RUNNING REPORTS AND QUERIES

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Overview

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 provides information about what the PeopleSoft database has to offer and instructions to make accessing data easy.

Reports

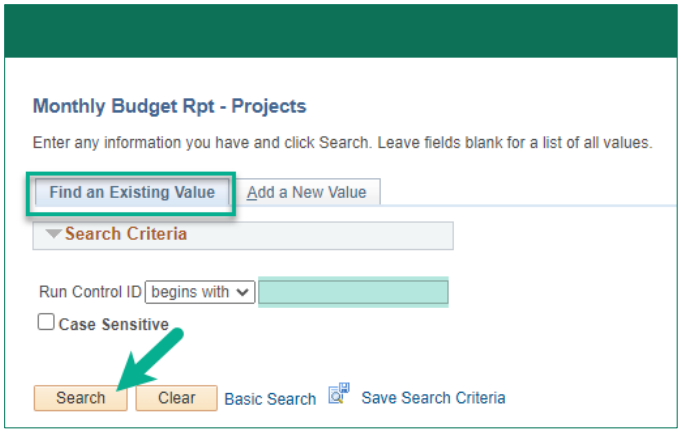
There are two types of reports in PeopleSoft: delivered and custom. Delivered reports are those that designed by Oracle/PeopleSoft developers and come as a standard part of the package. You will find delivered reports throughout the database under various menu items. Custom reports are those written 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

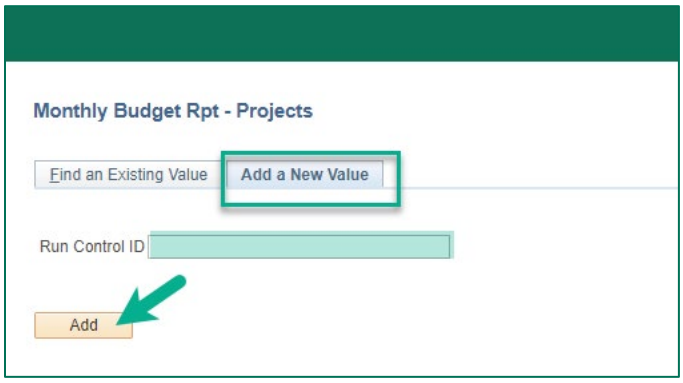
- Run Control IDs are placeholders for sets of values within a report.
- Run Control IDs need to be created in order to run reports in PeopleSoft. Once this series of steps is completed, run reports as often as needed with this Run Control ID without redoing these setup steps.
- Most people need only one or two 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.
- Run Control IDs can be deleted by navigating to: UVM System > Delete Run Control IDs

How to Set Up a Run Control ID

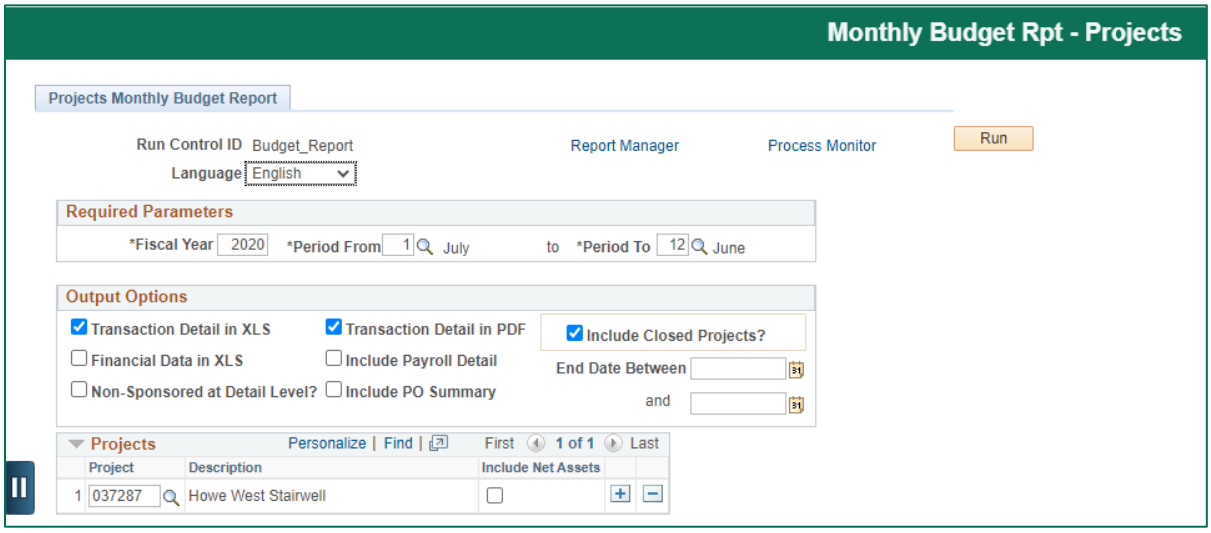
1. Log in to PeopleSoft through either the **Human Resources** or **Financials** login.
2. Navigate to a report to run. The **Run Control ID** screen will appear with the name of the report chosen to run at the top of the screen.
3. If a **Run Control ID** has already been created, type it into the search box and click **Search.** Then skip to **Step 6**.



