UW System

Shared Financial System

(SFS)

PeopleSoft Report Manager Manual
SFS Version 8.9

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The Report Manager stores reports run through Process Scheduler and lets you view, print, or save online reports. As users have different levels of access to Report Manager functionality based on their security, you may or may not be able to do everything described in this manual.

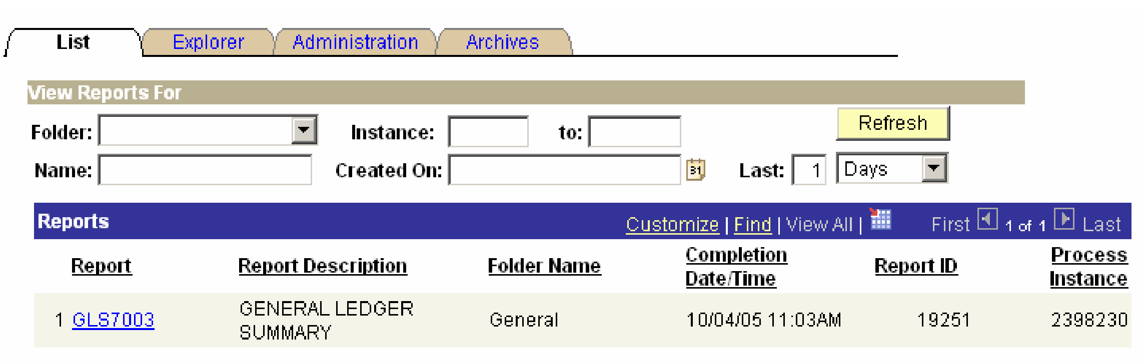
Using Report Manager

The navigation to Report Manager is Reporting Tools > Report Manager. There are also links on many processes to navigate directly to the Report Manager.

There are 4 tabs on the Report Manager. Reports can be viewed from the Explorer page, the List page, or the Administration page. Most users can ignore the Archives page, as they will not use it.

List Page

The Report Manager List page shows reports that have not been purged or have expired that are available to you. By default, reports will stay in the Report Manager for 90 days, unless deleted manually.   The List page looks like the following:



List Page Options

In the “View Report For” section, the user can define specific criteria to reduce the number of reports shown. Report Manager ignores blank fields as criteria. The following options can be used to limit the reports seen

Folder	Select a specific Folder to list only the Reports that are contained in that Folder, if one is specified when the process is run.
Instance and to	Enter a range of Process Instances. Leave these fields blank to list all Instances.
Name	Enter the Name or part of a Name to list only Reports that match the Name entered.
Created On	Use the Calendar, or enter a specific Date to list only Reports that are Created on that Date.

Last	Use to display only those Reports that were Created in the last number of Days, Hours, or Minutes. For example, to list only those Reports that were Created within the last five days, enter 5 and select Days.
Refresh	Click to update the Report list with Newly Run Reports and to use any newly entered filtering criteria.

The details for reports include the following information.

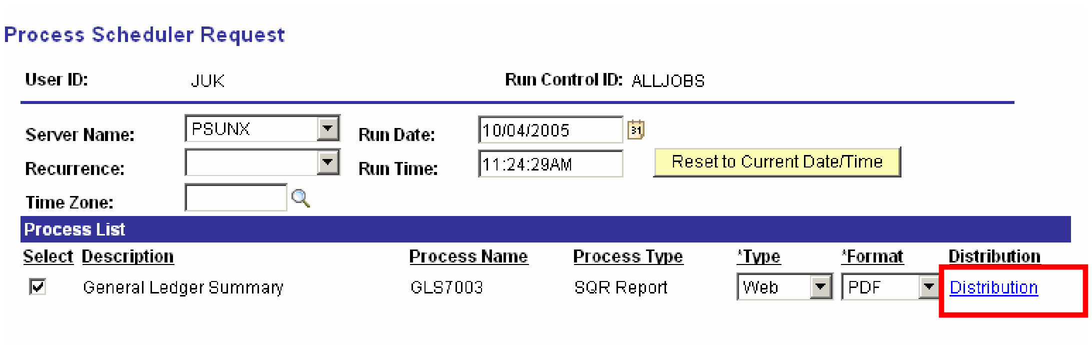
Report	Click the Name of a Report to display the Output File and any associated Log or Message File on the Report Detail page. **Click the required Link to display the Report or Message Log in another browser window.**
Report Description	Displays a detailed description of the Report.
Folder Name	Displays the Folder in which the Report is located.
Completion Date/Time	Displays the Date and Time at which the Report was Created.
Report ID	Displays the Report ID that was automatically assigned when the Report was run.
Process Instance	Displays the Process Instance Number that was automatically assigned when the Report was run.
	This icon on the navigation bar at the top right hand side of the List Page. Click the Download to download the List of the reports to a Microsoft Excel spreadsheet.

