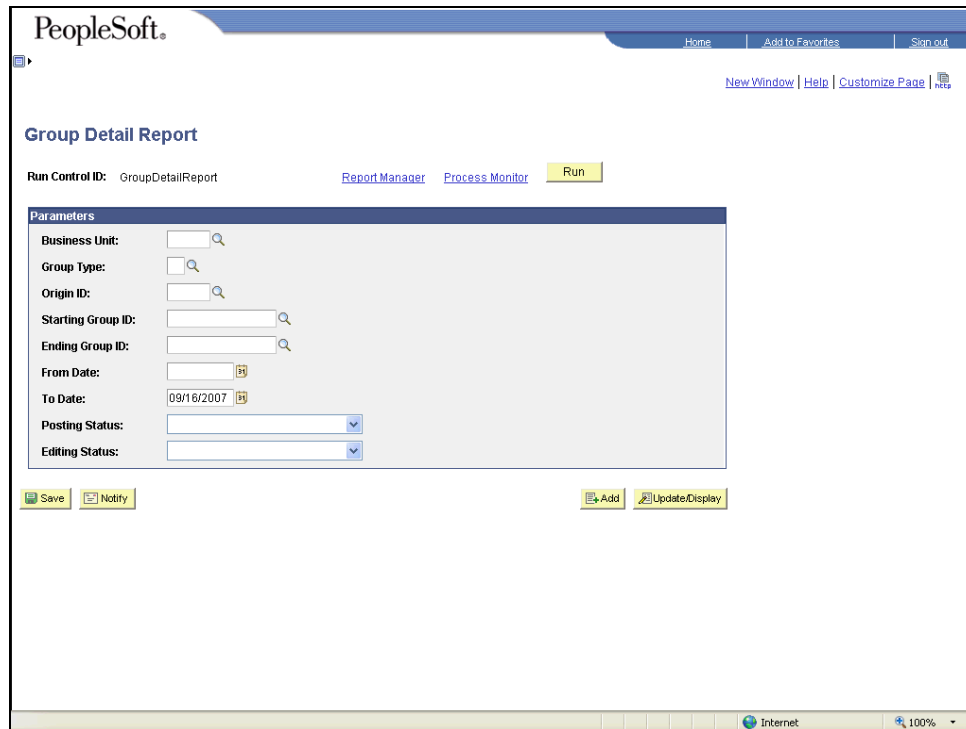
Step	Action
5.	<p>On the Group Detail Report page, you need to create a Run Control ID before you can process the report.</p> <p>A Run Control ID is an identifier that, when paired with your User ID, uniquely identifies the process you are running.</p> <p>The Run Control ID allows for important parameters to be available for a process when the process runs. This ensures that when a process runs in the background it does not have to prompt you for any additional values. All parameters are stored within the system and associated with Run Control IDs and User IDs. No one else can view or use the Run Control IDs that you create.</p> <p>Click the Add a New Value tab to create a Run Control ID.</p> <p>Add a New Value</p>


