

# Job Aid

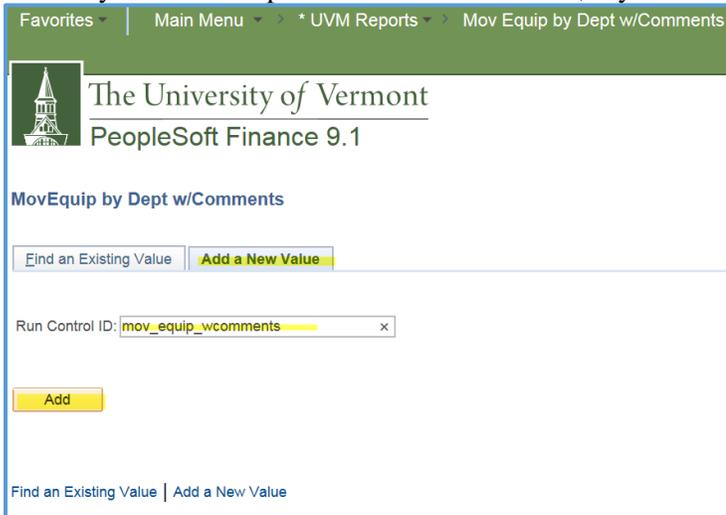
## How to Obtain Movable Equipment Data by Department

**Prerequisite:** [Submit a PeopleSoft access request](#) if you do not have access to run this report.

**Step 1** – Under UVM Reports, navigate to the “Mov Equip by Dept w/Comments” link in PeopleSoft Financials.

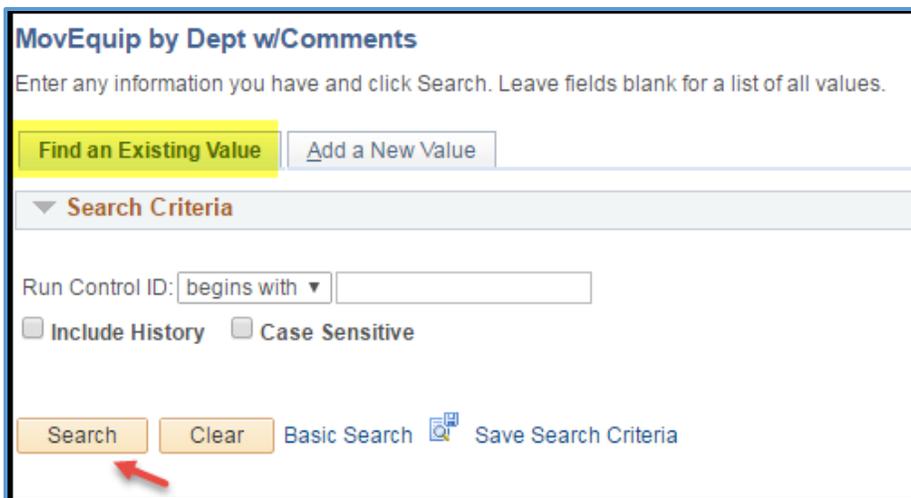
**Step 1A** – If you have never run this report before, you must set up a Run Control Id by clicking on the tab that says: Add a New Value, and in the Run Control ID field type in: mov\_equip\_wcomments – no spaces can be in here, and click on the add button.

You only need to set up the Run Control ID once, if you have run this report before, just go to Step 2.



The screenshot shows the top navigation bar with 'Favorites', 'Main Menu', '\* UVM Reports', and 'Mov Equip by Dept w/Comments'. Below this is the University of Vermont logo and 'PeopleSoft Finance 9.1'. The main heading is 'MovEquip by Dept w/Comments'. There are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs is a text input field for 'Run Control ID' containing 'mov\_equip\_wcomments'. An 'Add' button is located below the input field. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

**Step 2** – Select the tab “Find an Existing Value” and press “search”



The screenshot shows the 'MovEquip by Dept w/Comments' search criteria section. It includes the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with a dropdown menu set to 'begins with' and an empty text input field. There are two checkboxes: 'Include History' and 'Case Sensitive', both of which are unchecked. At the bottom, there are buttons for 'Search' (with a red arrow pointing to it), 'Clear', 'Basic Search', and 'Save Search Criteria'.

