### **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 Act	tivity Report			4
Run Control ID: Language:	General_Ledger_A English	Activity	<u>Report Manag</u>	er Process Monitor Run
Report Request	Parameters			
Unit:	UND01			
Ledger:	ACTUALS Q			Include Adjustment Periods Adjustment Period
Fiscal Year:	2008	Currency: USD	Q	1 Click column heading to sort ascending
From Period:	7	To Period:	7	
Show Discr	repancies Only	Show Journal Deta	il	✓ Display Full Numeric Field

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

#### Process Scheduler Request

User ID:	jbergsnev		Run Cont	rol ID: General	Ledger_Activity		
Server Name: Recurrence: Time Zone:	PSNT	Run Date: Run Time:	09/05/2008 11:46:55AM	iii Res	set to Oment Dat	e/Tin	
Process List							
OK Cance	dger Activity Report	GLS700	<u>s Name P</u> )2 S	GOR Report	Web Email File Printer Web Window	PDF CSV HP HTM LP PDF PS SPF	<u>Distribution</u>

- 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

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• 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 Act	ivity Report			↓	_
Run Control ID:	General_Ledger_A	ctivity	Report Manager	Process Monitor Run	
Language:	English 💟			Process Instance:42972	50
Report Request	Parameters				
Unit:	UND01 Q				
Ledger:	ACTUALS Q			Include Adjustment Periods	
Fiscal Year:	2008	Currency: USD	Q	1	<b>. . . .</b>
From Period:	7	To Period:	7		
Show Discr	epancies Only	Show Journal Deta	il	Display Full Numeric Field	
					Refresh

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

i.

Process List Server List		
View Process Request For		
User ID: jbergsnev 🔍 Type:	Last: 1 Hours Refresh	
Server: PSNT Vame:	Q Instance: to	
Run Distribution Status	Save On Refresh	
Process List	Customize   Find   View	First 🕙 1 of 1 🕩 Last
Select Instance Seq. Process Type	Process Name         User         Run Date/Time         Run Status	Distribution Status
4297250 SQR Report	GLS7002 jbergsnev 05/05/2008 2:30:01PM CDT Success	Posted Details
Go back to General Ledger Activity		1
Save Notify		
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."\*\*\*\*

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• When your report is ready (your status values are "Success" and "Posted"), click on the "<u>Details</u>" hyperlink to retrieve your report.

Process List Server	List								
View Process Request F	or								
User ID: jbergsnev	🔍 Туре:			Last:	1 Hours	F	Refresh		
Server: PSNT	Name:		Q	Instance:		to			
Run Status:	Distribution Status		~	[	Save On R	lefresh			
Process List					<u>Customize</u>	Find   V	/iew All  🛄	First 🖪 1 of	1 🕑 Last
Select Instance Seq. Pr	ocess Type	Process Name	<u>User</u>	Run Date/T	<u>ïme</u>		Run Status	Distribution Status	<u>Details</u>
4297250 SC	0R Report	GLS7002	jbergsnev	05/05/2008	3 2:30:01PM	CDT	Success	Posted	Details

