

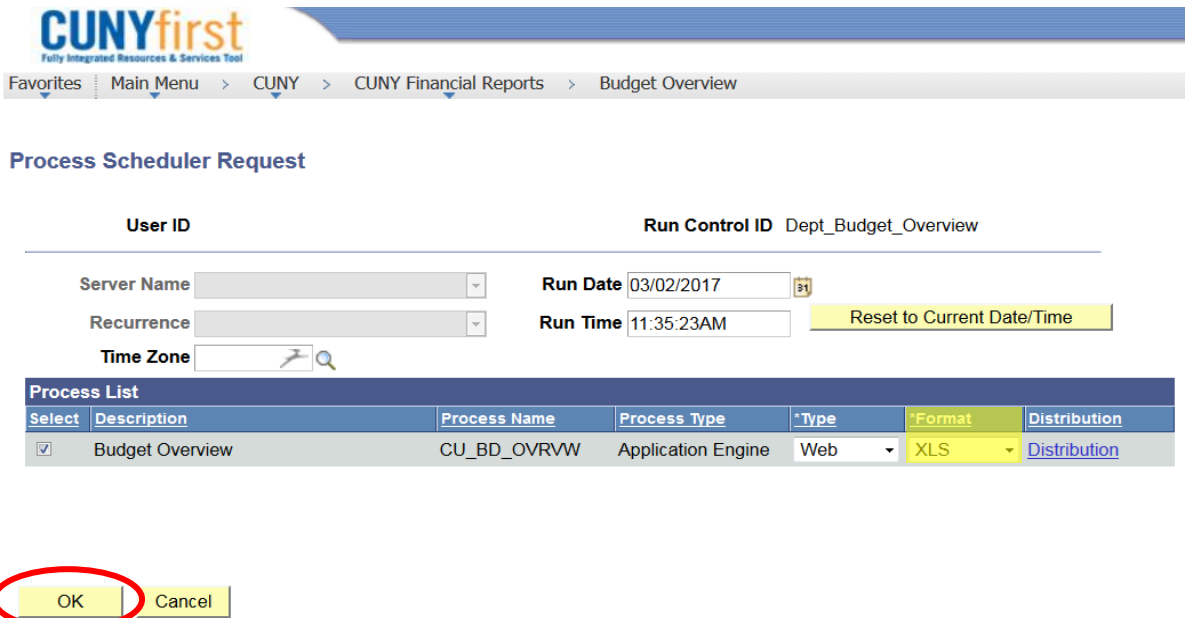


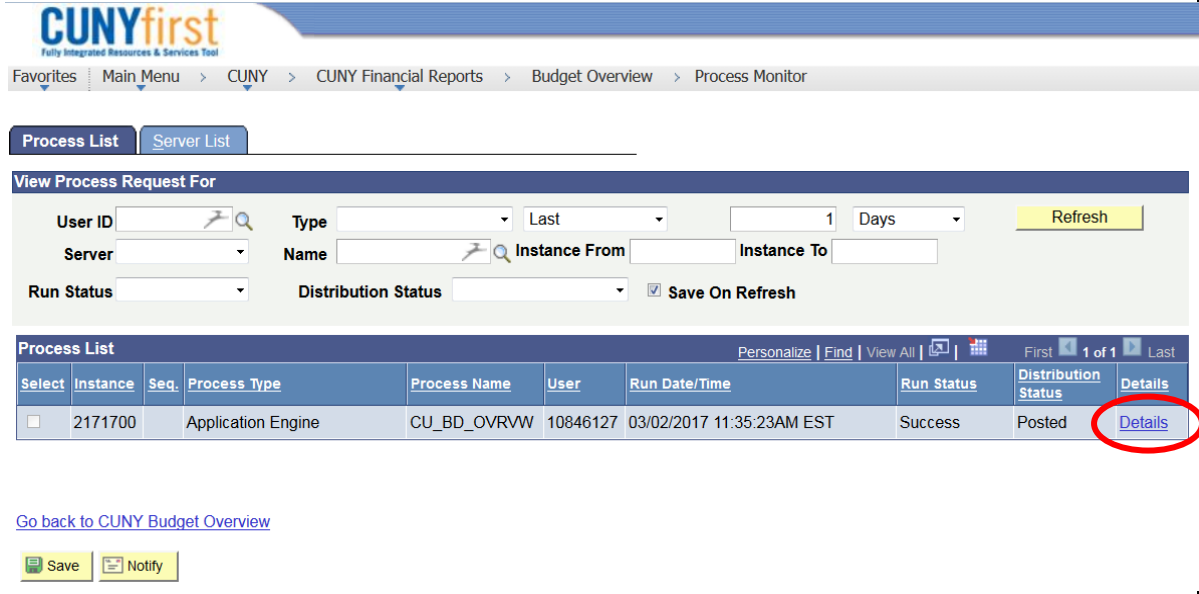
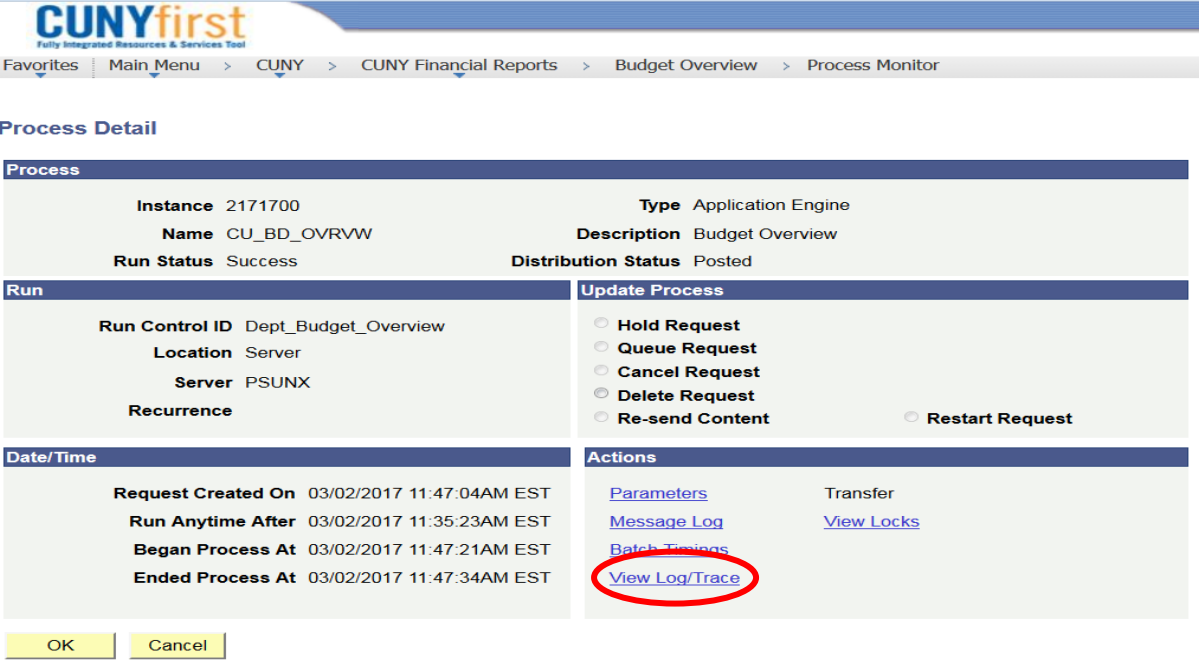
Running Budget Overview in CUNYFirst

Step	Action
1.	<p>Sign into CUNYFirst using your assigned Username and Password Click the Financial Supply Chain link</p>
2.	<p>Click Main Menu > CUNY > CUNY Financial Reports > Budget Overview</p>  <p>The screenshot shows the CUNYfirst logo and a breadcrumb trail: Favorites > Main Menu > CUNY > CUNY Financial Reports > Budget Overview. Below the breadcrumb is the heading 'CUNY Budget Overview' and the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values'. There are two buttons: 'Find an Existing Value' and 'Add a New Value', with the latter circled in red. Below the buttons is a 'Search Criteria' dropdown menu. The search criteria is set to 'Run Control ID begins with' followed by an empty text box. There is also a 'Case Sensitive' checkbox which is unchecked. At the bottom of the search area are 'Search' and 'Advanced Search' buttons.</p>
3.	<p>Select the Add a New Value tab and name your report when running report for the first time</p>  <p>The screenshot shows the same page as step 2, but the 'Add a New Value' button is now highlighted in dark blue, indicating it is selected. The 'Run Control ID' field now contains the text 'Dept_Budget_Overview'. At the bottom left, there is an 'Add' button circled in red.</p> <p>Click Add</p>

