RUNNING GENERAL REPORTS AND QUERIES IN PEOPLESOFT USER GUIDE

If you have questions about information in this document, or, if after reading it, you cannot find the information you need, please submit a help desk ticket in Footprints.

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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 document offers the ability to learn more about what the database has to offer and provides instructions to make accessing data easy.
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.

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.

5. On the Process Detail screen, choose View Log/Trace.
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>Name</th>
<th>File Size(bytes)</th>
<th>Date/Time Created</th>
</tr>
</thead>
<tbody>
<tr>
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<td>1.945</td>
<td>02/13/2012 1:37:33.400611PM EST</td>
</tr>
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<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.

![Distribution Detail](distribution_detail.png)

Click OK.

5. On the Process Scheduler Request page, click the OK button.

6. 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](http://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.

![Query Viewer](image)

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.

![Query List](image)

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.

![Query Parameters](image)

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
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 with GridTools.xla selected](image)

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

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

![Add-Ins tab selected](image)

2. Highlight the numeric data on the spreadsheet.

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

![Spreadsheet with Gridtools feature](image)
Helpful Links

- Professional Development & Training Classes

Relevant UVM Departments

- Financial Accounting and Reporting Services
- Office of Operational Excellence

Suggestions? Updates? Send an e-mail to ooe@uvm.edu.

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