

How to run Reports in PeopleSoft 8.8

Navigate to this link: <http://peoplebooks.ucr.edu>

Select the database in the upper right-hand corner where the reports are to be run - PSDEV, FSQA, or UCRTM2.


[[FSMARC](#) | [FSQA](#) | [PSDEV](#) | [UCRTM2](#)]

Login to CAS.

Central Authentication Services

You have requested access to a site that requires authentication.

Enter your NetID and password below; then click on the **Login** button to continue.



NetID:

Password:

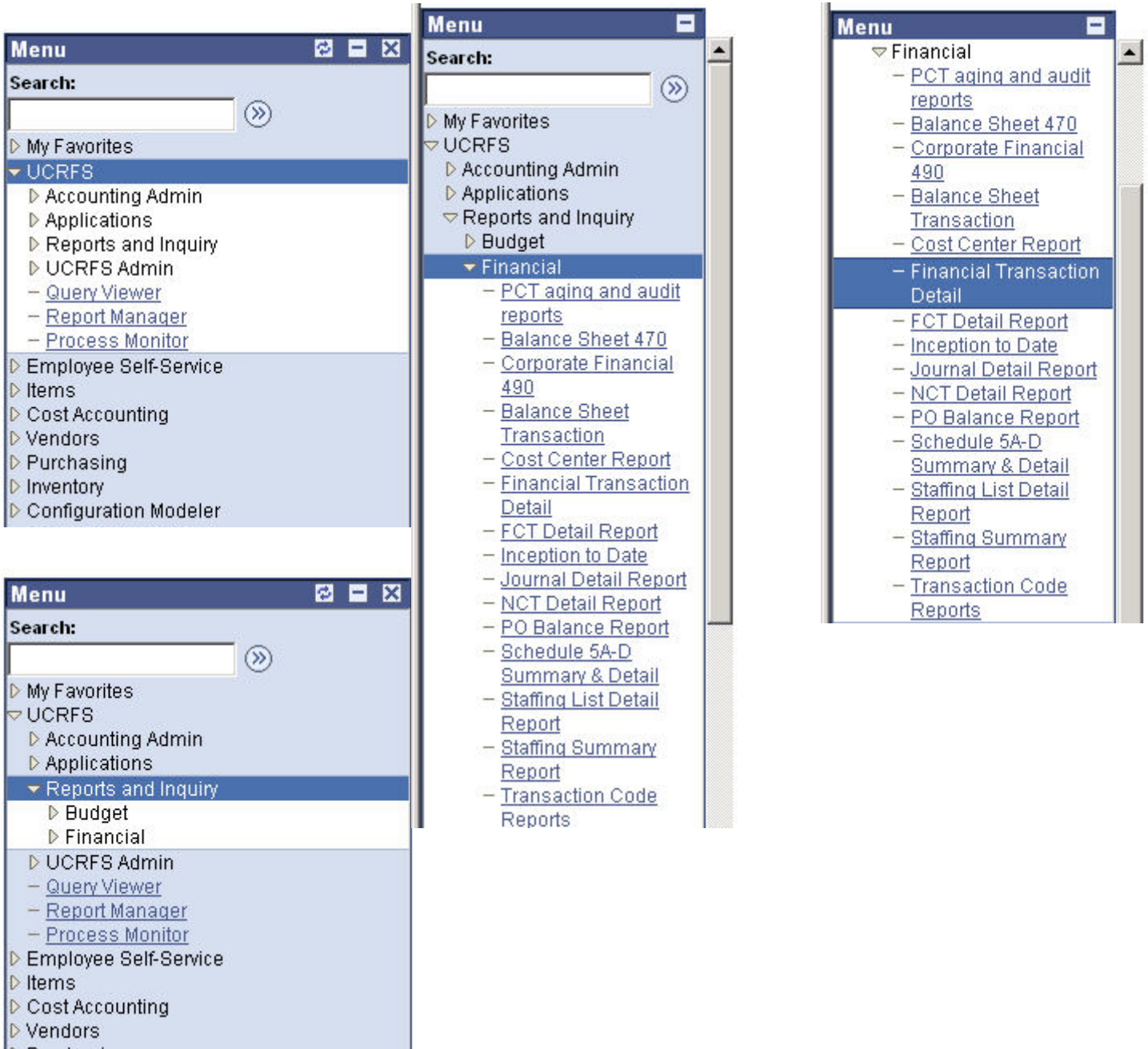
Warn me before logging me in to other sites.

