



CCR SpeedCodes

User Guide

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Overview

With the implementation of the Campus Cost Recovery (CCR) system in CMS, the eight-digit code currently known as “Speedtype” will now be referred to as **CCR SpeedCode**. The change will be in name only and will not affect the current form of the SpeedCode/Speedtype.

This manual shows you the process of Finding a CCR SpeedCode and Running CCR Department Reports. This process includes:

- Finding a CCR SpeedCode
 - Navigation
- Running CCR – Department Reports
 - Navigation
 - Creating the Run Control
 - Track Report Progress
 - Review and Print the Report



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Section 1 Finding a CCR SpeedCode

A CCR SpeedCode is an eight-digit abbreviated version of a Chartstring. Account is not included as it is assigned by the service provider.

Navigation

Main Menu > CSUS Custom Objects > Cost Recovery > Dept SpeedCode Setup

1. The CCR Dept-SpeedCode Setup search page displays. Select the Find an Existing Value tab.

CCR Dept-Speedcode Setup
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**

Business Unit: begins with ▼ SACST 🔍

Department: begins with ▼ 🔍

Include History Correct History

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

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

Figure 2: CCR Dept-SpeedCode Setup search page.

2. In the **Business Unit** field, enter “SACST”.
3. In the **Department** field, enter the **5 digit department code** or click the magnifying glass to Look Up your department code.
4. Click the **Search** button.
5. The **CCR Dept-Speedcode Setup** page displays.

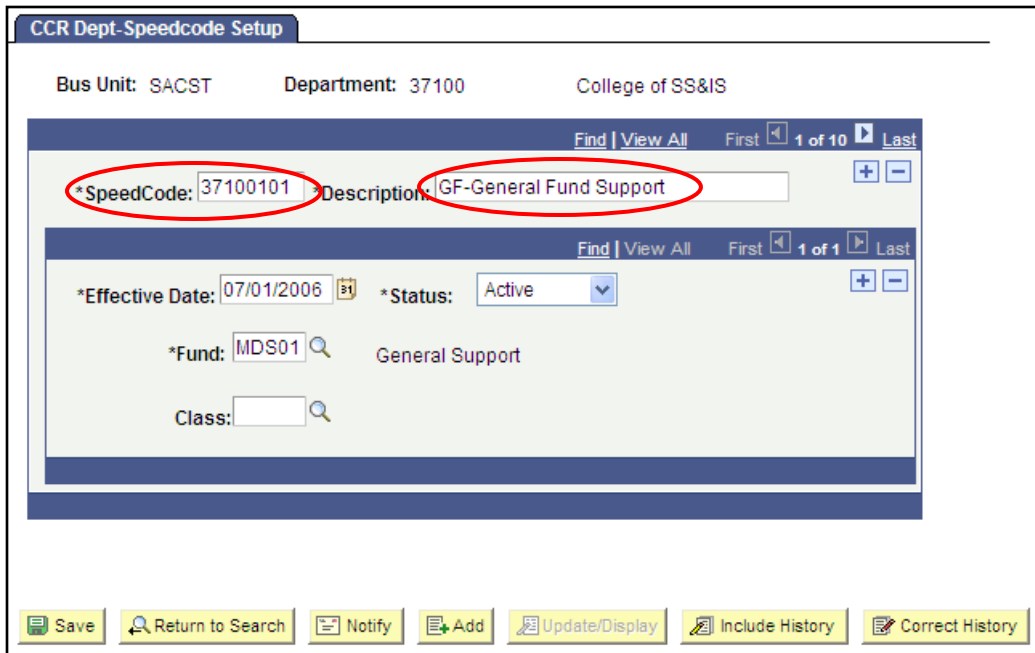


Figure 3: CCR Dept-Speedcode Setup page; SpeedCode and Description Fields

6. On this page you will find the SpeedCode(s) for your department along with a description. Please review the results carefully and pick the appropriate SpeedCode for your order.
7. You can also see the **Effective Date**, **Status**, **Fund**, and **Class** for the SpeedCode.
8. If there is more than one SpeedCode for a department, click on the “**View All**” link to display all the SpeedCode for that department.

