

**PeopleSoft**

**KUMC**

**PeopleSoft Financials 8.9 Upgrade  
Fundamentals Tips and Tricks**

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## OVERVIEW

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### Overview

PeopleSoft Financials is moving from version 7.5 to version 8.9, a web based system. While the user's interaction with the system has changed in some regard, the use of many of the modules remains the same. This manual contains the main function and feature changes of the new version of PeopleSoft Financials 8.9.



### **New operating environment**

PeopleSoft Financials 8.9 is a web based system. It is compatible with either Internet Explorer version 6 or version 7. After logging in to PeopleSoft, avoid the use of the browser's back and forward buttons since they may cause loss of data or inadvertent logout of the user. The focus of the user interaction should remain in the PeopleSoft window with the use of navigation icons and panel buttons. In addition, the user should sign out of PeopleSoft before closing the browser window.

### **New search features**

PeopleSoft has always allowed users to locate existing transactions through an Update/Display dialog box. In PeopleSoft Financials 8.9, searches are more flexible and search criteria can be saved for future use.

### **Changes in user interaction**

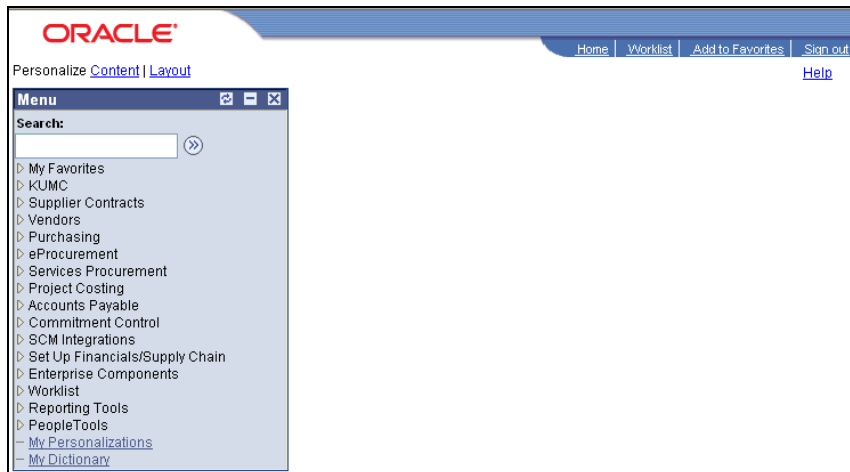
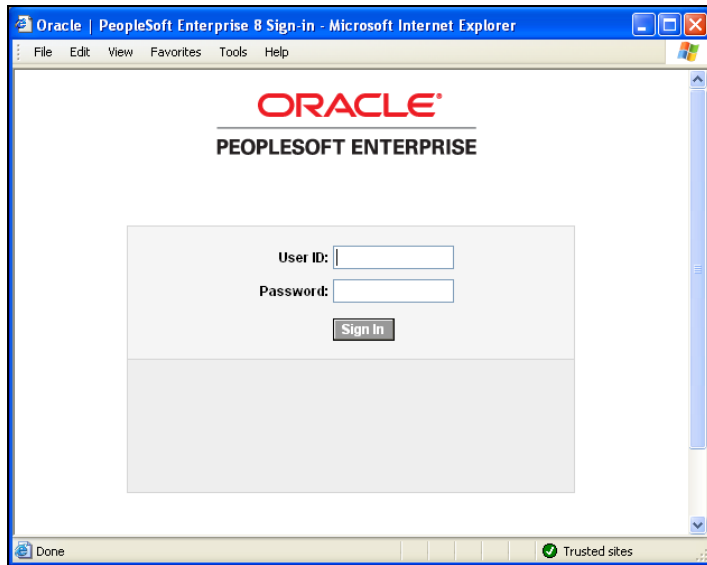
- There is no toolbar. As a result, the Save, Insert Row, and Run buttons appear on the panels. There is no  (cancel) button. When finished with a transaction, simply navigate away from the panel.  
There is no  (change window content) button for redisplaying the navigation icons. Use the [KU\\_PROCESSES](#) link instead.
- PeopleSoft Financials 8.9 does not display an hourglass while processing. Instead, the word "Processing" flashes in the upper right corner of the screen.
- The save button does not turn gray as an indication that the transaction has been saved. The word "Saved" appears briefly in the upper right corner of the screen.
- Working with multiple lines in a transaction has changed in two ways: adding and removing lines and viewing multiple lines.
- Query Manager is accessed from the main menu, under Reporting Tools.