For security reasons, quit your web browser when you are done accessing services that require authentication!

Be wary of any program or web page that asks you for your NetID and password. UCR Web Pages that ask you for your NetID and password will generally have URLs that begin with "http://www.ucr.edu/". In addition, your browser should visually indicate that you are accessing a secure page.

[Computing & Communications](#)

Once logged in navigate through the left hand menu to **UCRFS → Reports & Inquiry** and then select **Budget or Financial**. Finally, select the report to be run. In this example, the Financial Transaction Detail Report was selected.



Financial Transaction Detail

Run Control ID: adhoc

[Report Manager](#) [Process Monitor](#)


Run

*Fiscal Year:	2002	Business Unit:	UCR
*Period:	07		07 - January
*Activity:	A01375		Client/Server Sys/Pgrm/Sprt
*Function:	44		Organized Research
*Fund Code:	19900		GENERAL FUNDS
*Account:	BC10		BC, Faculty Appointments

Description Type

Use Journal Line Description

Use Account Description



Save Return to Search Notify

Add Update/Display

Enter the desired run-time variables (items with an asterisk are required) and then pres the **RUN** button

Process Scheduler Request

User ID: larryw

Run Control ID: adhoc

Server Name: PSUNX

Run Date: 09/30/2004

Recurrence:

Run Time: 3:31:35PM

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	
<input checked="" type="checkbox"/>	Financial Transaction Detail	DETLFIN	SQR Report	Web	PDF	

OK

Cancel

Make sure the **Server Name** is set to the **local server** (in this case it is PSUNX), and then **check** the desired process. Some reports use the same runtime variables as others so similar SQRs were grouped together in the Process Scheduler. An example of this is the Schedule 5A-D Detail and Summary reports. Select OK once all options are set.

You are returned to the report screen and near the top click the **Process Monitor** to view the status of the run request.


Financial Transaction Detail

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[Report Manager](#) [Process Monitor](#)

Run

*Fiscal Year: 2002 Business Unit: UCR
 *Period: 07 07 - January
 *Activity: A01375 Client/Server Sys/Pgrm/Sprt
 *Function: 44 Organized Research
 *Fund Code: 19900 GENERAL FUNDS
 *Account: BC10 BC, Faculty Appointments



Description Type

Use Journal Line Description
 Use Account Description

Process List [Server List](#)

View Process Request For

User ID: LARRYW Type: Last: 5 Days
 Server: PSUNX Name: Instance: to
 Run Status: Distribution Status: Save On Refresh

Process List									
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4647		SQR Report	DETLFIN	larryw	09/30/2004 3:31:35PM PDT	Queued	N/A	Details
<input type="checkbox"/>	4623		SQR Report	UCR470S	larryw	09/29/2004 2:17:08PM PDT	Error	Posted	Details
<input type="checkbox"/>	4622		SQR Report	UCBALTR	larryw	09/29/2004 2:17:08PM PDT	Error	Posted	Details
<input type="checkbox"/>	4621		SQR Report	SCHDL5A	larryw	09/29/2004 11:46:08AM PDT	Error	Posted	Details

Click the **Refresh** button to update the status

View Process Request For

User ID: LARRYW Type: Last: 1 Days

Server: PSUNX Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List

Customize | Find | View All | First 1-3 of 3 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4762		SQR Report	DETLFIN	larryw	10/04/2004 11:08:40AM PDT	Success	Posted	Details
<input type="checkbox"/>	4721		SQR Report	DETLFIN	larryw	10/04/2004 10:22:41AM PDT	Error	Posted	Details
<input type="checkbox"/>	4720		SQR Report	DETLFIN	larryw	10/04/2004 10:05:33AM PDT	Error	Posted	Details

Once the status of the job shows **SUCCESS** and **POSTED** you may view the detailed output of the report by clicking **Details**.

