CASE
CASE WESTERN RESERVE UNIVERSITY

PeopleSoft 8.4 Quick Reference Guide

Running Reports

1. Log into the Reporting Database (www.case.edu/erp/report). Use your Case ID and password to sign in.

2. From the left-hand navigation menu, select **Case Reports**.

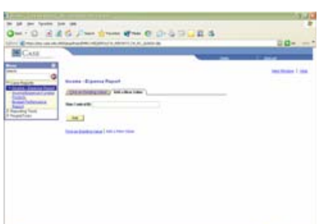
3. Select a report you would like to run. The choices include:

- Income – Expense Report
- Income – Expense Endowment Report
- Income/Expense – Funded Projects
- CIP Expense Statements
- Budget Performance Report
- FMS Vendor Cross Reference
- General Ledger Report
- Income Ledger Report

The Run Control ID - Find an Existing Value page appears.

4. Click the **Add a New Value** tab.

The Run Control ID – Add a New Value page appears.

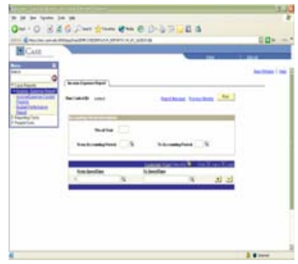


5. Enter a name for the Run Control.

When choosing a Run Control ID, name it something that will help you remember what report you're running. No spaces are permitted in the name. Each report type you run will require a different Run Control.

6. Click Add.

The Report page appears.



7. Select the parameters for your report under Accounting Period Information.

◊ From Fiscal Year, To Fiscal Year (20XX)

◊ From Accounting Period, To Accounting Period (corresponds to the months of the Budget Period at Case)

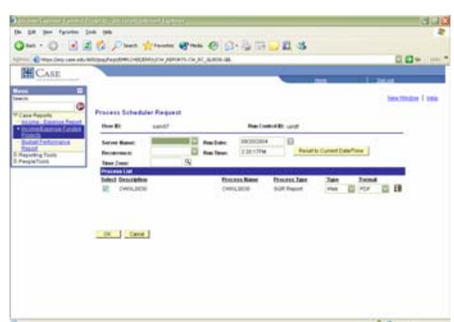
◊ Enter the SpeedType range you want the report for. You can add multiple SpeedTypes by clicking the +.

Please note the more SpeedTypes you add in each report request, the longer your processing time will be.

You must enter a SpeedType in each box, even if you need a single report.

8. Click Save in the lower left corner.

9. Click the '**Run**' button in the upper right hand corner.



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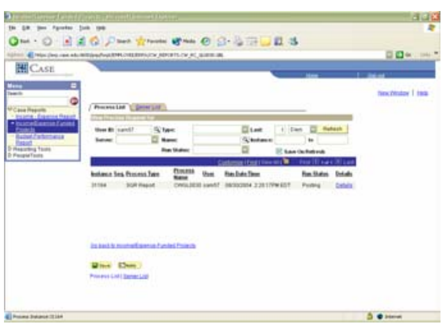
10. Click the **OK** button to go back to the Run Control Page.

Please note you should not have to change anything on the Process Scheduler Request page. The Output Type should be defaulted to 'Web' and the Output Format should be defaulted to 'PDF'.

11. Click on the **Process Monitor** button to view the status of your report and get the PDF file.

The Process Monitor page appears.



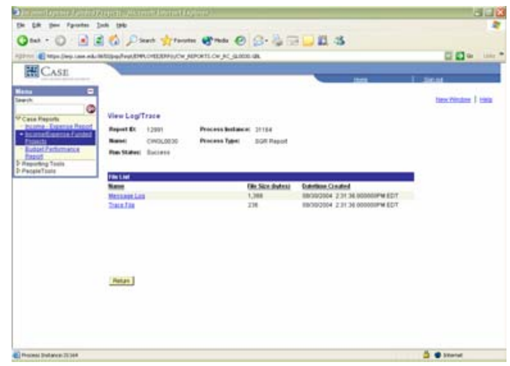
12. Click the '**Refresh**' button until your report has a Run Status of Success.

13. Click on the blue underlined hyperlink that says '**Details**'

The Process Details page appears

14. Click the blue underlined hyperlink '**View Log/Trace**' in the bottom right corner.

The View Log/Trace page appears.



15. A blue underlined hyperlink file will show. The file name will contain your report ID and end in '.PDF'

16. Click on the blue underlined hyperlink file name. Adobe will open with your report.

*If no report is created, please contact ERPsecurity to see if you have access to the SpeedType(s) you are using.