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1. **First Time Log in Set up**

The first time a new user logs-in to the new Application they will need to do the following set up:

- Go to Settings and select ‘Options’ in drop down box
- Click on Email tab
- Ensure under ‘Select the email messages to track in Microsoft Dynamics 365’:  
  Track is shown as ‘Email messages in response to Dynamics 365 email’
- Ensure under ‘Automatically create records in Microsoft Dynamics 365’:  
  Create checkbox in unchecked
- Then click on OK
2. **Accessing and viewing the Research Finance Statement Workflow Application**

1. Navigate to the Research Finance Statement Process Application in Dynamics:  

2. Login using your zid@ad.unsw.edu.au and password

3. The following ‘My Research Project Tasks’ view will be displayed:

4. You can select several different Views from the drop-down box next to the heading that is shown:

5. The various Views are as follows:
   a. My Assigned Research Tasks – my tasks I need to complete;
   b. My Assigned Research Tasks created in the past 7 days – my new tasks created in last 7 days;
   c. My Team Research Project Tasks – TL View – All team’s tasks – set up for Team Leaders;
   d. My Completed Research Tasks – tasks completed that I worked on;
   e. My Research Tasks due this week – All teams tasks due this week.
   f. My Research Project Tasks – All teams’ tasks – set up for RF Manager & Director.

6. The following details are shown under these Views:
   a. Institution Number;
   b. Finance Ref #;
   c. Case Title;
   d. Customer;
   e. Faculty;
   f. Department;
   g. RGC Due Date – this is 5 days prior to the Report Due date in InfoEd;
   h. Research Task Status;
   i. Status Reason;
   j. CI;
   k. Research Accountant;
   l. Grants Officer;

7. Created On.
You can do the following within these lists:

a. Set a filter on different columns;
b. Sort by Report Due Date, to ensure projects due first are completed first;
c. Search by inserting an asterisk ‘*’ then whatever you are searching for;
d. Download your tasks to Excel.

8. If you export to Excel this is the view of the projects:
3. **Research Accountants Steps**

The Research Finance Statement Process flow is as follows:

- Projects that Research Accountants (RAs) need to complete will be visible in their Views.
- Tasks for RAs in the initial workflow will be shown as either ‘Assign Deliverable’ (1st step of workflow) or ‘Prepare Report’. If the reports due date is less than 35 days from when initially loaded from InfoEd into the application, the workflow will automatically start at ‘Prepare Report’ as it needs to be worked on immediately.
- There are 3 Status Reasons that the Tasks can be set as, either ‘In Progress’, ‘Rework’ or ‘Waiting for Details’.
  - ‘In Progress’ means that the flow is progressing as normal and no rejections have been recorded.
  - ‘Rework’ means that the flow has reverted to Prepare Report after being rejected somewhere along the process, either by the Team Leader, CI or CA/CPA.
  - ‘Waiting for Details’ means that a query has been raised and awaiting GMO response to continue with completing the financial report.
- If a projects Financial Statements has been rejected by GMO, then the RF Manager will trigger a new workflow called RGC Process.

**Switch Process**

Select a different process.

- This flow is different to the initial workflow as it does not involve TL, CI or CA review, it just requires the RA to perform rework and then the RF Manager and Director to review and send back to GMO.
- This flow has a 2 day turn around due to the urgency of having the corrected financial statements returned to GMO to send to the Sponsor.
- Tasks for RAs in the RGC Process will be shown as ‘RA Rework’.

![Case: Research Finance Project Task](image)
When selecting a project from the list of tasks, the following screen will appear, showing where the flow is and all the project details.
For tasks set as ‘Assign Deliverable’, if the RA is ready to commence work on the project, they can commence the workflow by clicking on ‘Next Stage’ otherwise it will move to Prepare Report at the 35-day stage.

Once RAs click on Next Stage and refresh their screen the workflow will progress to ‘Prepare Report’. This is identified by a flag – which shows which stage of the workflow is Active. A tick indicates that that stage is complete.

All mandatory fields are shown with a red asterisk. Thus, in the Prepare Report Stage the following actions must be completed before progressing to the next stage – Team Leader Review.

