



PEOPLESOFT REPORTS – QUICK GUIDE

PRINTING A CHAPTER ROSTER

Menu Path: Membership System > Reports > Chapter Roster

1. Enter your Run Control ID – The first time you run a chapter roster you will need to create a Run Control ID (a “name”) to identify the process you will be using. Use the “Add a New Value” tab when you first start. In the blank space type, “roster” and then hit add. This will “name” this roster process. Next time you run a roster you can just enter “roster” in the Run Control ID field in “Find an Existing Value” and hit search.
2. Click the yellow SAVE button when the next screen appears
3. Enter the chapter number for the roster you want to print where it says FFA Chapter ID.
4. Leave the BATCH NUMBER blank to see all active Members and Staff and Partners for the current year.
5. Click yellow RUN button in the upper right corner
6. When new screen appears, make sure the CHAPTER ROSTER LIST has a check mark in the preceding box and the TYPE is Web and FORMAT is PDF
7. Click yellow OK box
8. Once returned to the previous screen, click the blue link PROCESS MONITOR in the upper right corner
9. Once in the Process Monitor screen, click the yellow REFRESH button (top right) until the Run Status says SUCCESS (middle right).
10. Click the blue DETAILS link next to SUCCESS.
11. Once the new screen appears, click the blue VIEW LOG/TRACE link
12. When the next screen appears, click the blue FFA3005_?????.pdf link
A PDF report of your current roster should appear shortly. This can be saved and printed. To print, use the print icon on the PDF screen.

NOTE – the two right columns on roster show Batch No.and Batch Status

AA – Advisor Approved

SA – State Approved

XA – Excel Uploaded

NA – National Approved

O – Not yet submitted for Advisor Approval

13. If you want to print another roster, just click on RETURN (lower left) to go back to the beginning of the process. Do not use the back button on your toolbar!

CREATING DOCUMENTATION FOR CHAPTER MEMBERSHIP BILLING

Menu Path: Membership System > Reports > Chapter Roster

1. Follow steps 1 and 2 above
2. Enter BATCH NUMBER for Member/Staff & Partner batch desired
3. Follow steps 4 through 11 above
A PDF report of your current roster should appear shortly. This can be saved and printed. This report contains summary information for National and State dues owed for the Members/Staff & Partner in that particular batch.