

Business Process	Navigation
1. Run a report and view report output.	1. Use various module navigation to run report then use Report Manager hyperlink from any report run control page.

Steps to Run a Report:

1. Navigate to any report request page for a module. The example here is a GL (General Ledger) report: **Main Menu > General Ledger > General Reports > Journal Entry Detail**.

Journal Entry Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search Criteria

Run Control ID: begins with

☐ Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. The first time you run reports you need to create a new run control id (see step 3 below). If you have previously run reports, then from the **Find an Existing Value** tab that you are on, you can complete or partially complete the blank box to the right of 'begins with' and click Search. The will bring up a list of run control ids to choose from or if you type the full name it will bring you to the run control page. From the **Search Results** area select the specific run control id to access the run control page.

Journal Entry Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search Criteria

Run Control ID: begins with

☐ Case Sensitive

[Basic Search](#)

Search Results

View All First 1-3 of 3 Last

Run Control ID	Language Code
REPORT	English
REPORTS	English
ReOpen	English

[Find an Existing Value](#) | [Add a New Value](#)

3. If this is your first time running a report, then you need to create a run control id that can be used for multiple reports. Click on **Add a New Value** tab, and then enter a **Run Control Id** such as REPORTS. Then click **Add** to access the run control page.

Journal Entry Detail

Find an Existing Value **Add a New Value**

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

- All run control pages will be different. The purpose of the run control page is to provide parameters to the report job if required. Some reports require more parameters than others. Think of the parameters as criteria to narrow the results. In this journal entry detail report example we are using, we do not want a report that includes all journals in the system. We want to use the run control parameters page to narrow down what transactions will be included in the report. Examples of common parameters used on many reports are a Date Range, a Chartfield value such as Dept, Fund, etc.

Journal Entry Detail Report

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

Language: English

Report Request Parameters

Unit: 62500 [Search](#)

Ledger Group: ACTUALS [Search](#) Ledger: ACTUALS [Search](#)

Source: BJK [Search](#) Journal ID: [Search](#)

From Date: 04/01/2013 [Calendar](#) To Date: 04/30/2013 [Calendar](#)

Journal Status: [Select](#)

☒ Show Description on Report ☐ Show Statistics Amount ☐ Display Full Numeric Field

[Refresh](#)

ChartField Selection			
Sequence	ChartField Name	Include CF	Descr
1	Fund Code	☒	☐
2	Department	☒	☐
3	Program Code	☒	☐
4	Account	☒	☐
5	Class Field	☒	☐
6	Funding Source	☒	☐

- Use as many parameters as necessary to narrow the results that will be included in the report.
- After you complete the parameters, you can click **Save** and then click **Run**. Or you can just click **Run**, as the Run button will also save the changes you made to the page for future use. Clicking the Run button will retrieve the Process Scheduler Request page.

Process Scheduler Request

User ID: VP1 Run Control ID: REPORTS

Server Name: [Select](#) Run Date: 05/07/2013 [Calendar](#)

Recurrence: [Select](#) Run Time: 10:41:28AM [Reset to Current Date/Time](#)

Time Zone: [Select](#)

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Journal Entry Detail Report	FIN2001	SQR Report	Web	PDF	Distribution

[OK](#) [Cancel](#)

- On many Process Scheduler Request pages, the actual report process will already be selected as shown above and all you need to do is click **OK**. The **Server Name** can be left blank and the process will run. Except if the process type is a Crystal, then the **Server Name** must be selected as **PSNT**. You may also want to change the output type/format. This is optional as it usually defaults to the desired type/format.
- However, some **Process Scheduler Request** pages will have multiple choices for processes to run and you will need to select which process to run as shown in the example below. When multiple choices exist, the system does not choose a default for you. You must select the appropriate checkbox.

Process Scheduler Request

User ID: VP1 Run Control ID: REPORTS

Server Name: Run Date: 05/07/2013

Recurrence: Run Time: 11:15:47AM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Withholding Control Report	APX3012	BI Publisher	Web	PDF	Distribution
☐	Withholding Control Report	APY3012-	Crystal	Web	PDF	Distribution

9. Once you select the appropriate process or leave the default select and click **OK**, the process is queued to run. After clicking OK you will return to the **Run Control Parameter** page you were on previously. However, in the top right will display the process instance assigned to this request to run your report.