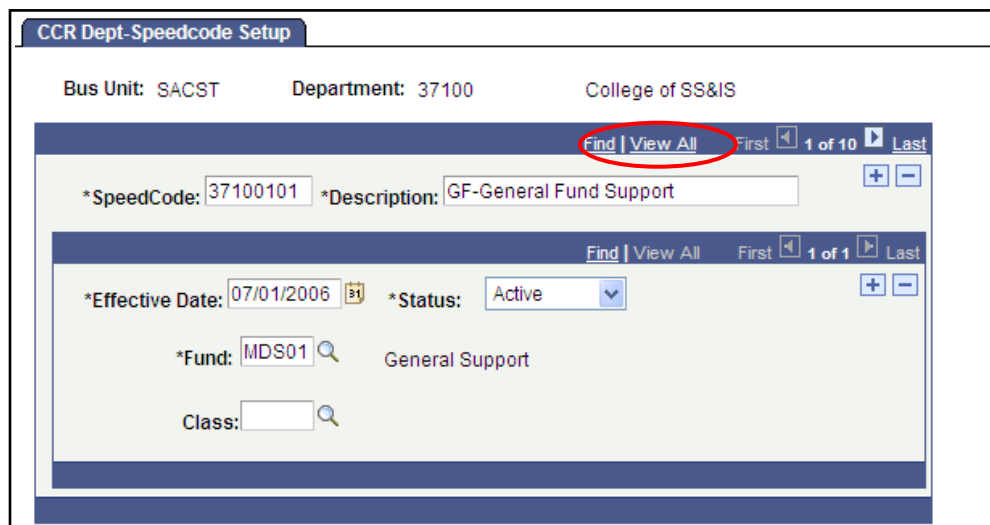


Figure 4: View All Link

- In this example, the department has 10 SpeedCodes. Click the **“View All”** link and the SpeedCodes will display all on the same page as seen in Figure 5. When you were to click the **Arrow Buttons**, you will see each SpeedCode one-by-one for that department.



Figure 5: “View All” SpeedCodes for a Department.

- From the View All screen, click on the **View 1** link to go back to displaying only one SpeedCode on the page.

Section 2 Running CCR – Department Reports

Navigation

Main Menu > CSUS Custom Objects > Cost Recovery > CCR Department Report

1. The **CCR – Department Report** search page displays. Select the **Add a New Value** tab.

2.1 Creating the Run Control

2. If this is the first time you will run this report, you need to set up a Run Control by selecting the **Add a New Value Tab**.
3. The **Add a New Value** page displays.

The screenshot shows the 'CCR - Department Report' interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red circle. Below the tabs, there is a text input field labeled 'Run Control ID:'. Underneath the field is a yellow 'Add' button. At the bottom of the page, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Figure 6: Add a New Value page

4. In the **Run Control ID** field, enter a Run Control name for the report and then click the **Add** button.


Note: Once you create and save this Run Control, for future reports you can click the “Find an Existing Value” tab and search the Run Control name that you created.

5. The **CCR Department Report** page displays.

The screenshot shows the 'CCR Department Report' page. At the top, there is a tab labeled 'CCR Department Report'. Below the tab, there is a text input field for 'Run Control ID' containing the value 'sampleReport'. To the right of this field are two links: 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below this is a section titled 'Process Request Parameters' with a blue header. Inside this section, there are several fields: 'Business Unit' with the value 'SACST', 'Fiscal Year' (highlighted with a red circle), 'Accounting Period', and 'Department' with a search icon. At the bottom right of this section, there is a checkbox labeled 'Use Work Records?'.

Figure 7: CCR Department Report page

6. In the **Fiscal Year** field enter the fiscal year (e.g. 2007 is 2007/2008 fiscal year).

7. In the **Accounting Period** field enter the accounting period with July equaling 01, August equaling 2, and so on.
8. In the **Department** field, enter the **5 digit department code** for your report. You can use the search icon  to look up your department number as well.

Note: Leave the Use Work Records box unchecked.

