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.

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

- 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."

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

****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.

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

Running & Retrieving Reports in PeopleSoft

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

- 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.