Western PeopleSoft Financials  
Research Project Statements

Objectives

By the end of this exercise you will be able to:

- Sign into Western PeopleSoft Financials
- Generate summary and detail statements by researcher or a range of researchers
- Generate summary and detail statements by single grant
- Access statements through the Report Manager

Content

1. Statements by Researcher
2. Retrieving Statements in Report Manager
3. Single Grant Statement

Signing Into Western PeopleSoft Financials

To sign into Western PeopleSoft Financials click on [https://finance.uwo.ca](https://finance.uwo.ca) or type the url directly in your browser window. You will need your Western ID and password to sign in. This should have been communicated to you by ITS (Information and Technology Services) and is the same ID that you use for “My HR” at Western. If you need help with your user ID or password, call the ITS Help Desk at 519/661-3800 or extension 83800.
1. **Statements by Researcher**

**Navigation:** UWO Menu/UWO Research/Grant Detail by Researcher

1. **Click on Add a New Value** (first time only) and enter the run control ID “Researcher” and click **Add**. (If this is not the first time) click on search and select your run control ID from the list (i.e. Researcher).

![Grant Detail by Researcher](image)

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

   - 2012 = May 2011 to April 30 2012
   - 2013 = May 2012 to April 30 2013
   - 2014 = May 2013 to April 30 2014
   - Accounting Period 1 = May
   - Accounting Period 2 = June
   - Accounting Period 3 = July
   - Accounting Period 12 = April

If printing statements for only one researcher enter the first 5 characters of a researcher’s project number (RXXX) in the Researcher Profile From and Researcher Profile To fields. If you are requesting a range of researcher’s project numbers enter the first researcher number in the Research Profile From and the last in the Researcher Profile To.

You will only be able to print statements for those research projects you have been given access to.
3. Click Run and you will be taken to the Process Schedule Request window. Ensure the *Type field is “Window” and the *Format field is “PDF”.

***Please note: if you are requesting a large volume of statements please see instructions on page 5 – steps 7-11.
4. Click OK and a new window will open which will display year to date summary totals for each research project. Data includes transactions processed to the end of the previous day.

5. Click on the printer icon to print statements.

6. Click on the down arrow or scroll down to view summary by account, followed by detailed reports for Actuals and Encumbrances for all accounts.
7. If you are requesting a large volume of statements, for example for one or more departments, it is suggested that these be run to the Web. On the Process Scheduler Request window select *Type Web from the drop down list.
8. **Click** OK. This will return you to the Grant Detail by Researcher window. You can view the progress of your statements and view and print the statements by clicking on the Process Monitor link. You can also view by navigating through Reporting Tools (Refer to Section 2).

![Process Monitor](image)

9. **Click** on the Process Monitor link and you will be taken to the Process List window. The Process Name is UFSRA101 and the initial status will be queued. Click **Refresh** and when your process is complete the Run Status will be, Success, and the Distribution Status, Posted.

![Process List](image)
10. Click on the Details link which takes you to the Process Detail window.

![Process Detail Window]

11. Click on the View Log/Trace link. Then from the File List click on UFSRA101 PDF file to view/print detail report.

2. Retrieving Statements in Report Manager

After you have run statements generated as Type Web they can be accessed through the Report Manager.

**Navigation:** Reporting Tools/Report Manager

1. Click on the plus sign to expand the General folder to access the link to the Grant Detail by Researcher report.

![Expanded General Folder]

2. Click on the Grant Detail By Researcher link to view/print detail report.
3. **Printing Single Project Detail**

**Navigation:** UWO Menu/UWO Research/Single Grant Detail

1. **Enter** Fiscal Year, Accounting Period and Research Project.

Steps to generate and print reports are the same as in Section 1, Statements by Researcher.