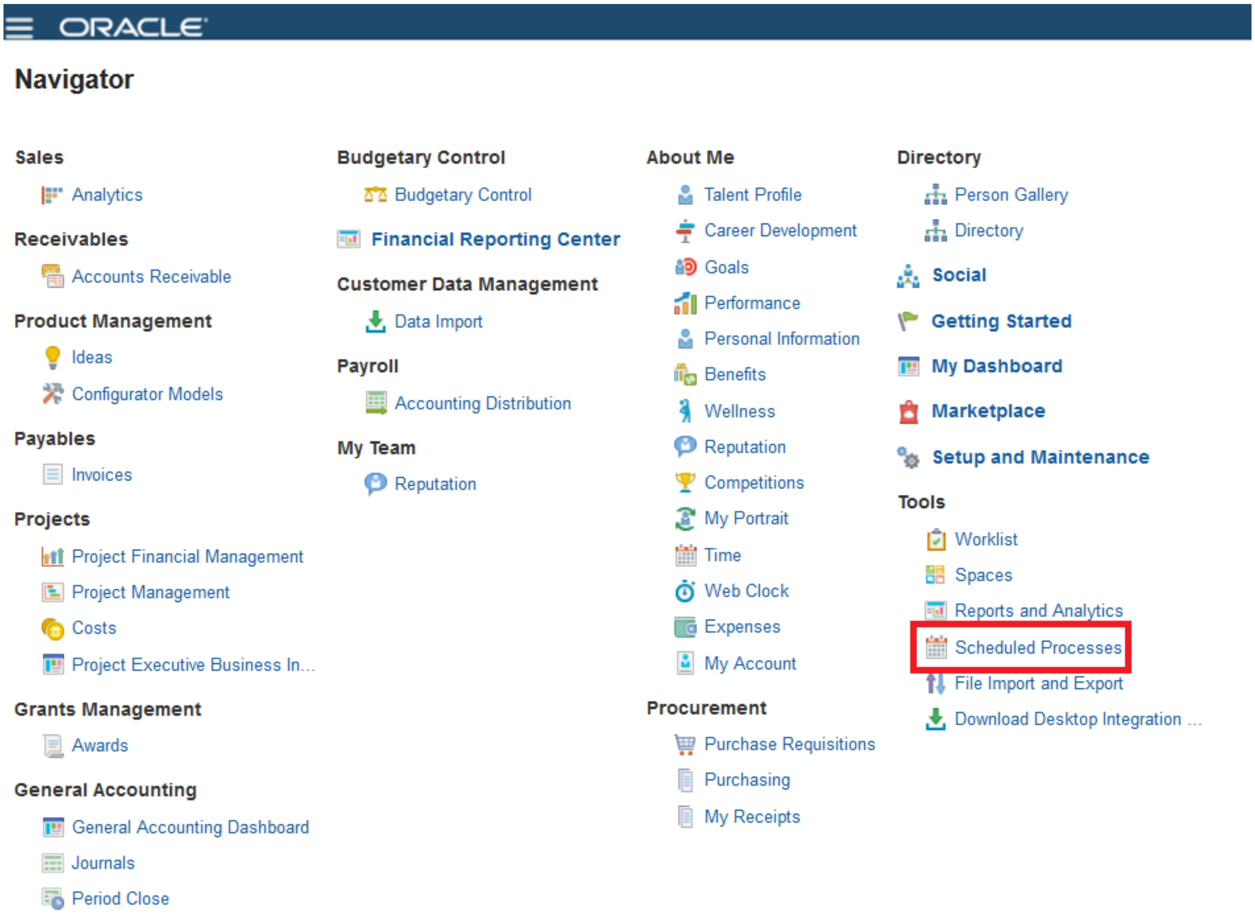
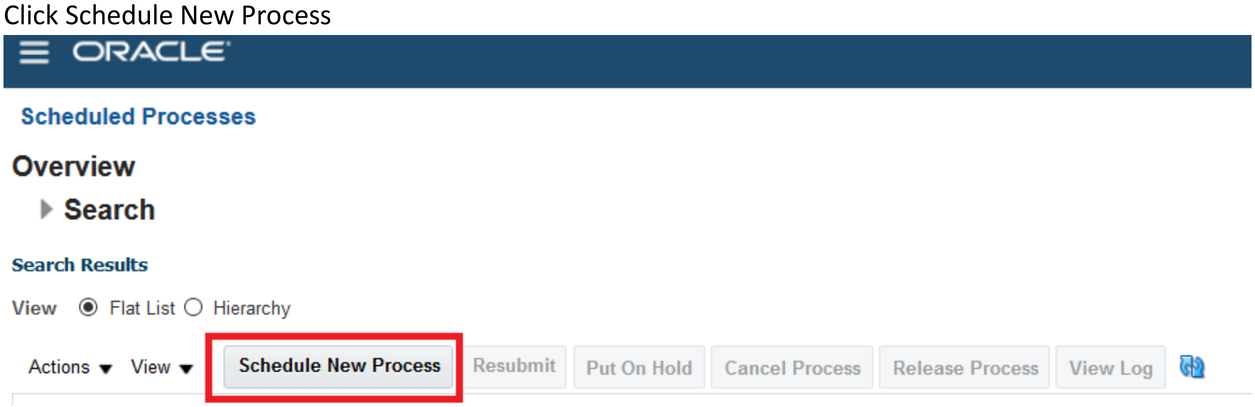
Scheduling Account Analysis Report

