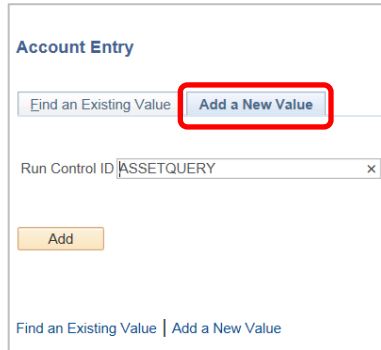


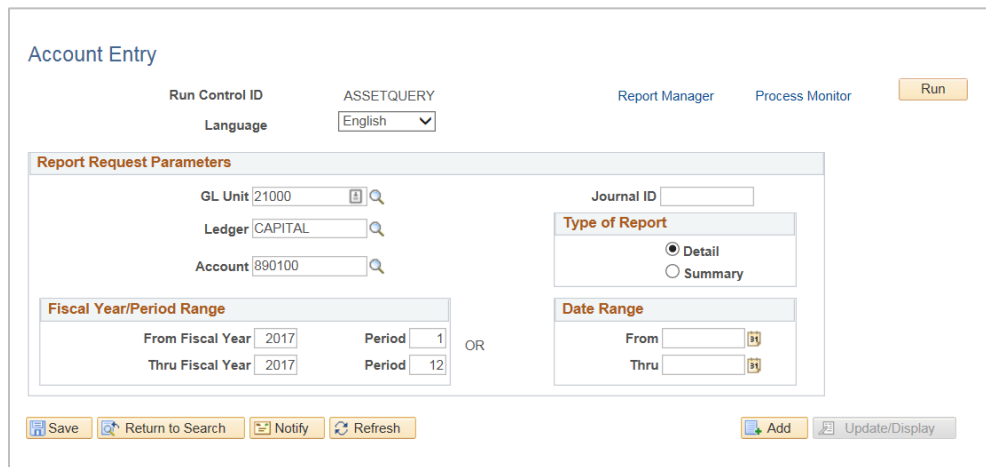
Scheduling a Report and Sending Results Via Email

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**.



The screenshot shows the 'Account Entry' page. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red rectangular box. Below these buttons is a text input field labeled 'Run Control ID' containing the text 'ASSETQUERY'. Below the input field is an 'Add' button. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

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



The screenshot shows the 'Account Entry' page. At the top, there are fields for 'Run Control ID' (ASSETQUERY) and 'Language' (English). To the right are links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below these is the 'Report Request Parameters' section. It contains several input fields: 'GL Unit' (21000), 'Ledger' (CAPITAL), 'Account' (890100), and 'Journal ID'. There are also radio buttons for 'Type of Report' (Detail and Summary). Below this is the 'Fiscal Year/Period Range' section with fields for 'From Fiscal Year' (2017), 'Period' (1), 'Thru Fiscal Year' (2017), and 'Period' (12). To the right of this is the 'Date Range' section with 'From' and 'Thru' date pickers. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

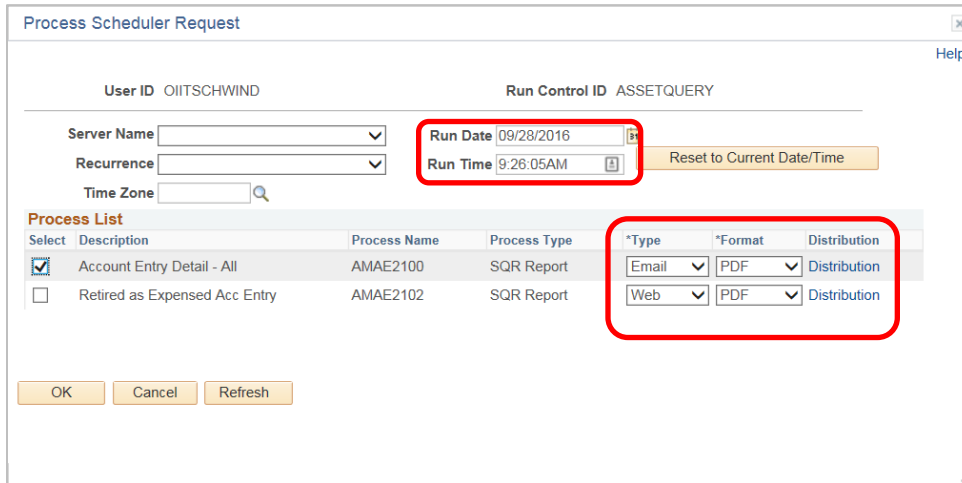
Fill out applicable **Report Request Parameters**.

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**.



The dialog box titled "Process Scheduler Request" contains the following fields and controls:

- User ID:** OIITSCHWIND
- Run Control ID:** ASSETQUERY
- Server Name:** A dropdown menu.
- Recurrence:** A dropdown menu.
- Time Zone:** A text field with a search icon.
- Run Date:** A date field showing 09/28/2016, highlighted with a red box.
- Run Time:** A time field showing 9:26:05AM, highlighted with a red box.
- Reset to Current Date/Time:** A button.
- Process List:** A table with columns: Select, Description, Process Name, Process Type, *Type, *Format, and Distribution.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Account Entry Detail - All	AMAE2100	SQR Report	Email	PDF	Distribution
<input type="checkbox"/>	Retired as Expensed Acc Entry	AMAE2102	SQR Report	Web	PDF	Distribution
- Buttons:** OK, Cancel, Refresh.

