

## PeopleSoft 9.0 Reports – Web Interface

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**Requirements:** Before using the web-reporting interface, make sure you have installed one of the supported browsers from the list in step one below. You will also need Adobe Acrobat Reader (<http://www.adobe.com/products/acrobat/readstep2.html>).

1. Open your browser; in the address bar enter <https://finreport.brandeis.edu>
  - Internet Explorer 6, 7 & 8, Firefox v3.6 and Safari 4 and 5 are supported browsers for web report distribution. If you're using any other browser and find you are having problems, you should try again using one of the browsers listed above.
  - Enter your UNet username and password

**NOTE:** If you enter your password incorrectly 5 times, your account will be locked out; you will need to call Lida Bensman (64564), Gail Wine (64652) or Richard Trudel (64532) to have it unlocked

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Navigate to the Run Reports/Run Control ID page:

1. In the Menu (located on the left side of the page) select the following hyperlinks; **Brandeis Reports > Brandeis Reports > Web Distribution Reporting > Run Reports**

*[If you've already created your MyReports Run Control ID, skip to Find an Existing ID \(Page 3\)](#)*

**Create a run Control ID:** Only to be done the first time you run reports

1. Click the tab labeled **Add a New Value**
2. In the **Run Control ID** box enter the following: **MyReports**
3. Click the **Add** button (skip to [page 4](#) to continue)

*Create A Run Control ID:*



The screenshot displays the PeopleSoft web interface. On the left is a navigation menu with the following items: Brandeis Reports, Brandeis Reports, Web Distribution Reporting, Run Reports (highlighted), Application Diagnostics, PeopleTools, Change My Password, My Personalizations, and My System Profile. The main content area is titled 'BR Rpt Dist' and features two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs is a text input field labeled 'Run Control ID:' containing the text 'MyReports'. A yellow 'Add' button is positioned below the input field. At the bottom of the page, there are two links: 'Find an Existing Value' and 'Add a New Value'.

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## Find an Existing Run Control ID:

1. Click the tab labeled **Find an Existing Value**
2. In the **Run Control ID Begins With** box enter the following: **my**
3. Click the **Search** button
4. In the resulting **Search Results** table click **My Reports**

*Find An Existing Run Control ID:*

The screenshot shows the PeopleSoft web interface. On the left is a navigation menu with categories like Brandeis Reports, Web Distribution Reporting, and Run Reports. The main content area is titled "BR Rpt Dist" and contains a search section. The search section has two tabs: "Find an Existing Value" (selected) and "Add a New Value". Below the tabs is a search criteria field: "Search by: Run Control ID begins with" followed by a text input box containing "my". There is also a "Case Sensitive" checkbox which is unchecked. Below the search criteria are "Search" and "Advanced Search" buttons. The "Search Results" section shows "View All", "First", "1 of 1", and "Last" navigation options. A table with the following content is displayed:

Run Control ID	Language Code
<a href="#">MyReports</a>	English

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This example will run all reports available for all department IDs available. The selected fiscal year is 2005, and the budget period will be October 2004 (period 4).

**NOTE:** Fiscal years run July – June

*Example:* Fiscal year 2011: July 01, 2010 – June 30, 2011

**Select Report Criteria:** Each of the steps are illustrated in the image below

1. Select your fiscal year; you may click the spyglass icon to see available years
2. Select your Accounting Period; you may click the spyglass icon to see available periods
3. Select the Dept Ids; click the **Select All** button (you may also run reports individually)
4. Save your selection; click the **Save Selection** button
5. Proceed to the process scheduler request; Click **Run**

*Select Report Criteria:*

The image consists of three screenshots from the PeopleSoft web interface, illustrating the steps to select report criteria. The top-left screenshot shows the 'Look Up Fiscal Year' screen with a search results table. The top-right screenshot shows the 'Look Up Accounting' screen with a search results table. The bottom screenshot shows the 'Br Rpt Dist Run' screen with the 'Department Selection' table.

