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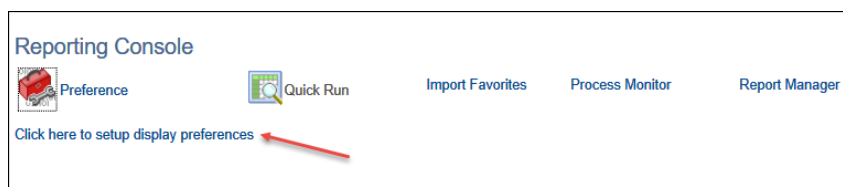
Understanding Reporting Console

The Reporting Console provides a single interface for you to manage and schedule most reports including Queries, BI Publisher reports and nVision reports. It can be accessed from the Reports/Processes section in many of the WorkCenters or from the Navigator.

Navigation

- Example of WorkCenter Navigation – Home Page – GL WorkCenter Tile – Reports/Queries Tab – Reports/Processes, Monitor, Reporting Console.
- NavBar – Navigator – Reporting Tools – Reporting Console

On your first visit to the Reporting Console, you will need to setup your display preferences. To initiate the Reporting Console, click the “*Click here to setup display preferences*” link. Once you’ve completed this step, you will not be asked to do it again; however, your preferences can be updated at any time.



You will see the following screen.

Default Folder – The default folder section allows you to determine which folders to display and the order of the folders.

- **Display Order** – Enter the numerical sequence for the folders.
- **Active Flag** – Select this check box if you want the folder to appear in the Reporting Console. At least one folder must be marked as active.

Process Link Display Option – Use this section to customize the display for My Favorites.

- **Name Only** – Select this radio button to display only the process name.
- **Description Only** – Select this radio button to display only the process description.
- **Name and Description** – Select this radio button to display both the process name and process description.

Type	Display Order	Active
My Reports	1	<input checked="" type="checkbox"/>
My Favorites	3	<input checked="" type="checkbox"/>
My Process Requests	2	<input checked="" type="checkbox"/>

Process Request Display Option - Use this section to customize the display for My Process Requests.

- **User ID** – Select the user ID to display.
- **Run Status** – Select the run status to display. Leave blank to display all statuses.
- **Type** – Select the process type to display. Leave blank to display all process types.
- **Name** – Select a specific process name to display. The process names available are based on the type selected. Leave blank to display all names.

Display Option - Use this section to customize the display for My Reports.

- **Distribution Status** – Select the distribution status to display. By default, report instances with distribution status Posted are displayed.

Show Instances For – These settings apply to folders where report or process instances are displayed.

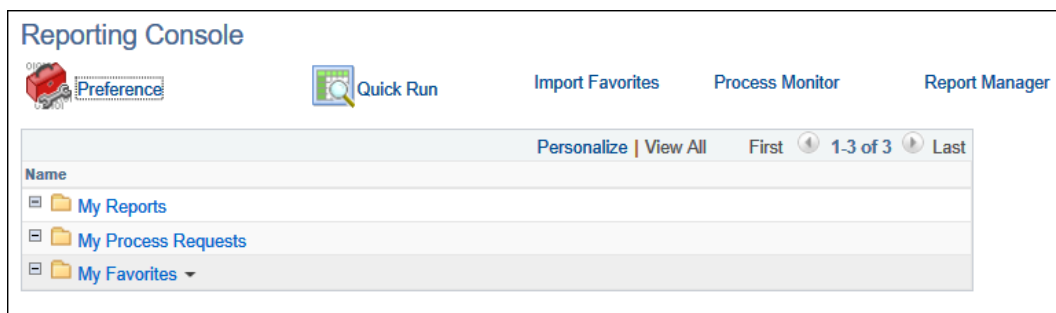
- **Last or Date Range** – Specify an interval of time by which to limit the process requests that appear in the list. Select Last to display only those reports that were created in the last number of days, hours, years, or minutes. Enter a custom numerical value in the field and then select a unit type: Days, Hours, Years, Minutes, or All. If you select All, the time interval fields will be grayed out and all process requests will appear. Select Date Range to display only those reports created between two specific dates. Enter a From date and a To date.
- **Display Latest** – Enter the number of instances to display.

Process Request Notification – The Process Request Notification section is not used at this time and this notification setting does not apply to nVision process requests submitted from the Reporting Console.

Export Favorites – Use this section to allow others to import your My Favorites folder structure

- **Public Access to Favorites** – Select this check box to allow other users to import bookmarks from their My Favorites folder

Click OK to accept the default settings for now. Preferences can be updated at any time. You should now see a list of folders as shown here:



Folders

The Reporting Console has 3 folders available:

- **My Reports** – This folder has a link to all reports for the user. The reports displayed in this folder are based on the preferences for the user. This is the same list of reports as found in the Report Manager. From the Reporting Console, you cannot filter reports, however there is a link to the Report Manager. This folder is intended to alert users to newly shared reports, similar to an E-mail inbox. Entries to this folder are always made by the system. The reports a user has access to will display in chronological order.
- **My Process Requests** – This folder displays all process requests the user has access to monitor while listing the current status. This is the same list of processes the user sees in the Process Monitor for their user ID. From the Reporting Console, you cannot edit the process request, however there is a link to the Process Monitor.
- **My Favorites** – This folder is used to add process bookmarks. You can create folders to organize your processes. From the bookmarks, you can edit a process, run a process or delete the process bookmark. You can also import favorites from another user and rename a folder.

Links

The Reporting Console has links for the following:

- **Preference** – This link allows the user to set the display preferences for the Reporting Console.
- **Quick Run** – This link allows the user to run a report or process.
- **Import Favorites** – This link enables you to import processed bookmarks from an authorized user to pre-populate the My Favorites list. This link allows the user to import processed bookmarks from another user. You can import process bookmark only if permission is granted for the processes.

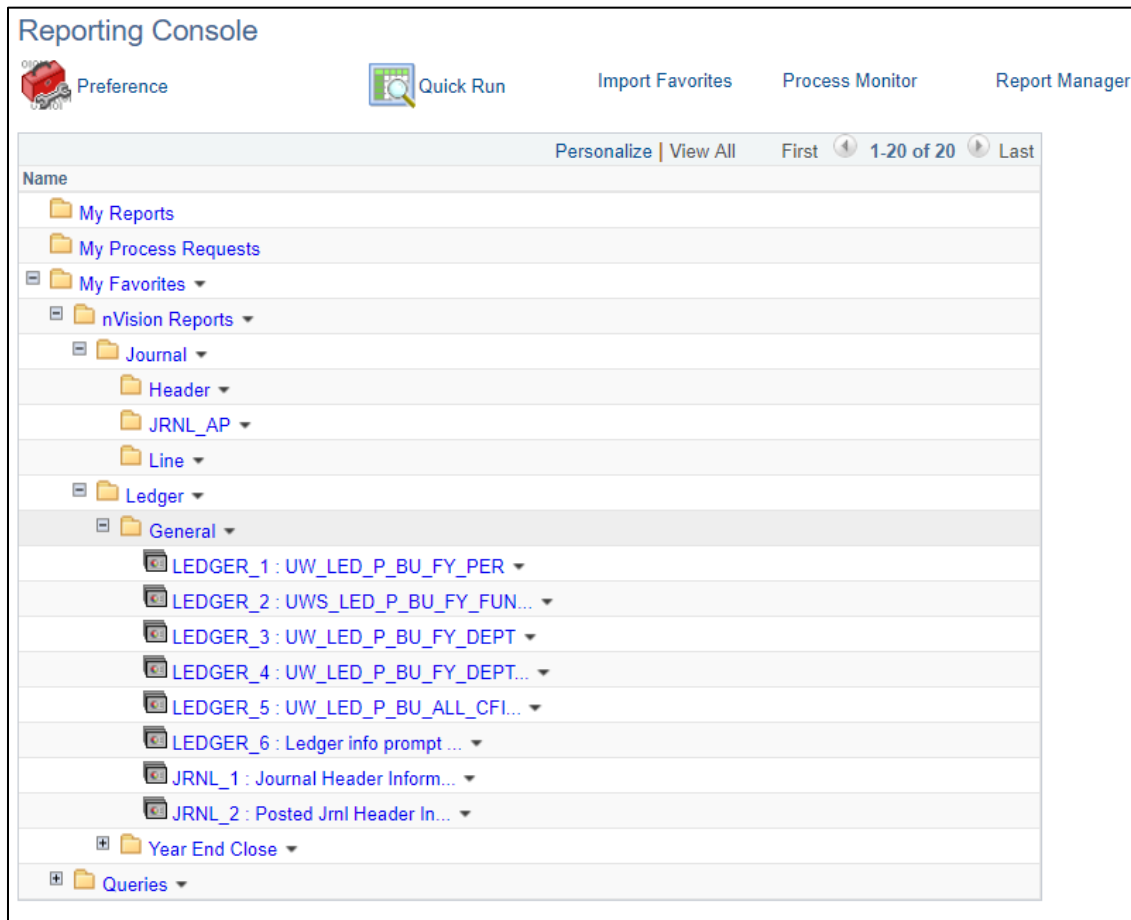
Please note: Imported bookmarks will overwrite any existing bookmarks. If you have bookmarks you want preserved, do not use this option.

- **Process Monitor** – This link will open the Process Monitor.
- **Report Manager** – This link will open the Report Manager.

Using Favorites

Within the My Favorites folder, you can build your own hierarchy of sub-folders to organize, access and monitor frequently used processes. Folders are used for organizing the processes and bookmarks are used to edit or run processes or jobs. When you add a process bookmark, the system automatically adds the appropriate links based on your permission to the process or job.

This is an example of My Favorites configured with some sub-folders and bookmarks.

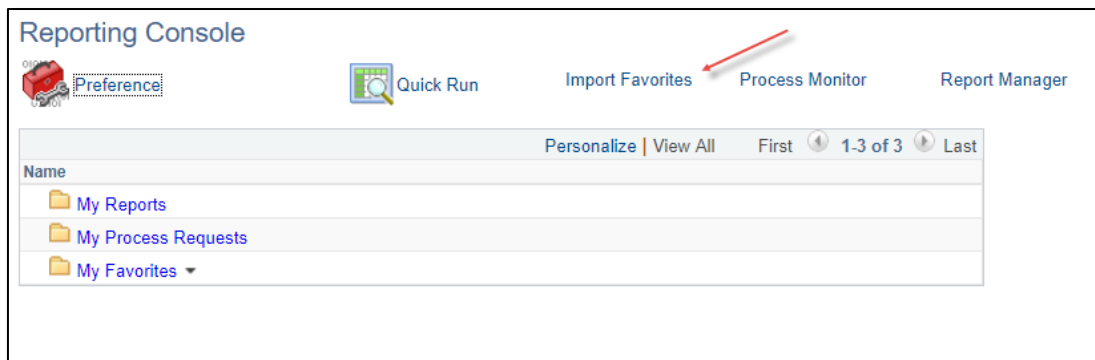


Plus or minus icons will appear next to a bookmark if it contains additional folders or reports. Use these icons to expand and collapse the bookmark folders.

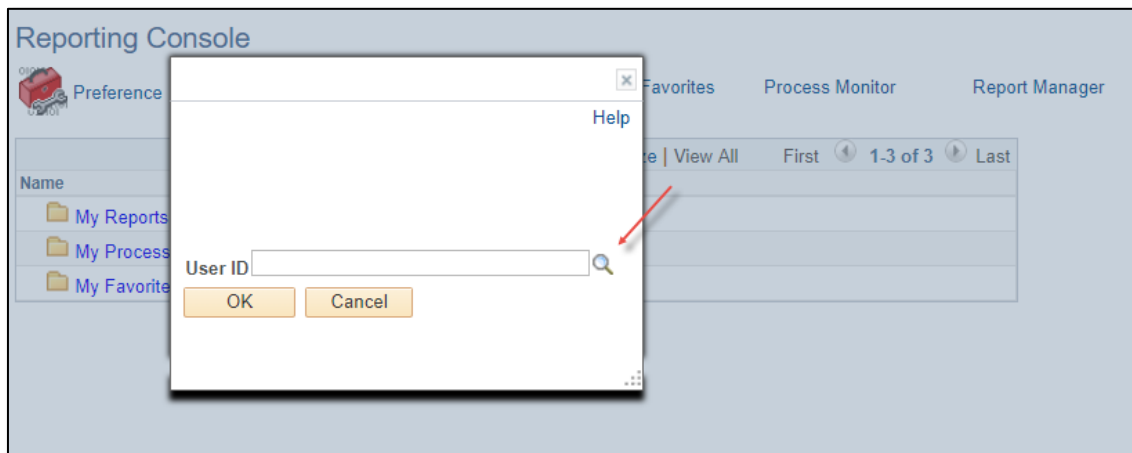
Importing Favorites

The easiest way to create My Favorites folders is to import them from another user. However, before a My Favorites folder structure can be imported, the originator of the folder structure must allow access to their folders by checking the Public Access to Favorites in the Reporting Console Preferences as described in the Understanding Reporting Console section above.

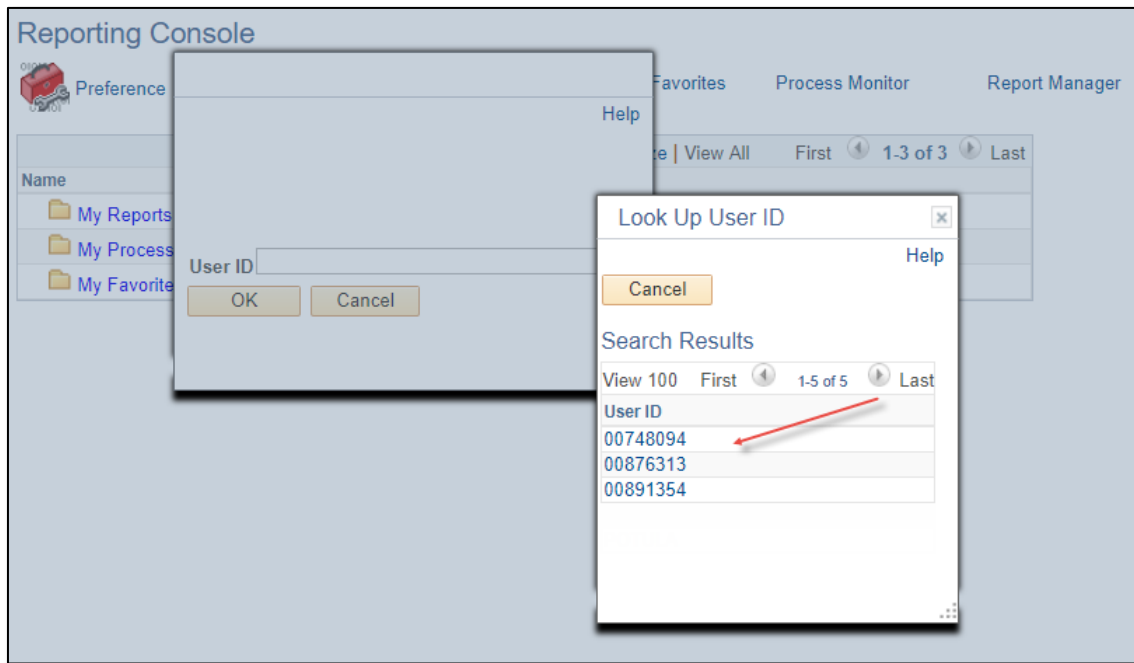
1. To import Favorites, click on the Import Favorites link located at the top of the Reporting Console.



