

UW System
Shared Financial System
(SFS)

PeopleSoft Report Manager Manual
SFS Version 8.9



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The Report Manager stores reports run through Process Scheduler and lets you view, print, or save online reports. As users have different levels of access to Report Manager functionality based on their security, you may or may not be able to do everything described in this manual.

Using Report Manager

The navigation to Report Manager is Reporting Tools > Report Manager. There are also links on many processes to navigate directly to the Report Manager.

There are 4 tabs on the Report Manager. Reports can be viewed from the Explorer page, the List page, or the Administration page. Most users can ignore the Archives page, as they will not use it.

List Page

The Report Manager List page shows reports that have not been purged or have expired that are available to you. By default, reports will stay in the Report Manager for 90 days, unless deleted manually. The List page looks like the following:

The screenshot shows the Report Manager List page interface. At the top, there are four tabs: List, Explorer, Administration, and Archives. Below the tabs is a 'View Reports For' section with the following fields and controls:

- Folder:** A dropdown menu.
- Instance:** A text input field.
- to:** A text input field.
- Refresh:** A yellow button.
- Name:** A text input field.
- Created On:** A date picker.
- Last:** A dropdown menu set to '1'.
- Days:** A dropdown menu.

Below the search fields is a table titled 'Reports' with the following columns: Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance. The table contains one report:

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 GLS7003	GENERAL LEDGER SUMMARY	General	10/04/05 11:03AM	19251	2398230


List Page Options

In the “View Report For” section, the user can define specific criteria to reduce the number of reports shown. Report Manager ignores blank fields as criteria. The following options can be used to limit the reports seen

Folder	Select a specific Folder to list only the Reports that are contained in that Folder, if one is specified when the process is run.
Instance and to	Enter a range of Process Instances. Leave these fields blank to list all Instances.
Name	Enter the Name or part of a Name to list only Reports that match the Name entered.
Created On	Use the Calendar, or enter a specific Date to list only Reports that are Created on that Date.

Last	Use to display only those Reports that were Created in the last number of Days, Hours, or Minutes. For example, to list only those Reports that were Created within the last five days, enter 5 and select Days.
Refresh	Click to update the Report list with Newly Run Reports and to use any newly entered filtering criteria.

The details for reports include the following information.

Report	Click the Name of a Report to display the Output File and any associated Log or Message File on the Report Detail page. Click the required Link to display the Report or Message Log in another browser window.
Report Description	Displays a detailed description of the Report.
Folder Name	Displays the Folder in which the Report is located.
Completion Date/Time	Displays the Date and Time at which the Report was Created.
Report ID	Displays the Report ID that was automatically assigned when the Report was run.
Process Instance	Displays the Process Instance Number that was automatically assigned when the Report was run.
	This icon on the navigation bar at the top right hand side of the List Page. Click the Download to download the List of the reports to a Microsoft Excel spreadsheet.

Report Manager – Explorer Page

The Explorer page is a hierarchical view of all reports the user is authorized to view, based on the folder selected when the report was run. To view the report, click on the hyperlink of the report to open it in a new window. NOTE – if no folder was selected when the process was run, the report will likely not be available on the Explorer page.

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

[First](#) | [Previous](#) | [Next](#) | [Last](#) | [Left](#) | [Right](#)

-  General
-  UWSA nVision Reports
 -  [\[GENERAL LEDGER SUMMARY - 2005-10-04-11.10.19.000000\]](#)

Setting the Folder Type to View Reports in the Explorer Page

When a process is run to the Web (to the Report Manager), a Distribution hyperlink is active. Click on that link.

Process Scheduler Request

User ID: JUK Run Control ID: ALLJOBS

Server Name: PSUNX Run Date: 10/04/2005
Recurrence: Recurrence Run Time: 11:24:29AM [Reset to Current Date/Time](#)
Time Zone: Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	General Ledger Summary	GLS7003	SQR Report	Web	PDF	Distribution

The Distribution Detail will be shown on the screen. Change the Folder Name to one of the available folders to see the reports on the Explorer page.

Distribution Detail

Process Name: GLS7003
Process Type: SQR Report

Folder Name: UWSA nVision Reports = JU NVISION-UWSA

Distribute To

ID	Type	Distribution ID
User		JUK

Email Only

Email Subject: Email With Log Email Web Report

Message Text:

Email Address List:

OK Cancel

If additional people should see this report in Report Manager, add their user ID to the 'Distribute To' section here.

Administration Page

The Report Manager Administration page will allow the deletion of reports in the repository, in addition to viewing and adding users to view the report. Only the reports a user has access to will be available for deletion.