- Complete Financial Statement – Yes/No;
- Financial Statement is Attached – Yes/No;
- Obtain Full Ledger (this is referring to a full list of transactions from Calumo) – Yes/No;
- Ledger Attached – Yes/No;
- Period Start Date – select date from calendar drop down box;
- Period End Date – select date from calendar drop down box – must be after Start date;
- Current Sponsor Template Received – Yes/No (this field is not mandatory).

Period End Date must be after Period Start Date or a message will be displayed, and you cannot progress.

If you try to progress to the next stage without completing all mandatory fields the system will display an Error message and not let you progress. You can save and come back and complete the stage at a later time.
To attach the financial statements and Ledger select the tab on the right titled ‘Financial Statement & Docs’.

Click in the box that says Enter a note.

When you click on Attach you can select a file, provide a Title and add a Note if required.

All documents that are attached in this tab will be sent to the CI when approval is requested as well as the GMO at final submission. If there are any documents that do not need to be sent, please delete from this tab by pressing on the x next to the title. You do have the option to ‘Undo’ but you do not get asked if you are ‘sure you want to delete this file’.
- All actions that occur within the application for the project is recorded under the Activities tab. Additional activities can be created directly from within this tab; e.g., send an email, recording a phone call, add a task etc.
- To attach an email, you have sent or received via Outlook into the Application, so it appears in the Activities Tab and not in the Financial Statement Tab please refer to notes below ‘Sending and attaching emails within the Application’
- In the Posts tab all Posts are recorded, and additional User posts can be made

<table>
<thead>
<tr>
<th>Posts</th>
<th>Activities</th>
<th>Financial Statement &amp; Docs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a note</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Transactions for the project**
Ledger transactions from Calumo
- P4 - Multi Year Project Summary (28).xlsx
  Suzie Woods - Today 1:27 PM

**Financial Statements**
Financial Statements
- 1-SR001 ARENA_CONsolidated (2017) (FINAL as at 31 Mar).xlsx
  Suzie Woods - Today 1:26 PM
4. **How to Add a Query to Show That a Project is Pending Further Information**

At the bottom of the Summary Page, below the Research Project Details, a separate section exists to enable Users to identify project queries, without altering or holding up the workflow. It does, however, change the Status Reason to "Waiting for Details" but it does not stop the SLA counter.

The main reason for this is to highlight projects where Research Finance Accountants are awaiting further clarification or information from the GMO or Sponsor before being able to complete the financial statements/deliverables.

To add a Query, do the following:
1. Go to the Queries section on the bottom of the screen
2. Click on the + on the side

3. A General screen will appear where all the following fields should be completed.
   a. ‘Pending Query with’ – when you click on this a drop-down box will be displayed where you can choose one of the following: GMO, Sponsor or Other External;
   b. ‘Query Raised with Name’ – free text to type the name;
   c. ‘Query Summary’ – description of query or issue raised;
   d. ‘Query Raised on’ – date that query/query was raised;
   e. ‘Query Closed on’ – date query was resolved.

4. Click on Save & Close once all fields are completed
5. When the Query is first raised and there is no ‘Query Closed On’ date the Status Reason will change to ‘Waiting for Details’

6. Once the query is resolved, open the same Query by double clicking on it and then complete the ‘Query Closed On’ date. Click the Save icon on the bottom right side of the screen and exit that screen.

7. The Status Reason will change back to ‘In Progress’ and the Query will show a Query Closed
5. **Research Finance Team Leaders Steps**

1. For Team Leaders (TLs) the Research Task Status will be set at Team Lead Review.
2. TLs will also be able to see a list of all their Faculties projects no matter where in the flow they are as well as seeing ALL projects. This is in case other faculties have an excessive number of projects to compete and all TLs can identify what teams may require assistance and projects can then be re-assigned to other RAs.
3. TLs need to Approve or Reject the attached financial statements once the RA has progressed the flow from Prepare Report to Team Lead Review. If TL rejects, it is mandatory to enter a comment.
4. If they reject the flow will go back to the RA to Prepare Report Stage.
5. If they approve the flow will progress to CI Review/Approve stage.
6. TLs have the option to Skip CI Approval if it is not required. If they do this, the Workflow will skip CI Review stage and move directly to CA/CPA Sign Off stage. This should only be completed if there is documentation from GMO to support this. An email or notes should be attached to the project to indicate that CI approval is not required.
6. **How to create a custom view**