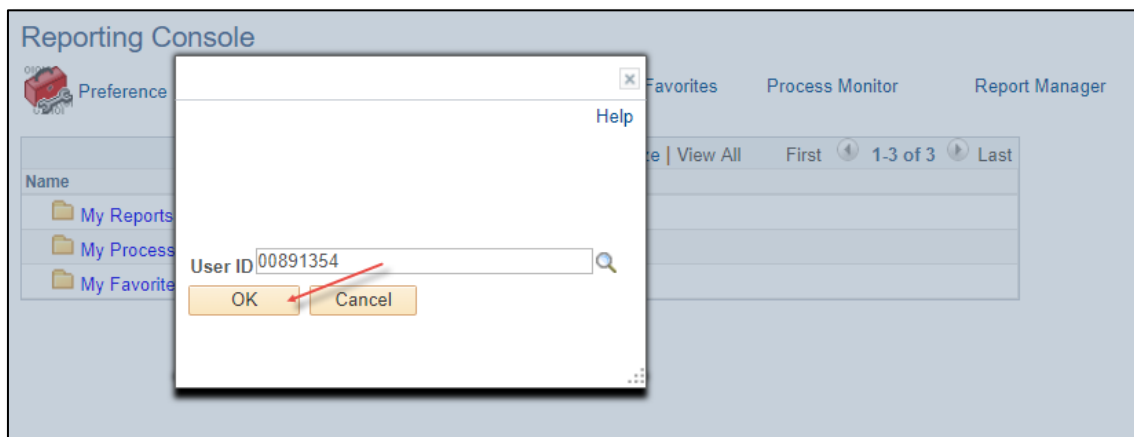
2. Next, use the **Find** tool to search for the list of users who allow Public access to their My Favorites folders.



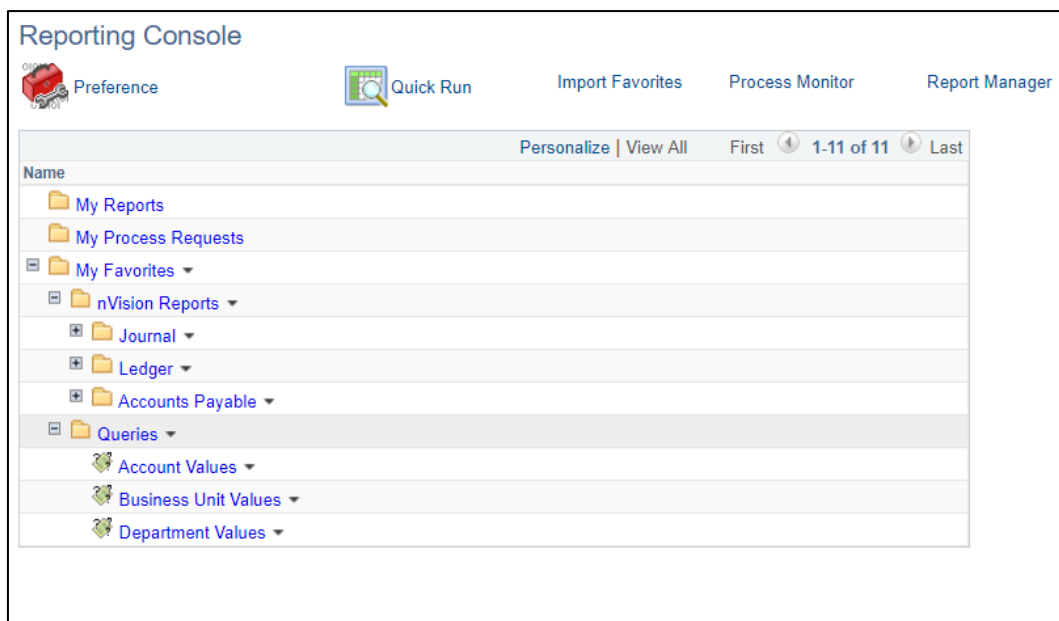
- The Import Favorites only shows UserIDs, not names. So, you'll need to know the originators UserID to import their My Favorite folders.



- Once you've selected the UserID, click on OK.



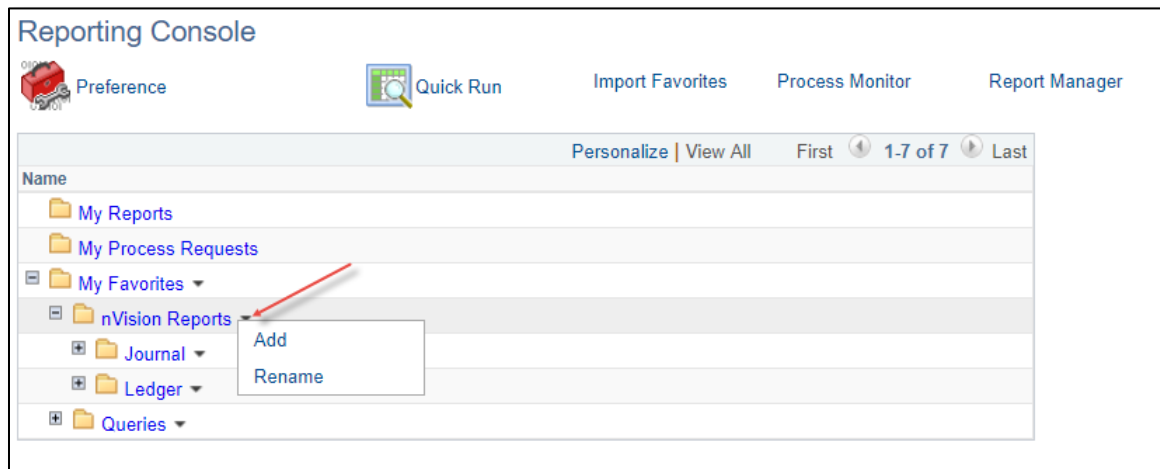
- Once the My Favorite's folders are imported, the structure is saved under your UserID. You can add additional folders and report bookmarks without affecting the originator's folder structures. Adding folders and report bookmarks are discussed in the following section.



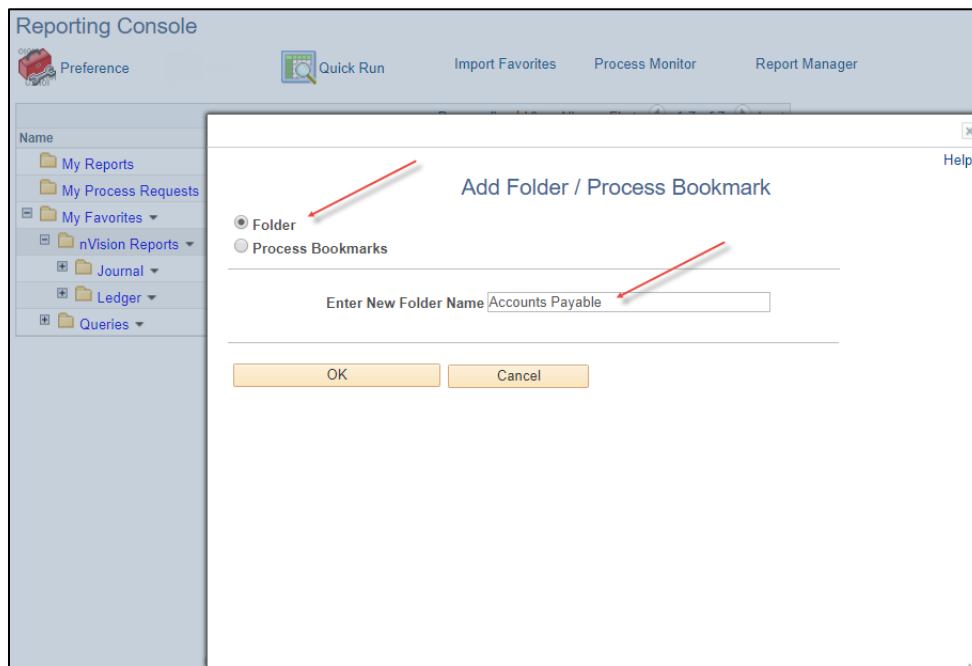
Adding New Folders

Within the My Folders folder, you can build your own hierarchy of sub-folders to organize, access and monitor frequently accessed reports. These can be used for all your nVision Reports Requests, Queries, BI Publisher reports and even SQRs.

1. On the Reporting Console page, go to the My Favorites section and click the arrow. Select Add.

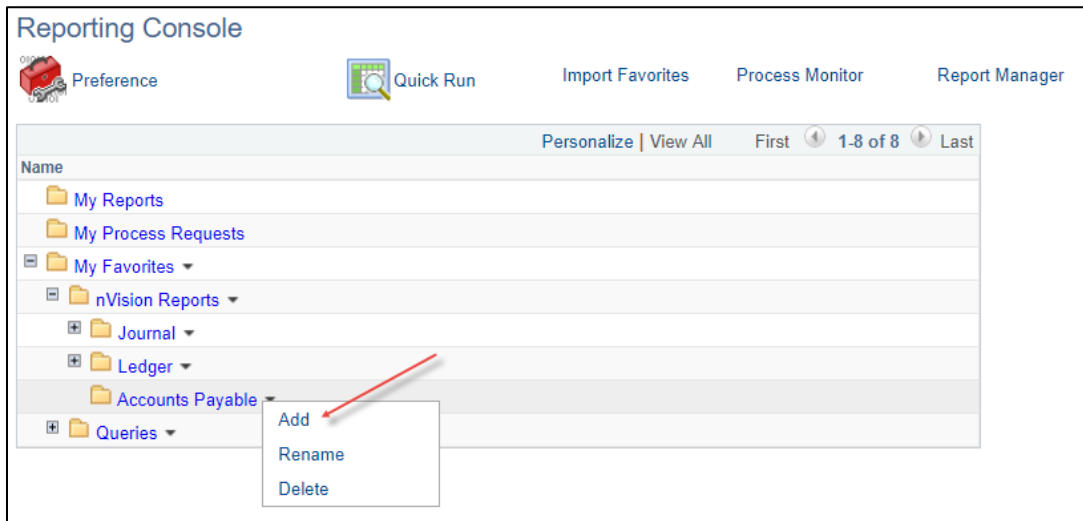


2. In the Add Folder / Process Bookmark page, select the Folder radio button.
3. Enter the new folder name and click OK.

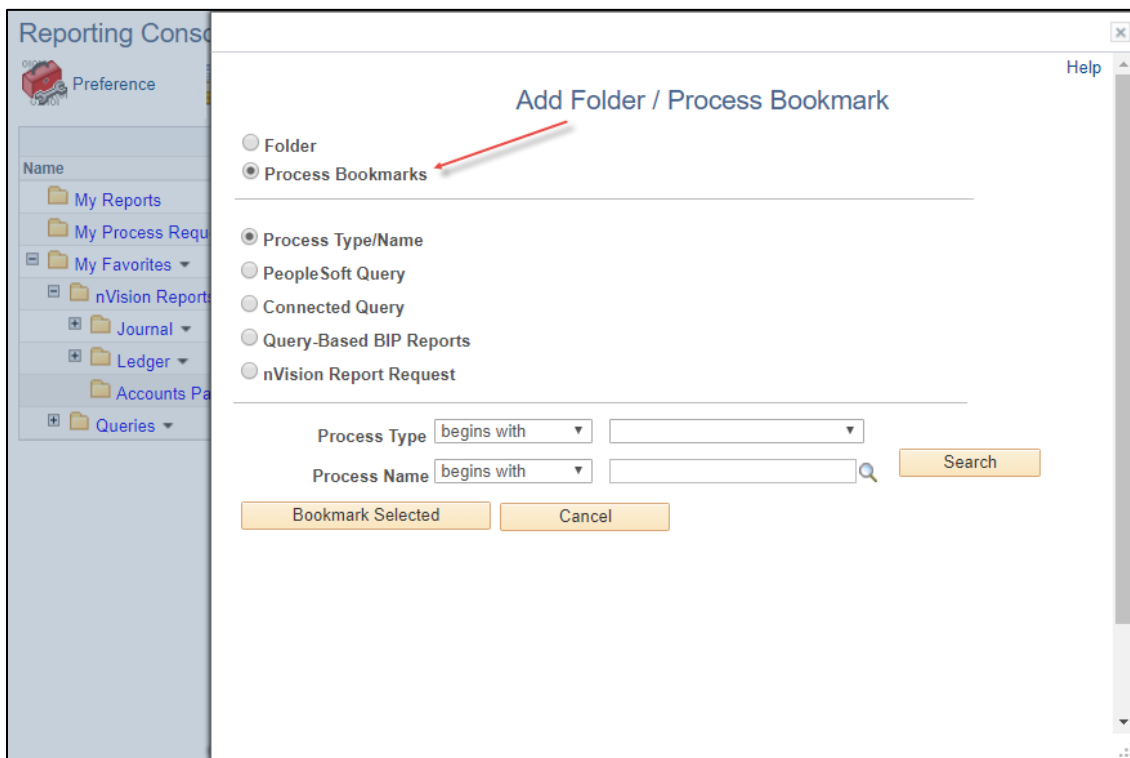


Adding Process Bookmarks for Processes

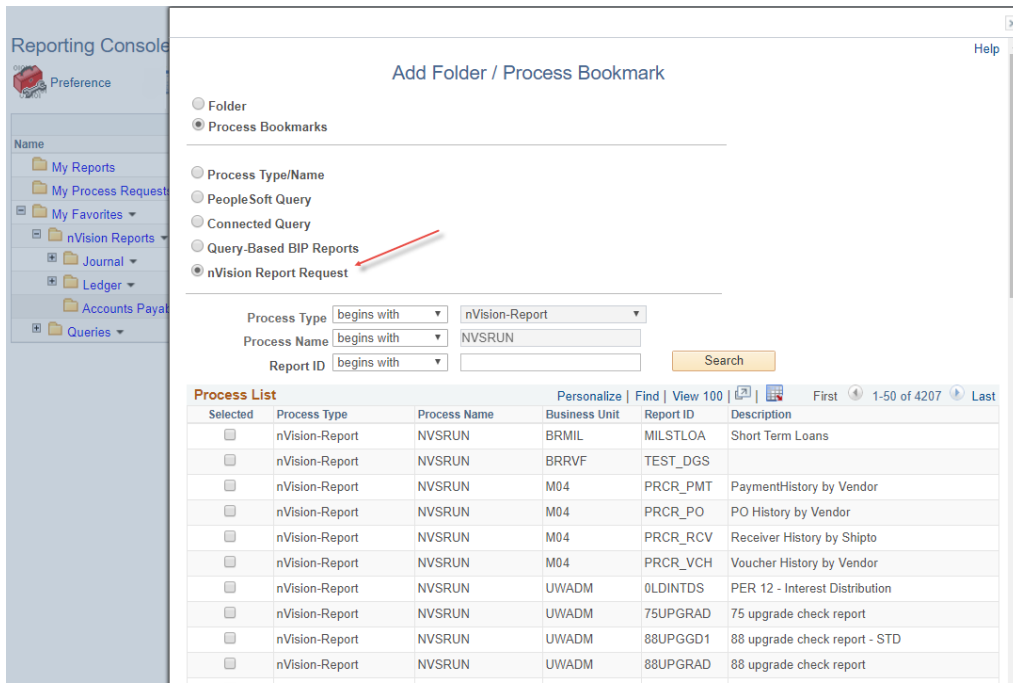
1. From the Reporting Console home click the Add link for next to the folder where you want to add the process bookmark.