**Look Up Fiscal Year Search Results:**

Fiscal Year
2000
2001
2002
2003
2004
2005

**Look Up Accounting Search Results:**

Accounting Period Abbreviation	Accounting Period
1	JUL
2	AUG
3	SEP
4	OCT
5	NOV
6	DEC

**Department Selection Table:**

Department	Description	Select
16100	Biochemistry	<input checked="" type="checkbox"/>
16200	Biology	<input checked="" type="checkbox"/>

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## Configure Process Scheduler Request/Run report:

1. Set the server name to **PSUNX**
2. Select the reports you want (see below for report names/descriptions)
3. Click the **OK** button (you will be returned to the select report criteria page)

## Report names/descriptions:

Budg/Actuals Summ - Fund 11 – Non-grants summary report  
 Budg/Actuals Detail - Fund 11 – Non-grants transaction (detail) report  
 Open Commitments - Fund 11 – Non-grants open commitment report  
 LDS - Fund 11 – Non-grants labor distribution report

Budg/Actuals Summ - Fund 12 – Projects summary report  
 Budg/Actuals Detail - Fund 12 – Projects transaction (detail) report  
 Open Commitments - Fund 12 – Projects open commitment report  
 LDS - Fund 12 – Projects labor distribution report

Budg/Actuals Summ - Grants – Grants summary report  
 Budg/Actuals Detail - Grants – Grants transaction (detail) report  
 Open Commitments - Grants – Grants open commitment report  
 LDS - Grants – Grants labor distribution report

## Configure Process Scheduler Request:

**Process Scheduler Request**

User ID: MSNELL1      Run Control ID: MyReports

Server Name: **PSUNX**      Run Date: 04/23/2004

Recurrence:      Run Time: 11:08:17AM      [Reset to Current Date/Time](#)

Time Zone:      [Time Zone](#)

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	LDS - Fund 11	BRLDSA	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	LDS - Grants	BRLDSC	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Open Commitments - Fund 11	BROPENCA	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Open Commitments - Fund 12	BROPENCB	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Open Commitments - Grants	BROPENCC	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Budg/Actuals Summ - Fund 11	BRSUMMA	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Budg/Actuals Summ - Fund 12	BRSUMMB	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Budg/Actuals Summ - Grants	BRSUMMC	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Budg/Actuals Detail - Fund 11	BRTRANSA	SQR Report	Web	PDF
<input checked="" type="checkbox"/>	Budg/Actuals Detail - Grants	BRTRANSB	SQR Report	Web	PDF

OK      Cancel

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After clicking the **OK** button you are returned to the page where you selected your report criteria. Your reports have been submitted to the process scheduler, the system will run your reports in the order in which they were received, only 3 reports can run at any one time and there may be other people ahead of you. You can use the Process Monitor to see what state your reports are in.