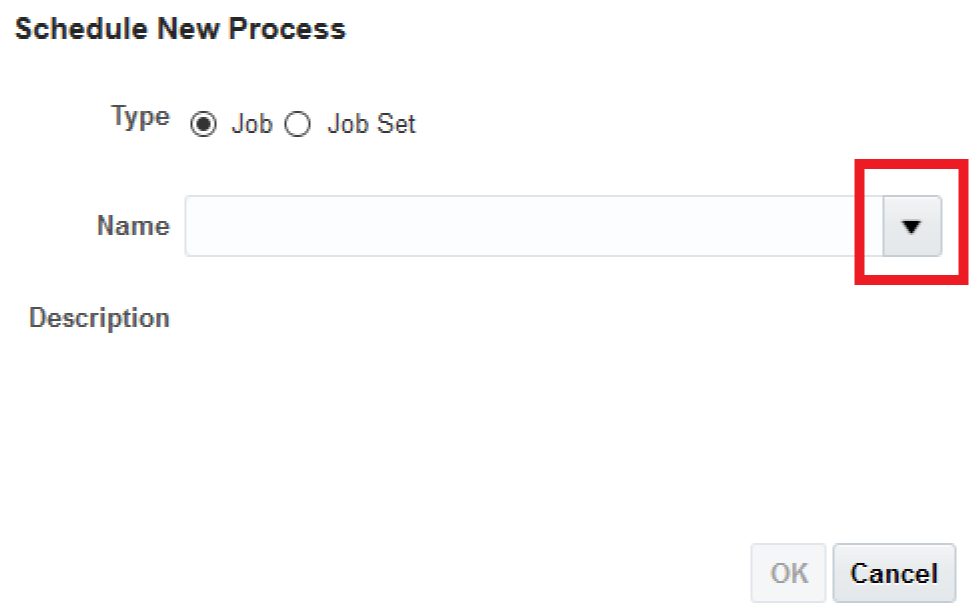
1. From the navigator select "Scheduled Processes"