Process Document

Group Detail Report_Enrollment Deposits



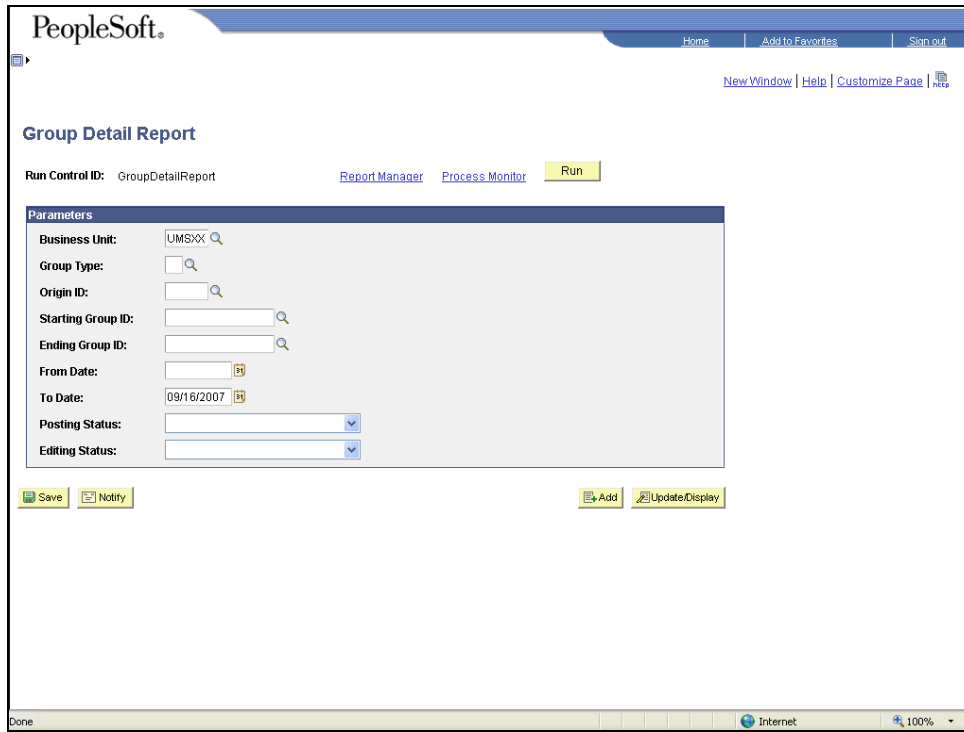
Step	Action
6.	<p>On the Add a New Value page, enter a name for the Run Control ID. Creating a Run Control ID name that is relevant to the process or that is based on your name may help you remember it for future use. By creating your own Run Control ID, you can save it and all of the assigned parameters so that you can easily access this report again in the future.</p> <p>After you create the new Run Control ID, the next time you run this process you will select the Find An Existing Value tab, click the Search button and select this Run Control from the list.</p> <p>After you have entered a name for the Run Control, click the Add button.</p> 



Step	Action
7.	On the Group Detail Report page you will enter the parameters for your report. Enter or lookup and select the <i>Business Unit</i> . 

Process Document

Group Detail Report_Enrollment Deposits





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Group Detail Report


Run Control ID: GroupDetailReport Report Manager Process Monitor Run


Parameters


Business Unit: UMSXX 


Group Type: 


Origin ID: 


Starting Group ID: 

Ending Group ID: 

From Date: 


To Date: 09/16/2007 

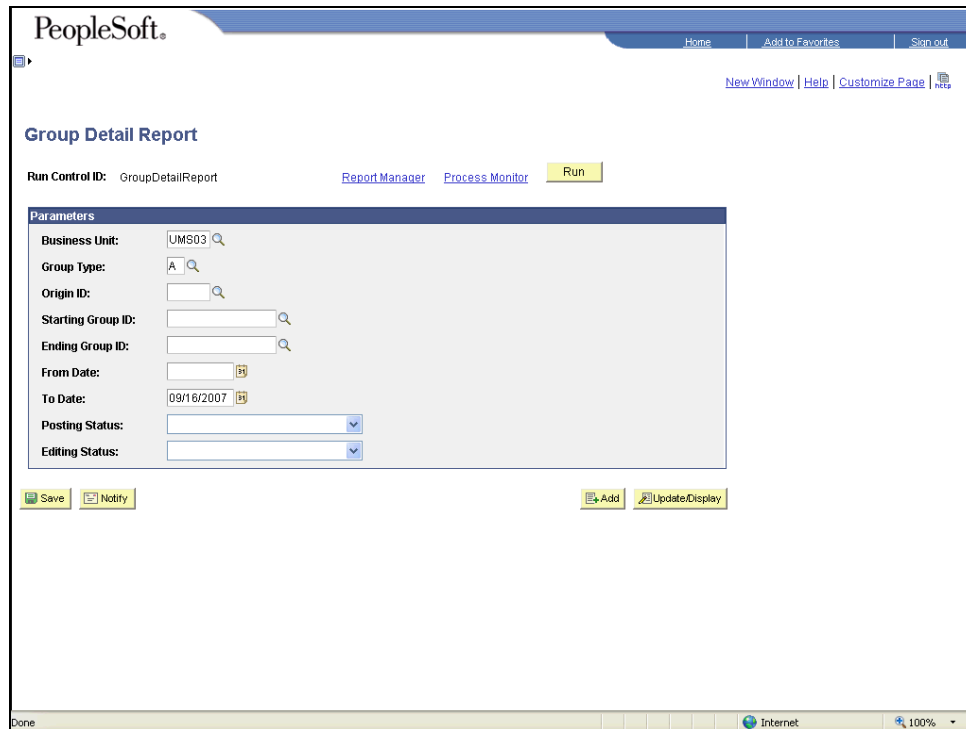
Posting Status: 

Editing Status: 

Save Notify Add Update/Display






Done Internet 100%

Step	Action
8.	Click on the Group Type Lookup button and select the appropriate Group Type for the Enrollment Deposit payment. 