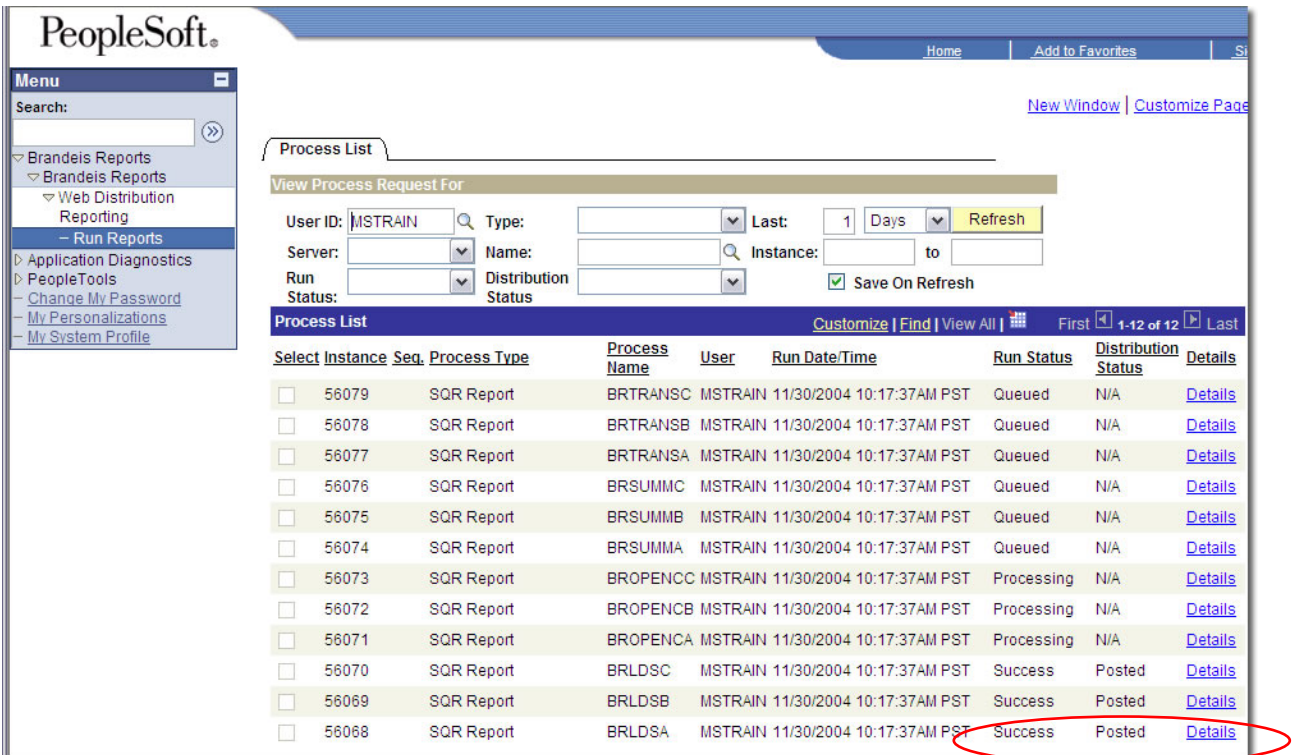


### 1. Click the Process Monitor Link

The image below shows all of the reports submitted within the last one day (you can change amount of days in your view by changing the number in the **Last:** field and clicking refresh).

Your reports may take some time to complete; this all depends on how many people are using the system and how large the reports are. To update the **Run Status** of your reports click the refresh button.

*Process Monitor:*



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## Viewing your reports:

1. Locate a report with a **Run Status** reading **Success**
2. Click the **Details** link next to that report (in this example I'm using LDS – Fund 11)

The process detail screen contains information about the run process

3. Click the **View Log/Trace** link

Process Detail:

The screenshot displays the PeopleSoft web interface for viewing process details. On the left is a navigation menu with options like 'Brandeis Reports', 'Web Distribution Reporting', and 'Run Reports'. The main area is titled 'Process Detail' and contains the following information:

Process			
Instance:	56068	Type:	SQR Report
Name:	BRLDSA	Description:	LDS - Fund 11
Run Status:	Success	Distribution Status:	Posted

Run	Update Process
Run Control ID: MyReports	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 11/30/2004 10:19:18AM PST	<a href="#">Parameters</a> Transfer
Run Anytime After: 11/30/2004 10:17:37AM PST	<a href="#">Message Log</a>
Began Process At: 11/30/2004 10:19:37AM PST	<a href="#">Batch Timings</a>
Ended Process At: 11/30/2004 10:19:50AM PST	<a href="#">View Log/Trace</a>

At the bottom of the interface are 'OK' and 'Cancel' buttons. The 'View Log/Trace' link in the Actions section is circled in black.

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The View Log/Trace page contains 4 links:

- Message.log – Information about the completed process
- **Brldsa\_56068.PDF – Your report in PDF format**
- Trace File – Information about the completed process
- **Brldsa\_MyReports.csv – Your Report in CSV format**

**IMPORTANT:** If there is no PDF file in View Log/Trace, there is no activity in the Dept ID for the period you selected. In cases such as this, you'll find that the CSV file is empty as well.

View Log/Trace Page:

PeopleSoft.