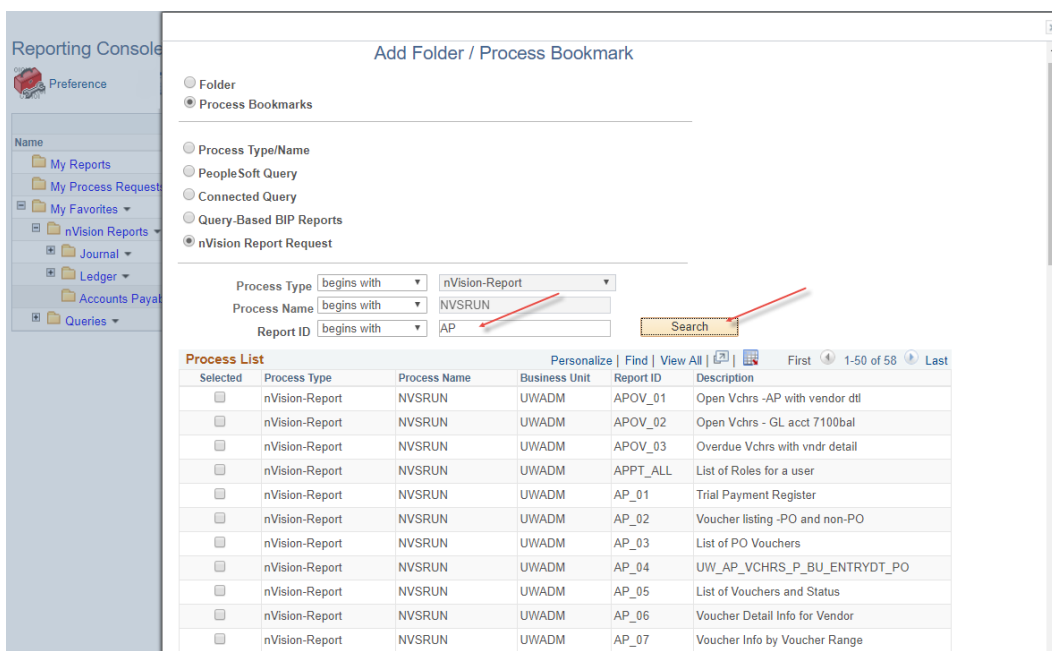
2. Select the Process Bookmarks radio button.



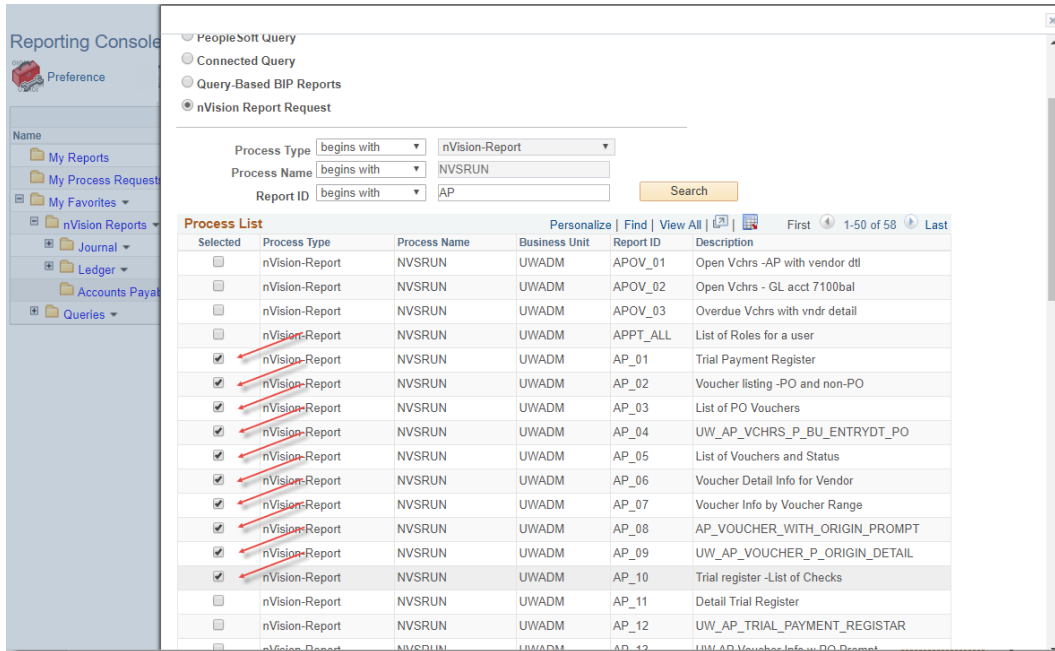
3. Select the radio button for the type of report (PeopleSoft Query, Connected Query, Query-Based BIP Reports or nVision Report Request). For this example, we are adding nVision Report Requests so select the radio button for nVision Report Requests.



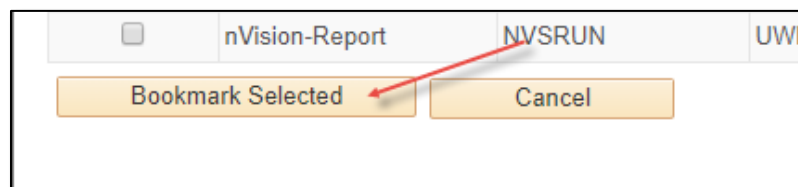
4. The list displays all nVision Report Requests in the system. You should narrow your search by typing part of the Report ID and selecting Search.



- Select the Process List check boxes for the nVision Report IDs you want to add to your new Folder.

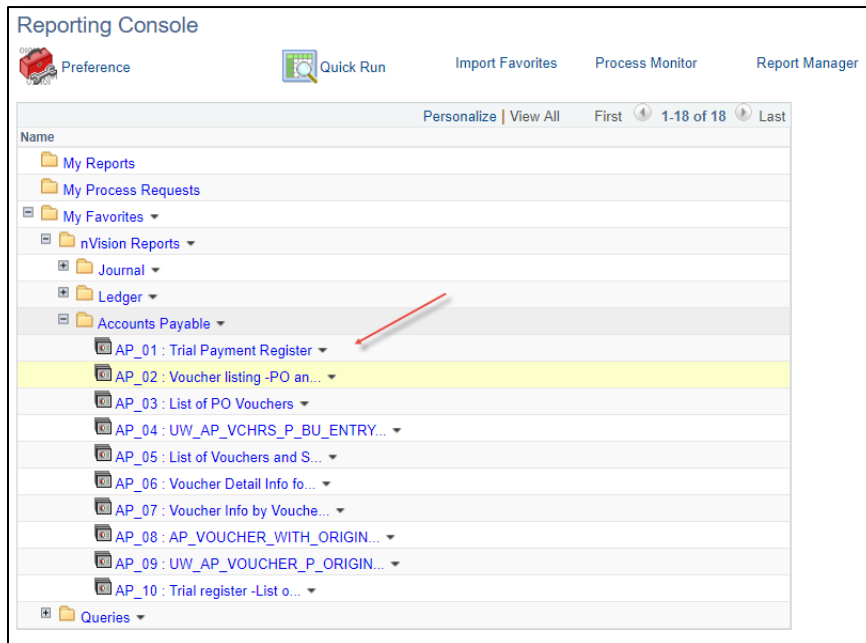


- Select the Bookmark Selected link when you have selected all the Report IDs you want to add to your new folder.



The reports will appear in your new folder.

Note: After bookmarking the selected reports, the folder structure will automatically collapse. You need to open the folders to see your new bookmarked reports.



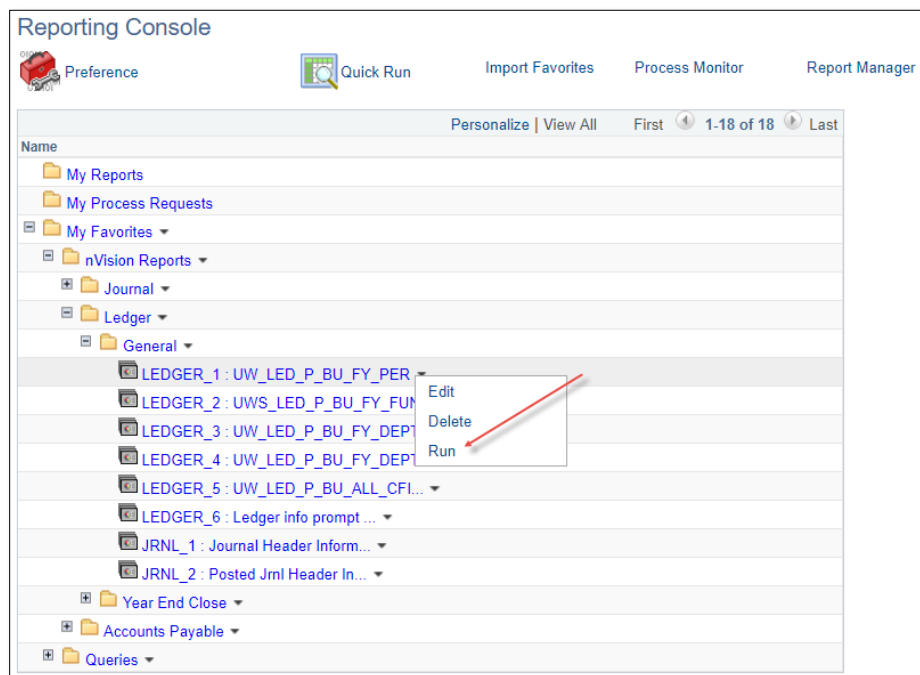
Running Reports

Running Reports from Folders

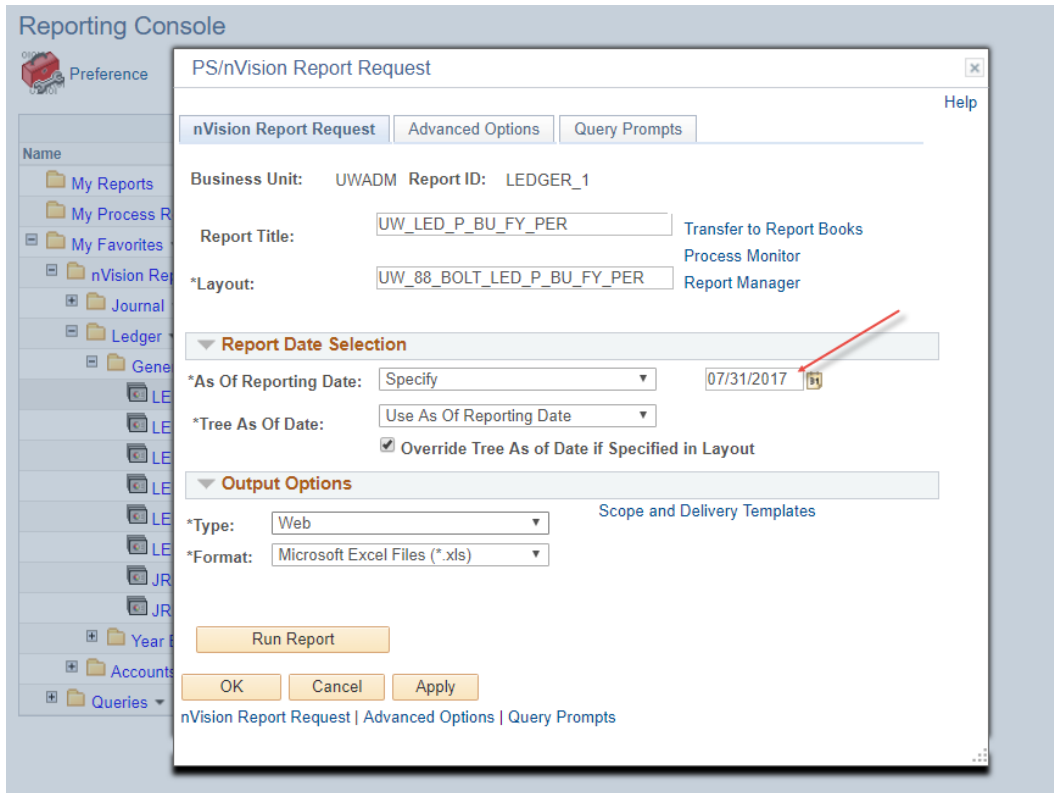
The Run link will be available next to the bookmarked process if the user has permission to run the process from the Reporting Console. The submit request page will differ based on the bookmark type and whether the process requires prompts.

Running nVision Reports from Folders

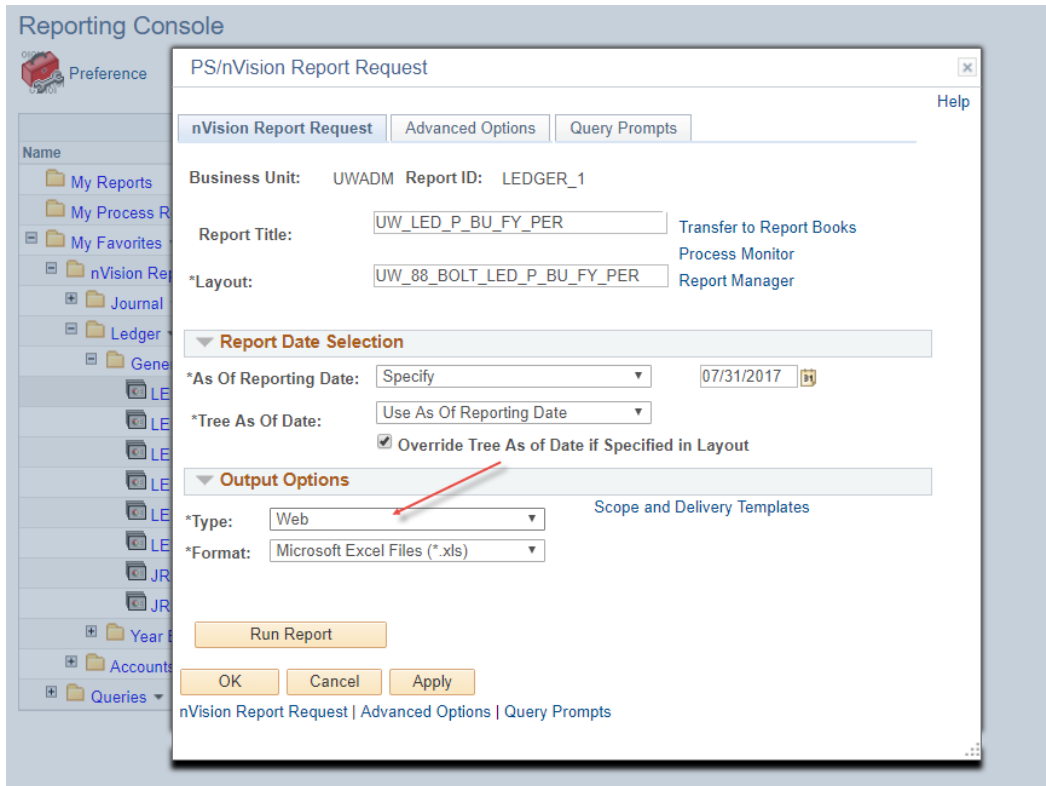
1. To run an nVision report from the My Favorites folder, open the folders containing your nVision report and select Run from the down arrow link provided to the right of the specific report name.