### **Run controls and running reports**

Run controls are still used in PeopleSoft Financials 8.9, and they provide the same information to the system as in Financials 7.5: what data to include in a report and how to run it. You might need to create new run controls after the upgrade. The rules for naming run controls have not changed - the name cannot contain spaces or special characters. All reports will be emailed as they were in Financials 7.5.

## LOGGING IN

### Navigation



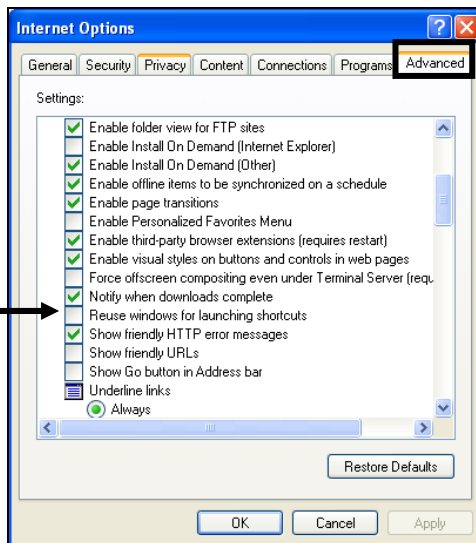
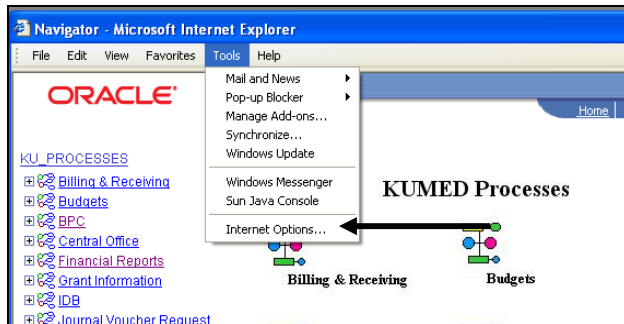
1. Double-click the icon on the desktop.
2. Using your network sign-on, enter your **User ID** and **Password**.
3. Click **Sign in**.

PeopleSoft displays the main menu.

## BROWSER SETTINGS

The browser setting "Reuse windows for launching shortcuts" needs to be turned off under Internet Options. This is true whether you are using Internet Explorer version 6 or version 7.

### Browser Settings



1. Select the **Tools** Menu, then **Internet Options**.

2. Select the **Advanced** tab.

3. Scroll down to "Reuse windows for launching shortcuts."

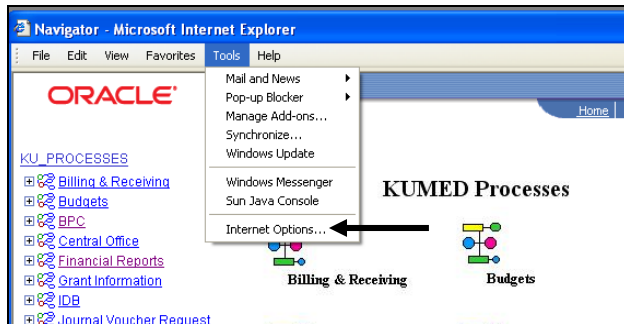
4. Uncheck the box for this option. If the box is already unchecked, no changes are needed.