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 New Window Help Customize Pane

Group Detail Report
 Run Control ID: GroupDetailReport Report Manager Process Monitor Run

Parameters
 Business Unit: UMS03
 Group Type: A
 Origin ID: 
 Starting Group ID: 
 Ending Group ID: 
 From Date: 
 To Date: 09/16/2007 
 Posting Status:
 Editing Status:

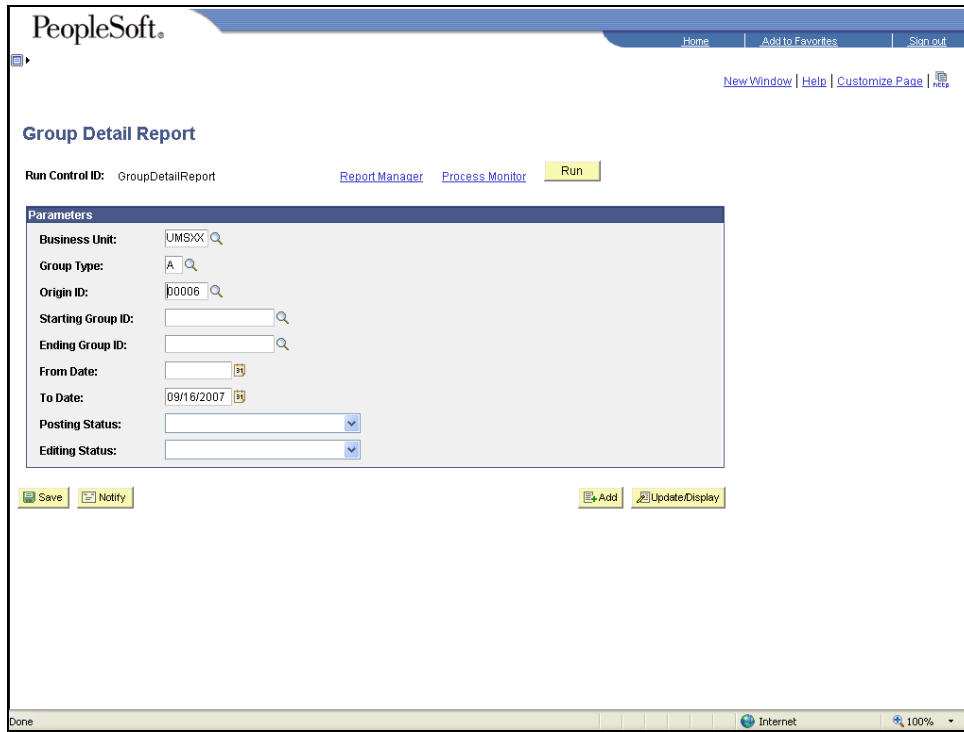
Save Notify Add Update/Display


Done Internet 100%

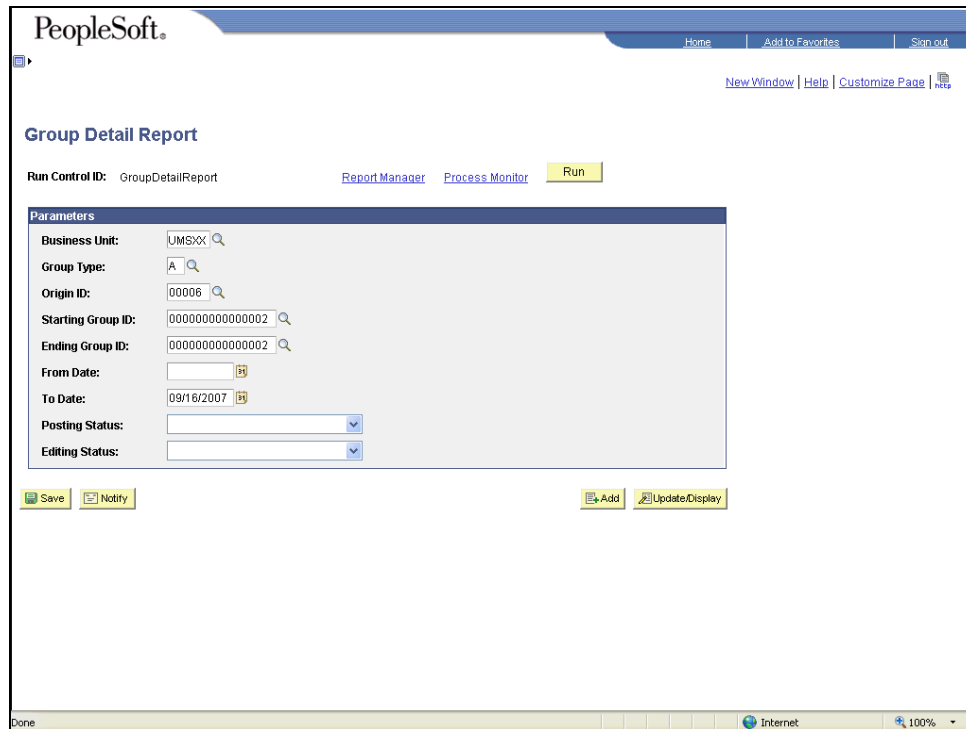
Step	Action
9.	Click the Look up Origin ID button to look up and select the appropriate Origin ID. 