9. Click the **Run** button.

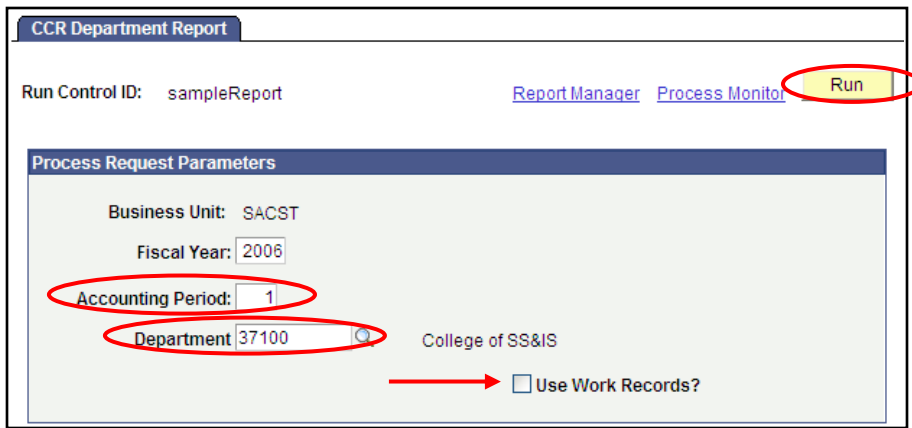


Figure 8: CCR Department Report Page

2.2 Track Report Progress

10. The **Process Scheduler Request** page displays.
11. In the **Server Name** field, use the drop down menu button to select “PSUNX” as the server, then click the OK button. You can also select the file type from the drop down menu in the Format column.

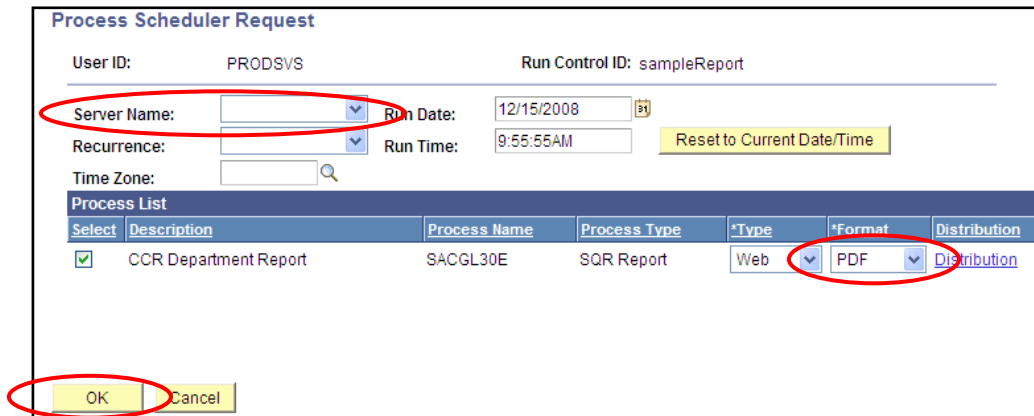


Figure 9: Process Scheduler Request page

- The **CCR Department Report** page re-displays showing a Process Instance number.

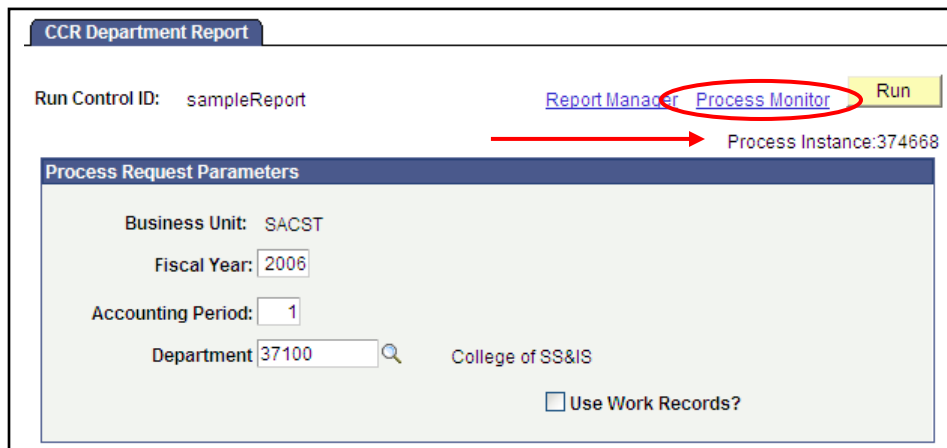


Figure 10: CCR Department Report page

- Click on the **Process Monitor** link.
- The **Process List** page displays.
- Locate the process instance and verify that the **Run Status** field displays “Success” and the **Distribution Status** field displays “Posted”. If this does not display, click on the Refresh button until this status changes to “Success” and to “Posted”.
- Click on the **Details** link.