Report Manager – Explorer Page

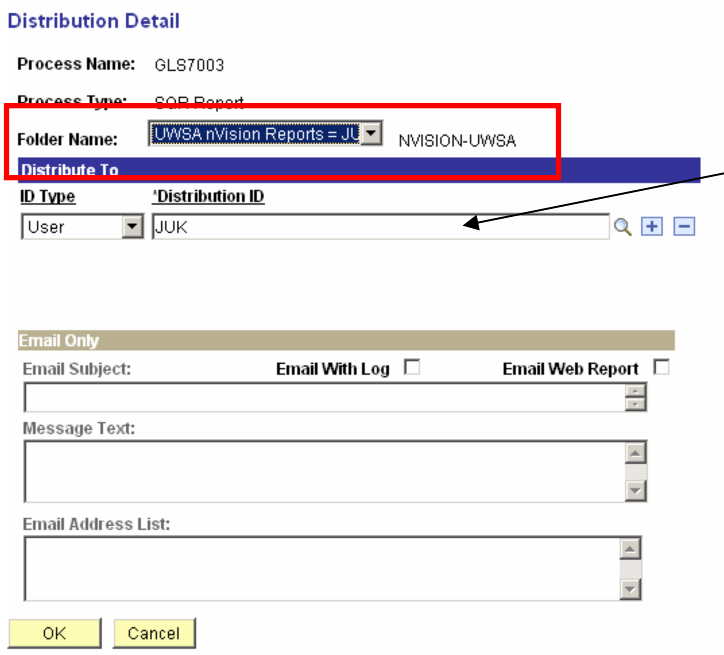
The Explorer page is a hierarchical view of all reports the user is authorized to view, based on the folder selected when the report was run. To view the report, click on the hyperlink of the report to open it in a new window. NOTE – if no folder was selected when the process was run, the report will likely not be available on the Explorer page.

Setting the Folder Type to View Reports in the Explorer Page

When a process is run to the Web (to the Report Manager), a Distribution hyperlink is active. Click on that link.



The Distribution Detail will be shown on the screen. Change the Folder Name to one of the available folders to see the reports on the Explorer page.

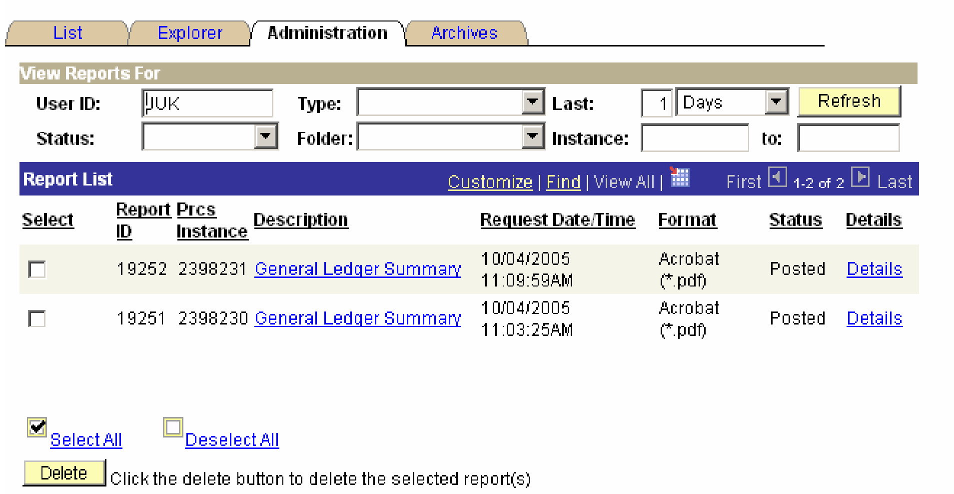


If additional people should see this report in Report Manager, add their user ID to the ‘Distribute To’ section here.