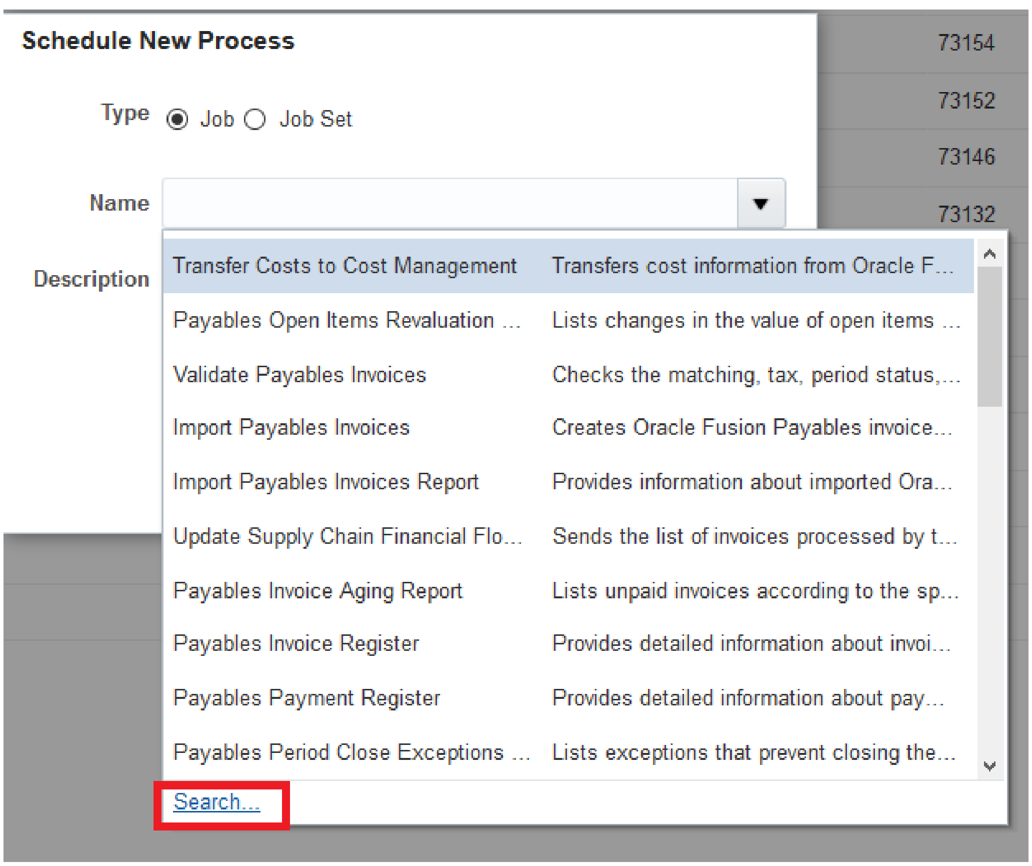
2. Click Schedule New Process



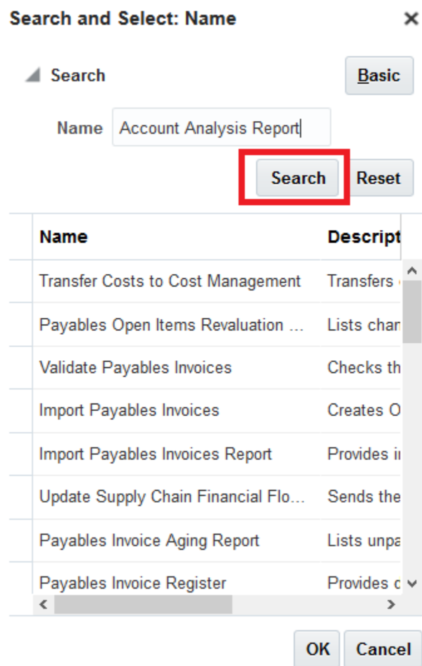
3. Click drop down arrow next to Name



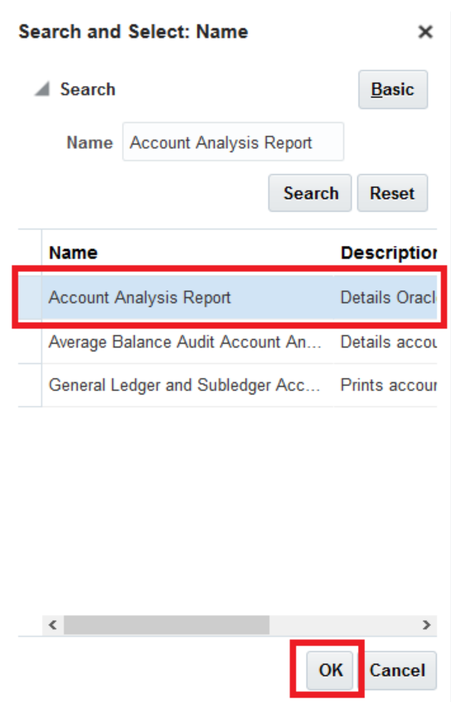
4. Click on Search



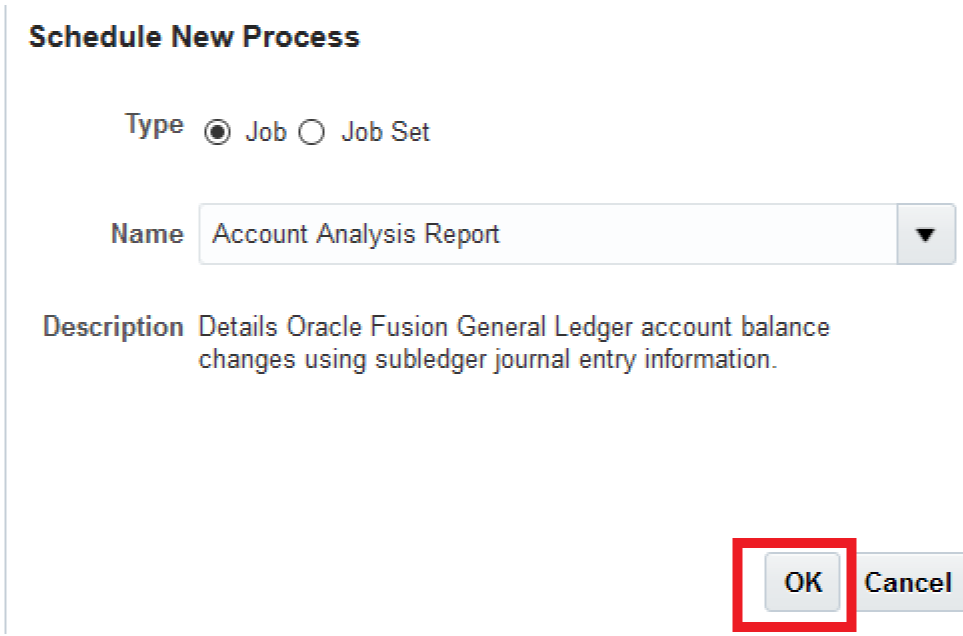
5. Enter "Account Analysis Report" in the Search box next to Name and click Search (Please note: This is case sensitive and must be entered as "Account Analysis Report")



