PeopleSoft

PeopleTools 8.12 Introduction to PeopleSoft Reporting PeopleBook

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SKU MTIRr8SP1B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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Printed in the United States of America.

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ABOUT THIS PEOPLEBOOK

PeopleSoft applications offer a wide range of query and reporting possibilities. These include the standard reports we deliver, as well as the reporting tools you can use to customize reports or create new ones.

Your database contains a wealth of information that you've carefully entered, maintained, and secured for the ultimate purpose of generating timely, meaningful, presentation-quality reports. Our reporting capabilities enable you to access the data you need and present it in the form that is most useful for those who depend on you for financial and management information.

And the tools are easy to use. You no longer have to rely on technical support staff to create queries or reports for you. That means you can get all the information you need, when *you* need it.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of the specific PeopleSoft applications your company uses. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through

the Documentation section of the PeopleSoft Customer Connection Web site:
http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer
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files to add to your PeopleBook library. You'll find a variety of useful and timely materials,
including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this PeopleTools release is provided in HTML format on the
PeopleTools PeopleBooks CD-ROM. The documentation for the PeopleSoft applications you
have purchased appears on a separate PeopleBooks CD for the product line.

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PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

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shipped. Customers and partners can order printed PeopleSoft documentation using any of the
following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.
	PeopleSoft Internet site: http://www.peoplesoft.com/.
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Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our
online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.
Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:
	For more information**,** see <u>Documentation on CD-ROM</u> in *About These PeopleBooks:* Related Documentation.
• Topic list	Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.
Name of Page or Dialog Box	Opens a pop-up window that contains the named page or dialog box. Click the icon to display the image. Some screen shots may also appear inline (directly in the text).

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleTools Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

PeopleSoft Reporting Tools

We deliver PeopleSoft applications with a set of standard reports that are designed to provide the kind of business information many companies need. Running a report is as easy as selecting it from a menu and entering any necessary parameters. But for those of you who want to customize our standard reports, create your own reports, or reformat report output, we offer a variety of reporting tools.

PeopleSoft Query Designer

The addition of Query Designer to PeopleSoft Internet Architecture provides Web users a simple, intuitive way to create and run queries using their browser. Casual users have an interface that is familiar and easy to understand, with the more complex Query development features residing in the Windows client. Query view development is still available in Application Designer.

The steps used to create a query on the Web are very similar to creating a query in Windows. Now, instead of using drag-and-drop mouse actions, you'll use point-and-click to select records, fields, and criteria. Queries can be as simple or as complex as necessary and can execute from a Web browser and then download the resulting spreadsheet in Excel.

While Query Designer is for creating and maintaining queries, you may have users who will only need to *run* queries rather than create or alter them. PeopleSoft 8 has a separate menu selection that allows access to the run-time Query options only.

For more information**,** see Using Query Designer on the Web and Running a Query on the Web.

PeopleSoft Query is more than just a reporting tool. You can use it to create queries for a variety of purposes.

For more information about PeopleSoft Query, see PeopleSoft Query . For information about using queries to trigger events, see PeopleSoft Workflow.

Crystal Reports

Crystal Reports is a versatile report formatter from Seagate Software. Combined with our Open Query interface, Crystal helps you generate clear and easy-to-read reports that contain data from PeopleSoft applications. You can use it to generate standard reports we've already created or to create your own custom reports. Crystal Reports version 8.0 is used with the PeopleSoft 8 release. These are some of the new Crystal features:

* Improved cross-tab and charting features

* Email distribution of reports through Process Scheduler

* Exception highlighting

Query and Crystal are linked together seamlessly. Once you build a query, you can use Crystal to create reports, mailing labels, or forms. You can quickly and easily lay them out using a variety of fonts, borders, and other special effects.

For more information, see Crystal Reports for PeopleSoft.

PS/nVision

PS/nVision is a sophisticated tool for creating business reports in Microsoft Excel. Working within Excel, you create a report layout that defines both the data to retrieve and the format of the report.