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



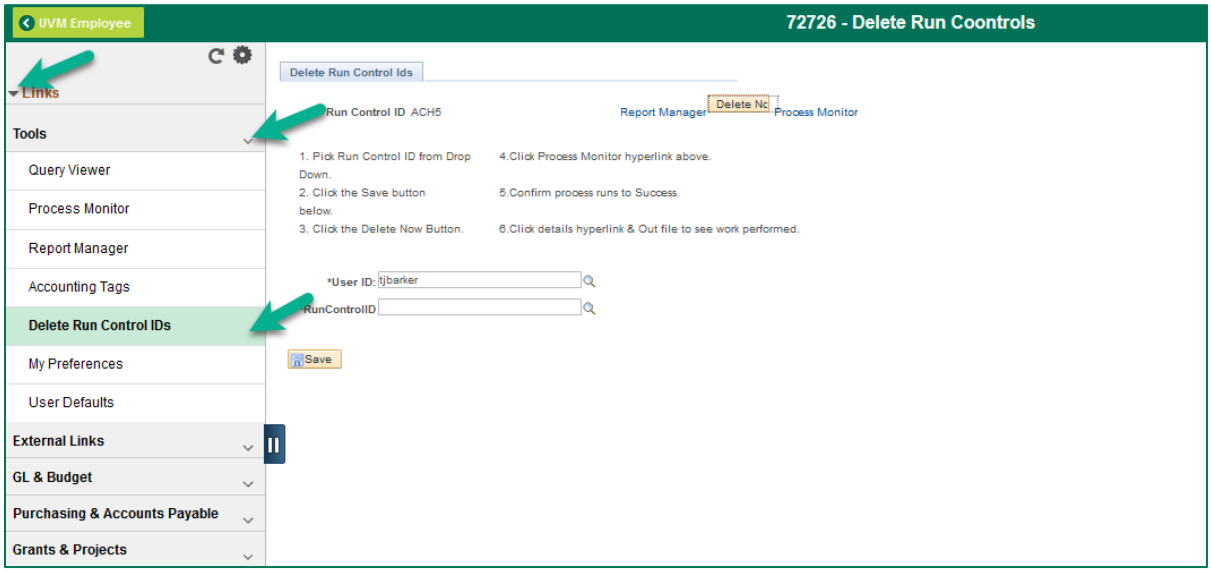
5. Click **Add**.
6. The report screen will appear.



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

Deleting Run Control IDs

Run Control IDs can be deleted by navigating to: **UVM System > Delete Run Control IDs** or under **Tools** in the **UVM Business Mgr WorkCenter.**

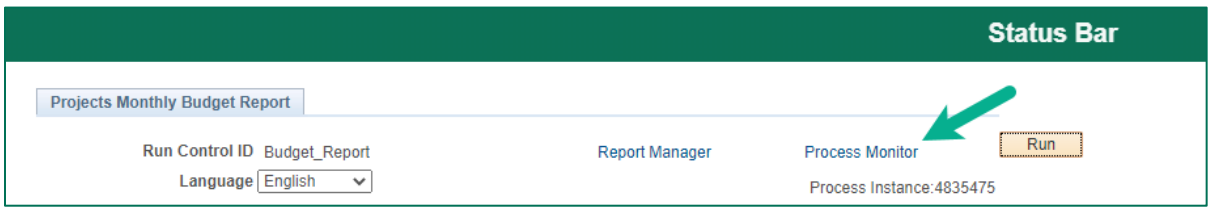


Process Monitor

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 previously initiated.

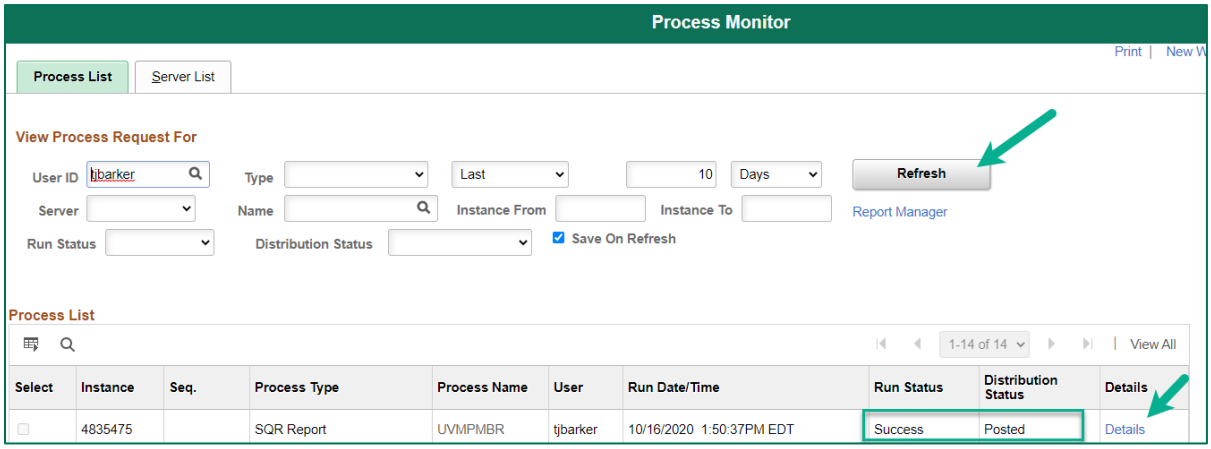
The Process Monitor consists of two pages: the **Process List** page and the **Server List** page. Use the Process List page to monitor the process requests that have been submitted. If a process encounters an error, or if a server is down, it is noticeable almost immediately. The Process List page also shows processes are queued to run in the future.