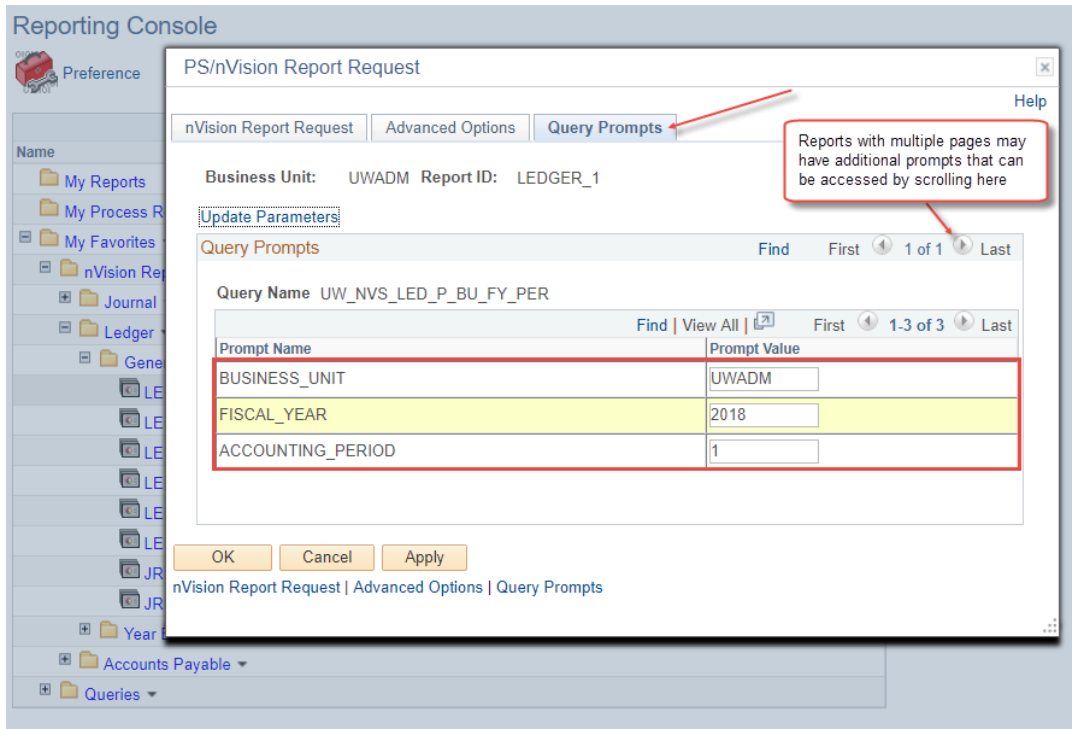
- The PS/nVision Report Request appears and contains several fields that may require updating. The first is the As of Reporting Date. Before running the report, verify that it is set to the correct date for generating the results.



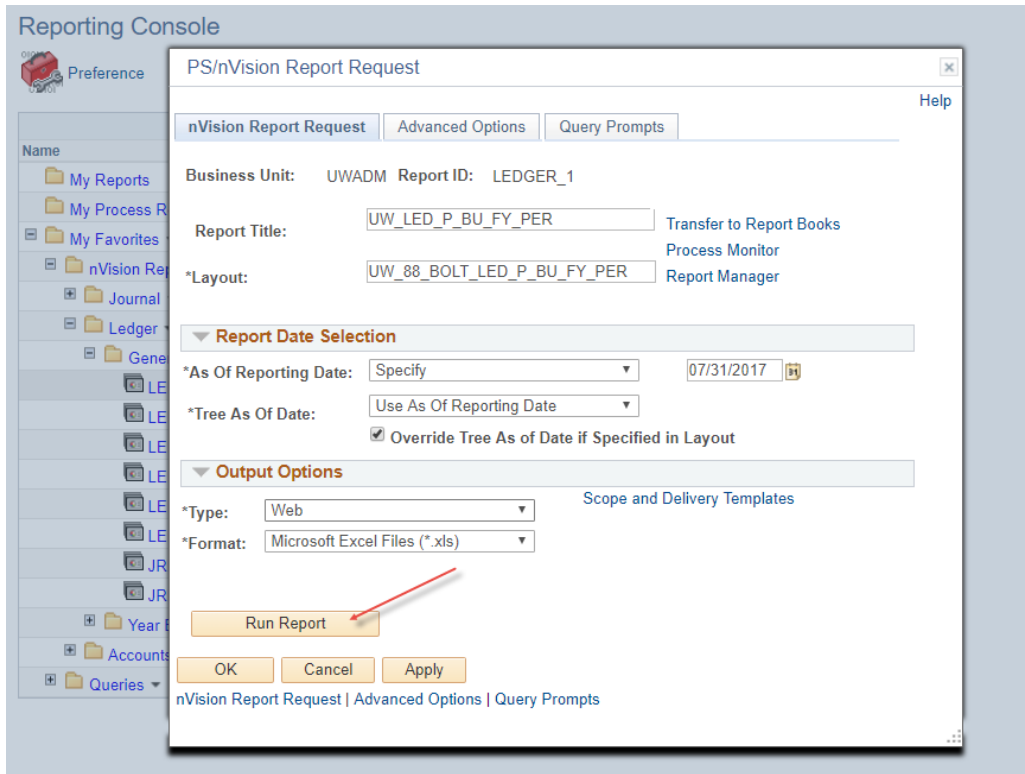
- Next, verify that the Type is set to Web if you want the results to populate in the Report Manager and the My Reports folder. Other valid options for running from the Reporting Console are Window and Email.



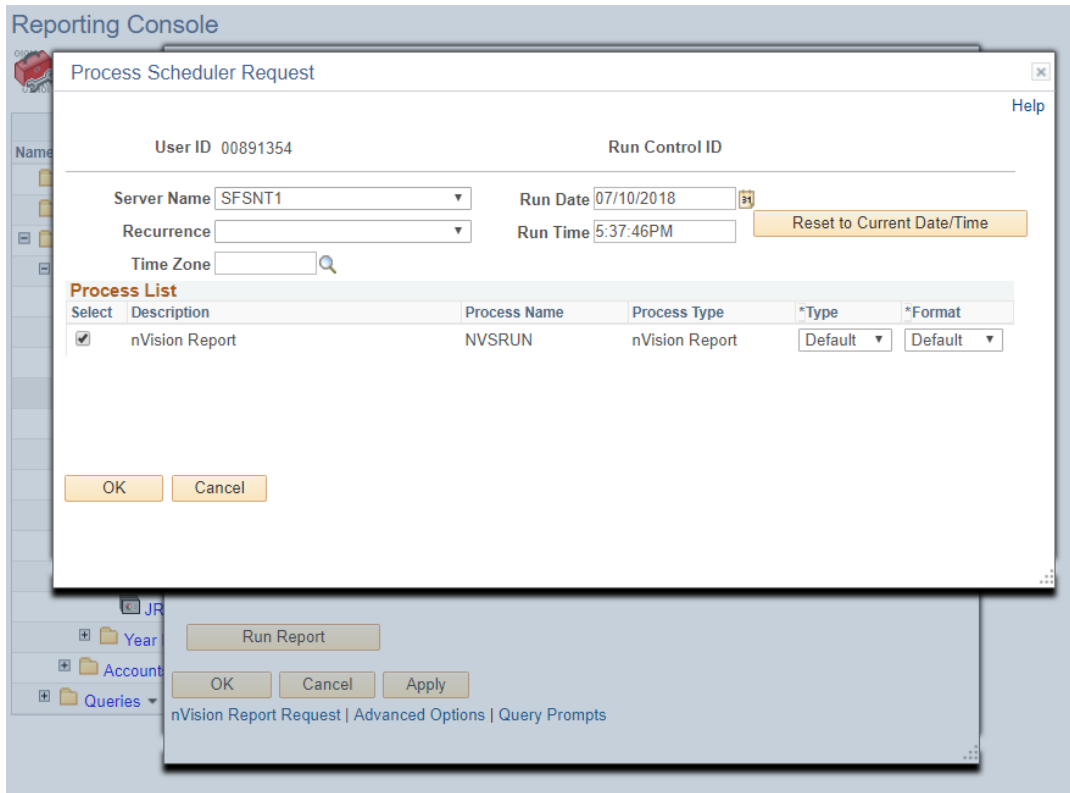
- Parameter values for reports using prompts are entered on the Query Prompts tab of the PS/nVision Report Request. Some reports may have multiple pages using different prompts. In those cases, you may need to scroll through the multiple values indicated here.



- Once all fields are verified and updated, navigate back to the nVision Report Request tab and select Run Report.

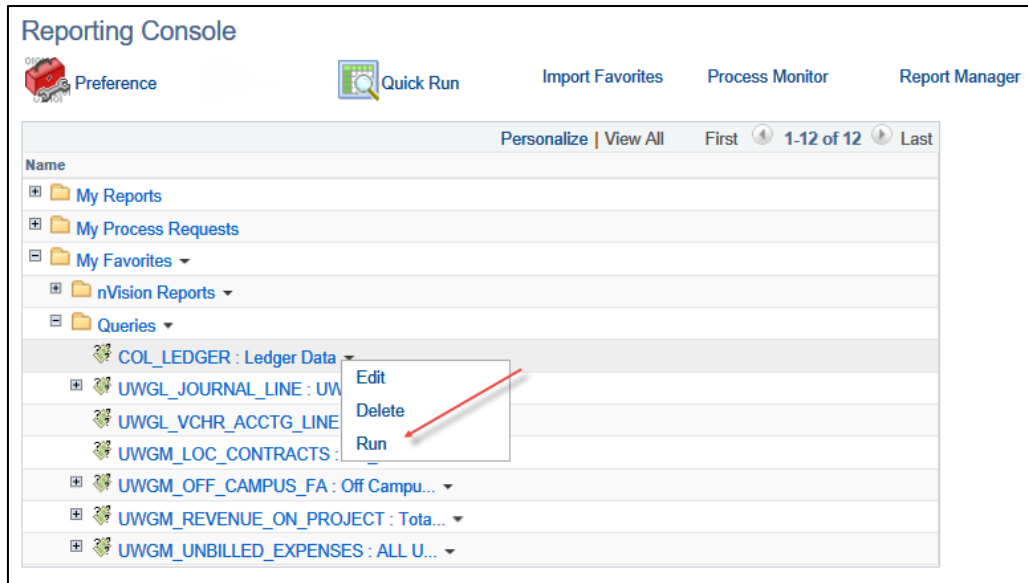


6. Select OK when the Process Scheduler Request page appears.

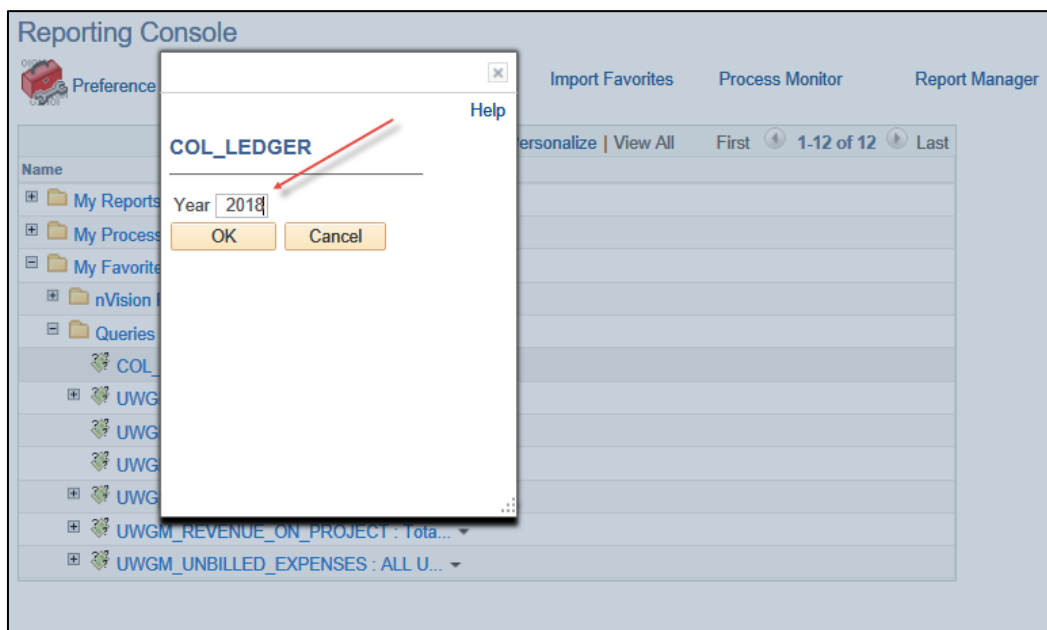


Running Queries from Folders


1. Running queries from folders is similar to running nVision reports from folders as described above. Open the folders containing your Queries and select Run from the link provided to the right of the specific report name.



2. If your query contains prompts, a window will appear to enter the prompt values. Enter the appropriate values and select OK.



- The Schedule Query page appears. If you have previously run the process and saved parameters, you can select the saved parameters from the drop-down list. The system then retrieves and populates the parameters values from the run control record and fields according to the parameters registered on the process definition. Select **Run Now**.

Use Saved Parameters: 

Query Name: COL_LEDGER

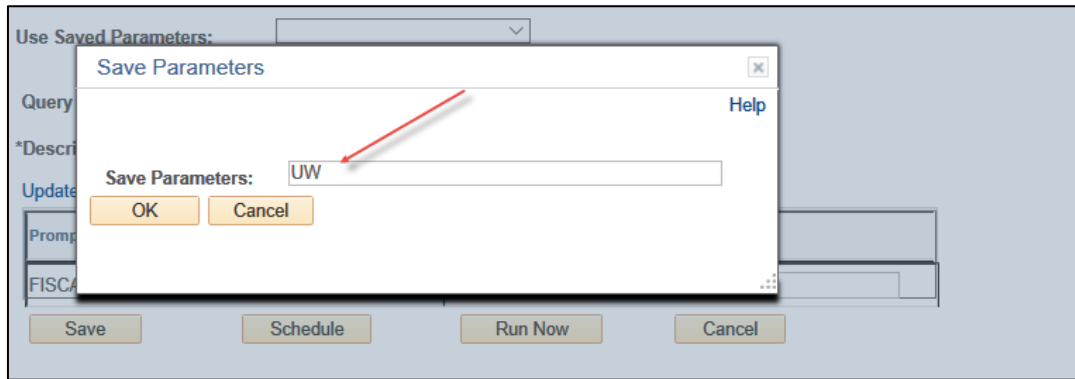
*Description:

Update Parameters

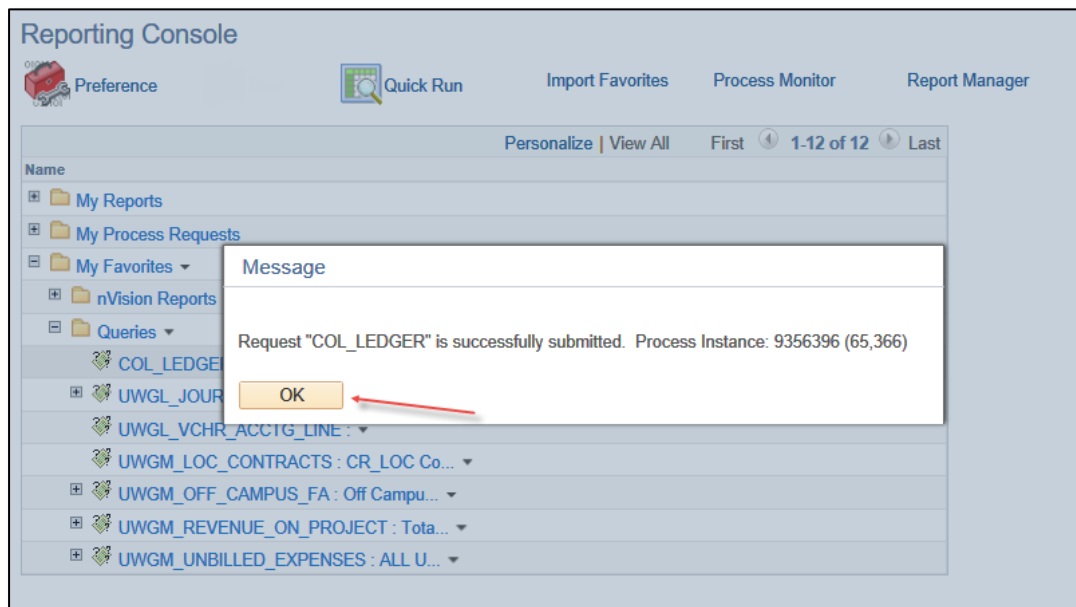
Prompt Name	Value
FISCAL_YEAR	<input type="text" value="2018"/>

- You will be required to name the parameters used with this query. If you only use the Reporting Console, you only need to create one Saved Parameter and use it for all your

queries. If you frequently schedule queries, you may want to create names for each query. Enter a Save Parameters name and select OK.