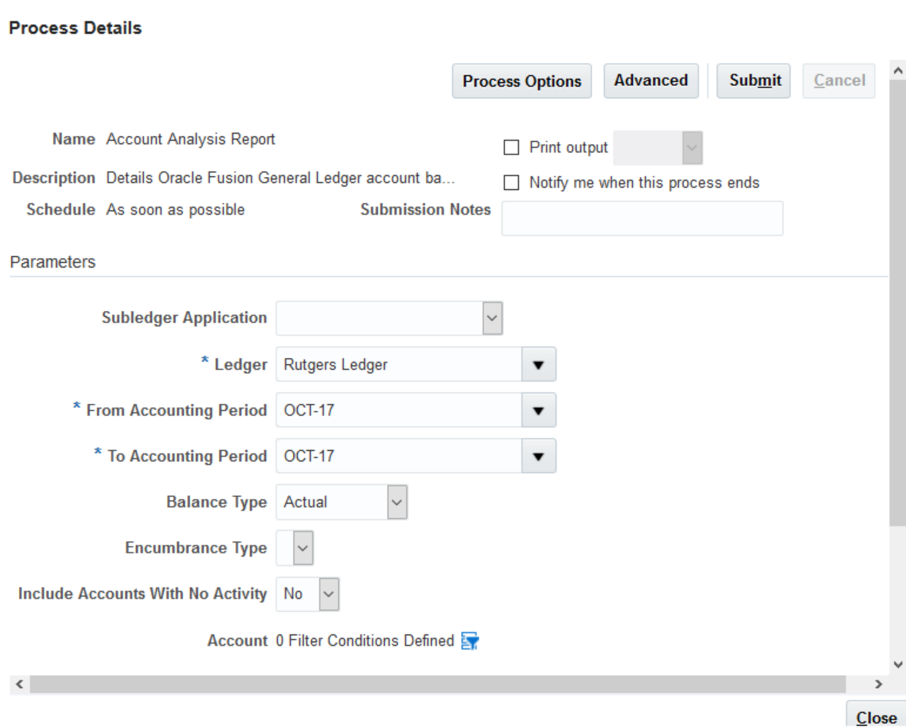
6. Click on the Account Analysis Report in the name section and then click ok



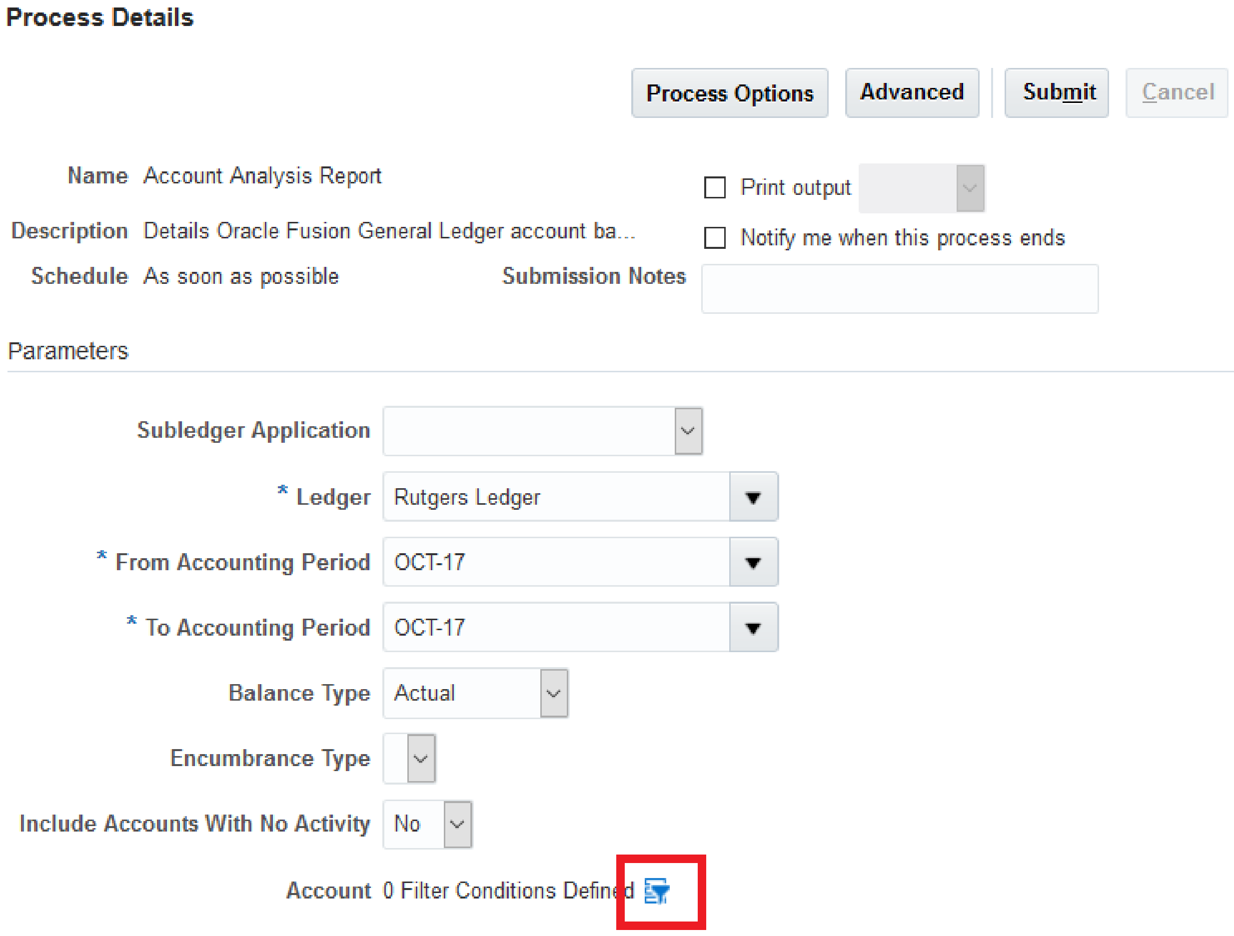
7. Click ok once the Account Analysis Report appears in name section