Administration Page

The Report Manager Administration page will allow the deletion of reports in the repository, in addition to viewing and adding users to view the report. Only the reports a user has access to will be available for deletion.

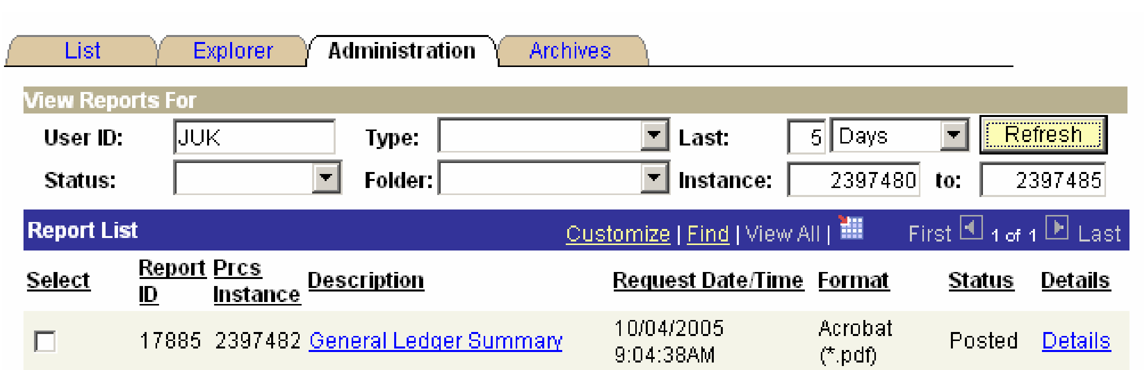
To view the report, click on the Details link, then select the file.



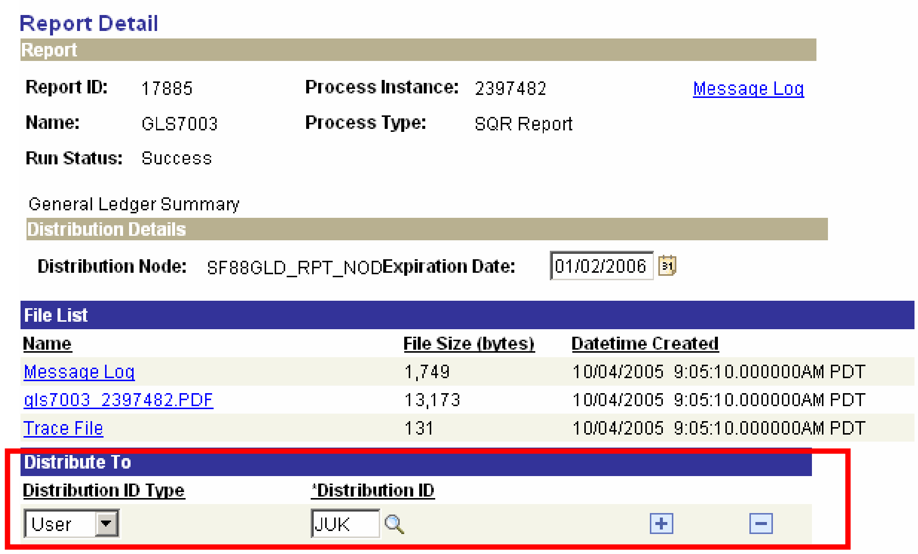
To delete a report, check the corresponding checkbox, then press the Delete button. The reports will be purged from the system.

Modifying the Report Distribution List

To modify the list of users authorized to view a report it is necessary to modify the distribution list associated with the report. If the user has authority to perform this function the Report Detail page will allow the addition of additional users.



