Running a Report in PeopleSoft

This training guide describes the process for running a report in PeopleSoft. For most PeopleSoft reports, this process includes creating or using a Run Control ID, specifying report parameters, and then running the report process.

Before you begin . . .

Upon completion of this guide you will be able to:
- Create a Run Control ID
- Run a PeopleSoft report
- Save the PeopleSoft report
- Print the report

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
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
- Visit the NU Portal at nuportal.northwestern.edu to access the Chart of Accounts crosswalk and Chart of Accounts Quick Reference Guide.

Where do I get help?
For assistance, contact NUIT Support Center at 847-491-HELP (4357) or e-mail consultant@northwestern.edu.
Step 1: Create a Run Control ID
A run control is a list of values (parameters) used for generating a report. These values specify what information should appear on the report. A Run Control ID is the name of that list of values.

Quick Navigation:
From the Menu panel, click General Ledger → General Reports → Journal Entry Detail, and then click the Add a New Value tab.

Run control facts
- Use _ instead of spaces in the Run Control ID.
- Run controls are user specific. You may only use the run controls that you create.
- To use a Run Control ID that you previously created, click Find an Existing Value, and then click Search. A list of Run Control IDs appear. Only select the ID if it uses the same parameters as the report you are running.
Step 2: Specify the report parameters

The parameters required to run a report vary according to the report you select. Parameters are shown in the Report Request Parameters area of the page. For example: Unit, Ledger Group, Source, and From Date are some of the parameters that you can use for this report.

1. Specify your parameters. This determines what information appears in the report.

2. Click Refresh.
Step 2: Specify the report parameters (continued)

Some reports allow you to select Chartfields or Fund values that should be included in the report.

1. Select the ChartFields that you would like to appear on the report.

2. Click Save to save the settings you selected on this form. Next time you run this report, these settings will appear.
Step 3: Run the report
When you click Run, it launches the process that creates the report.

Journal Entry Detail Report

Run Control ID: report_jrnl  
Language: English  

Report Request Parameters

Unit: NWUNV  
Ledger Group: ACTUALS  
Source: ONL  
From Date: 03/19/2008  
Journal Status:  

1. Scroll to the top of the page, and then click Run.
3b: Schedule the process

The Process Scheduler Request page appears. These settings are system-generated. The correct Server Name, Type, and Format are automatically selected by the system and cannot be changed. The Distribution and Recurrence features are not enabled. The report will run immediately.

1. Click OK.
Step 4: Make sure the process runs
Every time a process runs, a unique instance number is assigned. Use the instance number to track the progress of the report generation.

![Journal Entry Detail Report]

1. Note the Process Instance number. You will retrieve the report for instance 14782.

2. Click Process Monitor.
Step 4b: Check the process status
Click the Refresh button to see the most up-to-date Run Status.

<table>
<thead>
<tr>
<th>Run Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queued</td>
<td>The process is waiting to run.</td>
</tr>
<tr>
<td>Initiated</td>
<td>The process has started.</td>
</tr>
<tr>
<td>Processing</td>
<td>The process is running.</td>
</tr>
<tr>
<td>No Success</td>
<td>The process did not run. Make sure the report parameters are correct. See if you can retrieve the report, if not, call the Help Desk.</td>
</tr>
<tr>
<td>Warning</td>
<td>The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.</td>
</tr>
<tr>
<td>Success</td>
<td>The process ran successfully.</td>
</tr>
</tbody>
</table>
Step 4b: Check the process status (continued)

<table>
<thead>
<tr>
<th>Distribution Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queued</td>
<td>The process is waiting to run.</td>
</tr>
<tr>
<td>NA</td>
<td>The process is still running.</td>
</tr>
<tr>
<td>Posted</td>
<td>The report has posted.</td>
</tr>
<tr>
<td>Not Posted</td>
<td>The report did not post. Make sure the correct server is selected from the Process Scheduler Request page, or call the Help Desk.</td>
</tr>
</tbody>
</table>

Step 5: Retrieve the report

The Process Detail page appears. All reports are located on the View/Log Trace page.
5b: Open the report

The file that matches the output type that you selected in Step 3b is your report.

1. Click the report name ending in .pdf.
5c: Save the report
The report appears.

- To save the report, click **File → Save As**, navigate to the folder where the report should be saved, name the report, and then click **Save**.
- To print this report, click **File → Print** to access a print options box (driver). Print the report.
In a Nutshell . . .

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Process Overview
Step 1: Create a Run Control ID
   General Ledger → General Reports → Journal Entry Detail → Add a New Value tab.
   *This navigation varies depending on the report you are running.*
Step 2: Specify the report parameters
Step 3: Run the report
Step 3b: Schedule the process
Step 4: Make sure the process runs
Step 4b: Check the process status
Step 5: Retrieve the report
Step 5b: Open the report
Step 5c: Save the report