1. Log in to PeopleSoft through either the **Human Resources** or **Financials** login and navigate to the report you want to run.
2. Once the **Run Control ID** and associated criteria are entered, and the report has been run, click the **Process Monitor** link.

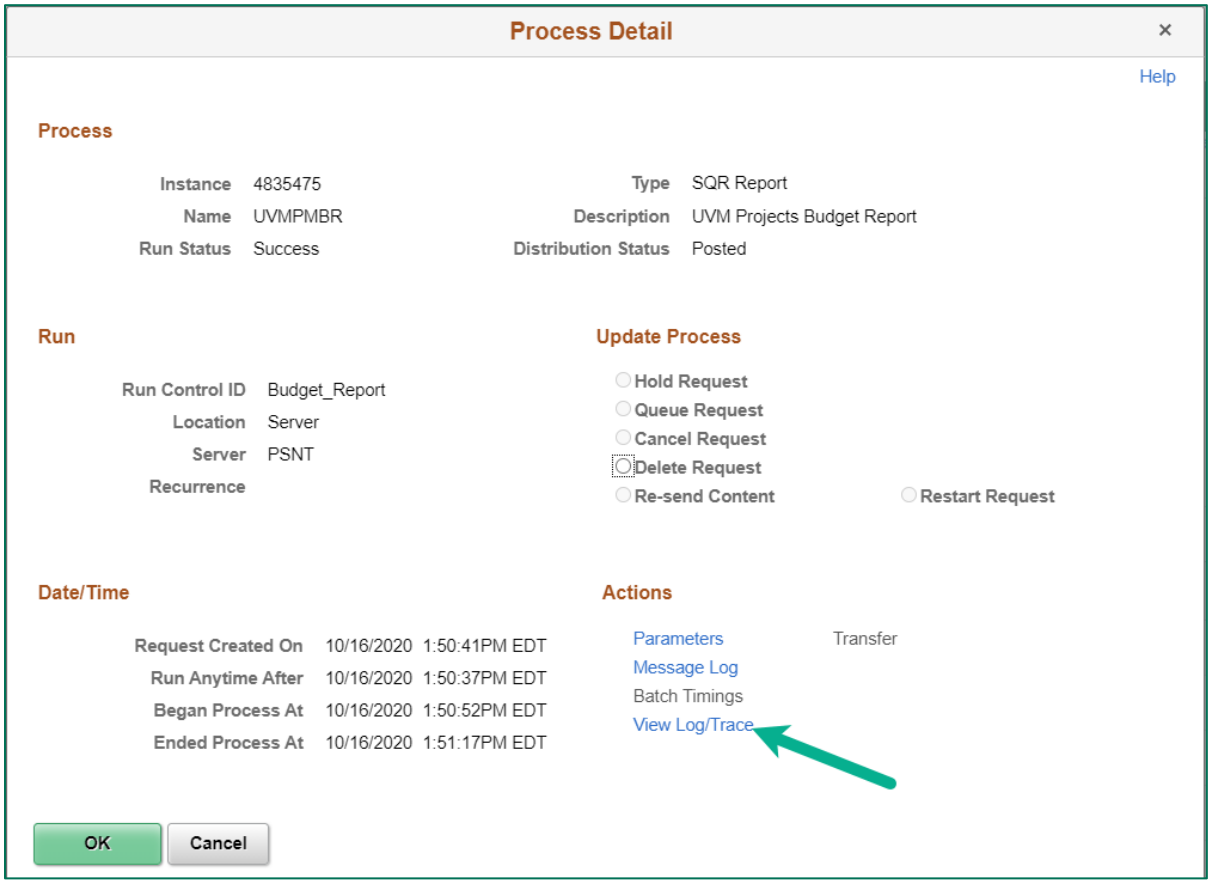


3. In the Process Monitor **Process List**, click the **Refresh** button until the **Run Status** shows "Success" and the **Distribution Status** shows "Posted."