Process Document

Group Detail Report_Enrollment Deposits




Step	Action
10.	<p>Click the Look up Starting Group ID button to look up and select the row that contains <i>today's date</i> and the <i>User ID</i> of the employee who created the group.</p> <p>Click on the row to select it.</p> 



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links. Below this, the title 'Group Detail Report' is displayed. The 'Run Control ID' is set to 'GroupDetailReport', and there are links for 'Report Manager' and 'Process Monitor', along with a 'Run' button. A 'Parameters' section contains the following fields:

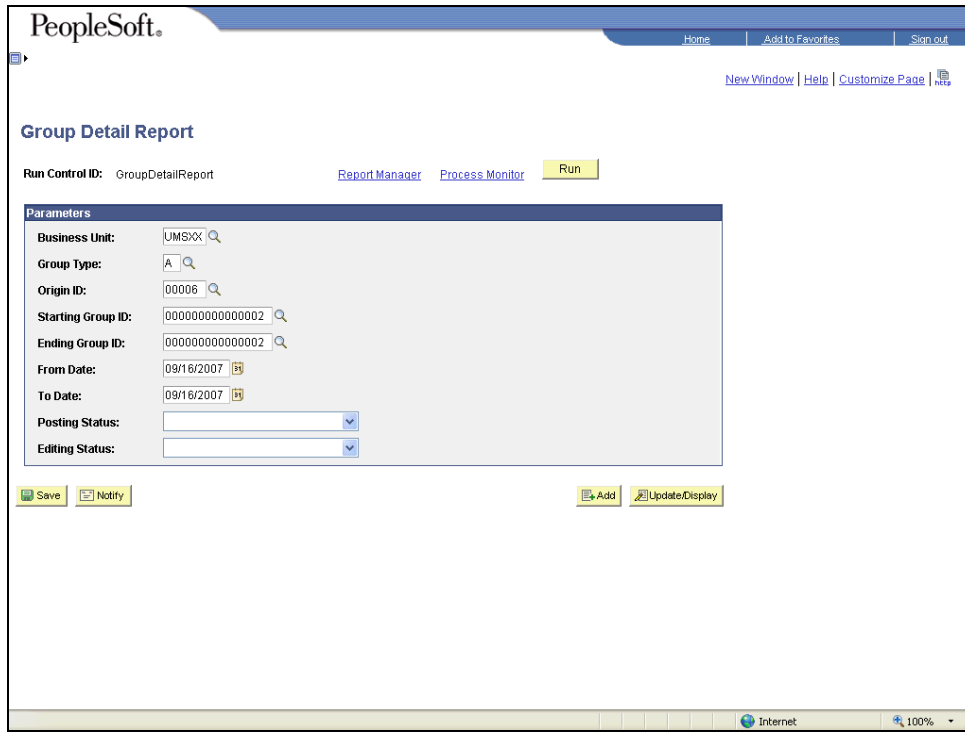
- Business Unit: UMSXX
- Group Type: A
- Origin ID: 00006
- Starting Group ID: 000000000000002
- Ending Group ID: 000000000000002
- From Date: (empty)
- To Date: 09/16/2007
- Posting Status: (dropdown menu)
- Editing Status: (dropdown menu)

At the bottom of the parameters section, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The browser status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.