5. Click  .

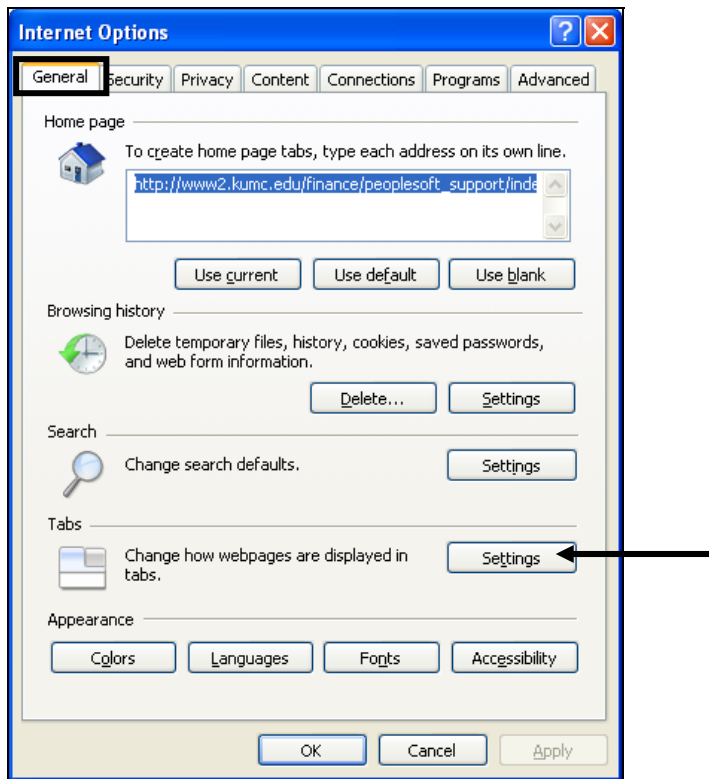
## BROWSER SETTINGS

If you are using Internet Explorer version 7 with tabbed browsing enabled, you must also set the "Open links from other programs in:" setting to either "A new tab in the current window" or "A new window".

### Browser settings for Internet Explorer 7



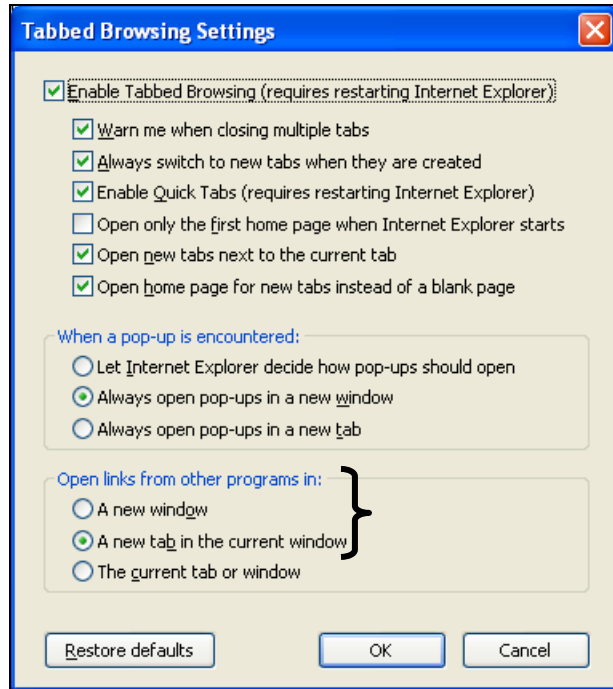
1. Select the **Tools** Menu, then **Internet Options**.