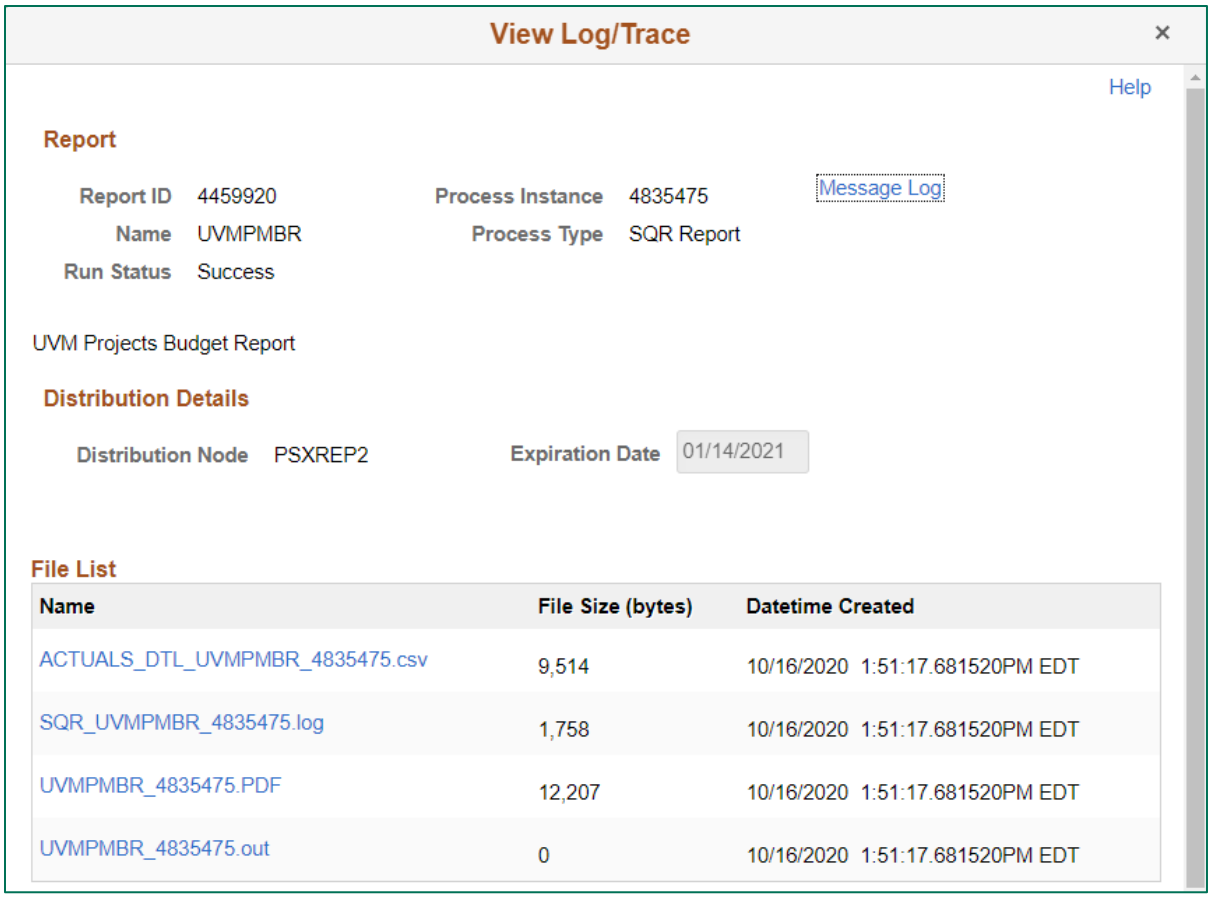
4. Once the report has run successfully, click the **Details** link.



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 Excel or other spreadsheet software
XLS: *Microsoft Excel*, originated and saved in Excel



View Log/Trace

Help

Report

Report ID 4459920 Process Instance 4835475 Message Log
Name UVMPMBR Process Type SQR Report
Run Status Success

UVM Projects Budget Report

Distribution Details

Distribution Node PSXREP2 Expiration Date 01/14/2021

File List

Name	File Size (bytes)	Datetime Created
ACTUALS_DTL_UVMPMBR_4835475.csv	9,514	10/16/2020 1:51:17.681520PM EDT
SQR_UVMPMBR_4835475.log	1,758	10/16/2020 1:51:17.681520PM EDT
UVMPMBR_4835475.PDF	12,207	10/16/2020 1:51:17.681520PM EDT
UVMPMBR_4835475.out	0	10/16/2020 1:51:17.681520PM EDT

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.

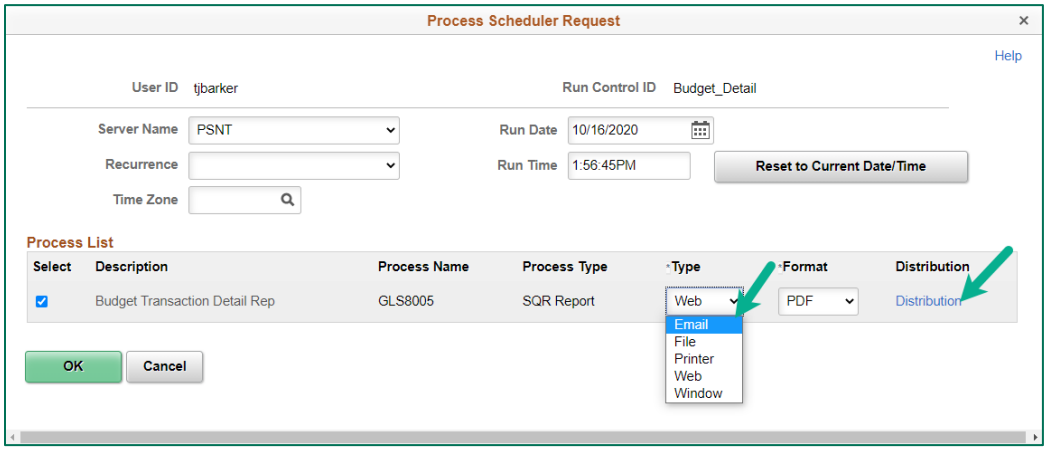
Send Reports via Email

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.