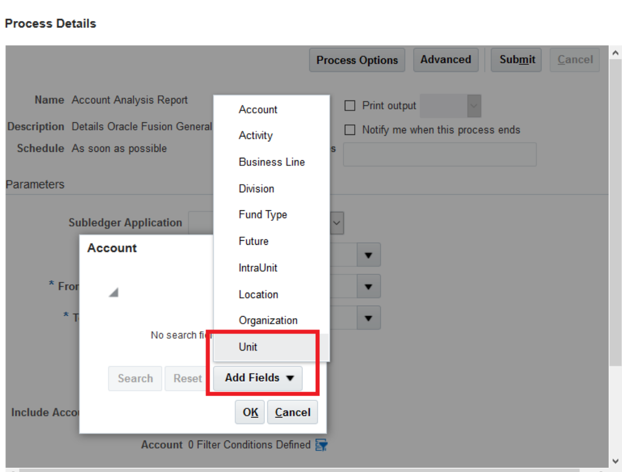
8. Enter parameters similar to below (change Subledger Application to blank for GL)



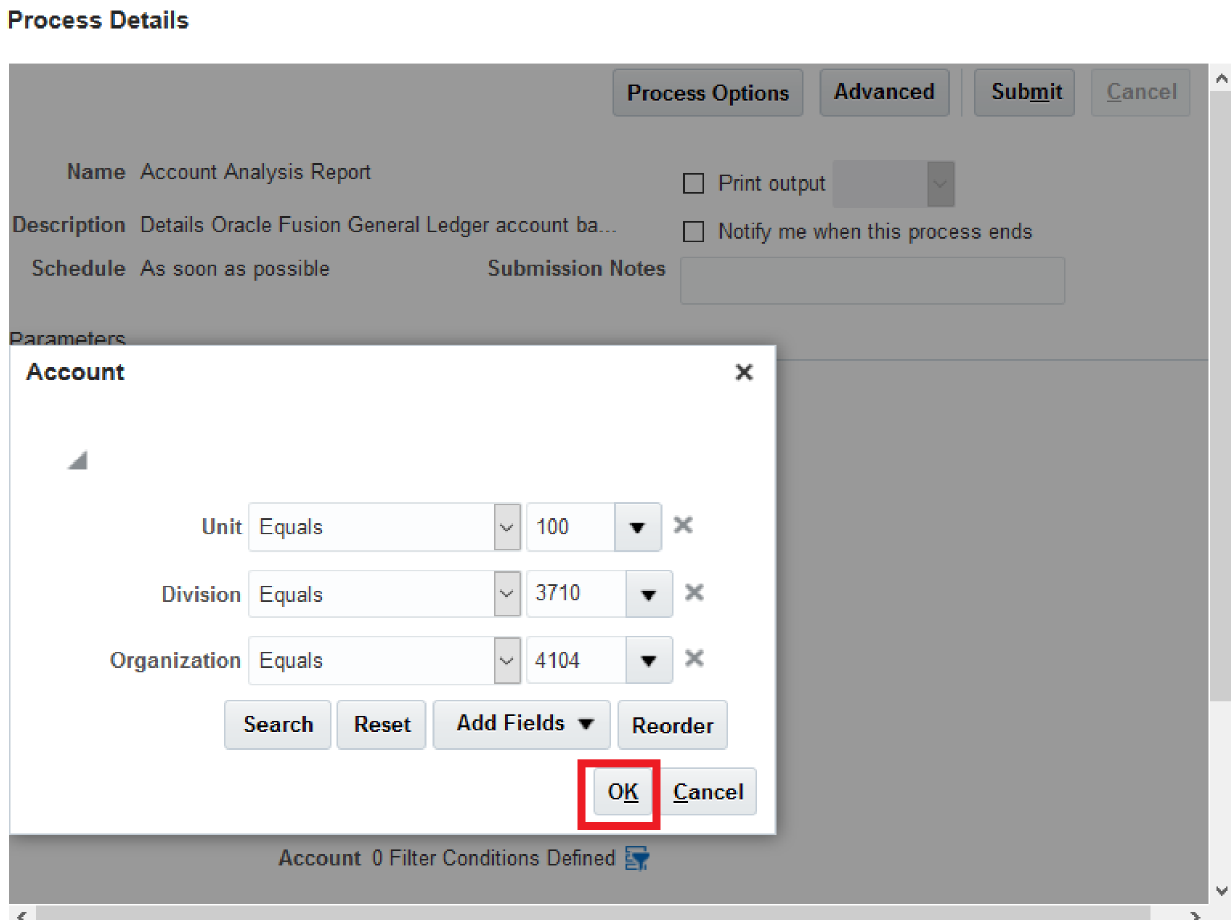
9. Click on the Filters icon at the bottom (see below)