1. Click on the drop-down button next to My Research Projects Tasks and from the menu select ‘Create Personal View’

2. Click on New.

3. Rather than create a brand-new View it is easier to use an existing view by clicking in the Used Saved View box and adding or deleting columns:

4. To add/change columns select Edit columns:
5. Click on Add Columns from the right drop down menu

6. Tick the additional columns you want to include in your View.

7. The list of all your columns will be shown.
8. You can rearrange the columns by selecting the column you want to move and pressing on the arrows → ← under Common Tasks. For example, Report Status. You can also Delete a column by selecting ‘Remove x’.

**Edit Columns**

Edit columns for the saved view. These columns represent the data that will be displayed in the view.

![Edit Columns Image]

*Note:* When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.

9. To be able to see what projects you last worked on/modified you can add ‘Modified On’ date to a personal view as well as ‘Period Start Date’ and ‘Period End Date’ that you have added under Prepare Report. To do this complete the above steps 1-5 then at Step 6 select the following columns. Click on OK,
10. New columns have been added

11. Select Save As and name your View,

12. The New View is now available. When you select it the columns you chose will be shown.

To delete a personal view
To delete a personal view

1. Click on Create Personal View. Click on Saved Views.
2. All your views will be listed.
3. Select the Views you want to delete by ticking the box next to the Name.
4. Click on ‘Delete Saved View’.
5. Confirmation box will be displayed.
6. Select Delete and View is no longer there.
7. **How to Send & Attach Emails to the Application**

The best way to send an email from the application is to send a normal email via Outlook and then attach it to the Project via the Dynamics 365 button/link in Outlook.

To attach an email to a project in the application via Outlook perform the following steps to ensure it appears in the ‘Activities’ Tab and not the ‘Financial Statements & Docs’ tab. Step 8 shows how to remove the email from the Application.

1. In Outlook you will see an additional button in the Menu Bar called ‘Dynamics 365’. Open the email you want to attach, it can be from your In Box or Sent Box. Click on the ‘Dynamics 365’ button and the following side screen will appear next to the email. Click on the 3 dots under ‘Set Regarding’.

2. The ‘Look for Records’ Search panel will appear:

3. Enter the Project number or name to search. When your project appears click on the project. This will automatically attach the email to the project you have selected.
4. A message will show ‘Successfully tracked’ indicating that the email has been successfully inserted in the application within that project and attached under the Activities tab.

5. To check that the email has been successfully loaded into Dynamics, open the project in Dynamics. The email will be shown within the Activities tab with the following icon indicating an incoming email.
6. You can open the email by clicking on 📦 which will display the message within the tab or click on 📫 which will display the full email as well as any attachments that was attached to the email.

7. To view the attachment, click on the attachment and the following screen will appear. To view it click on it and it will appear below the message for you to open.
8. Unfortunately, the application does not allow you to **track 1 email to multiple projects**, we are reviewing this. However, for now, the best option is a work around where in the case where we receive email correspondence relating to multiple projects, the RA can re-forward the email to themselves with an **adjusted subject** and then track it to other projects to maintain an audit trail.

9. **To untrack/remove an email from the Application** do the following:
   - Select the same tracked email again and click on the Dynamics 365 button;
   - It will show that the email has been Tracked as it will display a green box saying, ‘Tracked regarding’. Click on the 3 dots next to ‘Tracked Regarding’ within the green box and select Untrack.
   - A confirmation email will be displayed advising if you want to delete the email activity in Dynamics 365 – Select Yes.
   - A message will then show advising ‘Email will be deleted’.
   - If you select the same email again and click on Dynamics 365 button it will show the email as ‘Not tracked’ in a blue box and the email will no longer appear under the Activities Tab of the project in the Application.
Do you also want to delete the email activity in Dynamics 365?

