

2010

The University of New Orleans

PeopleSoft 9.0: Working with the List Page for Reports

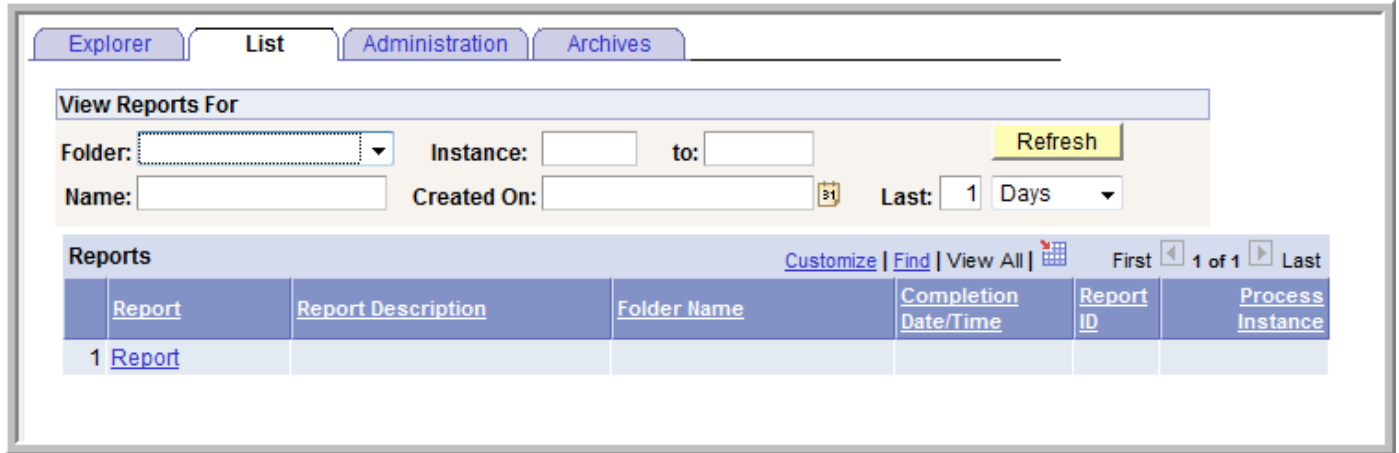


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List Page

The list page shows reports that have been processed and not purged. The list page allows users to view all of the reports that are in the system that the user is authorized to access. The reports will remain in the system for 90 days by default.



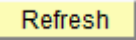
When using the list page the Reports are displayed by:

List Page Field ("Reports" Section)	Description
Report	Click the Report Name to view the Log or Message File on the Report Detail page.
Report Description	Detailed description of the report.
Folder Name	Displays the folder in which the report is located.
Completion Date/Time	Displays the Date and Time at which the Report was Created.
Report ID	Displays the Report ID that was automatically assigned when the Report was run.
Process Instance	Displays the Process Instance Number that was automatically assigned when the Report was run.

In the "View Report For" section, the user can define specific criteria to minimize the number of reports shown. Fields that are left blank will be bypassed.

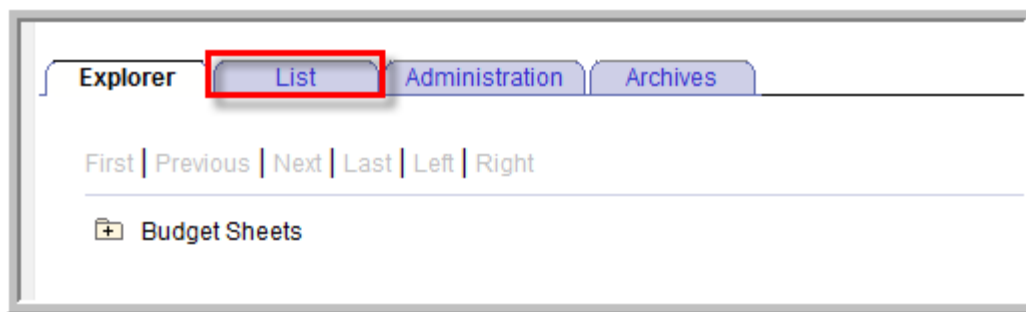
The list options are:

List Page Options ("View Report For" Section)	Description
Folder	Select a specific folder to list only Reports that are within the specified folder.
Instance, to	Enter a range of Process Instance..
Name	Enter the Name or part of a name to list only reports that match the Name entered
Created On	Use the Calendar, or enter a specific Date to list

Last	<p>only Reports that are created on that Date. Use to display only those Reports that were Created in the last number of Days, Hours, or Minutes.</p>
Refresh Button	
	<p>The refresh button must be selected after a user specifies criteria within the “view report for” section.</p>

See the Example below on how you can use the list tab to look up the current Fiscal Year’s nVision reports for a specified Department.