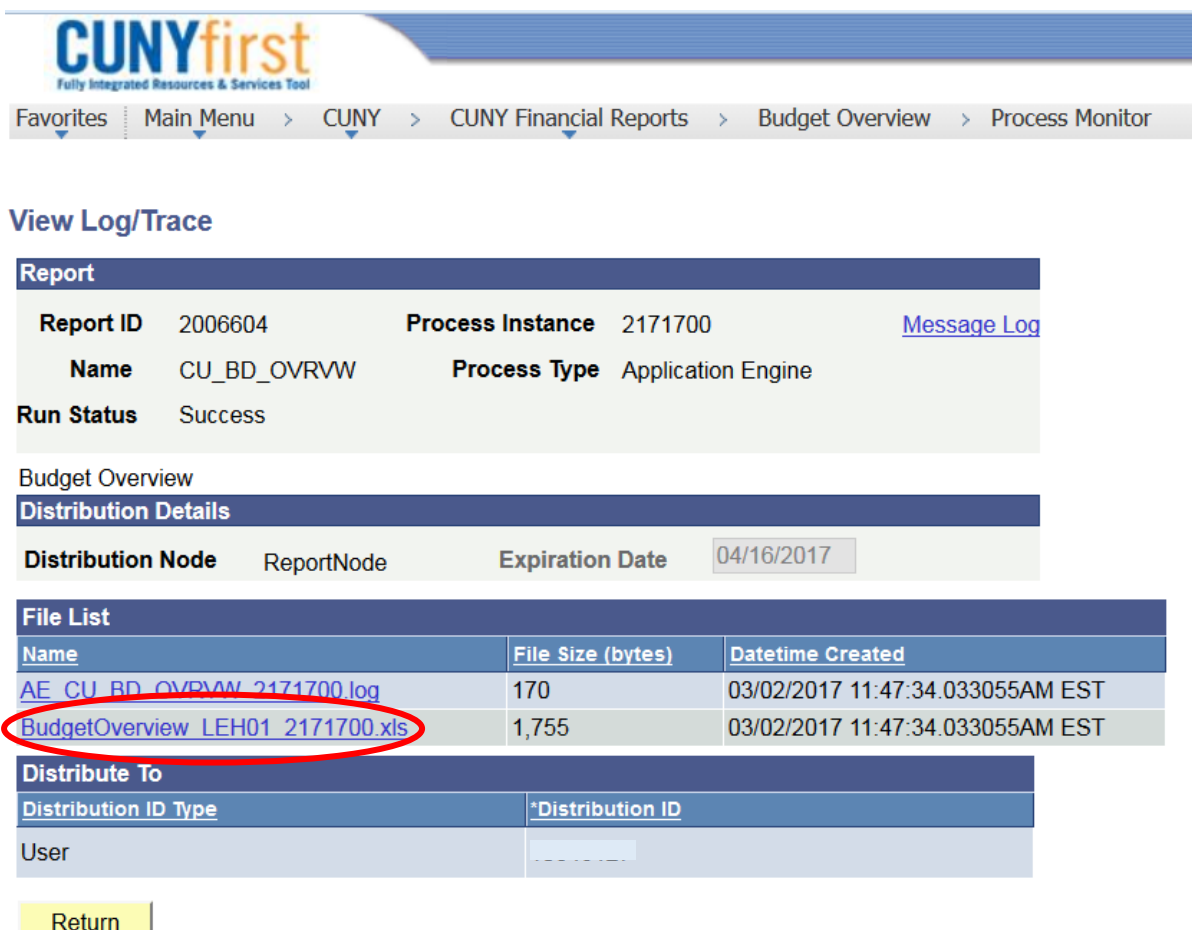
Running Budget Overview in CUNYFirst

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4.	<p>Enter Business Unit "LEH01"; Budget Period "20XX"; Department "12345" (CUNYfirst DEPT#)</p>  <p>Click Run</p>
5.	<p>Select Format "XLS" to download report into Excel</p>  <p>Click OK</p>