Process Detail

Process	
Instance:	4762
Type:	SQR Report
Name:	DETLFIN
Description:	Financial Transaction Detail
Run Status:	Success
Distribution Status:	Posted
Run	Update Process
Run Control ID: adhoc	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: FSQAU1	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request
Date/Time	Actions
Request Created On: 10/04/2004 11:08:41AM PDT	Parameters Transfer
Run Anytime After: 10/04/2004 11:08:40AM PDT	Message Log
Began Process At: 10/04/2004 11:08:52AM PDT	Batch Timings
Ended Process At: 10/04/2004 11:09:06AM PDT	View Log/Trace

Click on **View Log/Trace** to access links to the runtime logs and PDF document created by the report.

View Log/Trace

Report

Report ID: 4003 **Process Instance:** 4762 [Message Log](#)
Name: DETLFIN **Process Type:** SQR Report
Run Status: Success

Financial Transaction Detail

Distribution Details

Distribution Node: UCR_REPORT_NODE **Expiration Date:** 10/11/2004

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,462	10/04/2004 11:09:06.000000AM PDT
Click here to view the Adobe PDF File	2,379	10/04/2004 11:09:06.000000AM PDT
Trace File	19,370	10/04/2004 11:09:06.000000AM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	larryw

You will see a link that states, “**Click here to view the Adobe PDF File.**” That link will open the report output

Report ID: DETLFIN V3.10 UCRPS Page No. 1
FINANCIAL TRANSACTION DETAIL REPORT Run Date 10/04/2004
Run Time 11:25:20

Parameters:

Business Unit: UCR
Fiscal Year: 2002
Accounting Period: 07
Activity: A01375
Function: 44
Fund Code: 19500
Account: BCL0
Description Type: Account

ORGANIZATIONAL STRUCTURE

ACCOUNT DESCRIPTION	JRNL REF	DATE	CC	PROJECT	DEPT	CORE	SOURCE	JRNL #	APPROPRIATIONS	EXPENDITURES	BALANCE	ENCUMBRANCES	BALANCE Y/ENDUM
TOTAL FOR:									0.00	0.00	0.00	0.00	0.00
CURRENT PERIOD TOTALS FOR ALL BUDGET CATEGORIES:									0.00	0.00		0.00	

Finally, the Financial Transaction Detail report is viewed via the PDF Internet Explorer plugin.

Selecting the **Report Manager** link in the report's runtime control page and then selecting the **Administration** tab also allows access the report. Click the **Description** link to view the PDF.

Financial Transaction Detail

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[Report Manager](#) [Process Monitor](#)

Run

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'Period: 07 07 - January

'Activity: A01375 Client/Server Sys/Pgrm/Sprt

'Function: 44 Organized Research


'Fund Code: 19900 GENERAL FUNDS

'Account: BC10 BC, Faculty Appointments

Description Type

Use Journal Line Description

Use Account Description



[Explorer](#) [List](#) **[Administration](#)** [Archives](#)

View Reports For

User ID: Type: Last: Days Refresh

Status: Folder: Instance: to:

Report List

[Customize](#) | [Find](#) | [View All](#) | 1-4 of 4

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	4004	4763	Financial Transaction Detail	10/04/2004 11:25:00AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	4003	4762	Financial Transaction Detail	10/04/2004 11:08:41AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3973	4721	Financial Transaction Detail	10/04/2004 10:22:45AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3972	4720	Financial Transaction Detail	10/04/2004 10:05:38AM	Acrobat (*.pdf)	Posted	Details

[Select All](#) [Deselect All](#)

Click the delete button to delete the selected report(s)