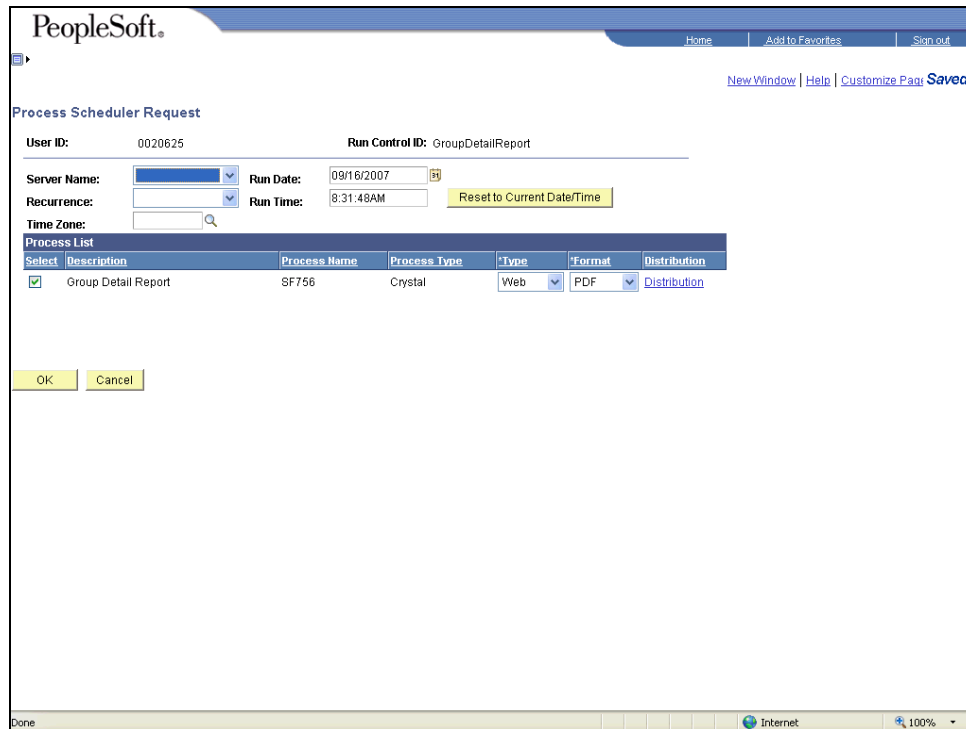
Step	Action
11.	Enter today's date as the From Date . Leave the remaining fields blank. 

Process Document

Group Detail Report_Enrollment Deposits



Step	Action
12.	Click the Run button to open the Process Scheduler Request page. <div style="border: 1px solid black; display: inline-block; padding: 2px 5px; margin-top: 5px;">Run</div>




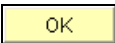
PeopleSoft. Home Add to Favorites Sign out
[New Window](#) | [Help](#) | [Customize Page](#) **Saved**

Process Scheduler Request
 User ID: 0020625 Run Control ID: GroupDetailReport

Server Name: [dropdown] Run Date: 09/16/2007
 Recurrence: [dropdown] Run Time: 8:31:48AM [Reset to Current Date/Time](#)
 Time Zone: [dropdown]