2. On the **General** tab, click the **Settings** button.

## BROWSER SETTINGS

### Browser settings for Internet Explorer 7 (continued)



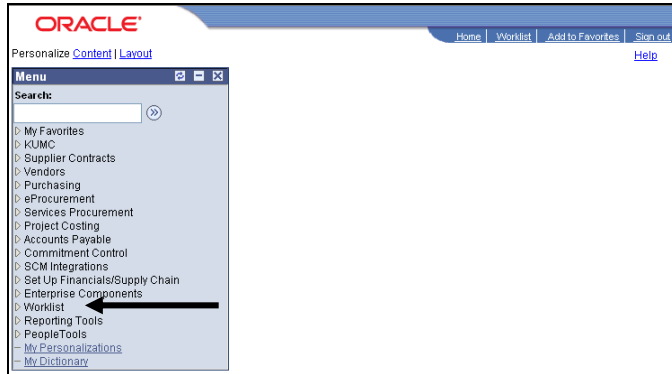
3. Set **Open links from other program in:** to either  
A new window  
OR  
A new tab in the current window

4. Click  twice.

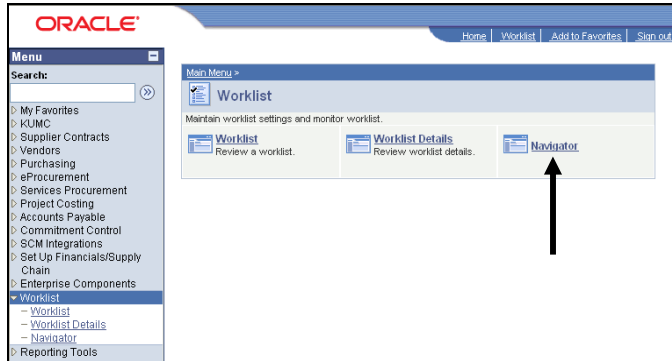
NOTE: Do not use tabbed browsing to open multiple PeopleSoft sessions including PeopleSoft HR.

# DISPLAYING NAVIGATION ICONS

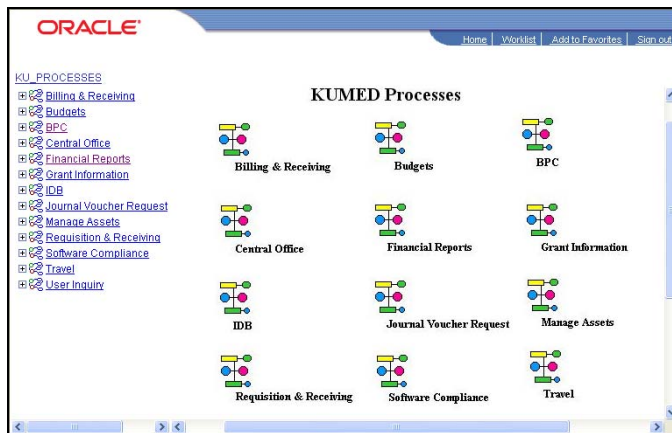
## Displaying Navigation Icons



1. Click the **Worklist** menu.



2. Click the **Navigator** link.



The navigation icons and tree structure are very similar to PeopleSoft Financials 7.5. The use of the icons is the same – single-click to access a process.

## SEARCH FEATURES

While we have always been able to locate existing transactions through an Update/Display dialog box, searches in PeopleSoft are now more flexible, and search criteria can be saved for future use.

### Using Criteria Operators

**Travel Expense - Personal**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value   Add a New Value

SetID: = KUMED

Travel ID: begins with

Interface Status: =

Entry Status: =

Approval Status: =

Name 1: begins with

Vendor ID: begins with

Entered By: =

Case Sensitive

Search   Save Search Criteria

When performing name searches in PeopleSoft 7.5, the % was used as the wildcard character to broaden the search. In PeopleSoft 8.9, most of the searches have drop-down boxes which allow flexibility in search criteria.

Here's an example of a name search in Travel.

1. Click the **Name 1** operator drop-down arrow.
2. Choose *contains*.
3. In the **Name 1** field, enter the name to search for.
4. Click **Search**.