PS/nVision goes well beyond simply formatting the results of a query. You can create report layouts that summarize information from your PeopleSoft database, and also enable you to use the DrillDown feature to expose the supporting details. You can share report layouts across multiple business units and time periods, creating reports that "roll" from unit to unit or period to period without changing the data-retrieval criteria.

The addition of nVision to the Internet Architecture provides web users a simple, intuitive way to run, view, and distribute nVision reports on the fly using their browser. Now, remote users with Internet access can log on to PeopleSoft through their browsers and run, view, and DrillDown on their reports without needing PeopleSoft installed on their workstation. New distribution options allow users to instantly send reports as email attachments rather than requiring recipients to navigate to a location on a file server. Casual users have an interface that is familiar and easy to understand, with the more complex nVision development features residing only in the Windows client.

New features for nVision with PeopleSoft 8 are:

* Output in both Excel (.xls) and HTML (.htm) formats

* DrillDown for nVision reports on the web using hyperlinks

* Email options that allow you to send your nVision reports to individuals users or roles

- Internet versions of Report Requests, Report Books, and Scope Definitions

- Integration with the new Report Manager so that you can "burst" report instances using scope fields, and send specific instances of reports to designated users or user roles

- Support for multiple nVision sessions when nVision is invoked from Process Scheduler

The Windows development environment of PS/nVision includes a totally redesigned user interface. From your personal PS/nVIsion HomePage, you can run your reports with the click of a button, choose to run other user's reports, and customize the page with buttons, menus, and toolbars that fit your needs. You can also use Visual Basic APIs to customize report requests and the NVSUSER HomePage.

PS/nVision provides you with "data on demand," so you don't have to wait for batch reports for the information you need. And since everything runs online right from your browser, there's less paper tracking. You're one step closer to a paperless office.

For more information on PS/nVision, see Understanding PS/nVision.

Structured Query Reports (SQRs)

One of the most versatile approaches to reporting is the Brio Structured Query Report Writer. This tool can extract data from any SQL-based relational database and print or display it in a prescribed format. We've created a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or, if needed, create your own. You can create tabular, single- or multi-page reports, and form letters. You can also use SQR to make global updates to your database, load and unload tables, and perform interactive queries.

PeopleSoft has created standard SQRs for often-requested information that you can produce and print easily. However, there may be times when your company needs information reported in different ways. When you need a customized report, you can copy a standard report from the \PS\SQR directory and use it as a model for a new report. Your programmers, or application users familiar with SQR, can use the existing fields, format, and logic as a starting point, then add the modifications your company needs.

PeopleSoft 8 allows you interface with SQR through Process Scheduler Manager. From Process Scheduler, you can convert output to text, HTML, or Acrobat (.PDF) file formats. You can also use the Process Scheduler to send SQR reports through email or distribute them on the Web.

For more information about the SQR language, see the SQR documentation.

Tree Manager

The addition of Tree Manager to PeopleSoft Internet Architecture provides Web users a simple, intuitive way to create, view, and maintain trees using their browser. Casual users have an interface that is familiar and easy to understand, and gives users all of the functionality required for creating and maintaining trees. The steps used to create a tree on the Web are very similar to creating a tree in Windows. Now, instead of using drag-and-drop mouse actions, you'll use point-and-click to select nodes and other values for your tree.

Building a tree and using Tree Manager on the Web follows the same basic principles and procedures as Tree Manager using Windows. If you know how to build a tree using the Windows client, using PeopleSoft Internet Architecture will be familiar and easy for you. The Windows version of Tree Manager is still available, and trees can be maintained from either environment (Windows or Web) depending on your preference.

New with web-based Tree Manager is the Tree Maintenance page that enables you to audit the tree, delete the entire tree, or make a copy of an existing tree all from one place in the application.

You can also create customized menus in your applications that include specific trees that are relevant for certain functions. For example, you can add a custom menu item that opens Chart of Account trees when you are working within General Ledger. The web-based Tree Manager uses a standard PeopleSoft search dialog box so that it can be accessed directly from applications menus or can be set up to open a specific tree based on a hyperlink or pushbutton from any application page.

For more information, see Using Tree Manager on the Web.