5. A new tab will open showing the query status. Close that tab and return to the Reporting Console. The following message will appear:



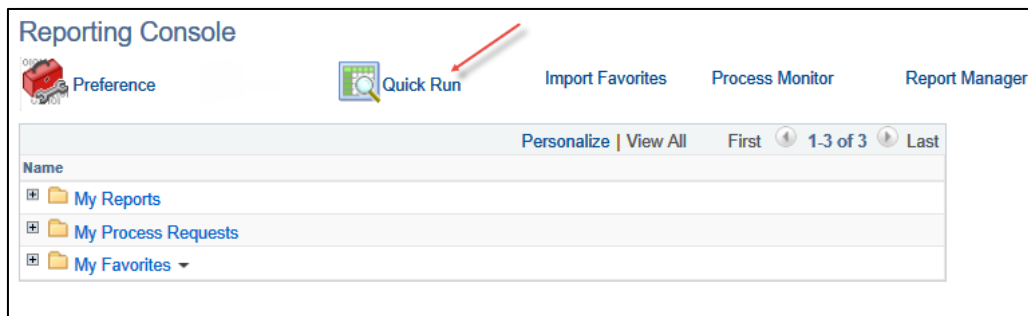
6. Select OK

Running Reports Using Quick Run

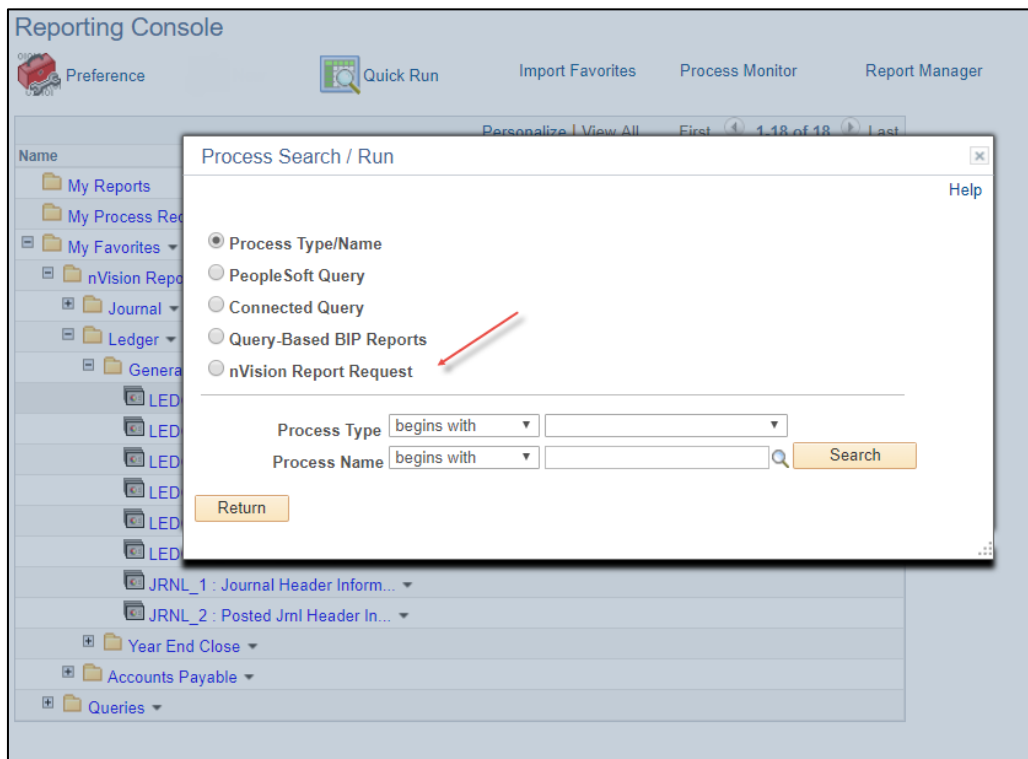
You can use the Quick Run option to run any Query, BI Publisher or nVision reports. This option is especially useful for reports that are not bookmarked.

Running nVision Reports using Quick Run

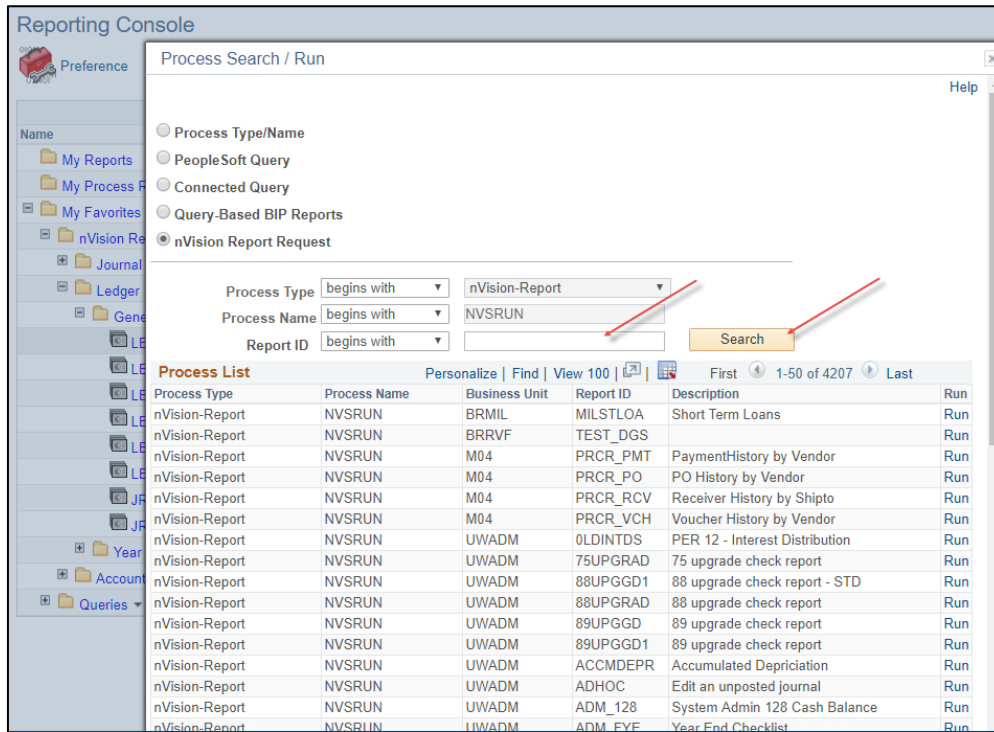
1. Click the Quick Run link on the Reporting Console to open the Process Search/Run page.



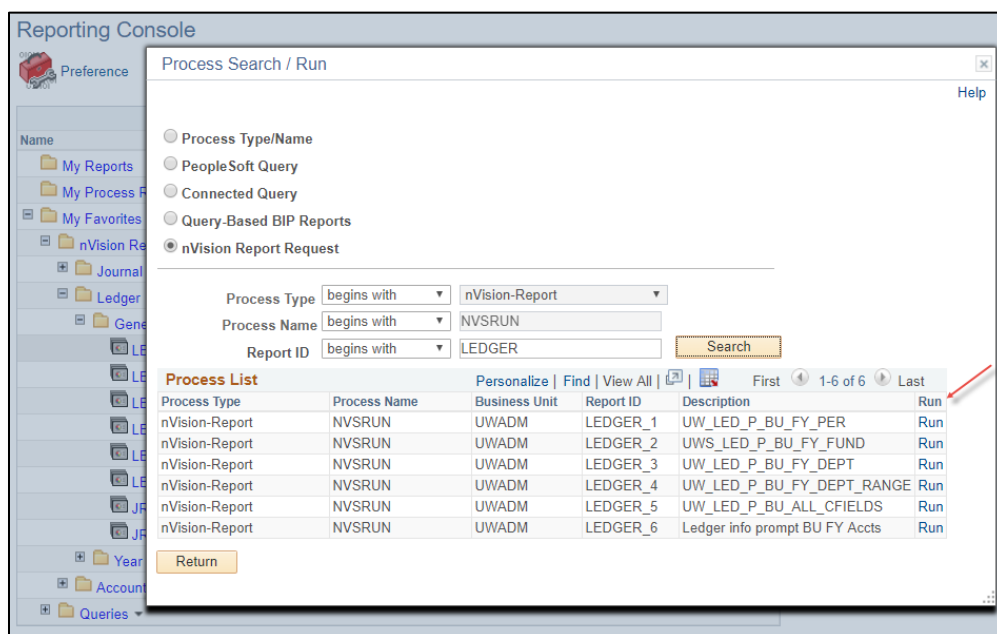
2. The Process Search / Run dialog box appears. Select nVision Report Request.



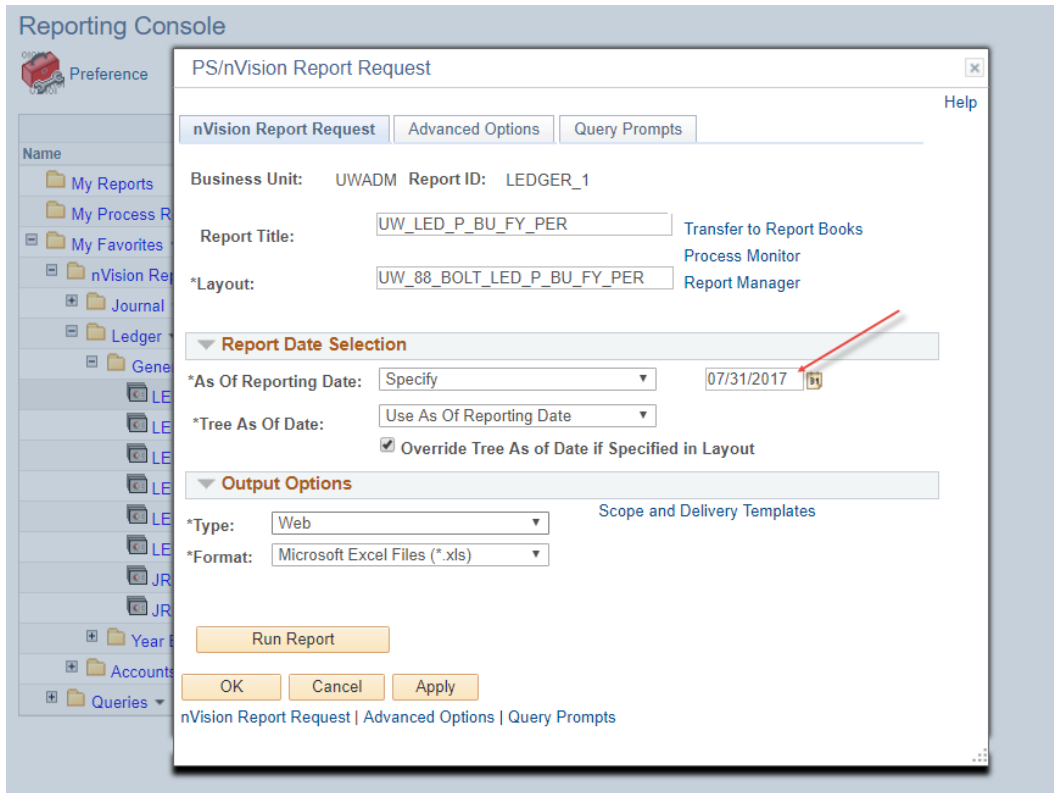
- Type part of the name for your report into the Report ID field. In this example, we know the Report ID begins with ledger. When done, select Search.



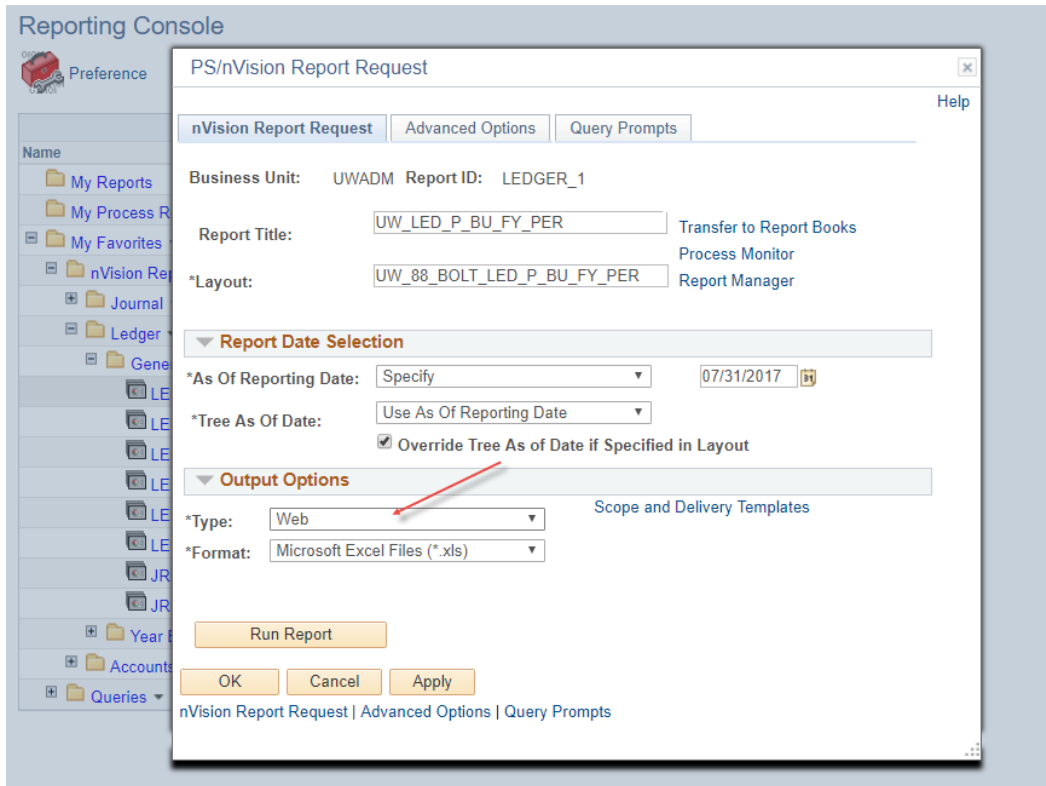
- Select the Run link to the right of the report you want to run.



