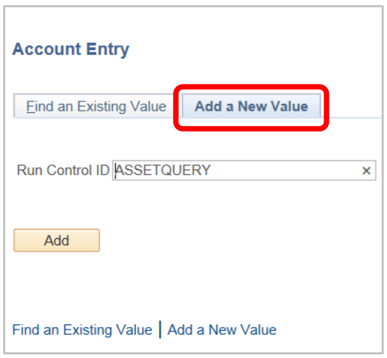
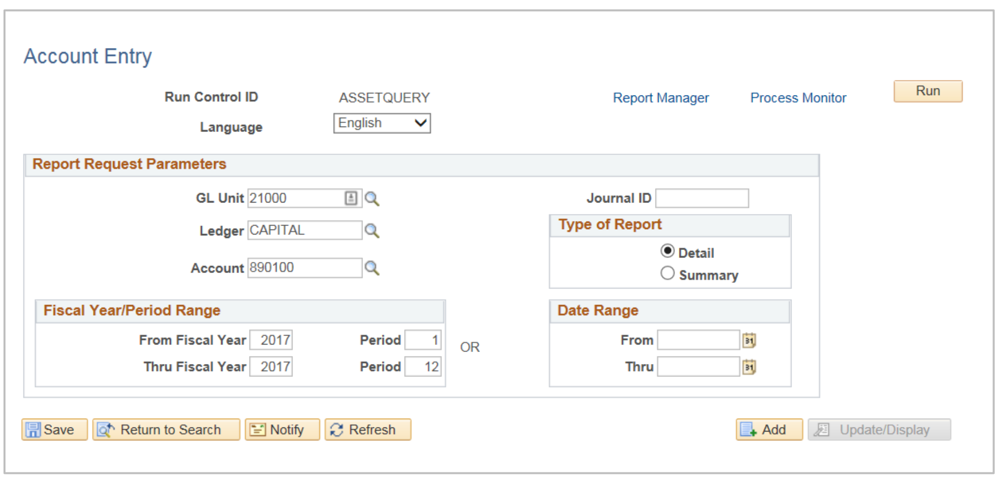
Scheduling a Report and Sending Results Via Email

PeopleSoft Financials 9.2 can generate a variety of reports. To schedule a report, navigate to the Run Control page of that report. Retrieve or look up your **Run Control ID**. If you do not have one, click **Add a New Value**, put in the **Run Control ID** you want, and click **ADD**.



You will see the **Account Entry** page.



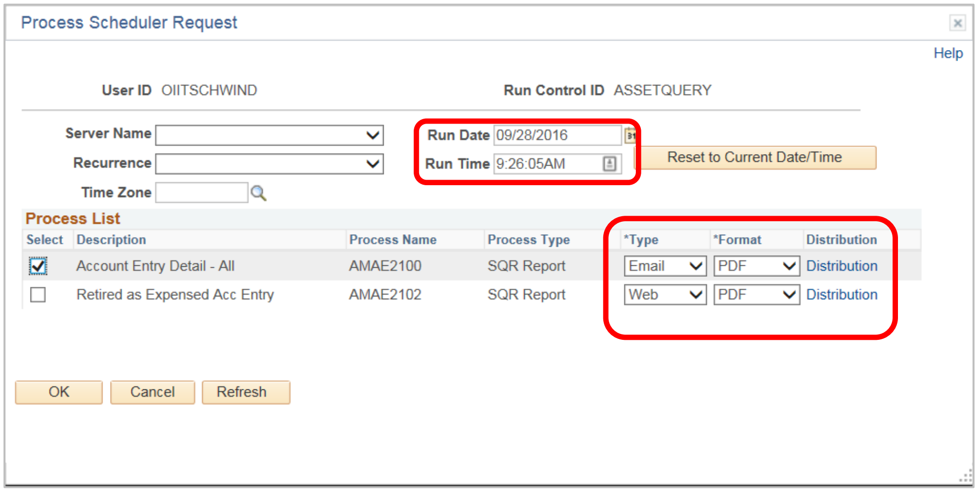
Fill out applicable **Report Request Parameters**.

Click the radio button in the **Type of Report** box to indicate whether you want a detailed report or a summary.

Then fill in either the **Fiscal Year/Period Range** or the **Date Range**. You don't have to fill in both.

Click **Add** if you want to run the same report with other date ranges. Click **Save**.

Click **Run.** You will see the **Process Scheduler Request**.