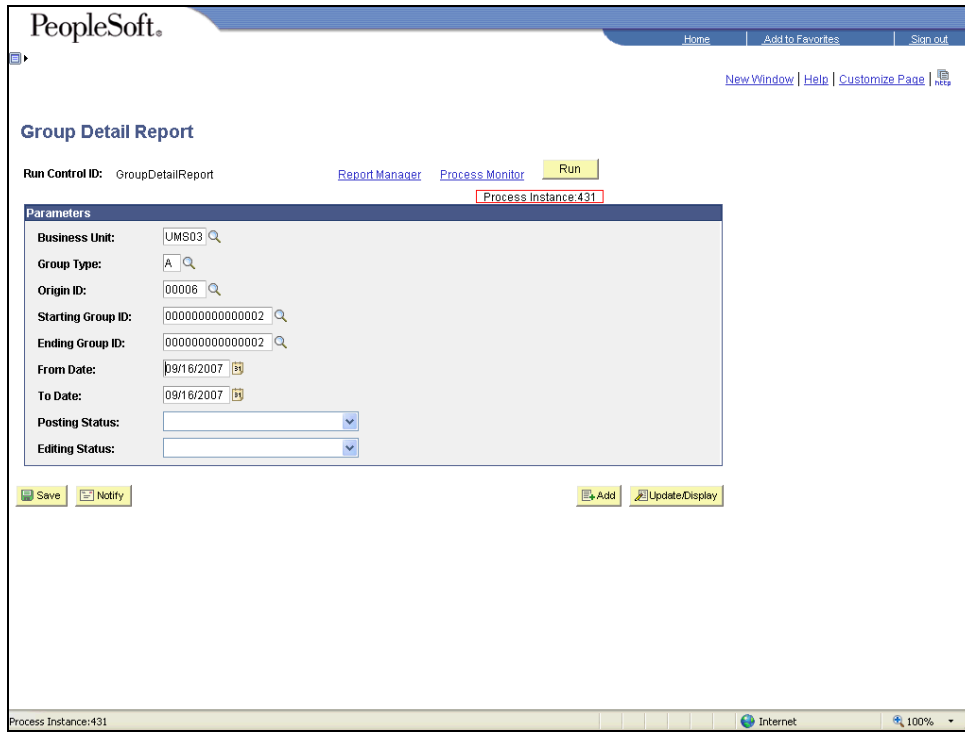
Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Group Detail Report	SF756	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

Step	Action
13.	On the Process Scheduler Request page, click on the drop-down arrow in the Server Name field and select PSNT . 
14.	Click the OK button to return to the Group Detail Report page. 

Process Document

Group Detail Report_Enrollment Deposits



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there are navigation links: Home, Add to Favorites, and Sign out. Below these are links for New Window, Help, Customize Page, and a printer icon. The main heading is "Group Detail Report". Underneath, there is a "Run Control ID: GroupDetailReport" and a "Run" button. A "Process Instance: 431" is highlighted in red. A "Parameters" section contains several input fields: Business Unit (UMS03), Group Type (A), Origin ID (00006), Starting Group ID (0000000000000002), Ending Group ID (0000000000000002), From Date (09/16/2007), and To Date (09/16/2007). There are also dropdown menus for Posting Status and Editing Status. At the bottom of the parameters section are buttons for Save, Notify, Add, and Update/Display. The status bar at the very bottom shows "Process Instance: 431" and "Internet 100%".

Step	Action
15.	On the Group Detail Report page, note the Process Instance number and click the Process Monitor link to open the Process List page.. Process Monitor



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Process List Server List

View Process Request For
 User ID: 0020625 Type: Last: 10 Days Refresh
 Server: Name: Instance: to
 Run Status: Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	431		Crystal	SF756	0020625	09/16/2007 8:31:48AM EDT	Queued	N/A	Details
<input type="checkbox"/>	430		Application Engine	UM_GRPPOST	0020625	09/16/2007 7:55:41AM EDT	Success	Posted	Details
<input type="checkbox"/>	159		Application Engine	UM_GRPPOST	0020625	09/13/2007 9:50:28AM EDT	Success	Posted	Details

[Go back to Group Detail Report](#)

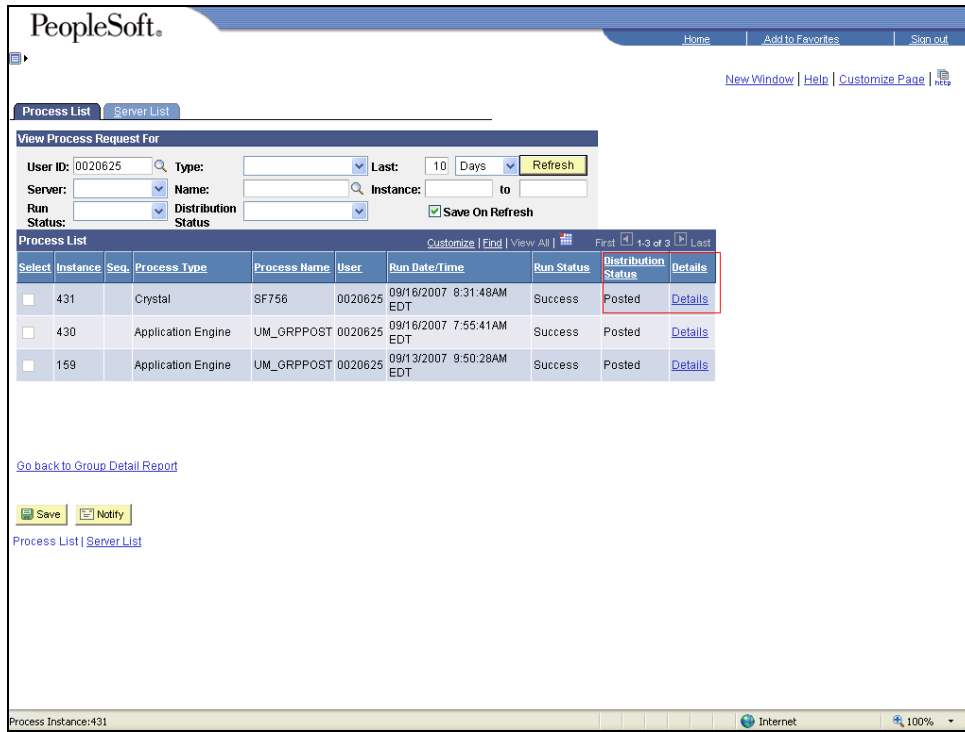
[Process List](#) | [Server List](#)