To view the report, click on the Details link, then select the file.

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

View Reports For

User ID: Type: Last: Days
 Status: Folder: Instance: to:

Report List Customize | Find | View All | 1-2 of 2

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	19252	2398231	General Ledger Summary	10/04/2005 11:09:59AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	19251	2398230	General Ledger Summary	10/04/2005 11:03:25AM	Acrobat (*.pdf)	Posted	Details

[Select All](#) [Deselect All](#)
 Click the delete button to delete the selected report(s)

To delete a report, check the corresponding checkbox, then press the Delete button. The reports will be purged from the system.

Modifying the Report Distribution List

To modify the list of users authorized to view a report it is necessary to modify the distribution list associated with the report. If the user has authority to perform this function the Report Detail page will allow the addition of additional users.

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

View Reports For

User ID: Type: Last: Days
 Status: Folder: Instance: to:

Report List Customize | Find | View All | 1 of 1

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	17885	2397482	General Ledger Summary	10/04/2005 9:04:38AM	Acrobat (*.pdf)	Posted	Details

The Report Detail page appears. If you don't have authorization to add users, the page is in display-only mode.

Report Detail

Report
Report ID: 17885 **Process Instance:** 2397482 [Message Log](#)
Name: GLS7003 **Process Type:** SQR Report
Run Status: Success

General Ledger Summary

Distribution Details

Distribution Node: SF88GLD_RPT_NODE **Expiration Date:** 01/02/2006

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,749	10/04/2005 9:05:10.000000AM PDT
gls7003_2397482.PDF	13,173	10/04/2005 9:05:10.000000AM PDT
Trace File	131	10/04/2005 9:05:10.000000AM PDT

Distribute To

Distribution ID Type	Distribution ID
User	JUK

Click on the Add icon to add user or role IDs to the distribution list, then click on OK. Make sure to save the changes to keep them.

Viewing Reports directly from Process Monitor

Reports run through process monitor are also available directly from process monitor, you do not need to go to the Report Manager to view them. To see the reports, click on the [Details](#) hyperlink once the process is Success and Posted.

Process List [Server List](#)

View Process Request For

User ID: JUK Type: Last: 3 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List Customize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2397482		SQR Report	GLS7003	JUK	10/04/2005 9:04:28AM PDT	Success	Posted	Details

The Process Details appear, click on the [View Log/Trace](#) hyperlink.

Process Detail

Process	
Instance: 2397482	Type: SQR Report
Name: GLS7003	Description: General Ledger Summary
Run Status: Success	Distribution Status: Posted

Run	Update Process
Run Control ID: ALLJOBS	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 10/04/2005 9:04:38AM PDT	Parameters Transfer
Run Anytime After: 10/04/2005 9:04:28AM PDT	Message Log
Began Process At: 10/04/2005 9:04:59AM PDT	Batch Timings
Ended Process At: 10/04/2005 9:05:10AM PDT	View Log/Trace

The View Log/Trace page appears, along with a link to the Report. This screen is the same that is seen when you look at the report in Report Manager. Click on the report hyperlink, and the report will open in a new window.

View Log/Trace

Report		
Report ID: 17885	Process Instance: 2397482	Message Log
Name: GLS7003	Process Type: SQR Report	
Run Status: Success		
General Ledger Summary		

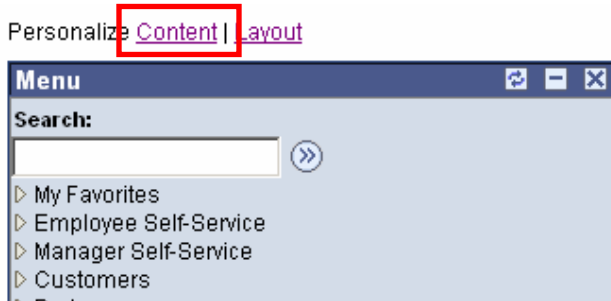
Distribution Details	
Distribution Node: SF88GLD_RPT_NODE	Expiration Date: <input type="text" value="01/02/2006"/>

File List		
Name	File Size (bytes)	Datetime Created
Message Log	1,749	10/04/2005 9:05:10.000000AM PDT
glS7003_2397482.PDF	13,173	10/04/2005 9:05:10.000000AM PDT
Trace File	131	10/04/2005 9:05:10.000000AM PDT

Distribute To	
Distribution ID Type	Distribution ID
User	JUK

Using “My Reports” Pagelet

PeopleSoft has the option of including a pagelet on the main page that has links to your reports that have been run. To add this pagelet, click on the “Personalize Content” hyperlink, which is just above the main menu:



The following options are available:

Personalize Content

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

Welcome Message:

PeopleSoft Applications

- [Menu](#)
- [My Reports](#)
- [Main Menu](#)

Products

- [Availability](#)
- [Product Alternates](#)
- [Product Notes](#)
- [Product Search](#)
- [Current Product Summary](#)
- [Product Specifications](#)

Cross-Financials

- [Media Sources](#)
- [Operational Threshold Chart](#)
- [Operational Threshold Alert](#)
- [Manage Proposals](#)
- [Manage Contracts](#)
- [Manage Departments](#)
- [Manage Practice](#)
- [Manage Project Accounting](#)
- [Manage Programs & Projects](#)
- [Resource Self Service](#)

Promotions

Customers

- [Customer Account Balances](#)
- [Customer Aging](#)
- [Customer Conversations](#)
- [Customer Notes](#)
- [Customer Search](#)

Customer Contracts

- [Most Recent Contracts](#)
- [Top Five Contracts](#)
- [Contract Milestone Metric](#)
- [Contract Product Group Metric](#)
- [Contract Status Metric](#)

Check the My Reports Hyperlink, and then press save at the bottom of the page. Then click on the link “Personalize Layout” to arrange the pagelet.

By default, there are two columns, and the “My Reports” will appear under the Menu. To move it, click on it to highlight it, then click on the arrows to move it to the right column. You can change the view to three columns, it is a personal preference as to what you like to see:

Personalize Layout

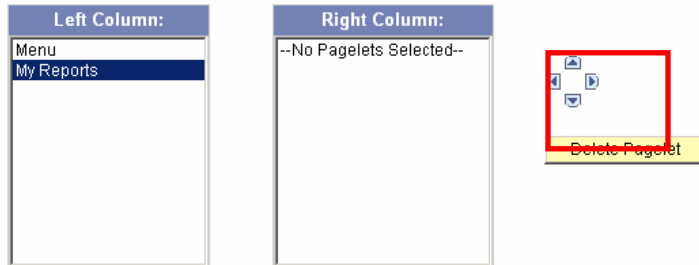


Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)

= Required - fixed position pagelet

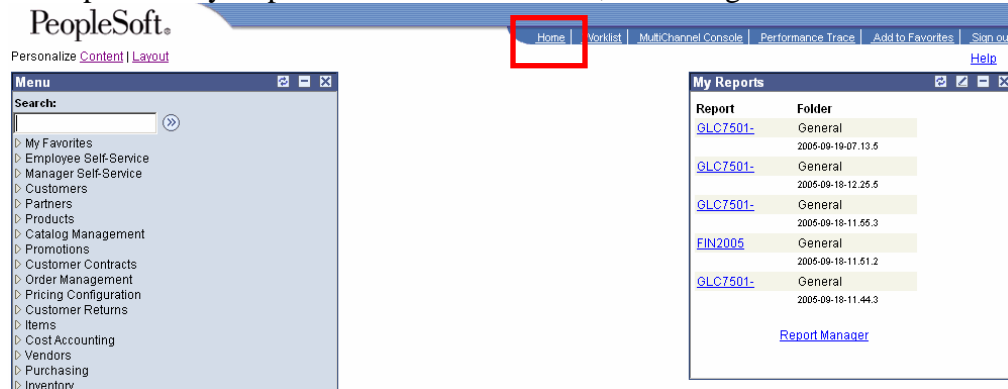
* = Required - moveable pagelet



Example of "My Reports" with two columns, in the Right Column:



Example of "My Reports" with three columns, in the Right Column:



Note – this pagelet only shows up on the HOME page, so press HOME to get back to this screen.

To view the report, click on the corresponding hyperlink, the following will appear.

Report

Report ID: 18677 **Process Instance:** 2397399 [Message Log](#)
Name: GLC7501- **Process Type:** Crystal
Run Status: Success

Journal Entry Print

Distribution Details

Distribution Node: SF88DEV_RPT_NODE **Expiration Date:** 12/18/2005

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	09/19/2005 7:13:58.000000AM CDT
GLC7501- 2397399.PDF	42,168	09/19/2005 7:13:58.000000AM CDT
PeopleSoft Trace File	465	09/19/2005 7:13:58.000000AM CDT

Distribute To

Distribution ID Type	Distribution ID
User	JUK

The report will have an extension after it (i.e. PDF or XLS, depending on the report run). You will also see a trace file and a message log, which will state any issues the report had when run.