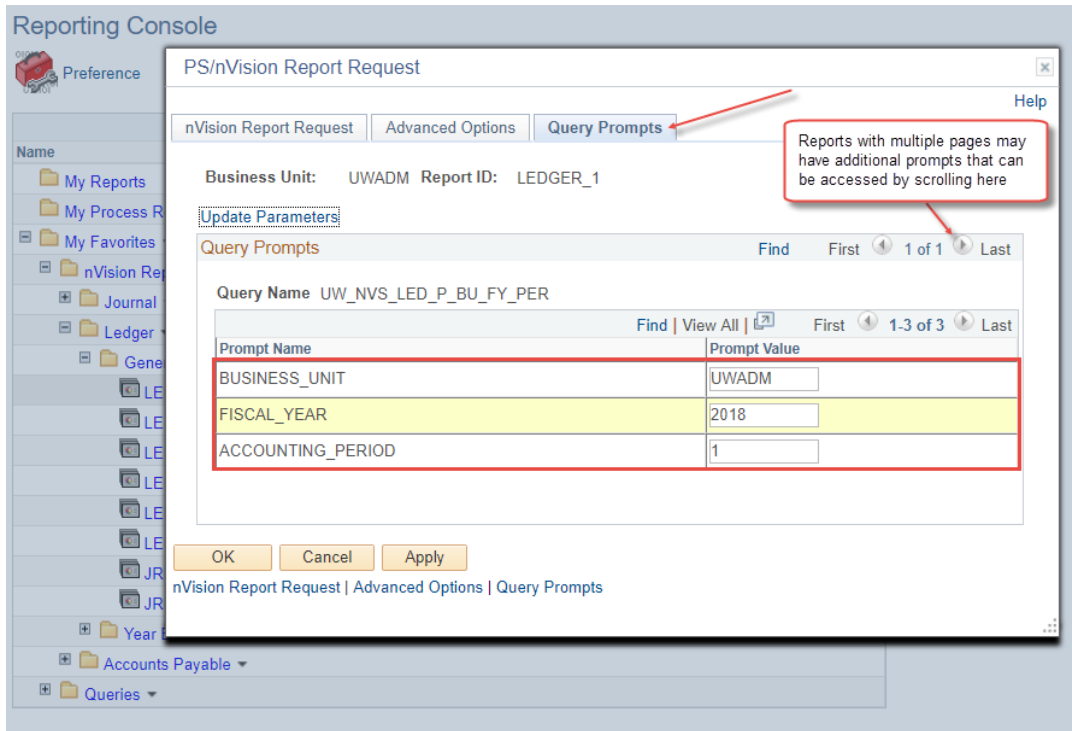
- The PS/nVision Report Request appears and contains several fields that may require updating. The first is the As of Reporting Date. Before running the report, verify that it is set to the correct date for generating the results.



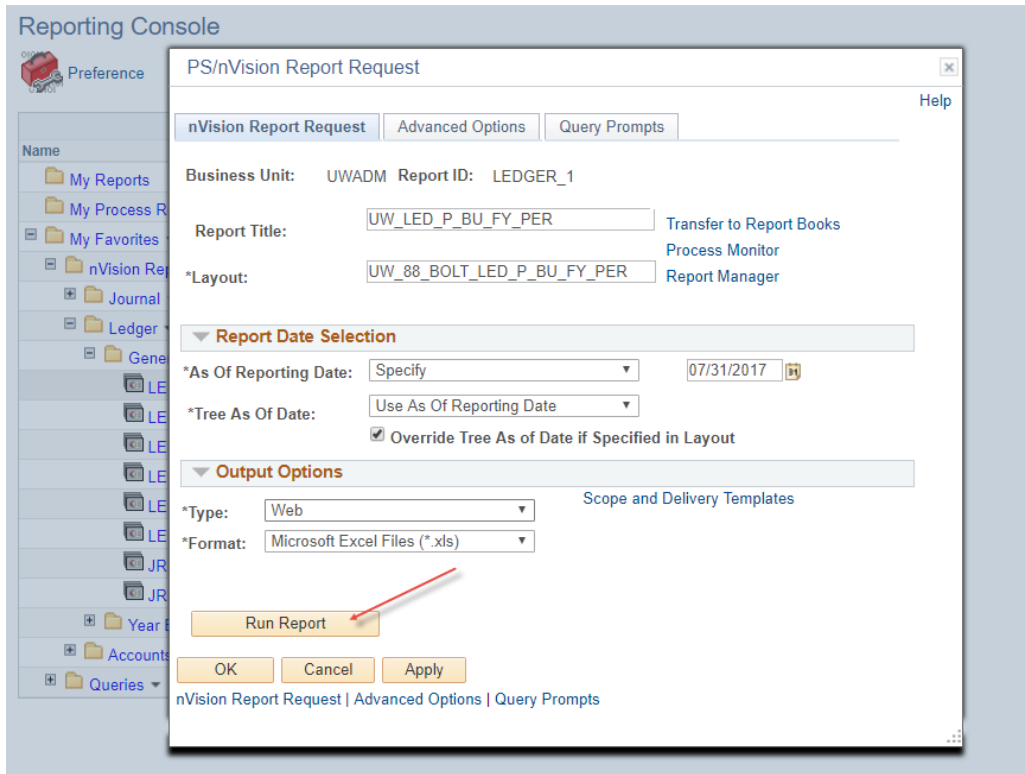
- Next, verify that the Type is set to Web if you want the results to populate in the Report Manager and the My Reports folder. Other valid options for running from the Reporting Console are Window and Email.



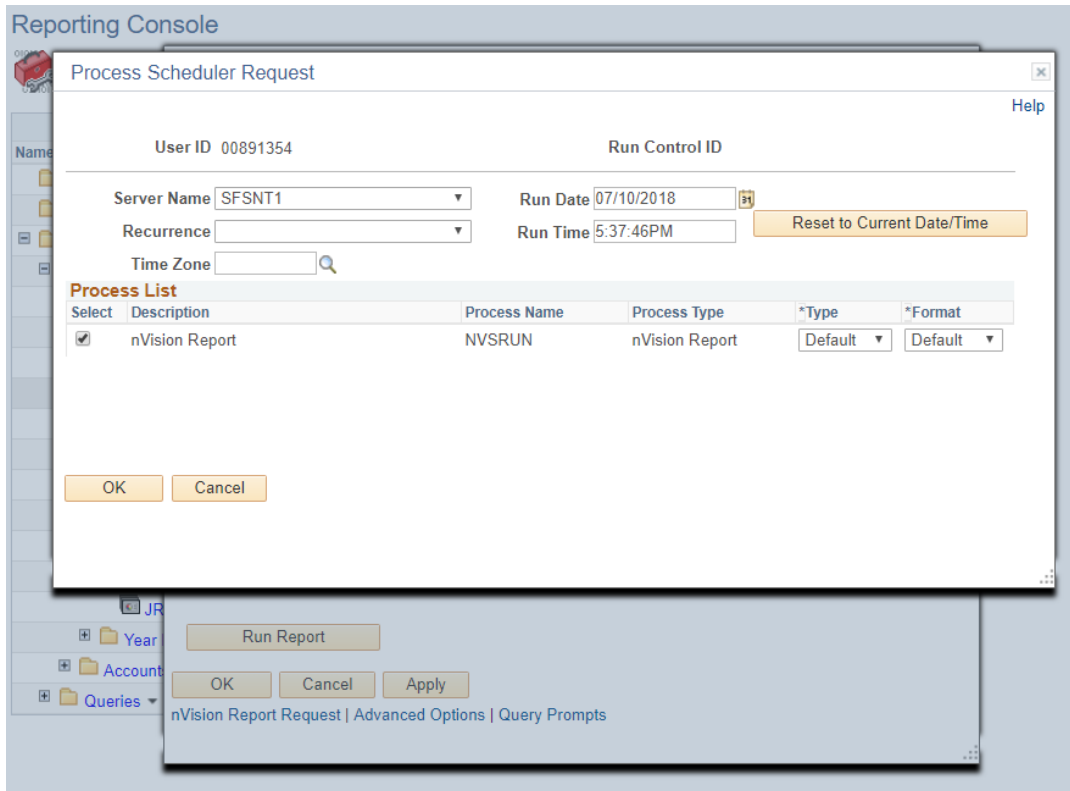
- Parameter values for reports using prompts are entered on the Query Prompts tab of the PS/nVision Report Request. Some reports may have multiple pages using different prompts. In those cases, you may need to scroll through the multiple values indicated here.



9. Once all fields are verified and updated, navigate back to the nVision Report Request tab and select Run Report.

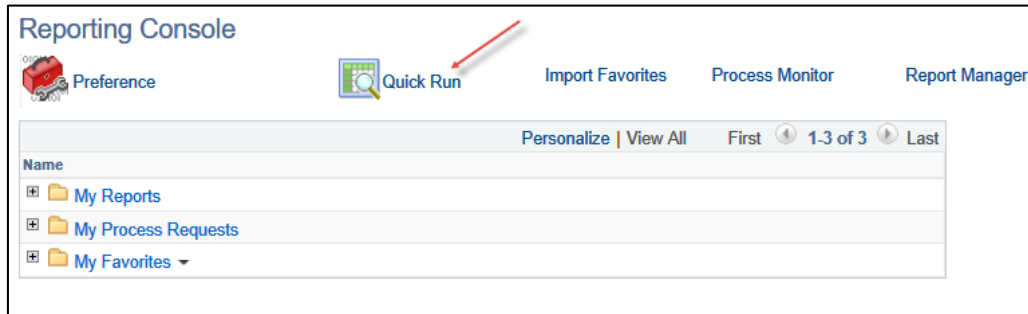


10. Select OK when the Process Schedule Request page appears.

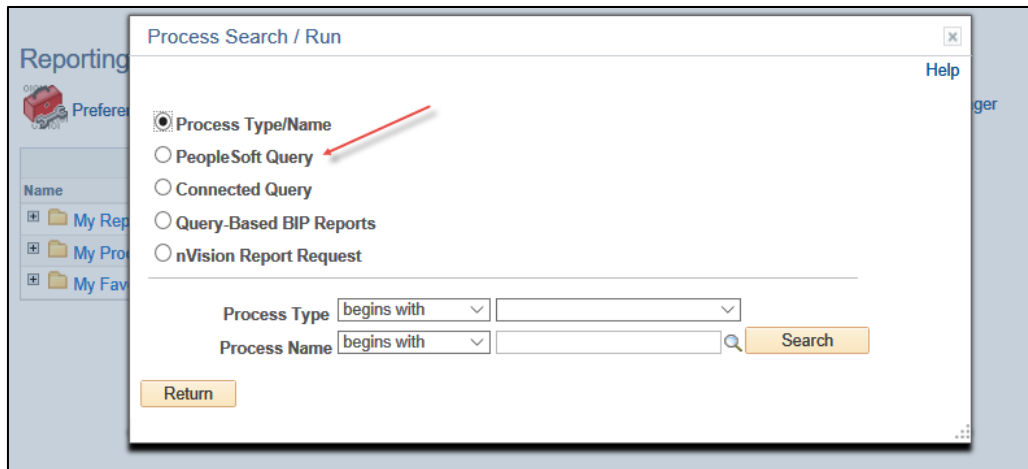


Running Queries using Quick Run

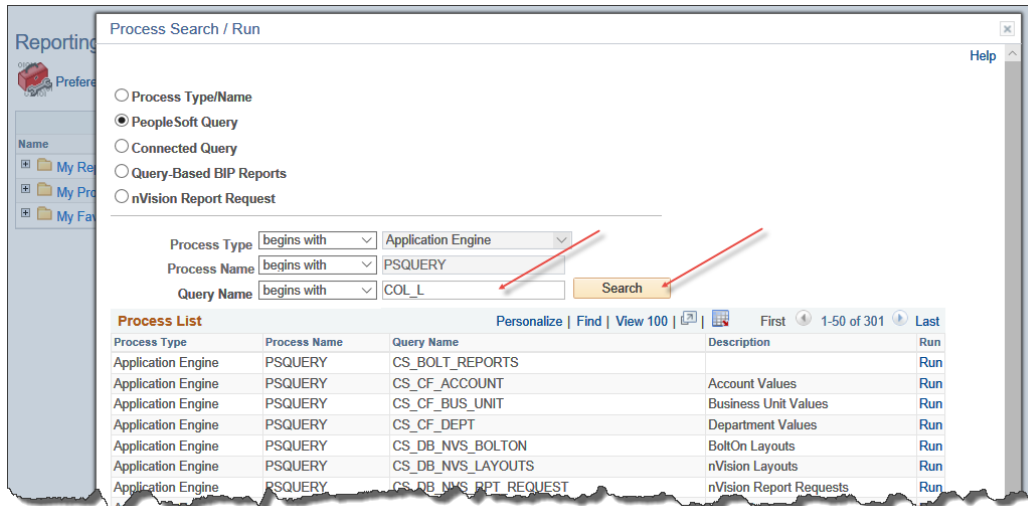
1. Click the Quick Run link on the Reporting Console to open the Process Search/Run page.



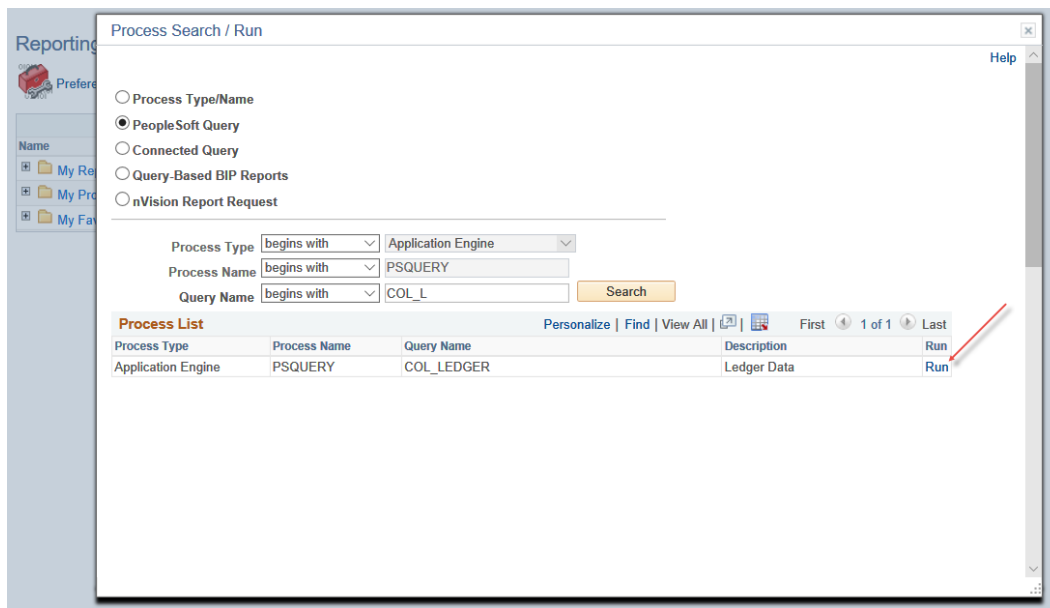
2. The Process Search / Run dialog box appears. Select **PeopleSoft Query**.