Favorites | Main Menu | \* UVM Reports | Mov Equip by Dept w/Comments

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Moveable Equipment

Run Control ID: Equipment      Report Manager      Process Monitor      **Run**

**Select**

\*From Department

\*To Department

Tag Number (%)  (Use % for wildcard search or for all Equipment)

**Report Output**

CSV/Excel Format       Report Format

**Step 3** – Enter the range of department codes in the “from” and “to” department fields.

**Step 4** - In the Tag Number field, type % sign to display all of the equipment for the department (s) you requested. Otherwise, use the % with tag specific number information to narrow your list of assets requested.

**Step 5** – Select CSV/Excel Format.

**Step 6** – Click on Run button.

Favorites | Main Menu | \* UVM Reports | Mov Equip by Dept w/Comments

Home | Worklist | Pr

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**Process Scheduler Request**

User ID Idesso      Run Control ID MOV\_EQUIP\_WCOMMENTS

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Server Name        Run Date

Recurrence        Run Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Mov Equip by Dept with Comments	UV_FSRPT038	Application Engine	<input type="text" value="Web"/>	<input type="text" value="TXT"/>	Distribution

**Step 7** – In the Process Scheduler select “Web” for the Type and “TXT” for the Format. Press OK button.

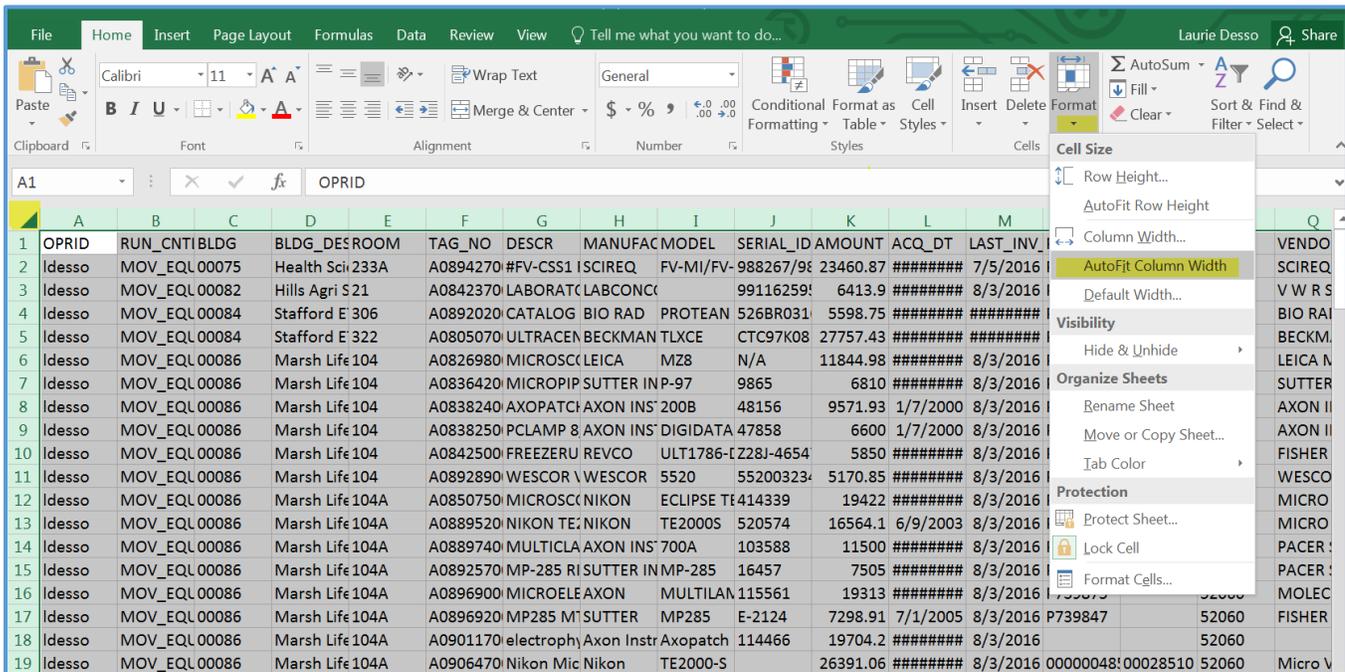
**Step 8** – Click on the Process Monitor line.