PeopleSoft 8 includes the new TreeMover utility. TreeMover allows you to move PeopleSoft trees between different PeopleSoft application databases. It provides functionality to export a tree to a flat file, and to import a tree from a flat file. TreeMover handles moving all types of tree data, including the tree definition, tree structure, tree nodes, tree leaves, tree node data, and tree level data.

For more information, see TreeMover.

Cube Manager

PeopleTools Cube Manager establishes a valuable link between your PeopleSoft applications and PeopleSoft or third-party OLAP tools allowing you to leverage existing information stored in your system. OLAP tools enable users to explore, interact with, and effortlessly "slice and dice" complex data, guiding them to the multidimensional information they need but can't easily discover with conventional reporting tools. This is all done in a way and at a speed not possible with traditional RDBMS products.

Cube Manager's simple to use internet interface enables you to build platform-independent cube definitions for analysis with Hyperion Essbase, Cognos PowerPlay, and CA Strategy PS/ROLAP. Reusable dimensions and analysis models create powerful and faster methods for designing and populates OLAP cubes by leveraging Peoplesoft Query and Tree Manager. A truly well integrated internet tool, Cube Manager also enables you to initiate the process of building a cube direction from a PeopleSoft application.

For more information, see Introduction to Cube Manager.

Process Scheduler Manager

Process Scheduler Manager is not a reporting tool, but it plays an important role in PeopleSoft reporting. It's the part of the system that actually runs most of the reports. When you request one of the standard reports, you're really asking Process Scheduler to run it for you.

The Process Scheduler is a tool that performs tasks "behind the scenes" of your application. It can run numerous kinds of processes—COBOL programs, database queries, reports—on a regular schedule or at your request. Furthermore, runs the processes on a server and then moves them to Report Manager for Web or email distribution.

Enhancements with version 8 include a new Process Scheduler Request dialog box that allows you to have different output types (file, printer, window, and email), output formats, and output destinations including a list of installed printers.

For more information on requesting reports and checking the status of your request, see Process Scheduler for the End User.

Process Monitor

Process Monitor gives you up-to-the minute information on the progress of your reports and processes. From your Web browser, you can monitor your Process Requests and the status of different servers that run your reports. If there are messages related to a process, you can view them from Process Monitor, as well.

For more information on using Process Monitor to view your submitted requests, see Checking Your Jobs With Process Monitor.

Report Manager

Report Manager is like your own personal "in box" of reports and processes. Working with Process Scheduler, it provides a secured means to view report content, check the status of a job, and see content detail messages.

Using Report Manager, you can see all of your reports by simply opening your Report List in your browser. You can also link to Application Engine and COBOL log and trace files by selecting the **Detail** link on the page.

For more information on using Report Manager to view your reports, see Viewing Output in Report Manager.

Choosing a Reporting Tool

With the various reporting and processing tools provided with your PeopleSoft system, there is often more than one way to retrieve the same information. However, some ways are easier and more convenient than others. Here are some guidelines you should consider when you're deciding which reporting tool to use.

Online Tools

The best way to review some kinds of information is to look at it online, using your PeopleSoft application or PeopleTools. With these tools, you can instantly look up the information you need without bothering to print a report.

- Throughout the system you'll find display-only *inquiry pages* which display summary data. Of course, if you know what you're looking for, you can use the Update/Display action with any page in the system for this kind of data retrieval.

- When you're using PeopleSoft Query, you can display query results immediately in a grid control (on the **Results** tab).

- When you print a report from a PeopleSoft application, you can tell the system to show the results in your browser rather than a printer or a file.

Query Link to Spreadsheets

PeopleSoft Query enables you to send your output directly to a Microsoft Excel spreadsheet. Query automatically formats your result set as it sends it to the spreadsheet program. From there, you can manipulate the data using all the features and formulas that Excel offers. Use Query's spreadsheet option when:

- You don't have PS/nVision and want to work with data in a spreadsheet.

- You'll perform further analysis on the data.

- You want a quick display of an ad hoc query answer, with default formats.

- You want to create mail merge documents using your system data.