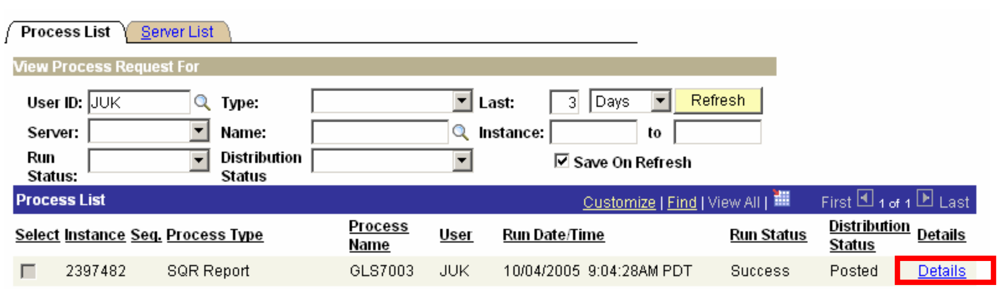
The Report Detail page appears. If you don't have authorization to add users, the page is in display-only mode.



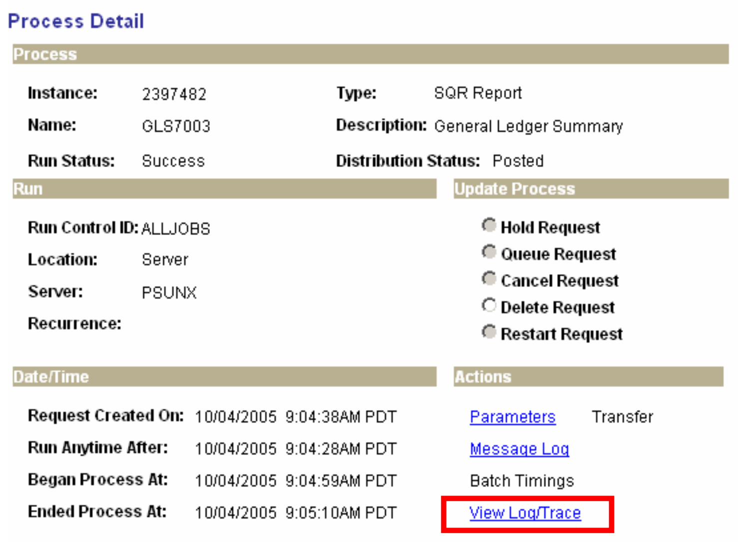
Click on the Add icon to add user or role IDs to the distribution list, then click on OK. Make sure to save the changes to keep them.

Viewing Reports directly from Process Monitor

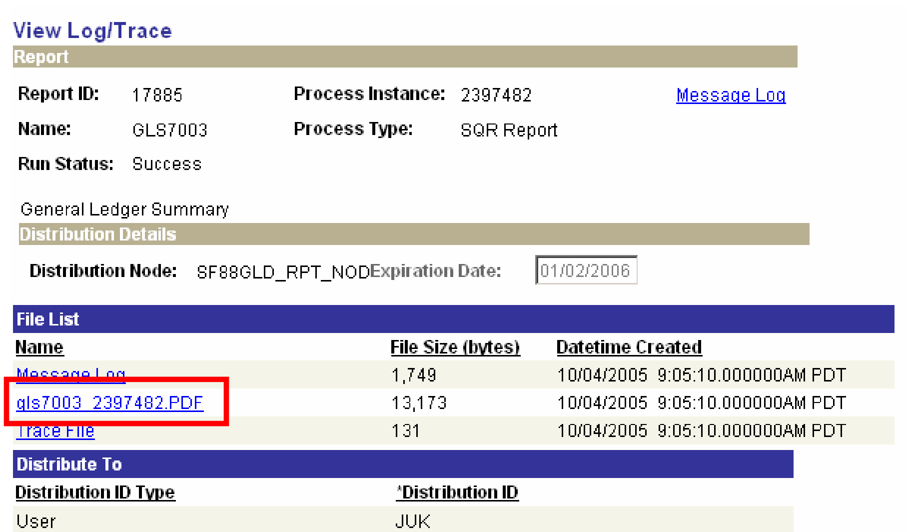
Reports run through process monitor are also available directly from process monitor, you do not need to go to the Report Manager to view them. To see the reports, click on the Details hyperlink once the process is Success and Posted.