**Step 9** – The report you just generated will be the top one in the process list and should have “Processing” as the run status, click the refresh button (may need to happen multiple times) until the run status changes to Success and the Distribution Status is Posted – then click “Details.”

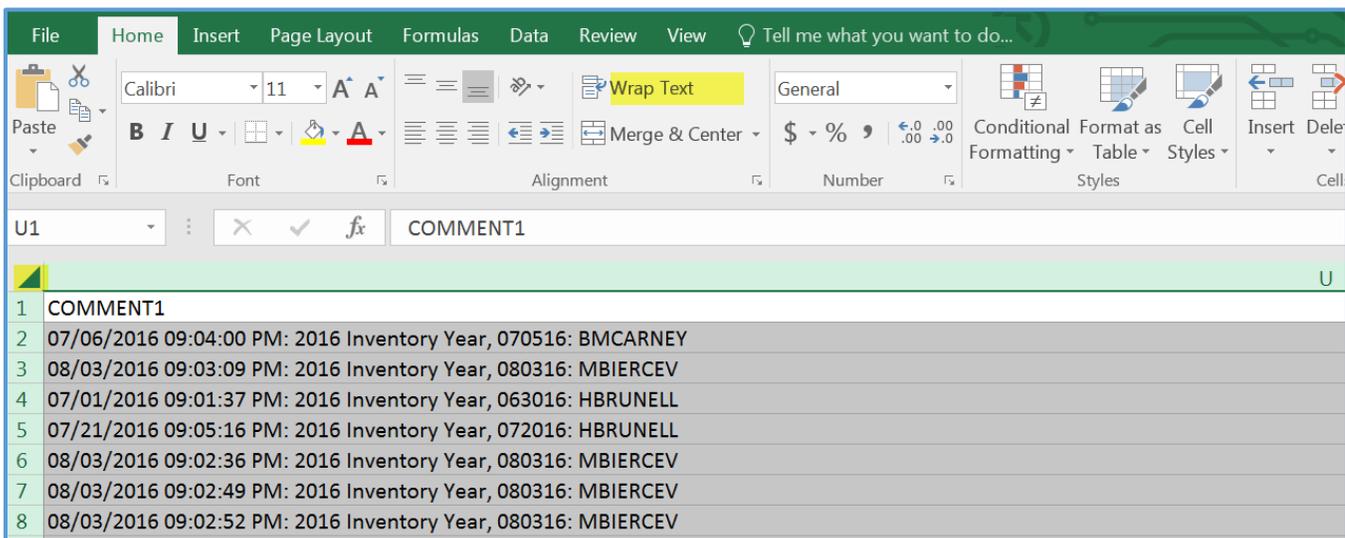
**Step 10** – Click the View Log/Trace line at the bottom of the screen.

**Step 11** – Click on the line that has your abbreviated name and ends with .csv and then choose to open the file.

**Step 12** – Highlight the entire excel spreadsheet by clicking on the cell above the 1 and to the left of the A column, and then go to the down arrow underneath the word Format (in the excel ribbon layout—3/4’s of the way on the right side at the top), and select Autofit Column Width.