Yes

No

Email will be deleted

Not tracked
8. **How to Create a Project in the Application**

All projects and deliverables should be in InfoEd as this is the Single Source of Truth. If there is a deliverable not in the Application and thus not in InfoEd contact GMO ASAP to ha. In the meantime, to create a new project directly in the RF Application do the following (only TL, RF Manager & Director have permission):

1. Select New Case on the top Menu
2. Complete all mandatory fields – indicated with a red asterisk *
3. Complete all fields with a red asterisk – these are mandatory.
9. How to Cancel a Project in the Application

For any project that is loaded from InfoEd but does not need to go through the work flow, the case/project will need to be cancelled by the TL or RF Manager or Director. By cancelling it rather than deleting the project all the details will be retained in the Application however the workflow will not need to be executed.

The person cancelling the project needs to select the project then click on Cancel Case on the Menu bar across the top of the screen.

A dialogue box will appear to Cancel case. When Confirm is selected a confirmation dialogue box will then appear.

When confirm is selected the project workflow goes from green to grey and a message appears on the bottom of the screen saying ‘Cancelled’. Once cancelled the Status Reasons shows as Cancelled and the flow becomes grey in colour rather than the normal green.
10. Setting up a new User in Dynamics 365 Application

1. Click on the drop-down arrow next to Dynamics 365 and select the ‘Dynamics 365’ application (as opposed to being in the ‘Research Finance Workflow’ application).

![Dynamics 365 application screenshot]

2. Select the drop-down arrow next to Sales; click on Settings and then under System click on Security.

![Sales settings screenshot]

3. Click on Users

![Users settings screenshot]
4. A list of all Enabled Users set up in Dynamics will be displayed. For all new Research Finance users, you need to ensure the following:
   a. Research Accountants should have Business Unit = Research Accountants
   b. Team Leaders, CA/CPAs, Managers and Directors should have Business Unit = Research & Finance

5. All Users will be added to Dynamics by IT when requesting set up, however you may need to change their set up. To do this select on the Person and select ‘Change Business Unit’ on the Menu bar.

6. Search for the Business Unit required – in this case ‘Research & Finance’ and click ‘OK’

7. Next you need to select ‘Manage Roles’ – which provides that permission/authority. To do this select on the Person and select ‘Manage Roles’ on the Menu bar.

8. From the list select all roles relevant to that User then click on OK
11. **How to Assign/Change User Roles and Responsibilities Within the RF Application**

TL, RF Manager and RF Director can assign RAs, TLs and CA/CPAs to various faculties and/or departments within the Application.

To change the RAs, TLs or CA/CPA do the following:

1. Click on the drop-down arrow next to Research Finance Area along the top menu
2. Select Research User Mappings under Settings

3. To add a new employee, select **NEW** on the Menu bar

4. All fields need to be completed as they are mandatory:
   - Name – this is the name you want to show – usually name of the person as well as their responsibility;
   - User – this is the person and they must be set up within the Application;
   - Faculty – this is the Faculty that the person is responsible for;
   - User Type – this is the person’s role/responsibility – either Director, Manager, CA, TL, or RA – select from drop down box;
   - Click on the Save icon on the Menu bar
   - You must save the record before you can add departments
5. Once record saved you can add departments in the bottom panel if a person is responsible for certain departments within a Faculty:

- Click on the + and search for a department;
- Select save icon on bottom right of screen to save record
12. **How to Reassign Projects to RAs or TLs if Roles Change or Users Leave**

1. **Update the Research User Mappings in Settings and ensure all Users are correctly assigned to Faculty and Departments.**
2. **Click on ‘Advanced Find’ button on the menu – looks like a funnel.**

3. **Next you need to create your Report/View that you are looking for.**
4. **Look for:** should show ‘Cases’
5. **Select Details in Menu.**
6. **A line will appear so you can select what you want to show within your Report.**

7. **Click on Select and chose the field you want to search on from drop down box. In this case Research & Finance Team Leader.**

8. **Then click on ‘Equals Current User’ and select from drop down box what you want it to contain, e.g., Equal or Not Equal**
9. In this View I want to see all cases where ‘Research & Finance Team Leader’, ‘Equals’ and then Enter Value. Click on the Search button to Look Up Records.