Crystal Reports

Once you build a query, you can use Crystal Reports to create reports, mailing labels, or forms. You can quickly and easily lay them out using a variety of fonts, borders, and other effects. Use Crystal when you need to:

- Use special formatting for the report (including color, images, and fonts).

- Suppress repeated values in the result set.

- Create multiple report lines per row of the result set.

- Create mailing labels.

- Control what columns display, and in what sequence, without changing the query.

- Control breaks and totals.

PS/nVision

PS/nVision allows you to import information directly from your query into pre-defined Excel layouts, so you can spend your time analyzing results, not typing data into your spreadsheet. Use PS/nVision when:

- You want to build summary reports using aggregate functions such as SUM.

- Query data and criteria form a matrix of rows and columns.

- You can use the same report layout and corresponding queries several times.

- You'll use the output for analysis and want to be able to drill down to the details.

- You need to create charts or graphs of the data.

- You   want to create mail merge documents.

Cube Manager

The Cube Manager helps you set up your PeopleSoft applications for use with *online analytical processing* (OLAP) tools. It supports two third-party OLAP tools—Hyperion Essbase, Cognos PowerPlay, Microsoft OLAP Services, or Sterling PS/ROLAP (also referred to as Sterling Eureka:StrategyPS).

Once your PeopleSoft data is integrated with your third-party tool, you can use one of those products to effectively analyze and interact with the data. You should consider building an OLAP solution if:

- You need to interact with summarized data online.

- You need to provide users with an analytical processing tool.

- You want to create a multi-user "data mart" that stores and summarizes large amounts of data.

SQR

SQR provides a flexible, but complex, report writing environment. You should consider using SQR for your reports if:

- You need the procedural logic of a programming language.

- You need to update the database data.

- You need to run reports on a server, not in Windows.

C H A P T E R 2

Running Standard Reports

In your day-to-day work, you run reports much more frequently than you define reports. You run reports that have been previously defined, by PeopleSoft, by your information systems department, or by you.

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you'll also execute off-line, or batch, processes that run in the background while your still using the application or even after you've left the office.

An off-line, or batch, process is a predefined process or program that runs independent of any end user intervention. Some typical, off-line processes are payroll, journal posting, complex mathematical calculations, or generating reports that you share with colleagues.

You run off-line (batch) processes in the PeopleSoft system using Process Scheduler Manager. Process Scheduler Manager allows your organization to define processes, submit requests for processes, and set up an "agent" that scans for submitted processes and runs them.

As an end user you'll only need to be concerned with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. You can safely leave Process Definitions and configuring the Process Scheduler Server Agent for the technical staff at your site.

In this chapter, we cover the general procedure for running the standard reports that come with your PeopleSoft applications. If you (or someone in your organization) have added custom reports to the system, the procedure should be quite similar to the one we describe.

The following sections briefly introduce you to the fundamentals of submitting, monitoring, and viewing your reports. We cover the following topics:

- Requesting reports in PeopleSoft Applications

- Checking the Status of Reports

- Adding Reports to Process Scheduler

- Viewing your report in Report Manager

The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

Requesting Reports in PeopleSoft Applications

The process of printing a report has four major steps:

1. Select the report you want to print.

2. Enter the parameters for the report.

3. Specify where and when you want the report to run.

4. Choose the report output type and the report distribution method.

This section discusses these steps.

Selecting Reports

To run a report, select it from the appropriate menu in your PeopleSoft application. Many applications have a Reports menu that lists the available reports.

When you select a report menu item, you frequently have the choice of two actions: Add or Update/Display. Of course, you might want to print a predefined report, not update it, or add a new one. Both options enable you to print a predefined report. What you're adding or updating is not the reports themselves, but run controls.

Run Controls

When you want to run a report, you need to tell the system when and where you want it to print. For example, you might tell it to print the report on the database server at midnight, or on a Windows server every Sunday afternoon, or you'd like to see it in your browser right away. For most reports, you also need to set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.

You can create run controls that apply to several related reports. For example, suppose all the reports you run at the end of a month require the same parameters—say, business unit, department, and From and To dates. You can create a single run control that provides values for these parameters and use it for every report.