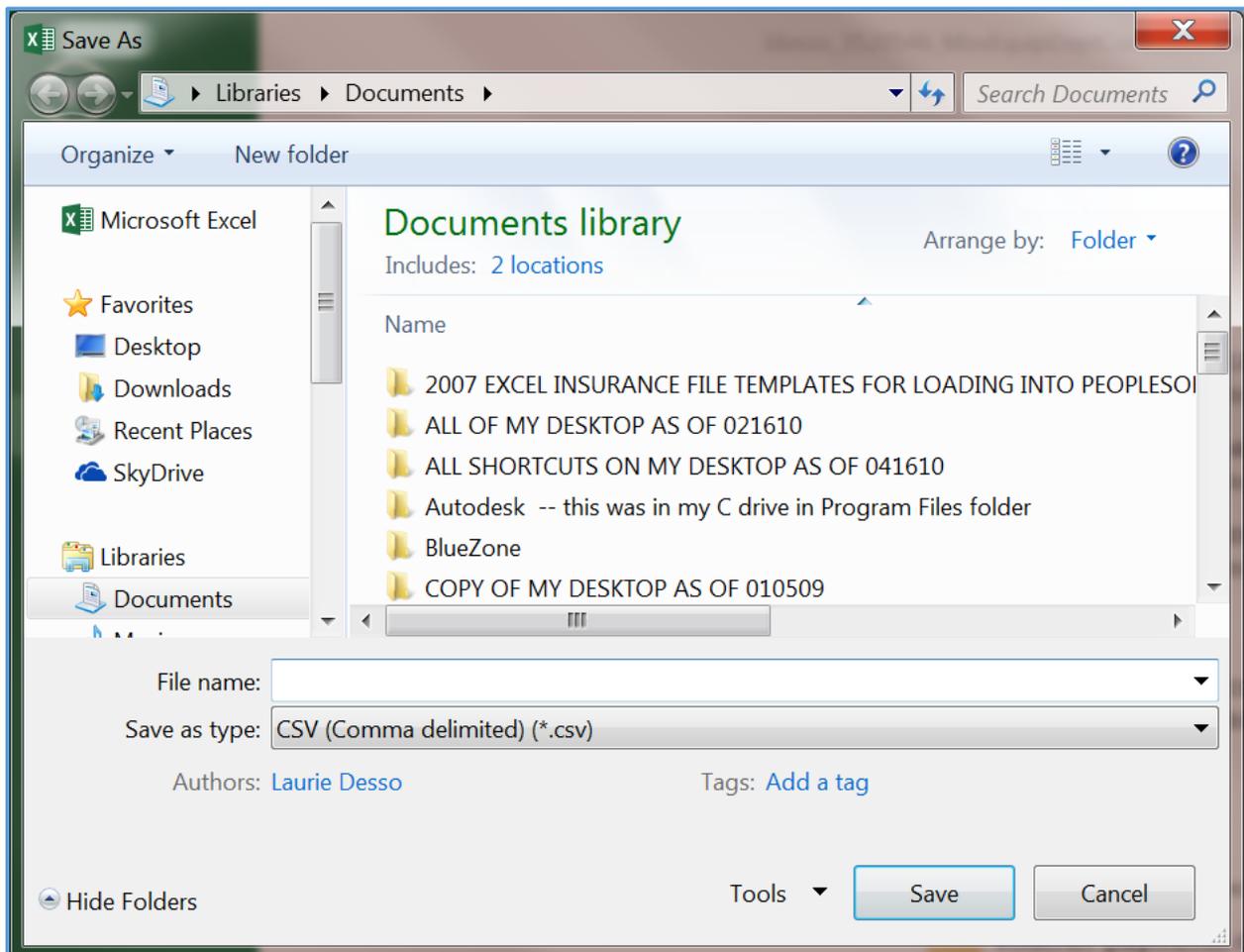


**Step 13** – Also, there are three columns on the right side of the excel file, comment 1, comment 2, and comment 3, please highlight each column and select wrap text in order to be able to read it better, do this for each column if necessary.