10. In this case I want to see the cases where Stella Chen is assigned a project as Team Leader. Search for Stella. Tick in the box next to the Users Name then click on Select and the Users name will appear in Selected records box. Press Add.

11. Once you have finished your selection click on Results.

12. A view/report will appear of all the credentials selected. In this view all cases where Stella Chen is assigned as the Team Leader.
13. I then want to reduce my selection and only show all projects that are not Completed so I select another line and have the following: ‘Research Task Status’ ‘Does Not Contain’ and Select Value = ‘Submitted to RGC’.
14. Click on Results. A new view/report will appear of all the credentials selected. In this view all cases where Stella Chen is assigned as the Team Leader and Projects are Open and have not been submitted to RGC.

15. Next Select those cases you want to change/update (tick box on the side next to Institution Number) and then Run Workflow
16. A dialog box will appear with all the Workflow Processes to select. In this case tick ‘RF – Assign RA & TL’ and click Add.

17. A confirmation box will appear. Select ‘OK’ to proceed.

18. The Results will appear showing that all projects have now been re assigned to the Team Leader assigned in the Research User Mappings.
13. ASSIGNING A FACULTY AND/OR DEPARTMENT TO AN EXISTING RA

In this example the Business Requirement is to re-assign all BDI (Department) Projects from Elena Tchaoun (RA) to Justyna Terlecka (RA)

**Part 1: Add Department Allocation (BDI) to Research Accountant (Justyna)**

1. Click on the drop-down arrow next to Research Finance Area along the top menu
2. Select Research User Mappings under Settings

3. Select the User, by ticking the box next to the Users name and click on Edit in the Menu bar. As BDI is a Department within the Faculty of Medicine; Select “Justyna Terlecka – RA – Faculty of Medicine”

4. Select ‘+’ to add the Department
5. Enter the department in the search field, and select Search Function, in this case ‘BDI’

6. A list of applicable departments will be shown. If the one you require is there click on it, otherwise click on ‘Look up more Records’

7. The Search Field will be populated with the department entered, but you can change it on this screen

8. Select the correct department, by ticking the box next to the department (in this case BDI)

9. Click on ‘Select’ button for the Department to appear in the Selected records field

10. Click ‘Add’

11. The newly assigned Department (BDI) will appear assigned to Justyna’s (RA) portfolio.

12. Save the new record by pressing on the save icon on the bottom right of screen.
Part 2: Remove prior Department Allocation to (BDI) from other Research Accountant(s)

Note: Allocation of a Department to more than ONE Research Accountant will cause Project Assignment Errors.

1. Click on ‘Advanced Find’ button on the menu – looks like a funnel.

2. Next you need to create your Report/View that you are looking for.

3. In the Look for box ensure it has ‘Cases’

4. Click on Details in Menu.

5. A line will appear so you can select what you want to show within your Report.

6. Click on Select and chose the field you want to search on from drop down box. In this case Department.

7. Then click on arrow next to ‘Equals’ and select from drop down box what you want it to contain, e.g., Equal or Does Not Equal, select ‘Equals Current User’
8. In this View we want to see all cases where ‘Department’, ‘Equals’ and then Enter Value. Click on the Search button to Look Up Records.

9. Enter the Department Code in Search Field and click on the Search button – in this case BDI.

10. Click on the Department Name in the list – in this case BDI and an information box will be displayed.

11. A list of all RA’s that are currently Assigned to the Department (BDI) will be shown. Any duplication of assignments must be removed from the other RA’s.
12. The Department (BDI) duplication needs to be deleted from Elena’s portfolio.
13. Next to ‘Elena Tchaoun – RA – Faculty of Medicine’ click on the rubbish bin icon to delete her.