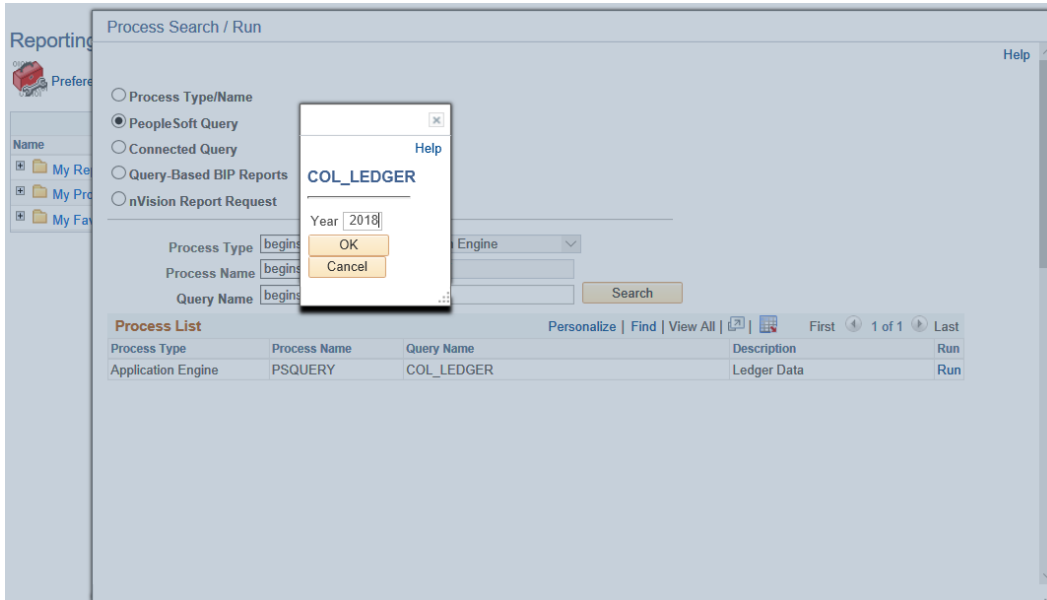
- Type part of the name for your Query into the Query Name field. In this example, we know the Query begins with COL_L. When done, select Search.



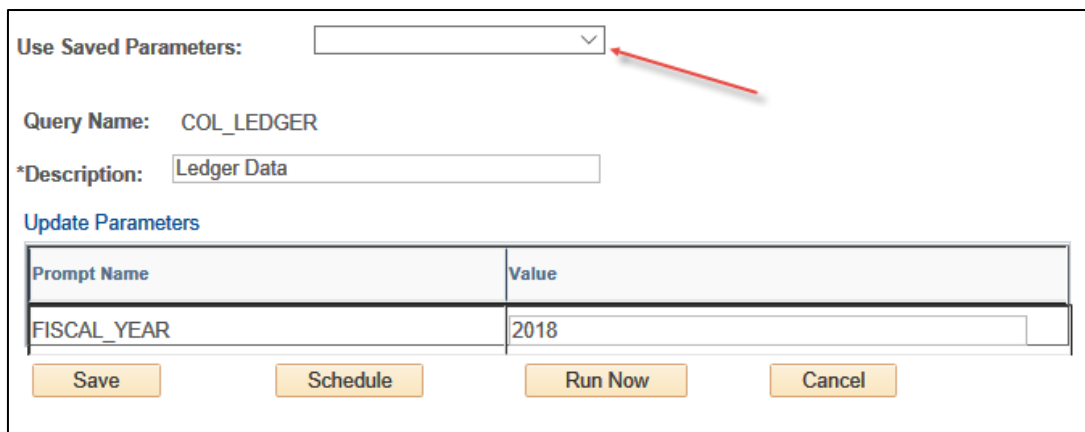
- Select the Run link to the right of the query you want to run.



- If your query contains prompts, a window will appear to enter the prompt values. Enter the appropriate values and select OK.

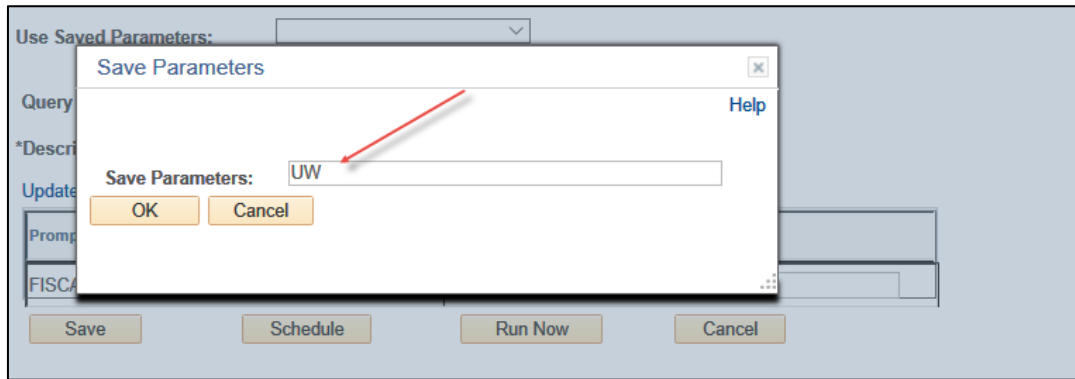


- The Schedule Query page appears. If you have previously run the process and saved parameters, you can select the saved parameters from the drop-down list. The system then retrieves and populates the parameters values from the run control record and fields according to the parameters registered on the process definition. Select Run Now.

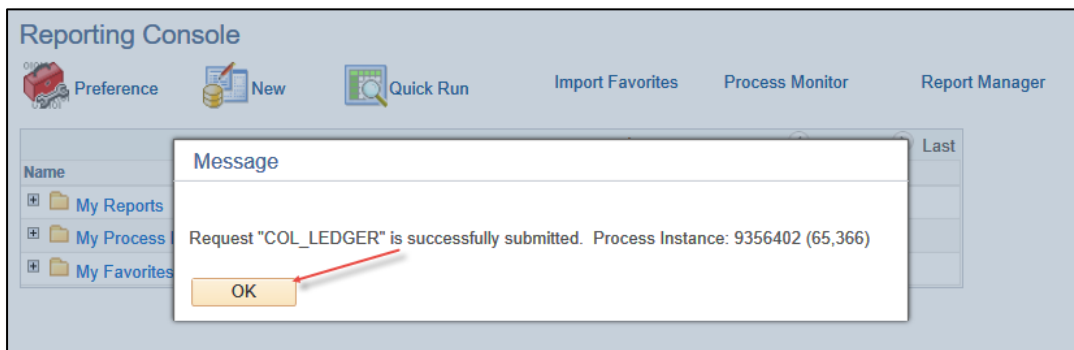


- You will be required to name the parameters used with this query. If you only use the Reporting Console, you only need to create one Saved Parameter and use it for all your

queries. If you frequently schedule queries, you may want to create names for each query. Enter a Save Parameters name and select OK.



8. A new tab will open showing the query status. Close that tab and return to the Reporting Console. The following message will appear:



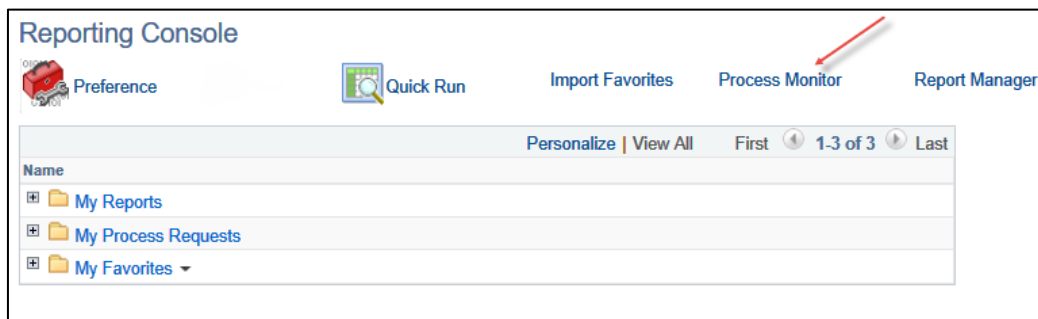
9. Select OK

Reviewing Processes

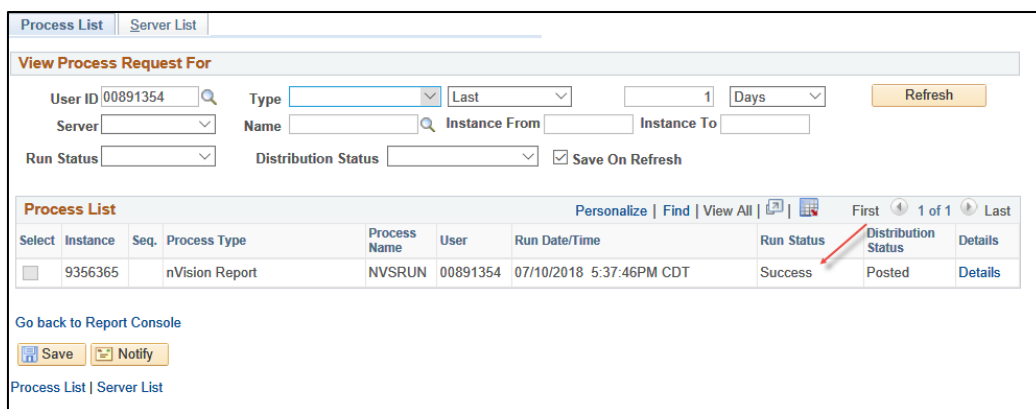
After you submit a job, Peoplesoft provides several methods of reviewing your Process Instance details within the Reporting Console. You can use these to view all processes to see the status of any job in the queue. The methods provided include the Process Monitor, the My Processes Folder and attached to the Bookmarked Reports under the My Favorites folders.

Process Monitor

1. In the Reporting Console click on the Report Manager link at the top left of the page to open the Report Manager



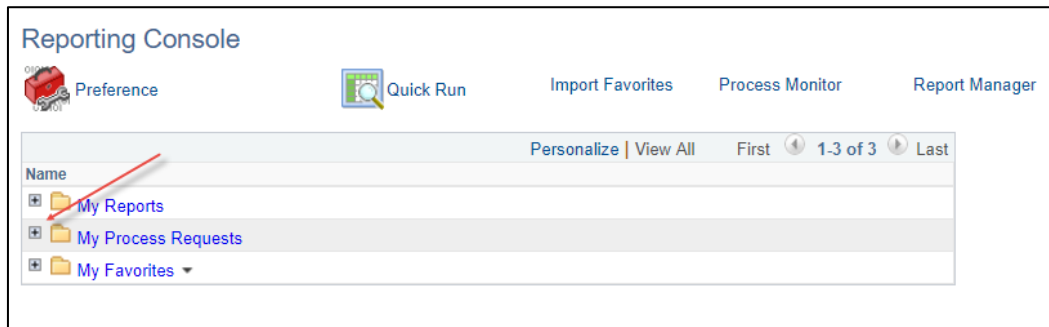
2. Review the status of the report in in the Run Status column of the Process List.



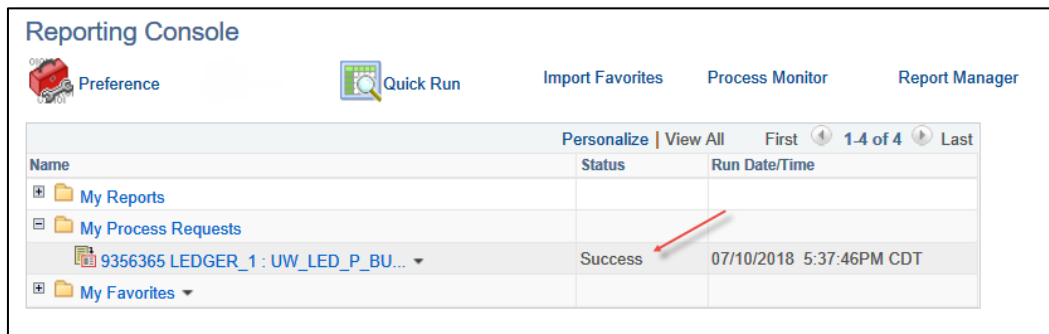
My Process Requests Folder

This folder displays all the process requests the user has access to monitor with the current status. This is the same list of processes the user would see in the Process Monitor for their user ID; however, you cannot edit the process request from this folder. Use the link for Process Monitor to edit your data.

1. In the Reporting Console click on the Plus icon to open the My Process Requests folder.



2. The folder will open to reveal a list of the processes you've run. The status of each process is listed in the Status column.



- Click on the down arrow link provided to the right of the specific process name to view the process details.

The screenshot shows the Reporting Console interface. At the top, there are navigation links: Preference, Quick Run, Import Favorites, Process Monitor, and Report Manager. Below these is a table with columns for Name, Status, and Run Date/Time. The table contains several entries, including folders like 'My Reports', 'My Process Requests', and 'My Favorites'. One entry, '9356365 LEDGER_1 : UW_LED_P_BU...', is highlighted, and a red arrow points to a 'View' button located to its right.

Name	Status	Run Date/Time
My Reports		
My Process Requests		
9356365 LEDGER_1 : UW_LED_P_BU...	Success	07/10/2018 5:37:46PM CDT
My Favorites		

The screenshot shows the 'View Process Instance' dialog box. It displays detailed information about a process instance, including its name, instance ID, type, and status. The dialog is organized into sections: Process, Run, Date/Time, and Actions.

Process	
Instance	9356365
Type	nVision Report
Name	NVSRUN
Description	nVision Report
Run Status	Success
Distribution Status	Posted

Run	
Run Control ID	
Location	Server
Server	SFSNT1
Recurrence	

Date/Time	
Request Created On	07/10/2018 5:38:18PM CDT
Run Anytime After	07/10/2018 5:37:46PM CDT
Began Process At	07/10/2018 5:41:50PM CDT
Ended Process At	07/10/2018 5:41:56PM CDT

Actions	
Parameters	Transfer
Message Log	
Batch Timings	
View Log/Trace	

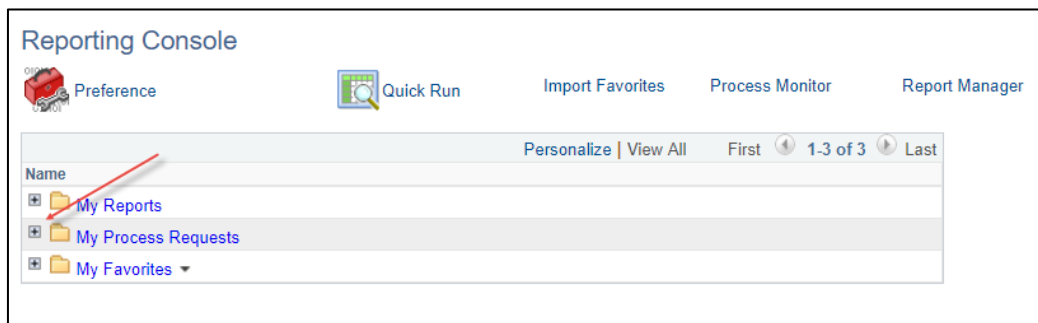
Additional options on the right side of the dialog include: Hold Request, Queue Request, Cancel Request, Delete Request, and Restart Request.

At the bottom left, there is a 'Return' link.