**Step 14** – Then do a File, Save As, and select where you want to save the file on your computer.

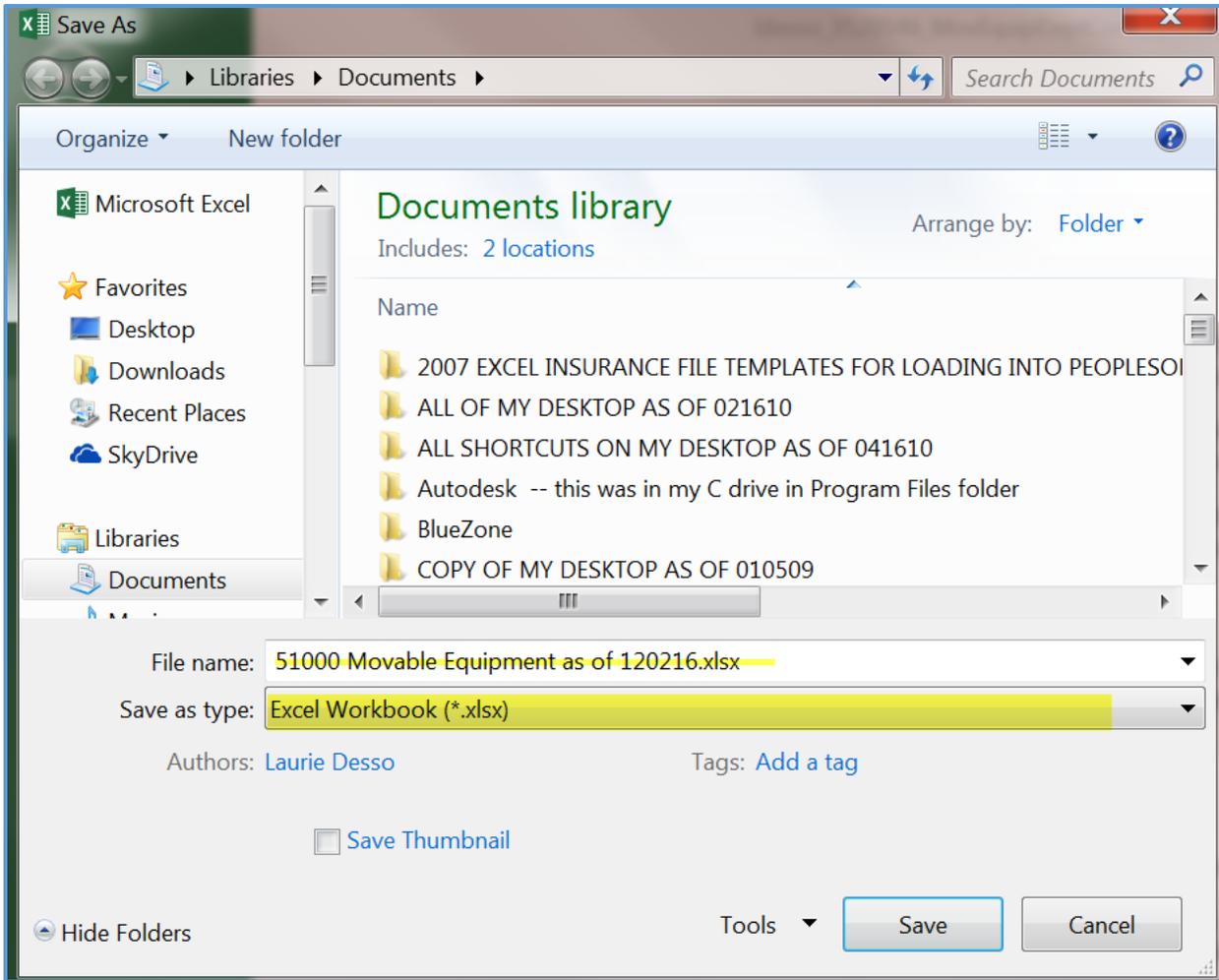
This box should pop up:



In the File name field: fill in what you want to call the file, for example: 51000 Movable Equipment as of 120216.

Then in the Save as type field: Click on the down arrow, and select the line that has: Excel Workbook (\*.xlsx) -- (this may be the top line on the list).

Then the box should look like this:



Please click on save.

**Note:** If you don't have PeopleSoft access to run this report, [click here](#) and submit a request.