

Running & Retrieving Reports in PeopleSoft

How do I get my reports in PeopleSoft?

Reports require a Run Control ID. Refer to the Tip Sheet "Establishing a Run Control ID" for assistance with Run Control IDs.

Follow these steps for running and retrieving your requested report.

- Click on RUN at the top of the page once the appropriate information for the report you are running has been entered into the fields.

Ledger Activity Report

Run Control ID: General_Ledger_Activity [Report Manager](#) [Process Monitor](#) **Run** ←

Language: English

Report Request Parameters

Unit: UN001
Ledger: ACTUALS
Fiscal Year: 2008 Currency: USD
From Period: 7 To Period: 7

Show Discrepancies Only Show Journal Detail Display Full Numeric Field

Include Adjustment Periods

Adjustment Period
1

Click column heading to sort ascending

- After you click on RUN, the following screen appears:

Process Scheduler Request

User ID: jbergsnev Run Control ID: General_Ledger_Activity

Server Name: PSNT Run Date: 09/05/2008
Recurrence: Run Time: 11:46:55AM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	General Ledger Activity Report	GLS7002	SQR Report	Web	PDF	Distribution

OK Cancel

- Be sure that the *Server Name* is PSNT.
- The report is selected with the Green Check box.
- The *Type* identifies how your report will be returned to you. The most common is *Web* and *Email*.
- The *Format* identifies the format for your report. The most common is *PDF* or *CSV* (Excel). *See the Running a Report to Excel Tip Sheet for help with CSV formatting.*
- Click OK at the bottom

Running & Retrieving Reports in PeopleSoft

- After you click OK, PeopleSoft brings you back to your report parameters page. PeopleSoft has given you a Process Instance number and in order to see the status of your report, you must click on the hyperlink for “Process Monitor.”

Ledger Activity Report

Run Control ID: General_Ledger_Activity [Report Manager](#) [Process Monitor](#)

Language: English

Process Instance: 4297250

Report Request Parameters

Unit: UN001
Ledger: ACTUALS
Fiscal Year: 2008 Currency: USD
From Period: 7 To Period: 7

Show Discrepancies Only Show Journal Detail Display Full Numeric Field

- Once you click the Process Monitor hyperlink, the following screen will appear:

Process List **Server List**

View Process Request For

User ID: jbergsnev Type: Last: 1 Hours

Server: PSNT Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List Customize | Find | View

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4297250		SQR Report	GLS7002	jbergsnev	05/05/2008 2:30:01PM CDT	Success	Posted	Details

[Go back to General Ledger Activity](#)

[Process List](#) | [Server List](#)

****You may have to click the Refresh button a few times until the “Run Status” reads “Success” and the “Distribution Status” reads “Posted.”****

Running & Retrieving Reports in PeopleSoft

- When your report is ready (your status values are “Success” and “Posted”), click on the “Details” hyperlink to retrieve your report.

Process List Server List

View Process Request For

User ID: Type: Last: Hours Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4297250		SQR Report	GLS7002	jbergsnev	05/05/2008 2:30:01PM CDT	Success	Posted	Details

- From the Process Detail page, click on the “View Log/Trace” hyperlink

Process Detail

Process

Instance: 4297250 Type: SQR Report
Name: GLS7002 Description: General Ledger Activity Report
Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: General_Ledger_Activity
Location: Server
Server: PSNT
Recurrence:

Hold Request
Queue Request
Cancel Request
Delete Request
Restart Request

Date/Time **Actions**

Request Created On: 05/05/2008 2:37:00PM CDT
Run Anytime After: 05/05/2008 2:30:01PM CDT
Began Process At: 05/05/2008 2:37:19PM CDT
Ended Process At: 05/05/2008 2:37:30PM CDT

Parameters Transfer
Message Log
Batch Timings
[View Log/Trace](#)

Running & Retrieving Reports in PeopleSoft


- The "View Log/Trace" screen will provide a hyperlink to your requested report.

View Log/Trace

Report			
Report ID:	2399875	Process Instance:	4297250 Message Log
Name:	GLS7002	Process Type:	SQR Report
Run Status:	Success		

General Ledger Activity Report

Distribution Details	
Distribution Node:	NT
Expiration Date:	<input type="text" value="07/04/2008"/>

File List		
Name	File Size (bytes)	Datetime Created
GLS7002_4297250.PDF 	2,085	05/05/2008 2:37:30.953000PM CDT
GLS7002_4297250.out	115	05/05/2008 2:37:30.953000PM CDT
SQR_GLS7002_4297250.log	1,670	05/05/2008 2:37:30.953000PM CDT

Distribute To	
Distribution ID Type	*Distribution ID
User	jbergsnev

- Click on the first hyperlink with the .PDF extension. Your report will automatically open in a new browser using Adobe Reader.

Thank you to UND for sharing their training document.