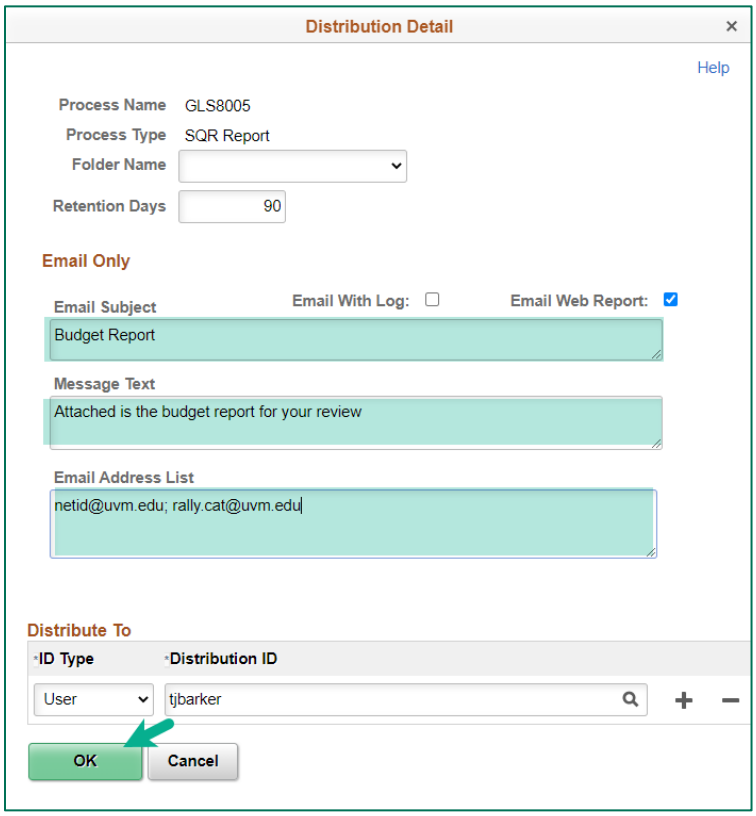
These instructions apply to emailing reports from both HCM and FSCM.

1. Set up the parameters and chartfields for a Financials or HR report that uses the Process Monitor.
2. Click **Run**.

3. The **Process Scheduler Request** screen will appear. Select **Email** from the **Type** dropdown, and then click **Distribution**.



4. On the **Distribution Detail** page, enter an **Email Subject** and **Message Text**. Enter email addresses separated by semi-colons, as shown in the Email Address List field. Click **OK**. (Please note, each time this Run Control ID is used, the email settings will be used.)



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 specified.

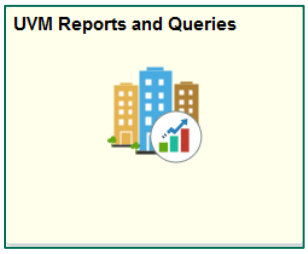
Queries

PeopleSoft Queries are an alternative to running reports. All queries have been written by UVM employees and are designed with UVM's needs in mind.

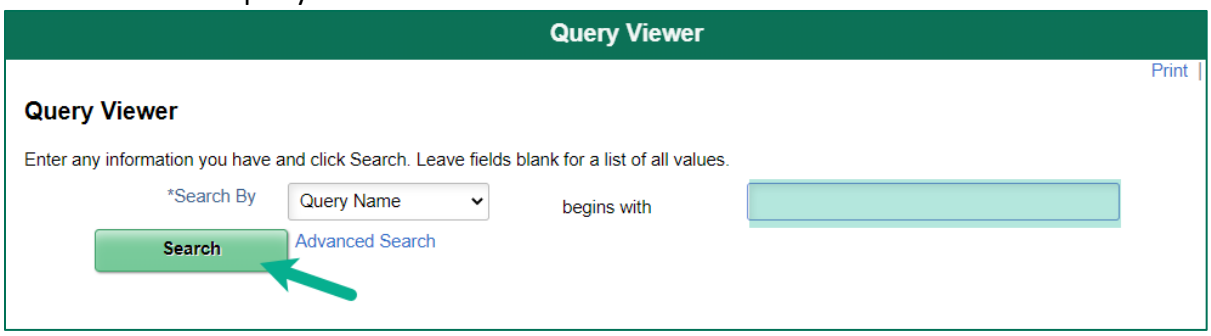
An advantage to accessing information through queries is the option to send them to Microsoft Excel, which makes manipulating the data easier and more user friendly. For a list of available queries, see Available Reports and Queries (PDF).