Journal Entry Detail Report

Run Control ID: REPORTS Language: English

[Report Manager](#) [Process Monitor](#) Process Instance: 703232

Report Request Parameters

Unit: 62500

Ledger Group: ACTUALS Ledger: ACTUALS

Source: BJK Journal ID:

From Date: 04/01/2013 To Date: 04/30/2013

Journal Status:

☒ Show Description on Report ☐ Show Statistics Amount ☐ Display Full Numeric Field

Sequence	ChartField Name	Include CF	Descr
1	Fund Code	☒	☐
2	Department	☒	☐

10. You would click on **Process Monitor** hyperlink next to see when the process completes and was successful. Details for this will be shown in a separate training quick reference guide called Process Monitor.
11. Once the process is successful, return to the run control page and click on the **Report Manager** hyperlink.

Favorites | Main Menu > General Ledger > General Reports > Journal Entry Detail

List | Explorer | **Administration** | Archives

View Reports For

Folder: Instance: to:

Name: Created On: 1 Days

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Report					

[Go back to Journal Entry Detail](#)

List | Explorer | Administration | Archives

12. From the default **Report Manager List** page you are on, click on the **Administration** tab.

View Reports For

User ID: VP1 Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
☐	702739	703232	Journal Entry Detail Report	05/07/2013 10:50:33AM	Acrobat (*.pdf)	Posted	Details
☐	702683	703184	PC PETIP SUM	05/07/2013 9:48:38AM	Text Files (*.txt)	Posted	Details

13. Then find the desired report by the name or the process instance from the previous run control parameters page, and select the **Details** hyperlink to access the report output.

Report Detail

Report ID: 702739 Process Instance: 703232 Message Log

Name: FIN2001 Process Type: SQR Report

Run Status: Success

Journal Entry Detail Report

Distribution Details

Distribution Node: FNCPY Expiration Date: 05/14/2013

Name	File Size (bytes)	Datetime Created
FIN2001_703232.PDF	1,829	05/07/2013 10:51:00.278711AM CDT
FIN2001_703232.out	130	05/07/2013 10:51:00.278711AM CDT
SQR_FIN2001_703232.log	1,786	05/07/2013 10:51:00.278711AM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	VP1

OK Cancel

14. Select the desired report output under the **File List** section of the page. The one circled above is the PDF output file, but if you select a different output format there will be a different extension on the end of the report. The **file name** is made up of the Process Name_Process Instance_format extension. Click on the **file name** hyperlink to view the report and print or save.

Report ID: FIN2001
Bus. Unit: 42500--Saint Paul Public Schools
Ledger Grp: ACTUALS --Actuals Ledger Group
Ledger: ACTUALS --Actuals Ledger
For the period 04/01/2013 through 04/30/2013
Source: ALL Journal ID: ALL Status: ALL

PeopleSoft Financials
JOURNAL ENTRY DETAIL REPORT

Page No. 1
Run Date 05/07/2013
Run Time 11:06:47

Line	Description	Program	Account	Class	Funding Src	Project	Entry Event	Cur	Debit	Credit
Journal ID: CNV1249351 Journal Date: 04/01/2013 Source: CNV--Conversion										
Status: V-Valid										
Description: Payments USD										
1	Journal Import Created		1010							
01										
2	Journal Import Created		2060					USD	4,360.00	0.00
21										
3	Journal Import Created		2060					USD	0.00	210.00
21										
4	Journal Import Created		2060					USD	0.00	400.00
21										
5	Interfund line added by Postin		1010					USD	0.00	3,750.00
21										
6	Interfund line added by Postin		1010					USD	4,360.00	0.00
21										
								USD	0.00	4,360.00
									8,720.00	8,720.00

15. At the bottom of the **Report Manager Administration** page or the **Process Monitor** page, there will usually be a hyperlink to take you back to the **Run Control** parameters page you started on. The text in the hyperlink will change based on the report/page name you are executing but below is an example of the link.

☐	702540	703042	BI_PRNXP01 - BI_PRNXP01.pdf	05/06/2013 4:01:10PM	Acrobat (*.pdf)	Posted	Details
☐	702538	703043	Invoice Bursting Program	05/06/2013 4:00:18PM	Text Files (*.txt)	Posted	Details

☒ [Select All](#) ☐ [Deselect All](#)

Click the delete button to delete the selected report(s)

[Go back to Journal Entry Detail](#)

[List](#) | [Explorer](#) | [Administration](#) | [Archives](#)