1. Navigate to **Reporting tools> Report Manager.**
2. Select the List tab



3. In the “View Reports For” modify the following fields:
 - 3a. **Name:** Enter the partial or full Department ID number to only match the number you enter. Example: **2400500000**

Wildcard Usage(Optional)

A wild card is a filter that allows users to filter a string of characters to track exact information that you need.

The List page support the% wildcard character matching one or more character to help you search for data in character fields.

Example: If you are searching for a music grant you can search by the first few characters of the Project ID. Example %MUSIC. The system will retrieve all the project IDs that matches one or more of the characters. **See figure below.**


The screenshot shows a web application interface with a search bar and a table of reports. The search bar has a 'Name' field containing '%MUSIC', which is highlighted with a red box. Below the search bar is a table with 7 rows of report data. A red arrow points from the search criteria to the first row of the table.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	4300650000-102XX-MUSIC6	Budget Sheets	05/18/10 11:32PM	1287615	1320701
2	4300650000-102XX-MUSIC6	Budget Sheets	05/18/10 11:32PM	1287615	1320701
3	4300650000-102XX-MUSIC5	Budget Sheets	05/18/10 11:32PM	1287614	1320701
4	4300650000-102XX-MUSIC4	Budget Sheets	05/18/10 11:32PM	1287613	1320701
5	4300650000-102XX-MUSIC3	Budget Sheets	05/18/10 11:32PM	1287612	1320701
6	4300650000-102XX-MUSIC1	Budget Sheets	05/18/10 11:32PM	1287610	1320701
7	4300650000-102XX-MUSIC2	Budget Sheets	05/18/10 11:32PM	1287611	1320701

3b. **Last:** Select the drop-down menu and change the field to Days. Use to display only those reports that were created in the last number of days.
 Example: 1 day

Note: Remember nVision Reports are ran every weekday. If you use this feature on a Monday, you will need to change this field to 3 days.

The screenshot shows a web interface with tabs for Explorer, List, Administration, and Archives. Below the tabs is a section titled 'View Reports For'. It contains several input fields: 'Folder:' (a dropdown menu), 'Instance:' (a text box), 'to:' (a text box), 'Name:' (a text box containing '24000050000'), 'Created On:' (a date picker), and 'Last:' (a dropdown menu set to '1 Days'). A yellow 'Refresh' button is located to the right of the 'Instance:' and 'to:' fields. A red box highlights the 'Name:' field and the 'Last:' dropdown. A red arrow points to the 'Last:' dropdown menu.

4. Select Refresh 
5. A list of links will appear based on the keyed Department ID or Project ID.
6. Select the desired Report Name. Steps 6a-6c are optional.
 - 6a. To filter a specific grant or project for the keyed Department ID select the (Optional) [Find](#) link on the grid.

The screenshot shows a table titled 'Reports' with columns: Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance. The first row is highlighted with a red box. The 'Find' link in the top right corner of the table is also highlighted with a red box.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
2400500000-103XX-LBOR0035NR00C	2400500000-103XX-LBOR0035NR00C	Budget Sheets	03/22/10 11:11PM	1094281	1284073
2400500000-142XX-324509101	2400500000-142XX-324509101	Budget Sheets	03/22/10 10:09PM	1093572	1284073
2400500000-130XX-PRIV0119NF00G	2400500000-130XX-PRIV0119NF00G	Budget Sheets	03/22/10 9:42PM	1093038	1284073
2400500000-125XX-LMIS0002NR00C	2400500000-125XX-LMIS0002NR00C	Budget Sheets	03/22/10 9:38PM	1092957	1284073

6b. Enter the partial or full Project or Grant ID in the Script Prompt window and select ok.

The screenshot shows a dialog box titled 'Explorer User Prompt'. It has a 'Script Prompt:' label and a text input field containing 'PF00C'. There are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box.

6c. Follow steps 6-8.

7. From the Report book select the Excel file.

Report

Report ID: 1094281 Process Instance: 1284073 [Message Log](#)
 Name: RPTBOOK Process Type: nVision-ReportBook
 Run Status: Success

2400500000-103XX-LBOR0035NR00C

Distribution Details

Distribution Node: FINPRD Expiration Date: 03/29/2010

File List

Name	File Size (bytes)	Datetime Created
DEPT(2400500000)-FUND103XX-PROJECTLBOR0035NR00C.xls	55,296	03/22/2010 11:11:59.000000PM PDT

8. The selected nVision report will appear.

Account	Descr	Preliminary Budget	Pre-Encumbrance	Encumbrance	Fund Balance, Revenue, Expenditure	Budget Balance Budget Deficit
EXPENDITURES & TRANSFERS						
		DR - Decrease			DR - Increase	
		CR - Increase			CR - Decrease	
	Personnel Services	0.00	0.00	0.00	0.00	0.00
	Employee Benefits	0.00	0.00	0.00	0.00	0.00
	Empl Benefit Recovery	0.00	0.00	0.00	0.00	0.00
	Travel	0.00	0.00	0.00	0.00	0.00