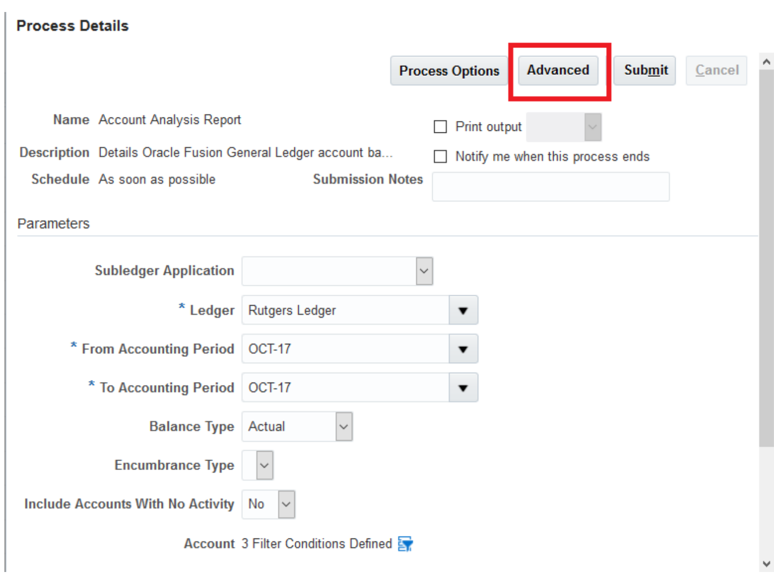
10. Add filters as necessary (ex. Unit/Div/Org) by clicking on the Add Fields drop down arrow and entering the desired COA segment value. Continue to click on add fields and enter values as needed.