Travel ID: begins with

Interface Status: =

Entry Status: =

Approval Status: =

Name 1: contains Smith

Vendor ID: begins with

Entered By: begins with

Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

**Search Results**  
View All

SetID	Travel ID	Interface Status	Entry Status	Approval Status	Name 1	Vendor ID
KUMED	000058	Not Vchrd	Working On	Pnd Approv	Delia Smith West	00000201
KUMED	000050	Not Vchrd	Working On	Pnd Approv	Elizabeth J. Smith	00000199
KUMED	000137	Vouchered	Done	Approved	Smith,Alan J	00000193
KUMED	000122	Vouchered	Done	Approved	Smith,Alan J	00000193

Note the search results displays transactions in which Smith appears in the middle, end and beginning of the traveler's name.

## SEARCH FEATURES

### Using Criteria Operators *(continued)*

Using the "IN" operator for the **SetID** or **Business Unit** criteria allows a search across both KUMED and RINST business units. This is helpful if you enter travel requests or requisitions for both business units. Be sure to narrow the search by including another criteria such as Entered By or Requester Name.

**Requisitions**  
Use the following search to look for an existing Requisition.

Find an Existing Value    Add a New Value

Business Unit:    =    KUMED

Requisition ID:    in    s with

Requisition Status:    =

Origin:    begins with

Requester:    begins with

Requester Name:    begins with

Hold From Further Processing   

Case Sensitive

Search    Clear    Basic Search    Save Search Criteria

Here's an example of searching for requisitions.

1. Click the **Business Unit** operator drop-down arrow.
2. Choose *IN*.
3. In the **Business Unit** field, enter "KUMED,RINST".
4. Enter another limiting criteria, such as Requester Name or Entered By (depending on criteria available).
5. Click Search.

Business Unit:    in    KUMED,RINST

Requisition ID:    begins with

Requisition Status:    =

Origin:    begins with

Requester:    begins with

Requester Name:    begins with    lwanna

Hold From Further Processing   

Case Sensitive

Search    Clear    Basic Search    Save Search Criteria

**Search Results**  
View All    First 1-3 of

Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From Further
KUMED	4000137378	Open	ONL	PSTRN02	lwanna.Learn	N
KUMED	4000137377	Pending	ONL	PSTRN02	lwanna.Learn	N
RINST	0000014727	Pending	ONL	PSTRN02	lwanna.Learn	N

Note that requisitions from both business units appear in the list.

# SEARCH FEATURES

## Saving Search Criteria

Business Unit: in KUMED,RINST

Requisition ID: begins with

Requisition Status: =


Origin: begins with

Requester: begins with

Requester Name: begins with lwanna

Hold From Further Processing

Case Sensitive

Search Clear Basic Search  Save Search Criteria ←

**Search Results**  
View All First 1-3 of

Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From Further
KUMED	4000137378	Open	ONL	PSTRN02	lwanna.Learn	N
KUMED	4000137377	Pending	ONL	PSTRN02	lwanna.Learn	N
RINST	0000014727	Pending	ONL	PSTRN02	lwanna.Learn	N

**Save Search As**

Name the search and then click Save.

Name of Search: ←

The saved search will contain these values:

Business Unit: in KUMED,RINST

Requisition ID: begins with


Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with lwanna

Hold From Further Processing

 Save [Return to Advanced Search](#)

**Save Search As**

Search saved as Both Units.

[Return to Advanced Search](#)

1. To save the search for future use, click [Save Search Criteria](#) .

2. Enter a name for the search.

3. Click  Save .

4. A confirmation of the save appears.

## SEARCH FEATURES

Once you have saved a search, you can use it again and again. An additional drop-down box appears at the top of the search criteria page. Simply choose the search you want to use and PeopleSoft automatically retrieves the results.

