| **Step** | **Action** |
| --- | --- |
|  | Begin by navigating to the **General Ledger WorkCenter**.  Point to the **Scroll Down** button. |
|  | Click the **General Ledger** menu. |
|  | Click the **GL WorkCenter** menu. |
|  | Use the **General Ledger WorkCenter** page to access work items, links, queries, reports, and proccesses that are specific to your position. |
|  | If you run reports and processes often, you will want to personalize the **Reports/Processes** pagelet of the General Ledger WorkCenter.  Click the **Reports/Queries** tab. |
|  | Minimize the Queries pagelet.  Click the **Queries Pagelet Settings** button. |
|  | Click the **Minimize** menu. |
|  | Access the personalization page for **Reports and Processes.**  Click the **Pagelet Settings** button. |
|  | Click the **Personalize** link. |
|  | Use the **Reports/Processes Pagelet Personalization** page to structure your **Reports/ Processes** pagelet to meet your needs.  Your system administrator has created a few group labels for you. You would like to add one more for **Personal Reports and Processes.** |
|  | Click the **Last** link. |
|  | Click the **Add a new row** (+) button. |
|  | Enter the desired information into the **Group Label** field. Enter "**Favorite Reports and Processes**". |
|  | Click in the **Display Order** field.  Enter the desired information into the field. Enter "**5**". |
|  | Click the **Define** link.  Use the **Define Link** page to determine the type of link and link information for the pagelet. |
|  | Click the **Link Type** list. |
|  | The **Link Type** can be Menu Item or URL.  Click **Menu Item.** |
|  | Click the **Select Menu Item** link. |
|  | Scroll down and click the **General Ledger** button. |
|  | Click the **General Reports** menu. |
|  | Click the **[Trial Balance by Fund]** tree item. |
|  | Click the **OK** button. |
|  | Click the **Save** button. |
|  | A message will be displayed reminding you to refresh the pagelet to see your changes.  Click the **OK** button. |
|  | Click the **Close** link. |
|  | Click to **Reload the Reports/Processes** link.  The **Favorite Reports and Processes** group label appears with the link that you added. |
|  | Click the **Trial Balance by Fund**  link. |
|  | The system automatically takes you to the **Trial Balance by Fund** run control search page. |
|  | Click on **Add a New Value** and enter the desired information into the **Run Control ID** field. Enter "**Trial\_Bal\_by\_Fund**".  Click **Add**. |
|  | You can change any option on the run control page.  Click the **Save** button. |
|  | Click the **Run** button. |
|  | On the Process Scheduler Request page, click **OK.** |
|  | To check the status of the process, click on the **Process Monitor** link. |
|  | **Refresh** the page until the Run Status is Success and the Distribution Status is Posted.  Click the object. |
|  | Click on **Go back to the Trial Balance by Fund** link to return to the run control page. |
|  | Click on the **Report Manager** link**.** |
|  | In the Report Manager, click the **Administration** tab. |
|  | Click the **Trial Balance by Fund** link to open the report. |
|  | Review your report. |
|  | Now, you want the **Trial Balance by Fund Report** link to automatically select your run control ID.  Click the **Pagelet Settings** button and choose **Personalize**. |
|  | Click the **Last** link to view the last **Group**. |
|  | On the Favorite Reports and Processes Link List, enter the the **Run Control ID** into the field provided.  Enter "**Trial\_Bal\_by\_Fund**". |
|  | Click the **Save** button. |
|  | A message reminding you to Refresh the paglet to see you changes will be displayed.  Click the **OK** button. |
|  | Scroll to the upper right corner of the screen.  Click the **Close** link. |
|  | Click the **Reload** button to update the Trial Balance by Fund link. |
|  | After reloading the pagelet, try clicking the run control link again for the **Trial Balance by Fund** report.  This time, the system takes you directly to the Run Control ID that you added to the **Personalization** page. The options that you saved for this run control ID are displayed. Now you can schedule or run this process. |
|  | You have completed personalizing the **Reports/Processes** pagelet.  **End of Procedure.** |