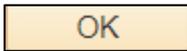## Quick Reference Guide to Setup Reporting Preferences and Run Query

1. Navigate to Reporting Console.
    Navigator > Reporting Tools > Reporting Console

2. Click on Preference Link:

Reporting Console

Preference

3. Accept the defaults or change them. Under "**Show Instances For**" section enter 2 and click

OK

View Preferences   ✕

Help

Default Folder

Type	Display Order	Active
My Reports	1	☑
My Process Requests	2	☑
My Favorites	3	☑

Process Link Display Option

○ Name only
○ Description only
◉ Name and Description

Process Request Display Option

User ID 00913865 🔍   Run Status ▾
Type 🔍   Name 🔍

Display Option

Distribution Status Posted ▾

Show Instances For

Last ▾ 2 Days ▾

Display latest 10 Instance

Process Request Notification

Enabled ☑

Export Favorites

Public Access To Favorites ☑

OK   Cancel

4. Click on "**My Reports**". Any reports you have run the past 2 days should populate.

Name	Status	Run Date/Time
⊟ 📁 My Reports		
🗏 7978952 Trail Balance Acct by …	Posted	10/09/2018 11:22:07AM CDT
🗏 7978943 Trail Balance Acct by …	Posted	10/09/2018 11:21:47AM CDT
🗏 7978939 Trail Balance Acct by …	Posted	10/09/2018 11:21:17AM CDT
🗏 7978919 Year End Checklist	Posted	10/09/2018 11:17:25AM CDT
🗏 7978904 UWSUP-POADJBAL	Posted	10/09/2018 10:52:53AM CDT
🗏 7978900 UWSTP-POADJBAL	Posted	10/09/2018 10:50:20AM CDT

5. To run a Query, choose "Quick Run".

Reporting Console

Preference   Quick Run

6. Choose the Report type you want to run.

Process Search / Run

Help

○ Process Type/Name
◉ PeopleSoft Query
○ Connected Query
○ Query-Based BIP Reports
○ nVision Report Request

Process Type	begins with ▾	Application Engine ▾	
Process Name	begins with ▾	PSQUERY	
Query Name	begins with ▾		Search

Process List   Personalize | Find | View 100 | 🗗 | 📊   First ◀ 1-50 of 301 ▶ Last

Process Type	Process Name	Query Name	Description	Run
Application Engine	PSQUERY	MN_GO_LIVE_VALIDATE_QUERIES	Go Live query numb validation	Run
Application Engine	PSQUERY	MN_NVSRUN_PROCESS_SEARCH		Run
Application Engine	PSQUERY	MN_NVS_REPORT_REQUEST	GOLIVE Validation Query	Run
Application Engine	PSQUERY	MN_PAGE_NAME_RECOR_SEARCH		Run
Application Engine	PSQUERY	MN_REPORTBOOK_VALIDATION	GoLive validation	Run
Application Engine	PSQUERY	MN_UWNVS_AMD_SYS_RUN_CNTRL	NVS UWAMD_SYS RUN CONTRLS	Run
Application Engine	PSQUERY	1000000_ALLOC_JRN_SPEC_DATE	Allocation journal details	Run
Application Engine	PSQUERY	1000000_ALLOC_JRN_YEST	1000000 Alloc Jrnls Yesterday	Run
Application Engine	PSQUERY	1000000_DEPOSIT_CONTROL_RECON	DEPOSIT CONTROL FOR RECON	Run

7. Enter the Query name or the first few letters and click Search. Once you find the Report click the Run Link.

8. Enter any Prompt values if prompted.

Date 10/10/2018

OK   Cancel

9. Click OK

10. You will be prompted to Save or run the report. Save your parameters.

Save Parameters

Save Parameters: 1000000_ALLOC
OK   Cancel

Process Search / Run

Use Saved Parameters: ▼

Query Name: 1000000_ALLOC_JRN_SPEC_DATE
*Description: Allocation journal details
Update Parameters

Prompt Name	Value
JOURNAL_DATE	2018-10-10

Save   Schedule   Run Now   Cancel

11. Click **Run Now** (or you can schedule the Query to run). App Engine Window may populate, you can ignore or wait until success.

← → C   🔒 https://portal.sfs.wisconsin.edu/psc/sfs-BD_38/

Success

Process Name: PSQUERY   PSQUERY
Process Instance: 10132504   **Process Type:**   Application Engine

12. Close this window.

13. You should see a reference to the process. Click OK.

Message

Request "1000000_ALLOC_JRN_SPEC_DATE" is successfully submitted. Process Instance: 10132504 (65,366)

OK

14. The Query report will populate in your Preferences folder.

Reporting Console

Preference   Quick Run   Import Favorites   Process Monitor   Report Manager

Personalize | View All   First ◀ 1-13 of 13 ▶ Last

Name	Status	Run Date/Time
⊟ 📁 My Reports		
📊 7979969 Allocation journal det...	Posted	10/10/2018 10:42:56AM CDT