

“Balance Sheet”:

1. Log onto PeopleSoft Reporting database
(<https://psprod.fiu.edu:8700/psp/psfsprd/?cmd=login&errorPg=ckreg&languageCd=ENG>) and sign in.
2. Click the “Reporting Tools” link (located in tan Menu on the left).
3. Click the “PS/nVision” link.
4. Click the “Define Report Request” link.
5. Enter the "FIU02" into the Business Unit field.
6. Click the “Search” button.
7. Select “Balance Sheet” report.
8. Verify/Enter Report Title: “Balance Sheet”
9. Verify/Enter *Layout: “FIU02_FIN_STMTS_BAL_SHEET”
10. Verify/Enter the “As Of Reporting Date”.
11. Go to "Advanced Options" tab under Report Request and ensure that "Data from Requesting Business Unit Only" or NOT checked.
12. Go back to previous tab.
13. Click the “Run Report” button.
14. In Process Scheduler Request window, click drop-down menu for “Server Name” and select “PSNT”.
15. Click the “OK” button.
16. Click the blue “Process Monitor” link (4th link down from the top).
17. Click “Refresh” button several times until Run Status shows and “Success” and Distribution Status shows as “Posted”.
18. Click on blue “Go back to Report Request” link on left middle of page.
19. Click on blue “Report Manager” link (2nd to last link).
20. Click on “Administration” tab at the top.
21. Click on “Balance Sheet [today’s date].xls” (blue link).
22. The report will download to Excel – click “OPEN”.

“Income Statement”:

Replace steps above with these:

8. Verify/Enter Report Title: “Income Statement”
9. Verify/Enter *Layout: “FIU02_FIN_STMTS_INC_STMT”
21. Click on “Balance Sheet [today’s date].xls” (blue link).