RUNNING GENERAL REPORTS AND QUERIES IN PEOPLESOFT

NOTE: This document is designed to use online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.

If you have not used one of the new “Mini-Manuals” you may wish to consult the document “Getting the Most Out of Mini-Manuals” prior to using this document.

If you have questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail psguides@uvm.edu.

TABLE OF CONTENTS GUIDE

(Click on topic headings to jump to a specific section.
Use Ctrl+Home to come back to the Table of Contents)

Background ........................................................................................................................................ 2

PeopleSoft Reports .......................................................................................................................... 2
  Run Control ID Setup for PeopleSoft Reports ............................................................................... 2
  Instructions to Set-up a Run Control ID ....................................................................................... 2
  PeopleSoft Process Monitor ......................................................................................................... 4
  Instructions to use the PeopleSoft Process Monitor .................................................................... 4
  Send Reports via Email .................................................................................................................. 6
  Instructions to send reports via Email ............................................................................................ 6

PeopleSoft Queries ........................................................................................................................ 8
  Access Information through Queries ............................................................................................ 8
  Instructions to Access Information through Queries ..................................................................... 8

PeopleSoft Inquiries .................................................................................................................... 9
  Enter a Ledger Inquiry .................................................................................................................. 9
  Instructions to Enter a Ledger Inquiry: ......................................................................................... 9
  Download Data from PeopleSoft Grids to Excel ......................................................................... 11
  Instructions to Download the Gridtools Add-In ......................................................................... 11
  Instructions for Using the Gridtools Add-In ............................................................................... 12

Helpful Links .................................................................................................................................. 13
  Further Help ................................................................................................................................. 13
Background

PeopleSoft stores and processes large amounts of data related to UVM, its people, and its finances. Users are able to employ that data in practical ways by running Reports, Queries and Inquiries. This mini manual offers the ability to learn more about what the database has to offer and provides instructions to make accessing data easy.

PeopleSoft Reports

There are two types of reports in PeopleSoft: delivered and custom. Delivered reports are those that have been designed by PeopleSoft developers and come as a standard part of the package. You will find delivered reports throughout the database under various menu items. Custom reports have been written and designed by UVM employees with the University’s unique needs in mind. These reports are more personalized and can be found under the UVM Reports menu heading.

Run Control ID Setup for PeopleSoft Reports

- Run Control IDs are place holders for sets of values within a report.
- Run Control IDs need to be created in order to run reports in PeopleSoft. Once this series of steps is completed, run reports as often as needed with this Run Control ID without redoing these setup steps.
- Once created, Run Control IDs cannot be deleted.
- Most people need only 1 or 2 Run Control IDs. However, when managing a series of projects or chartstrings, and consistently running a series of reports with similar criteria for each project or chartstring, consider creating a Run Control ID for each project.
- The criteria in each report can be changed as often as needed without entering a new Run Control ID.

Instructions to Set-up a Run Control ID

1. Log in to PeopleSoft through either the Human Resources Login or the Financials Login (www.uvm.edu/~erp/portal).
2. Navigate to a report to run. The **Run Control ID** screen will appear with name of the report chosen to run visible at the top of the screen.

3. If a **Run Control ID** has already been created, type it into the search box and click **Search**. You can then skip to Step 7.

4. If a new Run Control ID needs to be created, see Step 5.

5. Click the **Add a New Value** tab. Enter the new Run Control ID. Choose an ID that is memorable and related to the values used to run the report.

6. Click **Add**.
7. The report screen will appear.

![Projects Monthly Budget Report](image)

8. Enter the report criteria and run the report as appropriate.

**PeopleSoft Process Monitor**

After submitting a job, use Process Monitor to review the status of scheduled or running processes. View all processes to see the status of any job in the queue and control processes that were previously initiated. The Process Monitor consists of two pages: the Process List page and the Server List page.

Use the Process List page to monitor the process requests that have been submitted. If a process encounters an error, or if a server is down, it is noticeable almost immediately. In addition, here you are able to see which processes are queued to run in the future.

**Instructions to use the PeopleSoft Process Monitor**

1. Log in to PeopleSoft through either the Human Resources Login or the Financials Login and navigate to the report to run ([www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)).

2. Once the Run Control ID and associated criteria are entered and the report is ready to run, click the Process Monitor link.

3. In the Process Monitor, click the Refresh button until the Run Status shows Success.
4. Once the report has run successfully, click the **Details** link.

![Process List](image1)

5. On the **Process Detail** screen, choose **View Log/Trace**.

![Process Detail](image2)
6. To retrieve the report, click on the appropriate link on the View Log/Trace screen.

   File Name Descriptions:
   PDF – Portable Document Format, an image or snapshot
   CSV – Comma-Separated Values, can be manipulated via MS Excel or other spreadsheet software; XLS – MS Excel, originated and saved in MS Excel

<table>
<thead>
<tr>
<th>File List</th>
<th>File Size (bytes)</th>
<th>Date/Time Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQR_GLS7016_1906276.log</td>
<td>1,945</td>
<td>02/13/2012 1:37:33.400611PM EST</td>
</tr>
<tr>
<td>gis7016_1906276.PDF</td>
<td>2,051</td>
<td>02/13/2012 1:37:33.400611PM EST</td>
</tr>
<tr>
<td>gis7016_1906276.out</td>
<td>1,101</td>
<td>02/13/2012 1:37:33.400611PM EST</td>
</tr>
</tbody>
</table>

7. To go back to the Process Detail screen, click Return.

8. To go back to the Process List page, click OK.

9. Click the report title link at the bottom of the page to go back to where task started.

Send Reports via Email

PeopleSoft provides flexible ways to access and share information. The email function allows users to forward reports directly to individuals and groups without having to shuffle between several different software programs.