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

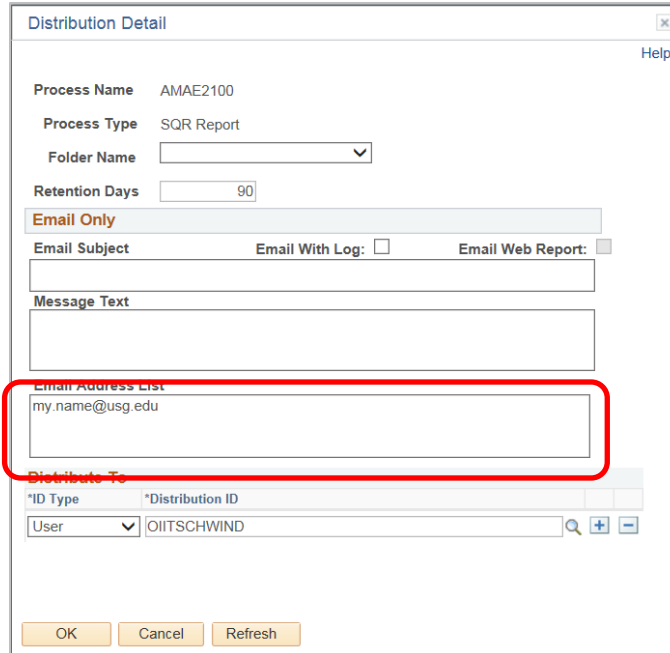
Click on the box by the report you want to run.

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**.



Distribution Detail [X] Help

Process Name: AMAE2100

Process Type: SQR Report

Folder Name: [v]

Retention Days: [90]

Email Only

Email Subject: [] Email With Log: ☐ Email Web Report: ☐

Message Text: []

Email Address List

my.name@usg.edu

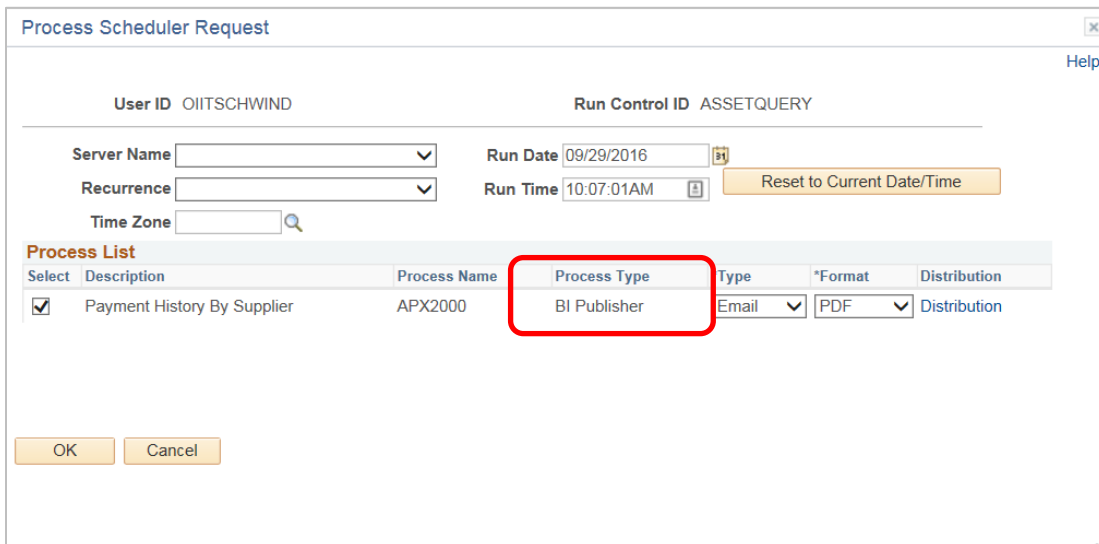
Distribute To

*ID Type: [v] *Distribution ID: [OIITSCHWIND] [] [] []

User: [v] [OIITSCHWIND] [] [] []

OK Cancel Refresh

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**.



Process Scheduler Request [X] Help

User ID: OIITSCHWIND Run Control ID: ASSETQUERY

Server Name: [v] Run Date: 09/29/2016 [] []

Recurrence: [v] Run Time: 10:07:01AM [] [] Reset to Current Date/Time

Time Zone: [] []

Process List

Select	Description	Process Name	Process Type	Type	*Format	Distribution
<input checked="" type="checkbox"/>	Payment History By Supplier	APX2000	BI Publisher	Email [v]	PDF [v]	Distribution

OK Cancel

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.”

Process List

Server List

View Process Request For

User ID

OIITSCHWIND

Type

Last

1

Days

Refresh

Server

Name

Instance

to

Run Status

Distribution Status

Save On Refresh

Process List

Personalize | Find | View All |

First 1-2 of 2 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	8971543		SQR Report	AMAE2100	OIITSCHWIND	09/28/2016 9:53:05AM EDT	Success	Posted	Details
<input type="checkbox"/>	8971290		SQR Report	AMAE2100	OIITSCHWIND	09/27/2016 4:34:08PM EDT	Success	Posted	Details

Go back to Account Entry

Save Notify