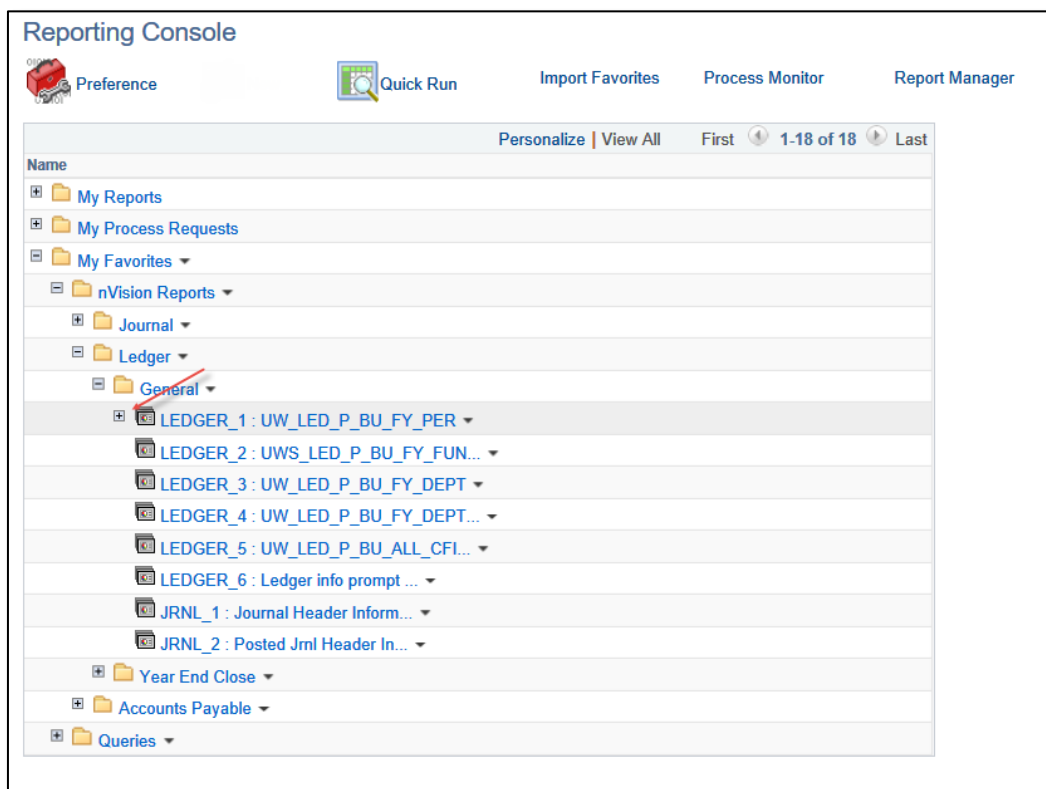
My Favorites Folder

Details about the process requests can also be found with the report's Process Bookmark under the My Favorites folders. As with the My Process Requests, you cannot edit the process request from this folder. Use the link for Process Monitor to edit your data.

1. In the Reporting Console click on the Plus icon to open the My Favorites folder.



2. Open the sub-folders to the one that contains the report you just ran. A Plus icon will show next to any reports that have Process Requests associated with them. Click on the Plus icon to show the Process Requests.



- The process status is located in the Status column. Click on the down arrow link provided to the right of the specific process name to view the process details.

The screenshot displays the Reporting Console interface. At the top, there are navigation links: Preference, Quick Run, Import Favorites, Process Monitor, and Report Manager. Below these is a table with columns for Name, Status, and Run Date/Time. A red arrow points to a 'View' link in the Status column of a row with the name '9356365 LEDGER_1 : UW_LED_P_BU...'. An inset window titled 'View Process Instance' is overlaid on the bottom right, showing details for the selected process instance.

Name	Status	Run Date/Time
My Reports		
My Process Requests		
My Favorites		
nVision Reports		
Journal		
Ledger		
General		
LEDGER_1 : UW_LED_P_BU_FY_PER		
9356365 LEDGER_1 : UW_LED_P_BU...	Success	07/10/2018 5:37:46PM CDT
LEDGER_2 : UWS_LED_P_BU_FY_FUN...		
LEDGER_3 : UW_LED_P_BU_FY_DEPT		
LEDGER_4 : UW_LED_P_BU_FY_DEPT...		
LEDGER_5 : UW_LED_P_BU_ALL_CFI...		

View Process Instance

Process

Instance	9356365	Type	nVision Report
Name	NVSRUN	Description	nVision Report
Run Status	Success	Distribution Status	Posted

Run | **Update Process**

Run Control ID		<input type="radio"/> Hold Request
Location	Server	<input type="radio"/> Queue Request
Server	SFSNT1	<input type="radio"/> Cancel Request
Recurrence		<input type="radio"/> Delete Request
		<input type="radio"/> Restart Request

Date/Time | **Actions**

Request Created On	07/10/2018 5:38:18PM CDT	Parameters	Transfer
Run Anytime After	07/10/2018 5:37:46PM CDT	Message Log	
Began Process At	07/10/2018 5:41:50PM CDT	Batch Timings	
Ended Process At	07/10/2018 5:41:56PM CDT	View Log/Trace	

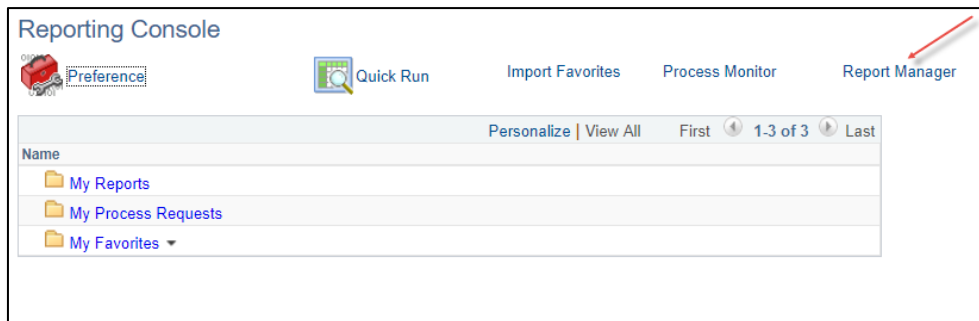
Return

Retrieving Reports

Peoplesoft provides two methods for reviewing reports – the Report Manager and the My Reports folder.

Report Manager

1. In the Reporting Console click on the Report Manager link at the top left of the page to open the Report Manager



- In the Report Manager click on the link associated with the report you ran to open the Report Index page.

List | Explorer | Administration | Archives

View Reports For

Folder Instance to Refresh

Name Created On Last 2 Days

Reports Personalize | Find | View All | First 1-11 of 11 Last

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Ledger Data	LEDGER DATA	UWSA nVision Repor	07/11/18 5:31PM	7163365	9356402
2 Ledger Data	LEDGER DATA	UWSA nVision Repor	07/11/18 4:35PM	7163364	9356401
3 Ledger Data	LEDGER DATA	UWSA nVision Repor	07/11/18 4:21PM	7163359	9356396
4 nVision Report Requests	NVISION REPORT REQUESTS	UWSA nVision Repor	07/11/18 3:52PM	7163358	9356395
5 Off Campus Projects	OFF CAMPUS PROJECTS	UWSA nVision Repor	07/11/18 11:35AM	7163345	9356380
6 ALL UNBILLED EXPENSES	ALL UNBILLED EXPENSES	UWSA nVision Repor	07/11/18 11:35AM	7163344	9356379
7 Total revenue on a project	TOTAL REVENUE ON A PROJECT	UWSA nVision Repor	07/11/18 11:32AM	7163343	9356378
8 UWGL_JOURNAL_LINE	UWGL_JOURNAL_LINE	UWSA nVision Repor	07/11/18 11:20AM	7163342	9356377
9 UWGL_JOURNAL_LINE	UWGL_JOURNAL_LINE	UWSA nVision Repor	07/11/18 11:11AM	7163341	9356376
10 UWGL_JOURNAL_LINE	UWGL_JOURNAL_LINE	UWSA nVision Repor	07/11/18 11:09AM	7163340	9356375
11 UW_LED_P_BU_FY_PER	UW_LED_P_BU_FY_PER	UWSA nVision Repor	07/10/18 5:41PM	7163330	9356365

Go back to Report Console

Save

List | Explorer | Administration | Archives

- Your report is shown in the File List section of the Report Index. Click on the report link to open your report

Report

Report ID 7163330 Process Instance 9356365 [Message Log](#)

Name NVSRUN Process Type nVision-Report

Run Status Success

UW_LED_P_BU_FY_PER

Distribution Details

Distribution Node SFPDEV_RPTNOD Expiration Date 10/08/2018

File List

Name	File Size (bytes)	Datetime Created
UW_LED_P_BU_FY_PER.xlsm	28,746	07/10/2018 5:41:56.993129PM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	00891354

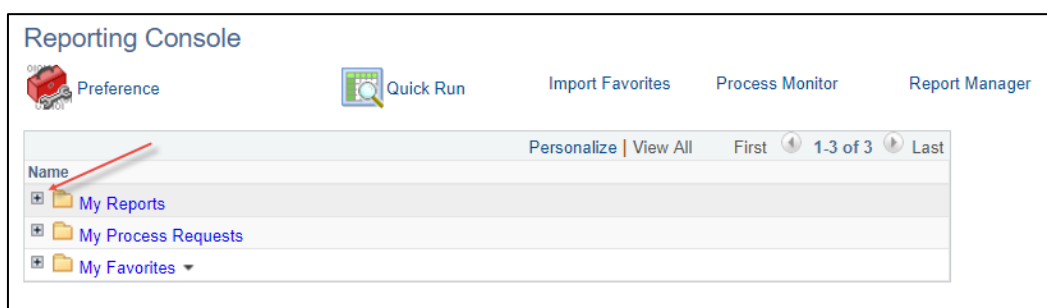
- Your report will open using the correct reporting tool.

Subtotal by Acctg Period		Subtotal by Fund		Subtotal by Department		Subtotal by Account				
Unit	Fund	Program	Dept	Acct	Class	Pri/Gr	Period	Total Amt	Year	
UWADM	150		010500	1921			1	9,746.76	2018	
UWADM	301		010500	1921			1	7,287.80	2018	
UWADM	150		051000	1921			1	2,620.00	2018	
UWADM	301		051000	1921			1	3,373.92	2018	
UWADM	150		052000	1921			1	1,473.02	2018	
UWADM	301		101000	1921			1	7,222.20	2018	
UWADM	301		265000	1921			1	9,027.28	2018	
UWADM	161		284000	1921		1610999	1	4,376.44	2018	
UWADM	128		286000	1921			1	1,391.18	2018	
UWADM	150		286000	1921			1	1,391.18	2018	
UWADM	301		286000	1921			1	6,299.98	2018	
UWADM	301		289000	1921			1	2,021.44	2018	
UWADM	301		423000	1921			1	16,601.63	2018	
UWADM	301		441000	1921			1	19,584.36	2018	
UWADM	150		451000	1921			1	1,488.48	2018	
UWADM	301		451000	1921			1	9,339.54	2018	
UWADM	128		457000	1921			1	2,944.16	2018	
UWADM	136		457000	1921			1	1,190.79	2018	
UWADM	150		457000	1921			1	940.22	2018	
UWADM	301		457000	1921			1	2,937.20	2018	
UWADM	301		281000	1921			1	5,564.72	2018	
UWADM	150		010100	1921			1	8,683.12	2018	
UWADM	301		010100	1921			1	8,734.08	2018	
UWADM	150		102000	1921			1	2,976.96	2018	
UWADM	301		285000	1921			1	2,911.36	2018	
UWADM	150		441000	1921			1	2,976.96	2018	
UWADM	133		989999	1921		1330001	1	2,798.96	2018	
UWADM	301		289000	1925			1	6.05	2018	
UWADM	150		051000	1925			1	3.08	2018	
UWADM	128		286000	1925			1	10.82	2018	
UWADM	150		286000	1925			1	6.68	2018	
UWADM	150		451000	1925			1	25.98	2018	
UWADM	128		457000	1925			1	37.48	2018	
UWADM	136		457000	1925			1	9.37	2018	
UWADM	301		457000	1925			1	7.29	2018	
UWADM	150		010100	1925			1	20.30	2018	
UWADM	301		010100	1925			1	271.78	2018	
UWADM	150		010500	1925			1	58.47	2018	
UWADM	301		010500	1925			1	38.87	2018	

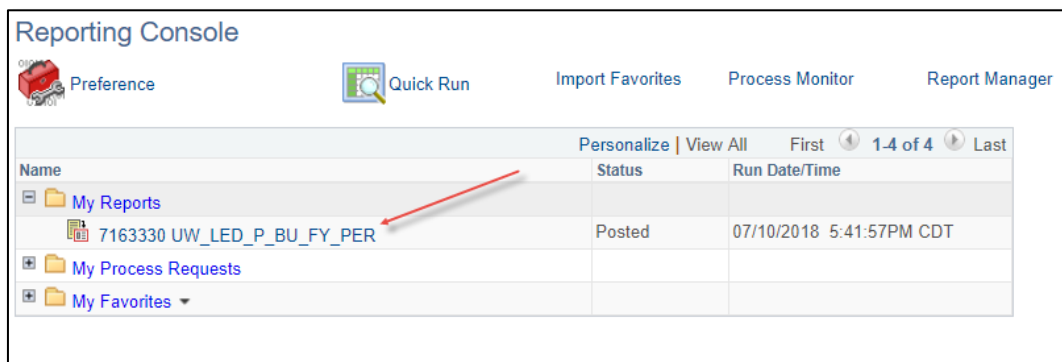
My Reports Folder

This folder is intended to alert users to newly published reports, like an E-mail inbox. Entries to this folder are always made by the system. The reports you have access to will display in chronological order and will include all the different types of reports you ran – Queries, BI Publisher and nVision reports.

- In the Reporting Console click on the Plus icon to open the My Reports Folder. If a report is posted to the report repository, the report name will provide a link to open the report.



- In the Reporting Console click on the Plus icon to open the My Reports Folder. If a report is posted to the report repository, the report name will provide a link to open the report.



6. Your report will open using the correct reporting tool.

Subtotal by Acctg Period		Subtotal by Fund		Subtotal by Department		Subtotal by Account				
Unit	Fund	Program	Dept	Acct	Class	Pri/Grt	Period	Total Amt	Year	
UWADM	150	1	010500	1921			1	9,746.76	2018	
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UWADM	301	1	289000	1921			1	2,021.44	2018	
UWADM	301	1	423000	1921			1	16,601.63	2018	
UWADM	301	1	441000	1921			1	19,584.36	2018	
UWADM	150	1	451000	1921			1	1,488.48	2018	
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UWADM	150	1	451000	1925			1	25.98	2018	
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UWADM	136	1	457000	1925			1	9.37	2018	
UWADM	301	1	457000	1925			1	7.29	2018	
UWADM	150	1	010100	1925			1	20.30	2018	
UWADM	301	1	010100	1925			1	271.78	2018	
UWADM	150	1	010500	1925			1	58.47	2018	
UWADM	301	1	010500	1925			1	38.87	2018	
UWADM	301	1	010500	1925			1		2018	

Revision History

Author	Version	Date	Description of Change
Chris Stephenson	1.0	7/12/2018	Initial Draft
Mike Niebanck	2.0	7/14/2018	Doc Review, see "Changes to Rep Console BPG" doc.