   Note: Instructions apply to emailing reports from both HCM and FSCM.

Instructions to send reports via Email

1. Set up the parameters and chartfields for a financial or HR report that uses the Process Monitor.

3. Change the **Type** of output to **Email**.

4. Click the **Distribution** link, and add the NetIDs of the people to whom the report is to be distributed.

5. Click **OK**.

6. On the **Process Scheduler Request** page, click the **OK** button.

7. When the report runs, the output will be emailed as a **PDF** file to the individuals selected.
PeopleSoft Queries

The use of queries in PeopleSoft is an alternative to running reports. All queries have been written by UVM employees and are designed with them in mind.

Access Information through Queries

An advantage to accessing information through queries is the option to send them to Microsoft Excel, which makes manipulating the data much easier and user friendly. For a list of available queries, reference the Available Reports and Queries document.

Instructions to Access Information through Queries

1. Log in to PeopleSoft through either the Human Resources Login or the Financials Login (www.uvm.edu/~erp/portal).


3. Enter the desired query into the search field and click search. The chosen query will show in a list below the search page.

4. By clicking on the appropriate link, the report can be run in HTML or Excel. Running a report in Excel will allow sorting and rearranging of results.  
   
   NOTE: If particular queries are searched on a regular basis, they can be added to a list of favorites by clicking on the link to the right of the query. Favorites will appear on the screen each time the Query Viewer page is accessed.

5. After clicking on the link to run in either Excel or HTML, the report parameters will appear. Fill in the blanks with the specific information requested and click View Results.
NOTE: The information entered here will vary based on the particular query chosen. Additional information on specific queries can be found in the list of queries at the end of this guide.

6. Results will open in the requested format.

PeopleSoft Inquiries

In addition to running reports and queries, users of PeopleSoft Financials can utilize Inquiries. Inquiries are designed to view on screen and they do not transfer well to Excel. Instructions for specific inquiries can be found in the General Ledger Mini Manual.

Enter a Ledger Inquiry

The first time entering the Ledger Inquiry, an Inquiry Name will need to be created. Existing Ledger Inquiries can be found by using the Find Existing Value tab.

Instructions to Enter a Ledger Inquiry:

1. In PeopleSoft Financials navigate to General Ledger > Review Financial Information

2. Select a Ledger Inquiry to run.

3. In order to run an Inquiry, there needs to be an Inquiry Name.
   - If an Inquiry Name already exists, access it by clicking on the Find an Existing Value tab, then clicking on Search. Skip to Step 7.
   - To create an Inquiry Name, see Step 5.
4. Select the **Add a New Value** tab and enter a name for the inquiry. Click **Add**.

5. Click **Add**, a page will open like the one reproduced below.

![Ledger Inquiry](image)

6. Complete the fields as appropriate.

7. Click **Search** to retrieve the data. Once the data is displayed, options are:
   - Click **Delete** to delete this Inquiry.
   - Click **Clear** to clear all values and set up the parameters again.
   - The parameters associated with a particular **Inquiry ID** can be changed and resaved as often as needed.
   - Click the **Activity** or **Detail** links to drill into more information about these transactions. All transactions appearing here are journal entries. (They may have originated as journal entries or, been generated by another PeopleSoft module like Accounts Payable.) Data in this search is updated once the journals are posted.
   - Click the **Inquiry Criteria** link to return to the search parameters.
   - There may be data not currently displayed on the page. To see it, click on **View All** (on the right side of the blue bar, next to the **Find** link).
Download Data from PeopleSoft Grids to Excel

Use the Excel icon at the top of any PeopleSoft grid to download the data contained within the grid to an Excel spreadsheet. When using this feature, some of the numeric data (i.e. budgets or expenses) downloads as numeric and some downloads as labels (alphas). This is visible in the Excel sheet because some of the values will be left-justified and some will be right-justified. Excel won't include any of the labels in its calculations (including subtotals) so the data set may be complete, but the totals are not accurate.

Below is an example of downloaded data in Excel. Any number justified to the left is actually formatted as text. Resolution: Install the Excel add-in GridTools.xla. Once installed, it will become available each time Excel is opened.

Instructions to Download the Gridtools Add-In

1. Click here to download the Add-in file and save the file to the desktop.

2. Open Microsoft Excel 2007 or later.

3. Under the File tab in the Excel window, click Options from the menu.

4. Click on Add-ins.

5. At the bottom of the window, find Manage: Excel Add-ins. Click Go.

6. In the Add-Ins window, select Browse.

7. Locate the GridTools.xla file saved to the desktop in Step 1 and select OK. If necessary, select Yes again.
8. **Gridtools** should now appear in the Add-Ins list:

![Add-Ins window](image)

**Instructions for Using the Gridtools Add-In**

1. Select the newly added **Add-Ins** tab.

2. Highlight the numeric data on the spreadsheet.

3. Click on the down arrow and select the appropriate option for the data.
Human Resource Services

Learning Services

• Financial Reporting page
• Mini Manuals

Suggestions? Updates? Send an email to psguides@uvm.edu

This document is designed to use online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.