• From the Process Detail page, click on the "View Log/Trace" hyperlink

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       Hold Request         Location:       Server         Server:       PSNT         Recurrence:       Velete Request         Object Request       Restart Request         Request Created On:       05/05/2008 2:37:00PM CDT         Request Created On:       05/05/2008 2:37:01PM CDT         Began Process At:       05/05/2008 2:37:30PM CDT         Batch Timings       View Log/Trace	rocess Deta	uil				
Instance:4297250Type:SQR ReportName:GL S7002Description:General Ledger Activity ReportRun Status:SuccessDistribution:: PostedRun Control ID: General_Ledger_ActivityUpdate ProcessLocation:ServerOueue RequestServer:PSNTCancel RequestServer:PSNTDelete RequestRecurrence:Status:Date/Time05/05/2008 2:37:00PM CDTParametersRequest Created On:05/05/2008 2:37:10PM CDTParametersRegan Process At:05/05/2008 2:37:10PM CDTBatch TimingsEnded Process At:05/05/2008 2:37:30PM CDTView Log/Trace	Process					
Name:GL S7002Description: General Ledger Activity ReportRun Status:SuccessDistribution Status:PostedRun Control ID: General_Ledger_ActivityUpdate ProcessLocation:ServerHold RequestServer:PSNTQueue RequestServer:PSNTDelete RequestRecurrence:Delete RequestDate/TimeKequest Created On:05/05/2008 2:37:00PM CDTParametersTransferRequest Created On:05/05/2008 2:37:10PM CDTParametersTransferBegan Process At:05/05/2008 2:37:10PM CDTBatch TimingsView Log/TraceEnded Process At:05/05/2008 2:37:30PM CDTView Log/TraceImage: Comparison of the text of text o	Instance:	4297250	Type:	S	QR Report	
Run Status:SuccessDistribution Status:PostedRunUpdate ProcessRun Control ID:General_Ledger_ActivityHold RequestLocation:ServerQueue RequestServer:PSNTCancel RequestRecurrence:Delete RequestDelete RequestDate/TimeS/05/2008 2:37:00PM CDTParametersTransferRequest Created On:05/05/2008 2:37:10PM CDTParametersTransferBegan Process At:05/05/2008 2:37:30PM CDTBatch TimingsUiew Log/TraceEnded Process At:05/05/2008 2:37:30PM CDTView Log/TraceImage: Concert	Name:	GLS7002	Descrip	otion: G	eneral Ledger Acti	vity Report
Run       Update Process         Run Control ID: General_Ledger_Activity       Hold Request         Location:       Server         Server:       PSNT         Recurrence:       Oblete Request         Date/Time       Actions         Request Created On:       05/05/2008 2:37:00PM CDT         Request Created On:       05/05/2008 2:37:10PM CDT         Began Process At:       05/05/2008 2:37:30PM CDT         Ended Process At:       05/05/2008 2:37:30PM CDT	Run Status:	Success	Distribu	ution Sta	atus: Posted	
Run Control ID: General_Ledger_Activity       Hold Request         Location:       Server         Server:       PSNT         Recurrence:       Delete Request         Date/Time       Actions         Request Created On:       05/05/2008 2:37:00PM CDT         Request Created On:       05/05/2008 2:30:01PM CDT         Began Process At:       05/05/2008 2:37:19PM CDT         Bedet Process At:       05/05/2008 2:37:30PM CDT	Run				Update Process	i -
Actions       Request Created On:     05/05/2008 2:37:00PM CDT     Parameters     Transfer       Run Anytime After:     05/05/2008 2:30:01PM CDT     Message Log       Began Process At:     05/05/2008 2:37:19PM CDT     Batch Timings       Ended Process At:     05/05/2008 2:37:30PM CDT     View Log/Trace	Run Control II Location: Server: Recurrence:	D: General_Ledger Server PSNT	_Activity		Hold Requ Queue Red Cancel Red Delete Red Restart Red	est quest quest quest quest
Request Created On:       05/05/2008 2:37:00PM CDT       Parameters       Transfer         Run Anytime After:       05/05/2008 2:30:01PM CDT       Message Log         Began Process At:       05/05/2008 2:37:19PM CDT       Batch Timings         Ended Process At:       05/05/2008 2:37:30PM CDT       View Log/Trace	)ate/Time				Actions	
Run Anytime After:         05/05/2008 2:30:01PM CDT         Message Log           Began Process At:         05/05/2008 2:37:19PM CDT         Batch Timings           Ended Process At:         05/05/2008 2:37:30PM CDT         View Log/Trace	Request Crea	ted On: 05/05/200	08 2:37:00PM CD	т	Parameters	Transfer
Began Process At:         05/05/2008 2:37:19PM CDT         Batch Timings           Ended Process At:         05/05/2008 2:37:30PM CDT         View Log/Trace	Run Anytime	After: 05/05/200	08 2:30:01PM CD	т	Message Log	
Ended Process At: 05/05/2008 2:37:30PM CDT View Log/Trace	Began Proce	ss At: 05/05/200	08 2:37:19PM CD	т	Batch Timings	
	Ended Proces	ss At: 05/05/200	08 2:37:30PM CD	т	View Log/Trace	

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

View Log/Trace				
Report				
Report ID: 2399875	Process In	stance: 4297250	Message Log	
Name: GLS7002	Process Ty	/pe: SQR Repo	rt	
Run Status: Success				
General Ledger Activity Report				
Distribution Details				
Distribution Node: NT	Ex	piration Date: 07	7/04/2008	
File List				
Name		File Size (bytes)	Datetime Created	
GLS7002 4297250.PDF		2,085	05/05/2008 2:37:30.953000P	ΜС
GLS7002 4297250.out		115	05/05/2008 2:37:30.953000P	мc
SQR GLS7002 4297250.log		1,670	05/05/2008 2:37:30.953000P	МC
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.