Process Instance: 431

Step	Action
16.	On the Process List page, locate your process in the listing. Click the Refresh button until the Distribution Status for your process shows <i>Posted</i> . <input type="button" value="Refresh"/>

Process Document

Group Detail Report_Enrollment Deposits



The screenshot shows the PeopleSoft interface for viewing process instances. At the top, there are navigation links: Home, Add to Favorites, and Sign out. Below that, there are links for New Window, Help, and Customize Page. The main area is titled 'Process List' and 'Server List'. There is a 'View Process Request For' section with search criteria: User ID (0020625), Type, Last (10 Days), Refresh, Server, Name, Instance, Run Status, and Distribution Status. A 'Save On Refresh' checkbox is checked. Below this is a table of process instances:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	431		Crystal	SF756	0020625	09/16/2007 8:31:48AM EDT	Success	Posted	Details
<input type="checkbox"/>	430		Application Engine	UM_GRPPOST	0020625	09/16/2007 7:55:41AM EDT	Success	Posted	Details
<input type="checkbox"/>	159		Application Engine	UM_GRPPOST	0020625	09/13/2007 9:50:28AM EDT	Success	Posted	Details

Below the table, there is a link 'Go back to Group Detail Report', 'Save' and 'Notify' buttons, and another 'Process List | Server List' link. The status bar at the bottom shows 'Process Instance: 431' and 'Internet 100%'.

Step	Action
17.	Click the Details link for your process to open the Process Details page.



PeopleSoft. Home Add to Favorites Sign out
[New Window](#) | [Help](#) | [Customize Page](#) |

Process Detail

Process

Instance: 431 **Type:** Crystal
Name: SF756 **Description:** Group Detail Report
Run Status: Success **Distribution Status:** Posted

Run

Run Control ID: GroupDetailReport
Location: Server
Server: PSNT
Recurrence:

Update Process

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time

Request Created On: 09/16/2007 8:32:10AM EDT
Run Anytime After: 09/16/2007 8:31:48AM EDT
Began Process At: 09/16/2007 8:33:01AM EDT
Ended Process At: 09/16/2007 8:33:11AM EDT

Actions

[Parameters](#) Transfer
[Message Log](#)
 Batch Timings
[View Log/Trace](#)

OK Cancel

Process Instance:431 Internet 100%

Step	Action
18.	Click the <i>View Log/Trace</i> link to open the <i>View Log/Trace</i> page and access your report. View Log/Trace

Process Document

Group Detail Report_Enrollment Deposits



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View Log/Trace

Report

Report ID: 431 Process Instance: 431 [Message Log](#)

Name: SF756 Process Type: Crystal

Run Status: Success

Group Detail Report

Distribution Details

Distribution Node: DEV Expiration Date: 09/26/2007

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	09/16/2007 8:33:11.000000AM EDT
SF756_431.PDF	51,782	09/16/2007 8:33:11.000000AM EDT
PeopleSoft Trace File	600	09/16/2007 8:33:11.000000AM EDT

Distribute To

Distribution ID Type	Distribution ID
User	0020625

Return

Process Instance: 431 Internet 100%

Step	Action
19.	Click the PDF file link in the <i>File List</i> section to open your report. SF756_431.PDF
20.	End of Procedure.