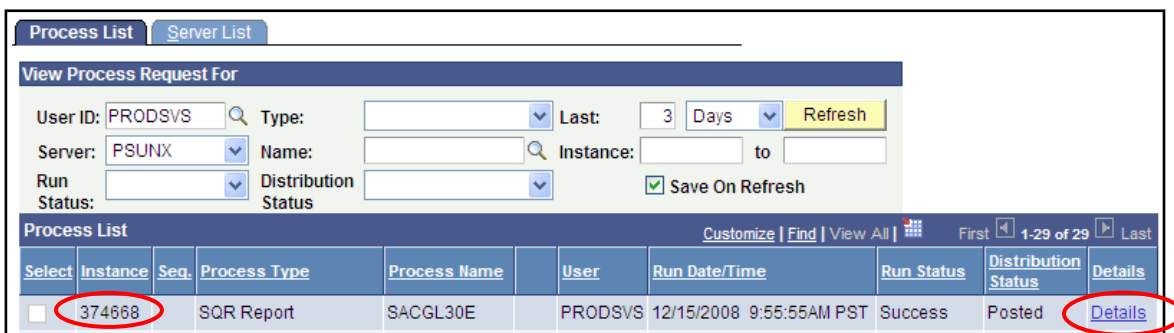


Figure 11: Process List page

2.3 Review and Print the Report

- The **Process Detail** page displays.
- Click on the **View Log/Trace** link.

Process Detail

Process			
Instance:	374668	Type:	SQR Report
Name:	SACGL30E	Description:	CCR Department Report
Run Status:	Success	Distribution Status:	Posted
Run		Update Process	
Run Control ID:	sampleReport	<input type="radio"/>	Hold Request
Location:	Server	<input type="radio"/>	Queue Request
Server:	PSUNX	<input type="radio"/>	Cancel Request
Recurrence:		<input checked="" type="radio"/>	Delete Request
		<input type="radio"/>	Restart Request
Date/Time		Actions	
Request Created On:	12/15/2008 9:57:27AM PST	Parameters	Transfer
Run Anytime After:	12/15/2008 9:55:55AM PST	Message Log	
Began Process At:	12/15/2008 9:57:37AM PST	Batch Timings	
Ended Process At:	12/15/2008 9:57:49AM PST	View Log/Trace	

Figure 12: Process Detail page

19. The **View Log/Trace** page displays.

View Log/Trace

Report			
Report ID:	236385	Process Instance:	374668 Message Log
Name:	SACGL30E	Process Type:	SQR Report
Run Status:	Success		
CCR Department Report			
Distribution Details			
Distribution Node:	FSACTST	Expiration Date:	<input type="text" value="12/17/2008"/>
File List			
Name	File Size (bytes)	Datetime Created	
SQR_SACGL30E_374668.log	1,605	12/15/2008 9:57:49.000000AM PST	
sacgl30e_374668.PDF	1,678	12/15/2008 9:57:49.000000AM PST	
sacgl30e_374668.out	240	12/15/2008 9:57:49.000000AM PST	
Distribute To			
Distribution ID Type	*Distribution ID		
User	PRODSVS		

Figure 13: View Log/Trace page

20. Click on the **PDF Report** hyperlink to display your report.

21. The report will display as a PDF file and you will have the option to save the report to your computer or print it.

CCR SpeedCodes

Chartfield	Speedtype	TransDate	Descr	Project	Reference	WorkOrder	Qty	Prior Amt	Trans Amt	Posted Amt
MSG01-660001-37100-	37100101	01/12/07	POSTAGE CHARGES				232	0.00	90.48	90.48
MSG01-660001-37100-	37100101	01/31/07	POSTAGE CHARGES				1	0.00	0.39	0.39
Charge Type Total									90.87	90.87
.....										
MSG01-660003-37100-	37100101	01/30/07	FACILITY WORK ORDER			W0161787	0	0.00	213.20	213.20
Charge Type Total									213.20	213.20
.....										

Figure 14: PDF Report generated

Summary

This manual has outlined the process of Finding a CCR SpeedCode and Running CCR – Department Reports. This process includes:

- Finding a CCR SpeedCode
 - Navigation
- Running CCR – Department Reports
 - Navigation
 - Creating the Run Control
 - Track Report Progress
 - Review and Print the Report

For more information on CCR SpeedCodes in PeopleSoft, look on the CMS website training pages at www.csus.edu/cms where you will find additional training material on this and other CMS related subjects. Alternately, you may contact the Help Desk at 278-2670 or cmshelpdesk@csus.edu.