Managing PeopleSoft Reports *Using Report Manager*

This training guide describes the process for managing your view of PeopleSoft reports that have been run using your NetID. The Report Manager is a central access point for any reports that you run.

**Before you begin . . .**

**Upon completion of this guide you will be able to:**
- Add the Report Manger to *My Favorites*
- View reports created by you
- Sort reports by instance number, report type, or report status
- Delete reports

**Who has access?**
All PeopleSoft (non-portal) users

**Things you need to know to complete this process:**
PeopleSoft navigation basics

**How do I sign in to PeopleSoft?**
1. Sign in to the NUPortal at [nuportal.northwestern.edu](http://nuportal.northwestern.edu)
2. Click the **Staff** or **Faculty** tab, **Finance and Budget** tab, and then click the *Login to PeopleSoft* link from the left navigation pane.

**Additional Resources**
Visit the Project Café website for additional training materials [www.cafe.northwestern.edu/training](http://www.cafe.northwestern.edu/training)

**Where do I get help?**
For assistance, contact NUIT Support Center at 847-491-HELP (4357) or e-mail [consultant@northwestern.edu](mailto:consultant@northwestern.edu).
Viewing Reports from Report Manager

Step 1: Update your *My Favorites* list
If you run reports often, you will want to add the Report Manager to your *My Favorites* list. This list is at the top of the navigation Menu and allows quick access to your most used pages.

Quick navigation: From the Menu panel, click **Reporting Tools → Report Manager → Administration** tab.

1. From the top of the page, click **Add to Favorites**.

2. The navigation link is the default Description. Type a new description, and/or click **OK**.

3. Report Manager appears on your My Favorites list at the top of the menu panel.

The Add to Favorites page appears.
Step 2: Access the Report Manager

From your My Favorites list, click Report Manager and then click the Administration tab. The Administration page appears. This page lists the reports that have been run using your NetID.

Areas of the page
A. User ID – This is your NetID
B. Last – Shows any process that was run within the increment you designate. Default = 1 Days.
C. Refresh – Click Refresh to update the page
D. Any process or report that you run is accessible here.

Notes
If you anticipate needing a report for more than 99 days, download the report. If you need a report that was run over 99 days ago, contact the Help Desk.
Step 3: View the report

1. Click on the report description to view the report.

2. The report appears in a new internet browser window.
Sorting Reports

Sorting reports by **Instance**

Reports can be sorted by Status, Type, and Instance. The instance number is a specific number that identifies your report. Every time you run a report, a unique instance number is assigned. You can follow up on a report if you know the instance number or the range of instance numbers that report falls between.
Sorting reports by **Type**

PeopleSoft report types include SQR, Crystal, or NVision. NVision reports are not covered in this guide. For SQR reports, select either *SQR Report*, or *SQR Report for WE DE* from the Type menu. For Crystal reports, select either *Crystal* or *Crw Online* from the Type menu.

Refer to the *PeopleSoft Report Inventory* to see the report type for each report.
Sorting reports by *Status*
Sorting by status allows you to narrow reports by the processing result (see descriptions below).

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Not used at NU</td>
</tr>
<tr>
<td>Generated</td>
<td>Not used at NU</td>
</tr>
<tr>
<td>N/A or None</td>
<td>Either processing has not yet started, or no report is associated with the process.</td>
</tr>
<tr>
<td>Not Posted</td>
<td>Either there was an error and the report did not post, or no report is associated with the process.</td>
</tr>
<tr>
<td>Posted</td>
<td>The report ran successfully and is available for viewing.</td>
</tr>
<tr>
<td>Processing</td>
<td>The report is still processing.</td>
</tr>
</tbody>
</table>
Deleting reports

You may only delete reports that have been run using your NetID. You may want to delete reports if they are not useful to you or contain errors. In this example, the user is deleting some edit and budget check messages.

1. Click the box next to each report you want to delete.
2. Click Delete.
3. Click Yes.

⚠️ Warning: If a report is deleted, it cannot be restored.

The following confirmation message appears.
In a Nutshell . . .
Managing PeopleSoft Reports
Process Overview

Viewing Reports from Report Manager
Step 1: Update your My Favorites list
   Reporting Tools → Report Manager → Administration
Step 2: Access the Report Manager
Step 3: View the report

Sorting Reports
Sorting reports by Instance
Sorting reports by Type
Sorting reports by Status

Deleting Reports
Step 1: Click the box next to each report you want to delete.
Step 2: Click Delete.
Step 3: Click Yes. A confirmation message appears.