Conversely, you can create several run controls for the same report to handle different situations. For example, you could create one run control that sets the parameters for a quarterly report and another run control that sets them for a year-to-date version of the same report. Each time you run the report, you select the appropriate run control. This way, you can print several variations of the same report without having to change the settings all the time.

PeopleSoft HRMS applications don't save run control information for reports that you've successfully run. You need to enter the parameters each time you run a report.

Run Control IDs

Each run control you create receives a unique run control ID. When you select a report from a menu, a search dialog box appears, asking for a run control ID. If you're in Add mode, enter a new ID for the run control you're about to define. If you're in Update/Display mode, enter an existing run control ID or press Enter and select from the list of available run control IDs.

📝   If you're running a number of reports from the same menu in a row, you only have to enter the Run Control ID for the first report. When you select a second report from the menu, the application remembers which run control you're using.

Specifying Report Parameters

For many reports, you need to enter values for parameters that specify what data the report includes, such as From and To dates or Business Units. The parameters page appears after you enter the run control ID. Here's an example for the General Ledger Activity report.

General Ledger Activity page

If you're in Update/Display mode, the values in this panel reflect the settings from the selected run control; if you're in Add mode (or you're using an HRMS application), they're the default values.

You can change any of these settings. Keep in mind, though, that your changes are saved to the run control when you save or run the report.

To run your report, click **Run** and the Process Scheduler Request page appears.

Specifying Where and When to Run Reports

You submit a process request from the Process Request Dialog page in your browser. This page shows you the options that you have selected for a particular process request and what processes are available for you to submit.

Process Scheduler Request page

Select the options that you want to use in running your process and select the checkbox for each process that you want to run. Clicking OK will queue your process request.

For more information about options for running your process, see Scheduling a Process Request.

PeopleSoft 8 gives you the option to create new output types and formats and to create distribution lists for email and Web viewing.

Selecting Output Types

There are several kinds of file output types that you can choose for your process. The following table shows a list of file output types listed by process type. The default output type for Crystal and nVision processes is HTML. The default output type for SQR is Adobe Acrobat (.pdf). COBOL and Application Engine processes defaults will create output in the log file.

File type	Crystal	SQR	nVision
Excel (*.xls)	X		X
Word (*.doc)	X		

File type	Crystal	SQR	nVision
Acrobat (*.pdf) (Must have Acrobat Reader installed to read these files.)		X	
HP Format (*.lis)		X	
Line Printer (*.lis)	X	X	
Rich Text Files (*.rtf)	X		
SQR Portable Format (*.spf)		X	
Text Files (*.txt)	X		
Post Script Files (*.lis)		X	
Crystal Reports (*.rpt)	X		
Comma Delimited (*.csv)		X	
HTML (*.htm)	X	X	X

Note. You must have Adobe Acrobat Reader installed on your workstation to be able to read Acrobat (.pdf) files.

Setting Report Distribution

The Distribution Detail page allows you to choose the recipients of your process output. To set up distribution for your process output, click ▣.

If the process that you are running allows output that can be emailed (for example, Crystal can create Adobe Acrobat (.pdf) files), you can enter an email subject and message and send the output to a group of email addresses.

Note. If you are entering a list of email addresses, make sure to use a *semicolon* to separate each address from the others.

You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

For more information about setting up report distribution lists, see Setting Report Distribution.

Checking the Status of Reports

When you click OK from the Process Scheduler Request page, you are returned to your Application page. To check the status of your report, select the link to Process Monitor or select PeopleTools, Process Monitor, Inquire, Process Requests.

When you run a report from a PeopleSoft application, the system automatically starts Process Monitor. Process Monitor is a tool designed to track the status of all completed and pending Process Scheduler requests.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run.

Checking Process Status with Process Monitor

Your user ID appears in the **User** list box. If the list of processes is too long, you can use the navigation arrows on the screen to scroll through the list. Use the **Server, Type, Run Status, Last,** and **Instance** list boxes to limit the processes that Process Monitor displays.