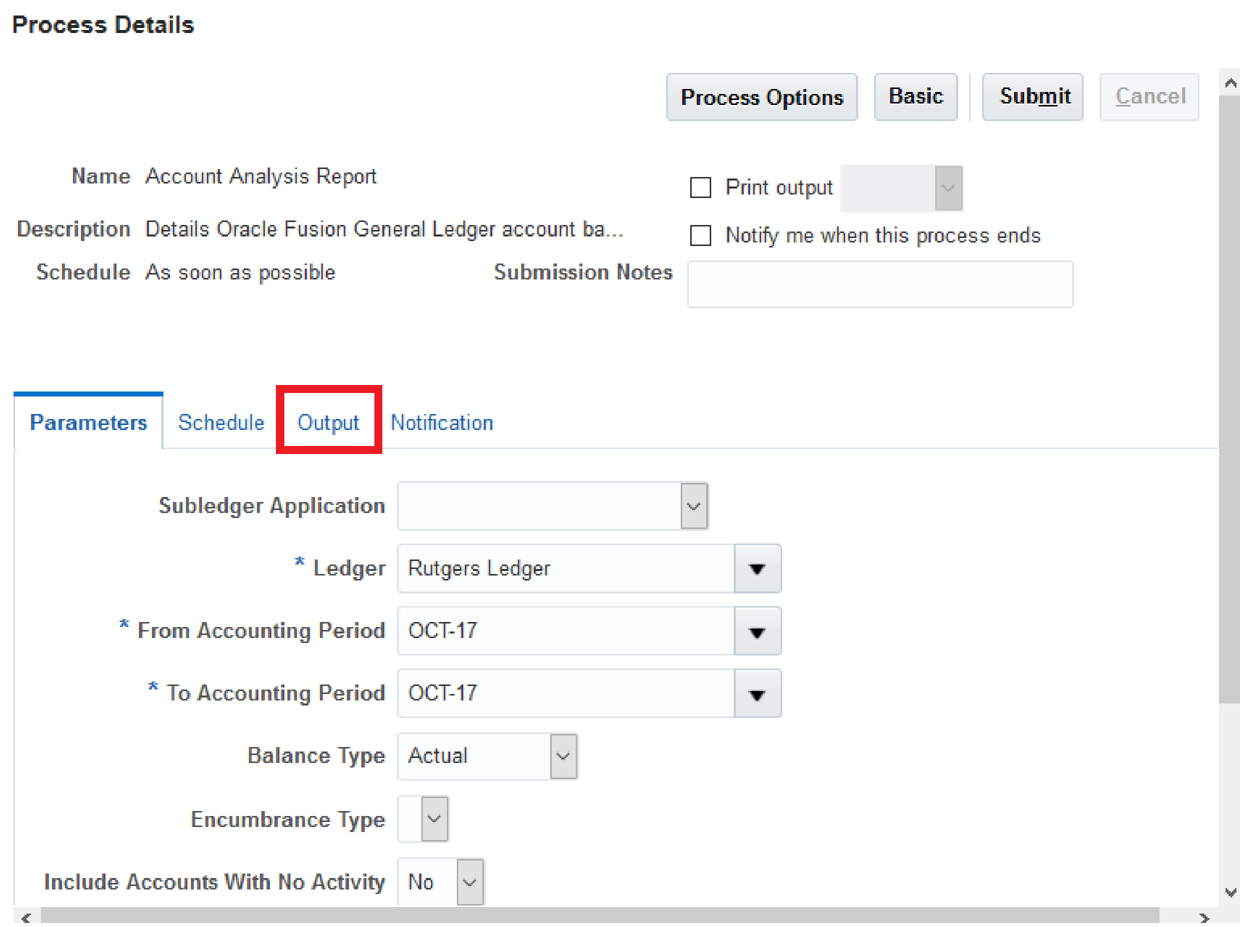
11. Click ok after adding filters



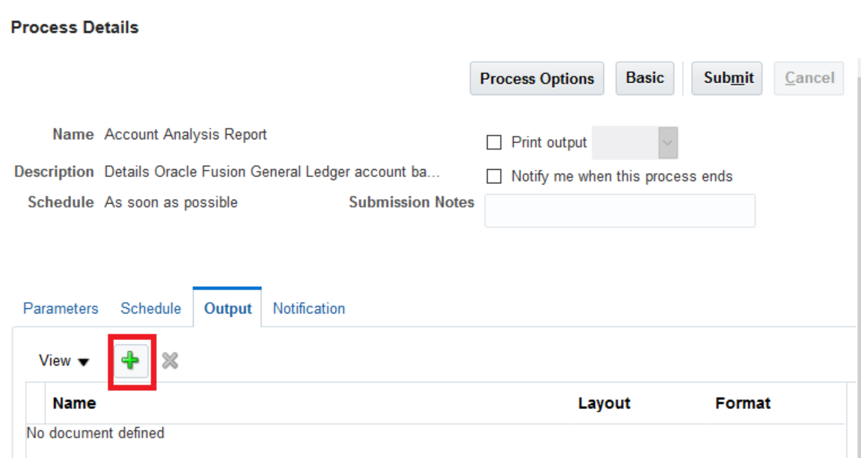
12. Select Advanced



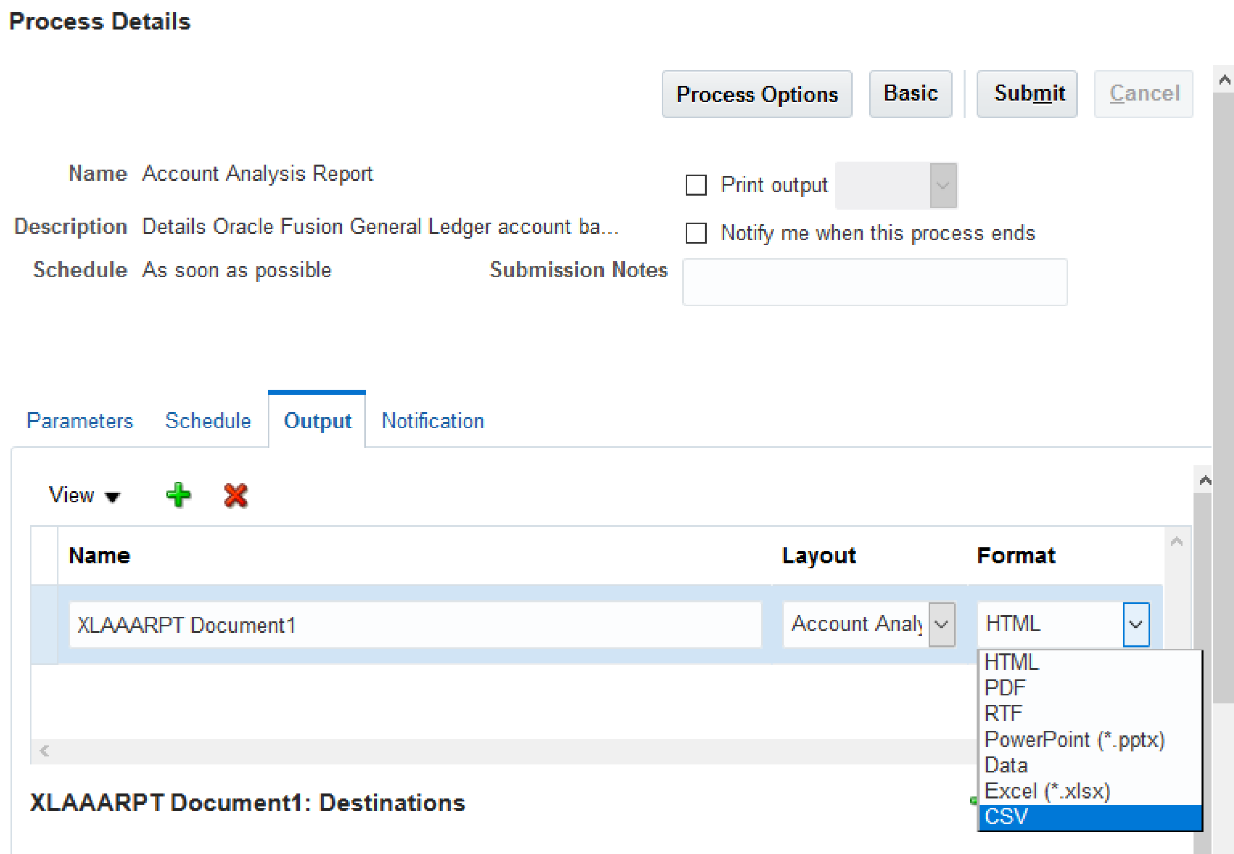
13. Select Output



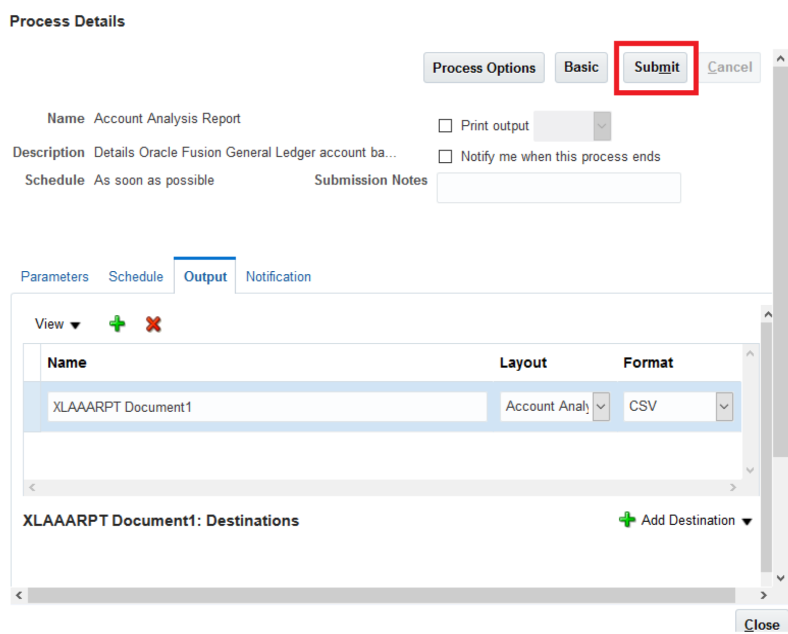
14. Click the green Plus sign (+)



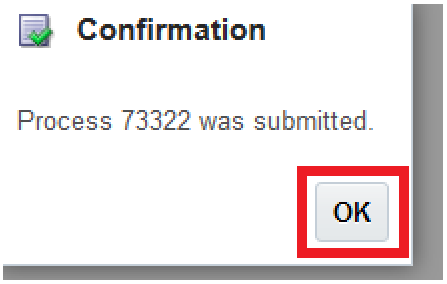
15. Select desired output format (Suggestion to select .csv)



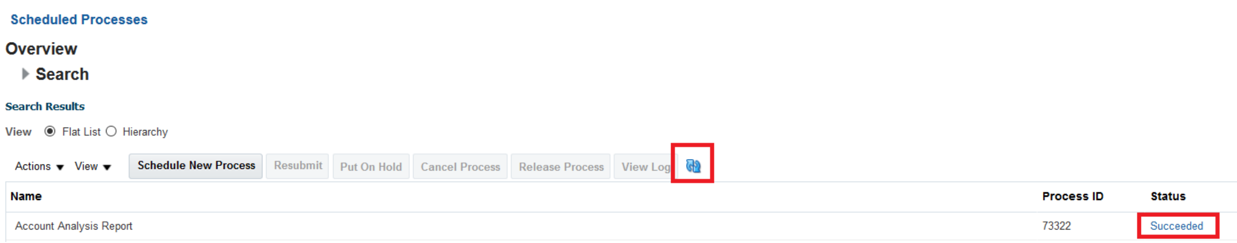
16. Click Submit



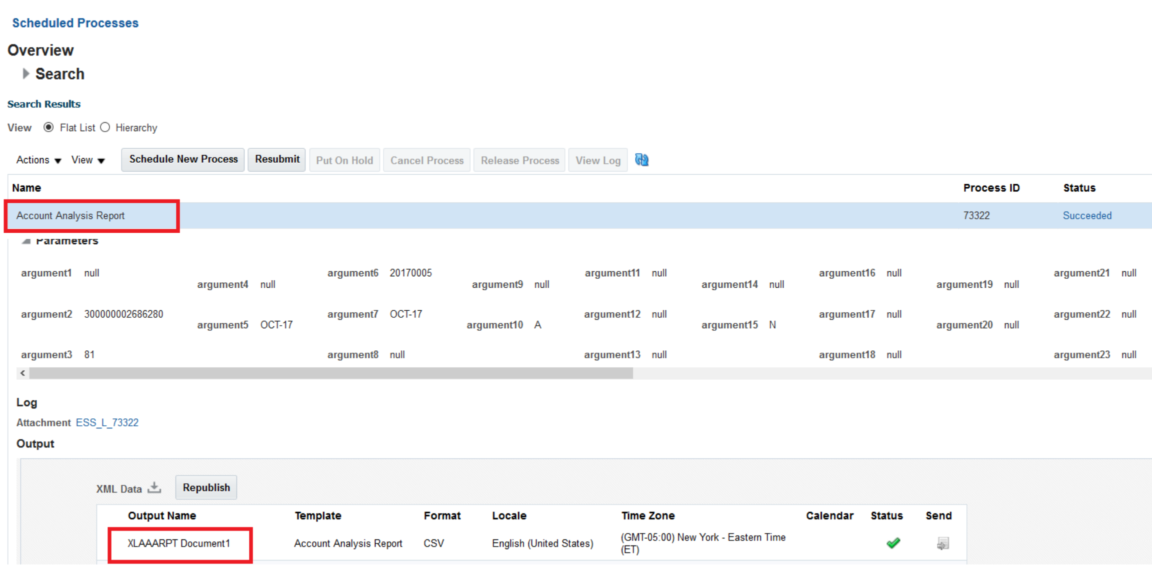
17. You will see a confirmation that the process was submitted, then click ok then Close the Process Details window



18. Wait for 2-3 minutes for report to run, then click the blue refresh icon and confirm status is "Succeeded"



19. Click on the Account Analysis Report in the Name section and scroll down to see the document



20. Click on the Document under Output name to open it

21. Open Document. If the file does not automatically open in excel, you can save the file and then open the file from your downloads folder.