1. Log in to PeopleSoft through either the **Human Resources** or the **Financials** login.
2. In Human Resources, click the **UVM Reports and Queries** tile. In Financials, click **UVM Business Mgr WorkCenter** tile.

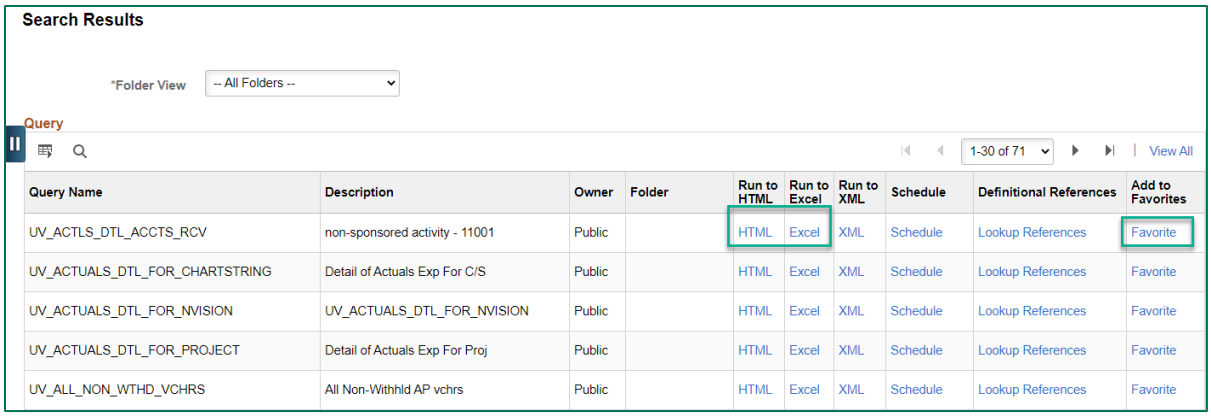
   Note: Both of these tiles open the **Query Viewer** by default. You can also click the **Arrow** icon next to the **Queries** menu to view groups of frequently used queries.



3. Enter the desired query into the search field and click **Search**.

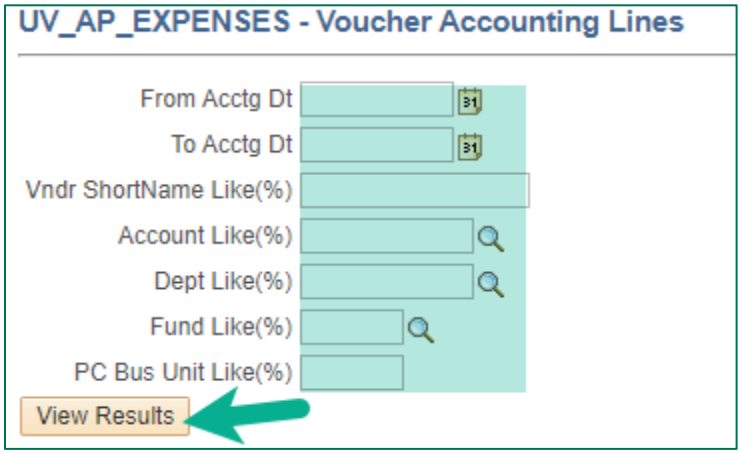


4. The chosen query will show in a list below the search page. Click the appropriate link to run the report in either HTML or Excel. (Running a report in Excel will allow sorting and rearranging of results.) If you want to run particular queries on a regular basis, you can add them to a list of favorites 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 Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UV_ACTLS_DTL_ACCTS_RCV	non-sponsored activity - 11001	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ACTUALS_DTL_FOR_CHARTSTRING	Detail of Actuals Exp For C/S	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ACTUALS_DTL_FOR_NVISION	UV_ACTUALS_DTL_FOR_NVISION	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ACTUALS_DTL_FOR_PROJECT	Detail of Actuals Exp For Proj	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UV_ALL_NON_WTHD_VCHRS	All Non-Withhld AP vchrs	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

5. The report parameters will appear. (**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.) Fill in the blanks with the specific information requested and click **View Results**.