Running Budget Overview in CUNYFirst

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6.	<p>Click Process Monitor and then Details</p>  <p>The screenshot shows the CUNYfirst interface for the Process Monitor. At the top, there's a navigation breadcrumb: Favorites Main Menu > CUNY > CUNY Financial Reports > Budget Overview > Process Monitor. Below this are tabs for 'Process List' (selected) and 'Server List'. A search section titled 'View Process Request For' includes fields for User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A 'Refresh' button is present. Below the search is a table with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The first row shows Instance 2171700, Process Type Application Engine, Process Name CU_BD_OVRVW, User 10846127, Run Date/Time 03/02/2017 11:35:23AM EST, Run Status Success, and Distribution Status Posted. The 'Details' link in the last column is circled in red. At the bottom, there are links for 'Go back to CUNY Budget Overview', 'Save', and 'Notify'.</p>
7.	<p>Click View Log/Trace</p>  <p>The screenshot shows the CUNYfirst Process Detail interface. At the top, there's a navigation breadcrumb: Favorites Main Menu > CUNY > CUNY Financial Reports > Budget Overview > Process Monitor. Below this is the 'Process Detail' section. It is divided into several panels: 'Process' (Instance 2171700, Name CU_BD_OVRVW, Type Application Engine, Description Budget Overview, Run Status Success, Distribution Status Posted), 'Run' (Run Control ID Dept_Budget_Overview, Location Server, Server PSUNX, Recurrence), 'Update Process' (radio buttons for Hold Request, Queue Request, Cancel Request, Delete Request, Re-send Content, Restart Request), 'Date/Time' (Request Created On 03/02/2017 11:47:04AM EST, Run Anytime After 03/02/2017 11:35:23AM EST, Began Process At 03/02/2017 11:47:21AM EST, Ended Process At 03/02/2017 11:47:34AM EST), and 'Actions' (Parameters, Message Log, Batch Timings, View Log/Trace, Transfer, View Locks). The 'View Log/Trace' link in the Actions section is circled in red. At the bottom, there are 'OK' and 'Cancel' buttons.</p>

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8.	<p>Click .xls file to view your report</p>  <p>View Log/Trace</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c4e64; color: white;"> <th colspan="4">Report</th> </tr> </thead> <tbody> <tr> <td>Report ID</td> <td>2006604</td> <td>Process Instance</td> <td>2171700 Message Log</td> </tr> <tr> <td>Name</td> <td>CU_BD_OVRVW</td> <td>Process Type</td> <td>Application Engine</td> </tr> <tr> <td>Run Status</td> <td colspan="3">Success</td> </tr> </tbody> </table> <p>Budget Overview</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c4e64; color: white;"> <th colspan="4">Distribution Details</th> </tr> </thead> <tbody> <tr> <td>Distribution Node</td> <td>ReportNode</td> <td>Expiration Date</td> <td>04/16/2017</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c4e64; color: white;"> <th colspan="3">File List</th> </tr> <tr style="background-color: #2c4e64; color: white;"> <th>Name</th> <th>File Size (bytes)</th> <th>Datetime Created</th> </tr> </thead> <tbody> <tr> <td>AE_CU_BD_OVRVW_2171700.log</td> <td>170</td> <td>03/02/2017 11:47:34.033055AM EST</td> </tr> <tr style="border: 2px solid red;"> <td>BudgetOverview_LEH01_2171700.xls</td> <td>1,755</td> <td>03/02/2017 11:47:34.033055AM EST</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c4e64; color: white;"> <th colspan="2">Distribute To</th> </tr> </thead> <tbody> <tr style="background-color: #2c4e64; color: white;"> <td>Distribution ID Type</td> <td>*Distribution ID</td> </tr> <tr> <td>User</td> <td><input type="text"/></td> </tr> </tbody> </table> <p>Return</p>	Report				Report ID	2006604	Process Instance	2171700 Message Log	Name	CU_BD_OVRVW	Process Type	Application Engine	Run Status	Success			Distribution Details				Distribution Node	ReportNode	Expiration Date	04/16/2017	File List			Name	File Size (bytes)	Datetime Created	AE_CU_BD_OVRVW_2171700.log	170	03/02/2017 11:47:34.033055AM EST	BudgetOverview_LEH01_2171700.xls	1,755	03/02/2017 11:47:34.033055AM EST	Distribute To		Distribution ID Type	*Distribution ID	User	<input type="text"/>
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