Click **Refresh** to update this page with the latest system activity. If the **Run Status** column says *Initiated* or *Processing,* the report is still running. When it says *Success,* the system has finished running the report.

For more information about options for viewing your process, see Using Process Monitor.

Canceling or Holding Report Requests

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click **Details** to display the options for canceling or holding a request.

Adding Reports to Process Scheduler

You may want to add your own custom reports to menus within PeopleSoft applications so that they're easily accessible. That way, you can run them just as you run the standard reports.

This section gives a brief overview of how you add a custom report to a PeopleSoft application.

For more information about any of the steps, see Process Scheduler Development.

To add a custom report to Process Scheduler:

1. Create the custom report.

    The most convenient way to create a custom report is to copy an existing report, make the necessary changes, and save it with a new name in the directory that contains all the reports.

2. Identify the report parameters.

    Determine whether the users who run the report need to enter any parameters to specify what data the report includes. For example, you might design a report that enables users to specify what location, department, and account on which to report.

    If your report requires input parameters like these, the next step is to determine whether there are other reports that require the same parameters. If there are, then you have the option of running the new report from the same panel as the existing report, saving you the work of creating a new panel.

3. Decide from where to run the report.

    You have two options:

    *   You can add a new menu option and page for running the report.

    *   You can make the custom report available from the same menu option and page as an existing report. The new report appears in the list of available reports at the bottom of the Process Scheduler Request dialog box.

        If you choose the second option, you must identify an existing report that has the same input parameters as your custom report. It's also a good idea to add the report to a menu option whose text makes identifies it. You want the user to be able to find the report!

4. Add or modify menu options and pages.

If you're adding a new menu option for running the report, you need to create a page that collects the necessary input parameters. If you're adding the report to an existing page, you may need to modify it to contain all the fields you need. Depending on what the parameters are, you might have to create or modify a record definition as well.

If you're making the report available from an existing menu option, you might consider modifying the menu text to reflect the added report.

For more information on creating pages and adding them to menus, see Application Designer. If you add a new menu item, don't forget to grant users access to it in Maintain Security.

5. Add the report to Process Scheduler.

You need to create a process definition for your report. The process definition identifies, among other things, what kind of report it is (SQR, Crystal report) and where you run it. In the Panel Groups box on the Process Definitions panel, select the panel you created at step 4 or the panel to which you decided to add the report.

For more information, see Page Transfer Page for details.

After you've saved the process definition, don't forget to set up process security for the new process.

Viewing Reports in Report Manager

Report Manager is like your own personal "in box" of reports and processes that you have access to. It provides a secured means to view report content, check the status of a job, and see content detail messages. Select PeopleTools, Report Manager, Inquire, Report List to view your list of reports.

You can also link to Application Engine and COBOL log and trace files by selecting the **Detail** link on the page.

Report List page

To view your report output, select Detail from the Report List and the Report/Log Viewer page appears in another browser window.

Report/Log Viewer page

Click the link to the report or any associated files that you want to view. In this example, the General Ledger Activity report appears in Adobe Acrobat (.PDF) format.

```
                                                    PeopleSoft GL
 Report ID:  GLS7002                               GENERAL LEDGER ACTIVITY
 Bus. Unit:  BRE01--BRE01
 Ledger:     LOCAL      -- Local Currency Ledger
 For Fiscal Year 2000  Period   7 to   8
  Currency Code: USD

 Account     Cur  Journal Date Journal ID Seq Line



 100000      USD  Beginning Balance:

                  07/31/2000   SUSPENSE1      1
                  07/31/2000   SUSPENSE2      1


                  08/01/2000   SJE1           1



 100000      USD  Total Activity:

                  Ending Balance:


 ─────────────────────────────────────────────────────

 100001      USD  Beginning Balance:

                  07/31/2000   0000005301     1
                  07/31/2000   0000005301     2
                  07/31/2000   SUSPENSE1      2
                  07/31/2000   SUSPENSE2      2
                  07/31/2000   SUSPENSE4      1
```

General Ledger Activity report in Adobe Acrobat format

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