How to run a Financial Detail and Operating Summary report for the current month:

Step 1: Go to https://portal.cusys.edu/MyCUInfoFedAuthLogin.html

Step 2: Login using your Identikey and password.

Step 3: Click the CU RESOURCES tab.

Step 4: Select Reporting from the left hand column.

Step 5: Select Public Folders.

Step 6: Click on Finance, the 2nd folder.

Step 7: Choose m-Fin FINANCIAL DETAIL.

Step 8: A new screen populates. Enter information into the “FISCAL YEAR AND ACCOUNTING PERIOD” box. NOTE: The “Fiscal Year” will automatically default to the current fiscal year we are in.

1) Go into the “FISCAL YEAR AND ACCOUNTING PERIOD” box and select the 2nd row of the FROM boxes and click on the month you want from the drop down menu. Note that the numbers in front of the month mean accounting periods not the date.

2) Make sure the 2nd row of the TO boxes has the correct month listed from the drop down menu. (You can run separate months, i.e. August to September)

* For example, if you want to run a report for May 2014, you will select May in the FROM box and the TO box. *

Step 9: Go into the SPEEDTYPE box type and in the “Keywords” field enter your speedtype number and click the “Search” button.

Step 10: The speedtype will appear in the “Results” box. Click the “Insert” button and the number transfers to the “Choice” box.

Step 11: Scroll down to the bottom and click the “Finish” button.

If you want to run your Operating Summary Report, follow the same steps 1 through 11 except Step 7 and Step 8:

Step 7: Click on m-Fin OPERATING SUMMARY

Step 8: In the box at the top you will chose the month you want to run the report for and the CURRENT and ACCOUNTING PERIOD boxes need to have the same month. The fiscal year will default to the current one. NOTE: You can only run one one month at a time.
Step 9: Go into the SPEEDTYPE box type and in the “Keywords” field enter your speedtype number and click the “Search” button.

Step 10: The speedtype will appear in the “Results” box. Click the “Insert” button and the number transfers to the “Choice” box.

Step 11: Scroll down to the bottom and click the “Finish” button.