Enter the **Run Date** and **Run Time** you want the report to run.

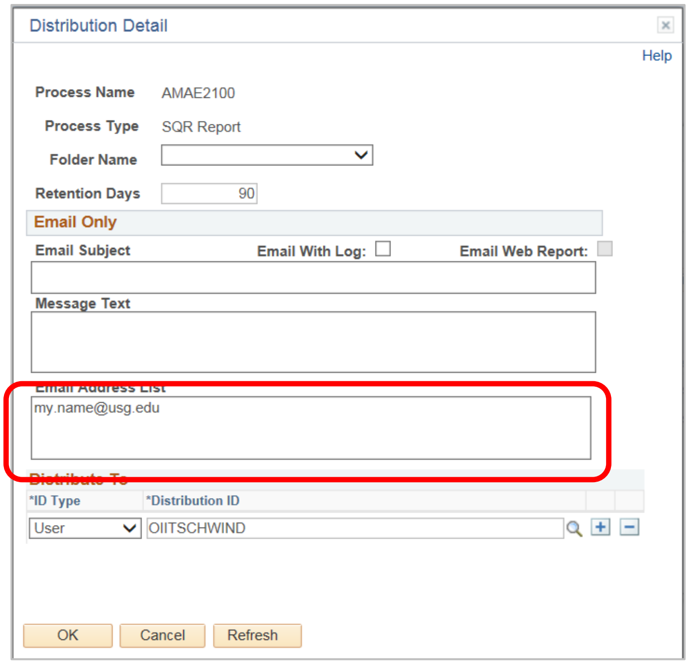
Click on the box by the report you want to run.

Under **Format**, choose one of the eight selections. Most people choose PDF or CSV, which returns results in an Excel spreadsheet.

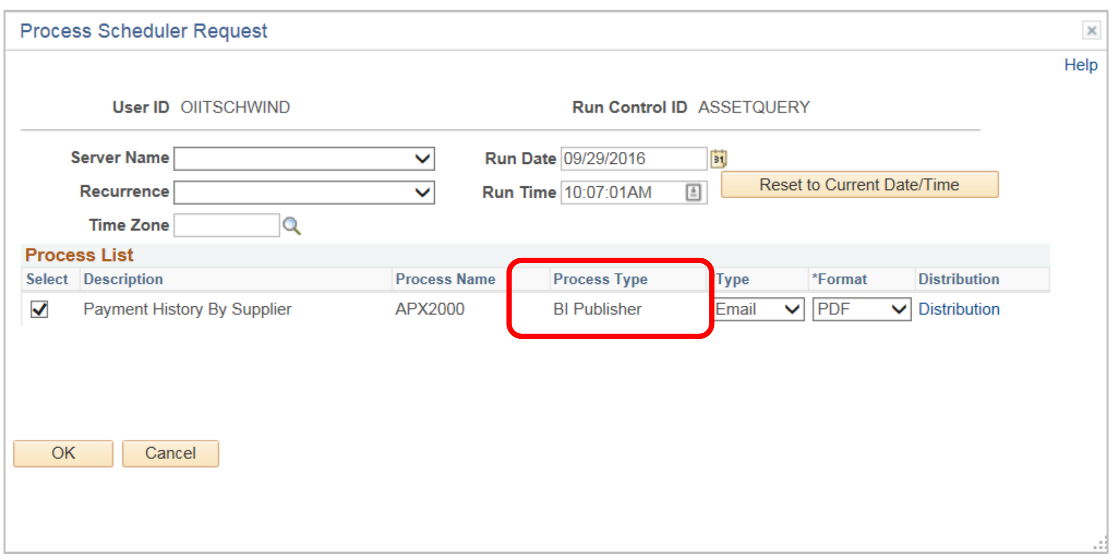
Select how you want the system to return the results by clicking on **Type**.

- If you want the results in your browser, choose **Web**.
- If you want the results via email, choose **Email**.

If you choose email, click the Distribution link. You may leave the subject and message fields blank if you wish but must include the email address you want results sent to. Click **OK**.



Please note: If the Process Type is **BI Publisher**, you cannot email the report because it is not produced in the Process Monitor. You must retrieve BI Publisher reports from **Report Manager**.



In the **Process Monitor**, the report will show a Run Status of “Queued” until it is scheduled to run. Once it runs, the status will show “Success” and the Distribution Status will be “Posted.”