The Process Details appear, click on the View Log/Trace hyperlink.

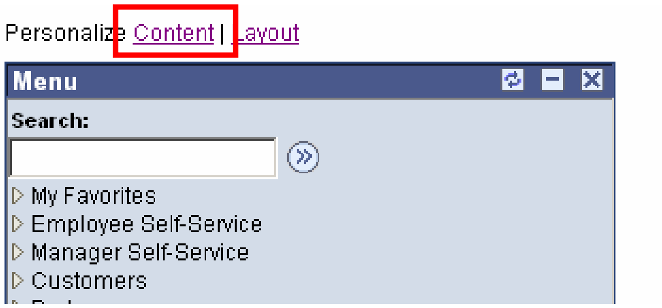


The View Log/Trace page appears, along with a link to the Report. This screen is the same that is seen when you look at the report in Report Manager. Click on the report hyperlink, and the report will open in a new window.

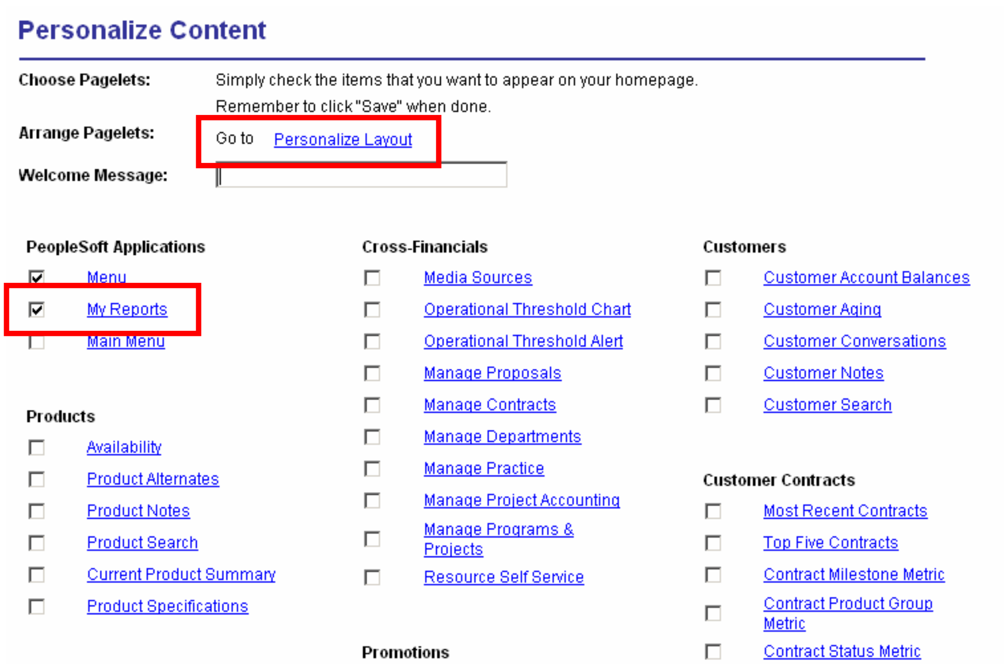


Using "My Reports" Pagelet

PeopleSoft has the option of including a pagelet on the main page that has links to your reports that have been run. To add this pagelet, click on the "Personalize Content" hyperlink, which is just above the main menu:

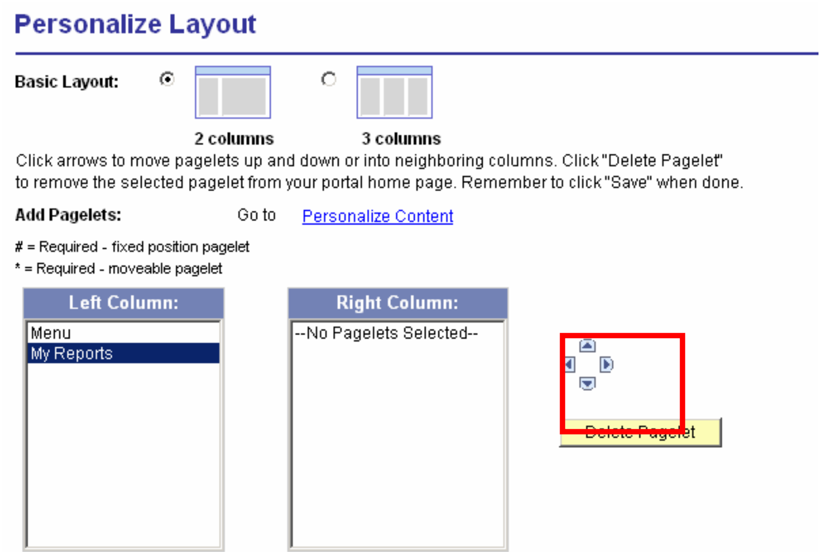


The following options are available:

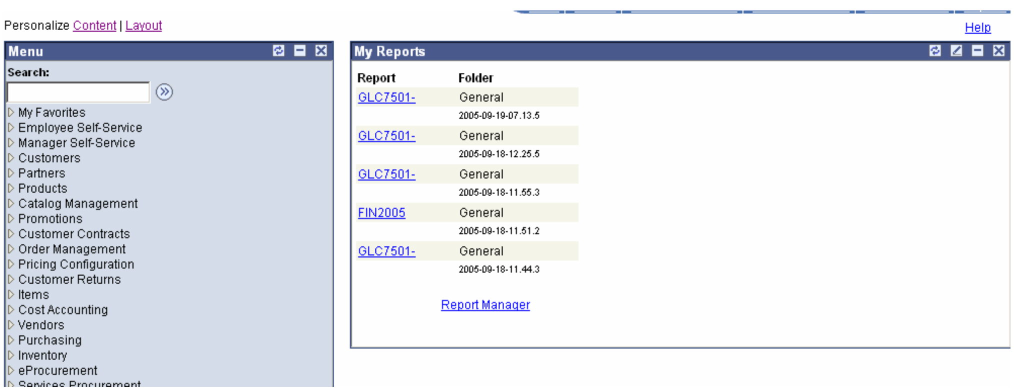


Check the My Reports Hyperlink, and then press save at the bottom of the page. Then click on the link "Personalize Layout" to arrange the pagelet.

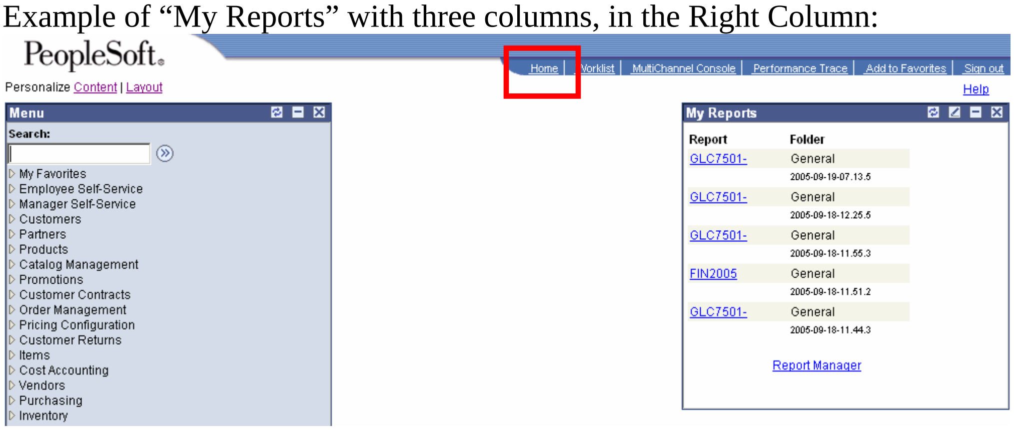
By default, there are two columns, and the "My Reports" will appear under the Menu. To move it, click on it to highlight it, then click on the arrows to move it to the right column. You can change the view to three columns, it is a personal preference as to what you like to see:



Example of "My Reports" with two columns, in the Right Column:



Example of "My Reports" with three columns, in the Right Column:



Note – this pagelet only shows up on the HOME page, so press HOME to get back to this screen.

To view the report, click on the corresponding hyperlink, the following will appear.

The report will have an extension after it (i.e. PDF or XLS, depending on the report run. You will also see a trace file and a message log, which will state any issues the report had when run.