6. Results will open in the requested format.

Inquiries

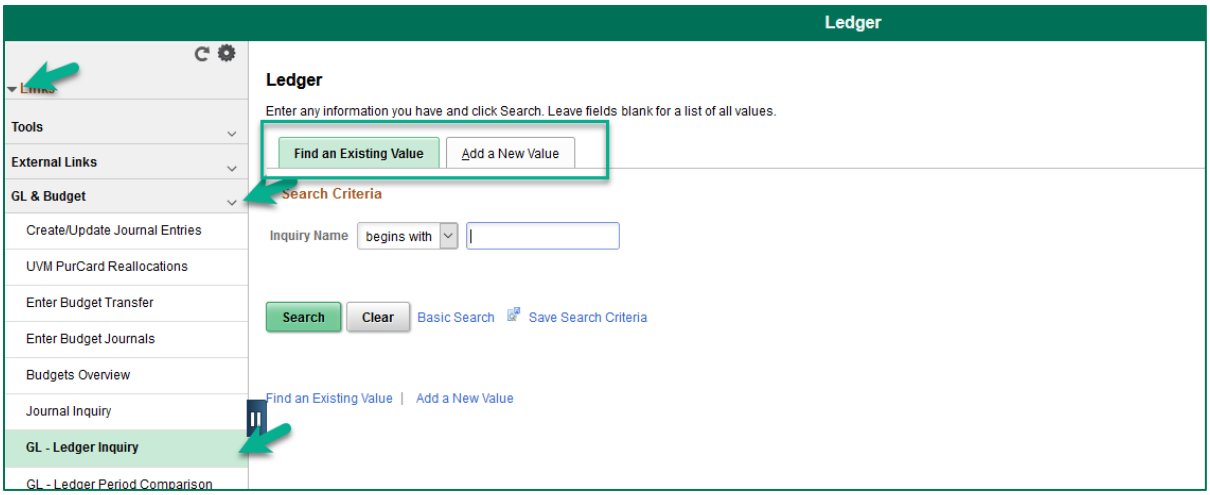
In addition to running reports and queries, PeopleSoft Financials users can access data using Inquiries. Inquiries are designed to view on screen and they do not transfer well to Excel.

How to Enter a Ledger Inquiry

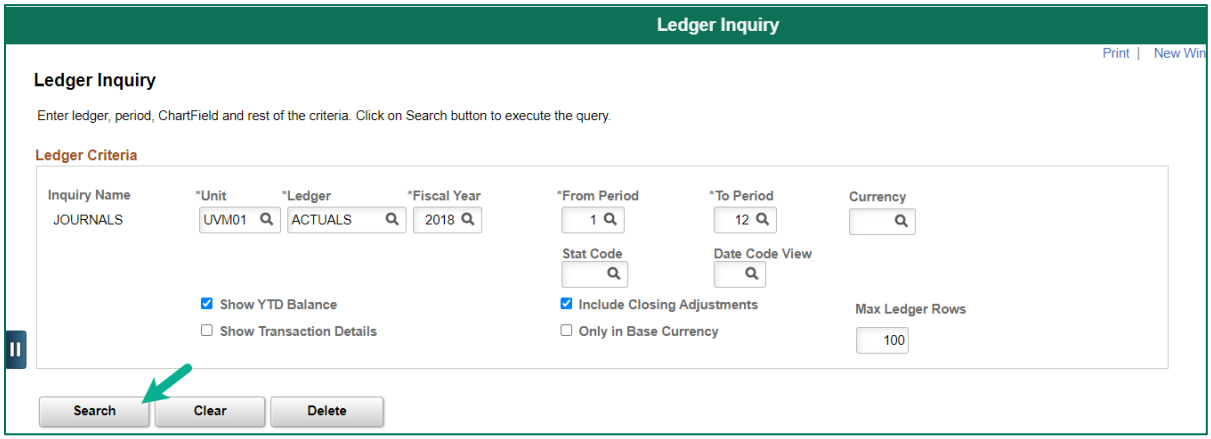
The first time entering the Ledger Inquiry, an **Inquiry Name** will need to be created. Existing Ledger Inquiries can be found by using the **Find Existing Value** tab.

1. Log in to PeopleSoft Financials
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile**.**

3. Click the **Arrow** icon to expand the **Links** and **GL & Budget** to expand the menu, showing a list of frequently used links. Select **GL – Ledger Inquiry**
4. In order to run an Inquiry, there needs to be an **Inquiry Name**.
   a. If an Inquiry Name already exists, click the **Find an Existing Value** tab, then click **Search**. A list of available inquiries will be displayed. Click the desired **Ledger Inquiry** to run.
   b. To create a new Inquiry Name, select the **Add a New Value** tab and enter a name for the inquiry. Click **Add**.



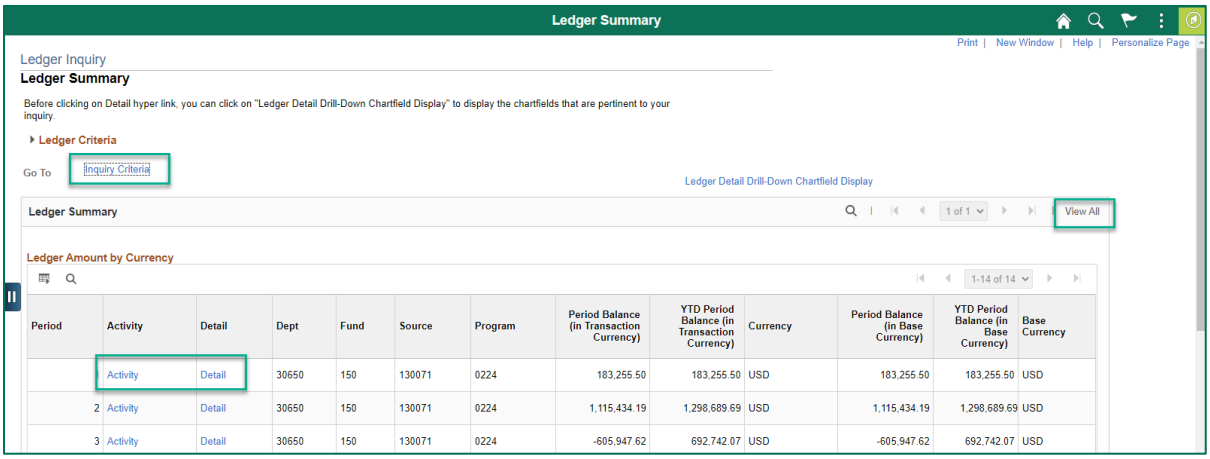
5. The **Ledger Inquiry** page will open. Complete the fields as appropriate, and then click **Search** to retrieve the data.