Home | A

Ne

### View Log/Trace

Report

Report ID: 15619      Process Instance: 56068      [Message Log](#)

Name: BRLDSA      Process Type: SQR Report

Run Status: Success

LDS - Fund 11

#### Distribution Details

Distribution Node: NNODE      Expiration Date: 02/28/2005

#### File List

Name	File Size (bytes)	Datetime Created
<a href="#">Message Log</a>	1,885	11/30/2004 10:19:50.000000AM PST
<a href="#">brldsa_56068.PDF</a>	47,705	11/30/2004 10:19:50.000000AM PST
<a href="#">Trace File</a>	411	11/30/2004 10:19:50.000000AM PST
<a href="#">brldsa_MyReports.csv</a>	24,717	11/30/2004 10:19:50.000000AM PST

#### Distribute To

Distribution ID Type	*Distribution ID
User	MSTRAIN

6. Once open, you can save the report to your hard disk by clicking the Save icon

To save this pdf report to your hard disk, click the save icon

https://finreport.brandeis.edu/psreports/FRPT84/1101/brldsa\_4265.PDF - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address [https://finreport.brandeis.edu/psreports/FRPT84/1101/brldsa\\_4265.PDF](https://finreport.brandeis.edu/psreports/FRPT84/1101/brldsa_4265.PDF)

Google Search Web 79 blocked AutoFill Options

93%

Run Date: 04/29/2004  
Run Time: 11:24:23  
Report ID: BR1LDSA

BRANDEIS UNIVERSITY  
LABOR DISTRIBUTION REPORT  
Fund: 11 - Unrestricted Operations  
For 31-MAR-2004

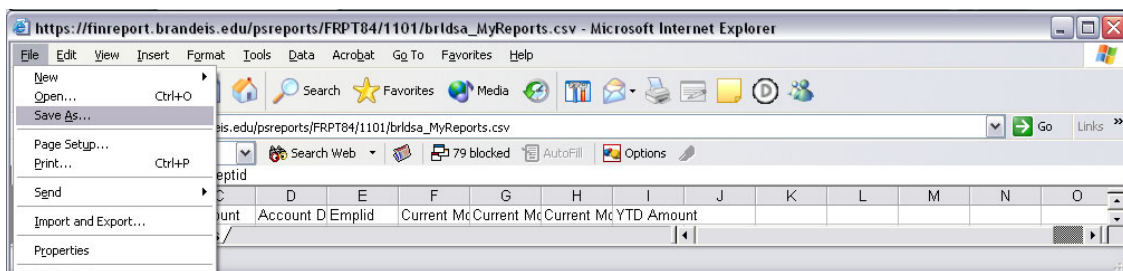
Page No. 1

Done Local intranet

## PeopleSoft 9.0 Reports – Web Interface

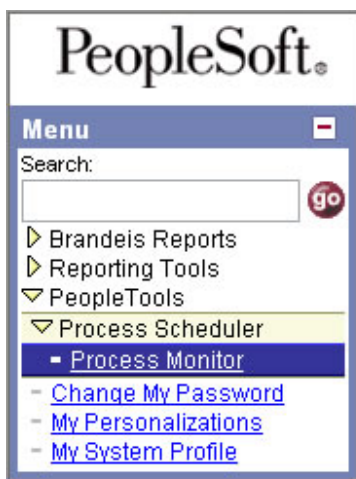
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7. To view your CSV report, click on its link (in the example it would be **Brldsa\_MyReports.csv**)
8. Once open, you can save the report to your hard disk by Choosing **File** and **Save As**



Once the files are saved to your disk you can view them at will, and manipulate the CSV file in Excel.

### Retrieving Reports Later:



If you haven't the time to wait for your reports to finish, or if you walk away and your session times out (30 minutes) you can always go back and retrieve your reports using the process monitor.

1. In the Menu (located on the left side of the page) select the following hyperlinks; **People Tools > Process Scheduler > Process Monitor**
2. Return to [Viewing your reports \(Page 7\)](#) for further instruction (page 6 has more information the process monitor for your reference)

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- If you know of somebody that needs access to the web-reporting interface, ask his/her department head to visit <http://www.brandeis.edu/controller/forms/webaccess.html> and complete the request form on-line.
  - If you want to receive a monthly email notifying you that an accounting period has closed, send a blank email to [join-psreportnotification@lists.brandeis.edu](mailto:join-psreportnotification@lists.brandeis.edu) or visit <http://www.brandeis.edu/controller/forms/reportnotify.html>.

PeopleSoft 9.0 Reports – Web Interface.doc

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