14. Then click on the Save icon on bottom right of screen.
Step 3: Re-allocation of ALL “In Progress” Projects based on NEW Portfolio Assignment – will need to reperform some tasks from above

1. Click on ‘Advanced Find’ button on the menu – looks like a funnel.

2. Next you need to create your Report/View that you are looking for.
3. In the Look for box ensure it has ‘Cases’
4. Click on Details in Menu.
5. A line will appear so you can select what you want to show within your Report.
6. Click on Select and chose the field you want to search on from drop down box. In this case Department.

7. Then click on arrow next to ‘Equals’ and select from drop down box what you want it to contain, e.g., Equal or Does Not Equal, select ‘Equals Current User’
8. In this View we want to see all cases where ‘Department’, ‘Equals’ and then Enter Value. Click on the Search button to Look Up Records.

9. Enter the Department Code in Search Field and click on the Search button – in this case BDI.

10. Tick the box next to the Department Name in the list – in this case BDI and click on Select then Press Add.
11. Click on Results to get a view/report will appear of all the credentials selected. In this view all cases assigned to the Department BDI. Both Justyna and Elena have been assigned BDI projects.

12. To reduce the selection to only show projects NOT Completed, select another line and add the following: ‘Research Task Status’ ‘Does Not Equal’ and Select Value = ‘Submitted to RGC’. Click on OK then Results
13. Next Select those cases you want to change/update (tick box on the side next to Institution Number) and then Run Workflow

14. A dialog box will appear with all the Workflow Processes to select. In this case tick ‘RF – Assign RA & TL’ and click Add

15. A confirmation box will appear. Select ‘OK’ to proceed.
14. Reviewing the Audit History of a Project

To review the actions and changes that have occurred over the lifetime of a project and who made the changes an Audit History is available.

To access the history, open the project you want to view and on the top black menu bar next to the name of the Project click on the ‘V’.

When you click on Audit History all the activities will be listed in date order with what changes have been made to which fields, who changed them and what the old value was, and the new value is.

Audit History

<table>
<thead>
<tr>
<th>Changed Date</th>
<th>Changed By</th>
<th>Event</th>
<th>Changed Field</th>
<th>Old Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/03/2019 11:2...</td>
<td>Muhammad Asi...</td>
<td>Update</td>
<td>Research Task Status</td>
<td>Submitted to RGC</td>
<td>Submitted to RGC</td>
</tr>
<tr>
<td>4/03/2019 10:24</td>
<td>Christopher Pratt</td>
<td>Update</td>
<td>Resolution Date</td>
<td></td>
<td>25/02/2019 12:00 AM</td>
</tr>
<tr>
<td></td>
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<td>Stage Id</td>
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<td></td>
<td>Traversed Path</td>
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<td></td>
</tr>
<tr>
<td>25/02/2019 11:0...</td>
<td>Muhammad Asi...</td>
<td>Update</td>
<td>CA / CPA Review</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>25/02/2019 11:0...</td>
<td>Muhammad Asi...</td>
<td>Assign</td>
<td>Owner</td>
<td>Grace Zhou</td>
<td>Isabella Cheung</td>
</tr>
<tr>
<td>25/02/2019 11:0...</td>
<td>Muhammad Asi...</td>
<td>Activate</td>
<td>Status</td>
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<td>Status Reason</td>
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<td></td>
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<td>Research Task Status</td>
<td>In Progress</td>
<td>Complete</td>
</tr>
<tr>
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<td></td>
<td></td>
<td>CA / CPA Sign Off</td>
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<td>Submitted to RGC</td>
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<tr>
<td>25/02/2019 11:0...</td>
<td>Muhammad Asi...</td>
<td>Update</td>
<td>CA/CPA Decision</td>
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<td>Stage Id</td>
<td></td>
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</tbody>
</table>
15. Reporting

To run and view reports that have been specifically created. From the Tasks screen click on the dropdown arrow next to Run Report on the Main Menu. A list of available reports will be shown.

Select the report you want to view – in this case CSC Report. For this report you can select the From and To Report Due Date. Then click on View Report to view the results.
You can then Print or Open the report in various formats such as Excel.