- 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 it as often as needed.

6. The data will be displayed on the **Ledger Summary** page.

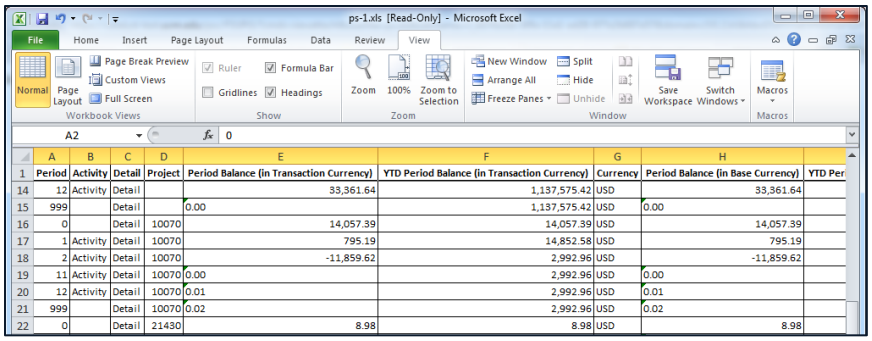
- Click the **Activity** or **Detail** links to drill into more information about these transactions. All transactions appearing here are journal entries. (They may have originated as journal entries or, been generated by another PeopleSoft module like Accounts Payable.) Data in this search are updated once the journals are posted.
- 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).
- Click the **Inquiry Criteria** link to return to the search parameters.



Download Data from PeopleSoft Grids to Excel

Use the **Grid Action** 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) download as numeric and some download as text/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.

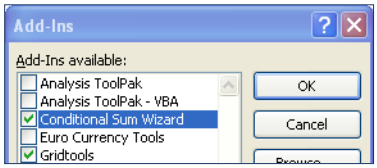
Below is an example of downloaded data in Excel. Any number justified to the left is actually formatted as text. *Resolution:* Install the Excel add-in ***GridTools.xla.*** Once installed, it will become available each time Excel is opened.



	A	B	C	D	E	F	G	H	
1	Period	Activity	Detail	Project	Period Balance (in Transaction Currency)	YTD Period Balance (in Transaction Currency)	Currency	Period Balance (in Base Currency)	YTD Per
14	12	Activity	Detail		33,361.64	1,137,575.42	USD	33,361.64	
15	999		Detail		0.00	1,137,575.42	USD	0.00	
16	0		Detail	10070	14,057.39	14,057.39	USD	14,057.39	
17	1	Activity	Detail	10070	795.19	14,852.58	USD	795.19	
18	2	Activity	Detail	10070	-11,859.62	2,992.96	USD	-11,859.62	
19	11	Activity	Detail	10070	0.00	2,992.96	USD	0.00	
20	12	Activity	Detail	10070	0.01	2,992.96	USD	0.01	
21	999		Detail	10070	0.02	2,992.96	USD	0.02	
22	0		Detail	21430	8.98	8.98	USD	8.98	

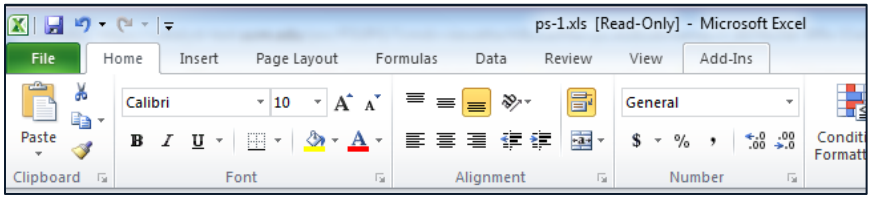
How to Download the Gridtools Add-In

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:

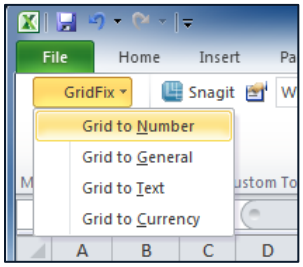


How to Use the Gridtools Add-In

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.



Resources/Help

Help/Footprints

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.

Training

- Professional Development & Training Classes

Relevant UVM Departments

- Financial Accounting and Reporting Services

Suggestions? Updates?

Send an email to PS9-1Upgrade@uvm.edu.