### Using a Saved Search

**Requisitions**  
Use the following search to look for an existing Requisition.

Find an Existing Value    Add a New Value

Use Saved Search: ▼

Business Unit: Both Units  
KUMED only

Requisition ID: begins with ▼

Requisition Status: = ▼  ▼

Origin: begins with ▼

Requester: begins with ▼

Requester Name: begins with ▼

Hold From Further Processing

Case Sensitive

[Basic Search](#)  [Delete Saved Search](#)

Use Saved Search: Both Units ▼

Business Unit: in ▼

Requisition ID: begins with ▼

Requisition Status: = ▼  ▼

Origin: begins with ▼

Requester: begins with ▼

Requester Name: begins with ▼

Hold From Further Processing

Case Sensitive

[Basic Search](#)  [Delete Saved Search](#)

**Search Results** View All    First

Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From
<a href="#">KUMED</a>	<a href="#">4000137378</a>	<a href="#">Open</a>	<a href="#">ONL</a>	<a href="#">PSTRN02</a>	<a href="#">lwanna,Learn</a>	<a href="#">N</a>
<a href="#">KUMED</a>	<a href="#">4000137377</a>	<a href="#">Pending</a>	<a href="#">ONL</a>	<a href="#">PSTRN02</a>	<a href="#">lwanna,Learn</a>	<a href="#">N</a>
<a href="#">RINST</a>	<a href="#">0000014727</a>	<a href="#">Pending</a>	<a href="#">ONL</a>	<a href="#">PSTRN02</a>	<a href="#">lwanna,Learn</a>	<a href="#">N</a>

1. Navigate to the Find an Existing Value page for the module.
2. Click the **Use Saved Search** drop-down arrow.
3. Select the search to use.

4. PeopleSoft automatically returns the search results.

## CHANGES IN USER INTERACTION

### Button Differences

ORACLE

Home Worklist Add to Favorites Sign

KU\_PROCESSES

Header Info Line Info

Procurement Card -- Enter Purchases

Header Info

KUMED Trans Id: NEXT Entered Date: 08/12/2008 Service Code: 9999  
Entered By: Schroeder,Elizabeth

Header Details

\*Quick Card: 07-021 Arbuckle,Dan E

\*Purchase Date:   Credit Only

\*Purchased From:

Reconciliation Details

Transaction Reconciled

Credit Pending  
 Credit Resolved

Total Lines: 1 Total Charges: 0.00

Save Notify Previous tab Next tab

Header Info Line Info

Procurement Card -- Enter Purchases

Header Details

Trans #: NEXT Quick Card: 07-021 Purchase Date:  
Arbuckle,Dan E

Total Lines: 1 Total Charges: 0.00

Line Details

Find | View All First 1 of 1 Last





Line Number: 1  State Charges Approved  Charges Pre-Approved  Line Interfaced  
 Private Funds Required  Private Funds Received

Qty:  Unit of Measure:  Unit Price:  Total Price: 0.000

\*Item Purchased:  SC

\*SpeedType:  \*Account:  \*State Contract Number:  or NONE

Since there is no toolbar, the save button appears on individual panels. The screen at the left shows the BPC panel.

Instead of Insert Row  and Delete Row  toolbar buttons, panels contain Add row  and Delete row  buttons.

The keystroke to add a row is now Alt-7.

The keystroke to delete a row is now Alt-8.

## CHANGES IN USER INTERACTION

### Ending a Transaction

ORACLE

Home | Worklist | Add to Favorites | Sign out

[KU\\_PROCESSES](#) ←

[Billing & Receiving](#) [New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

[Budgets](#)

[BPC](#)

[New BPC Entry or Credit Entry](#)

[Enter Transaction](#)

[BPC Adjustment](#)

[BPC Inquire](#)

[BPC Transaction Log Report](#)

[BPC Unreconciled Transactions](#)

[Central Office](#)

[Financial Reports](#)

[Grant Information](#)

[IDB](#)

[Journal Voucher Request](#)

[Manage Assets](#)

[Requisition & Receiving](#)

[Software Compliance](#)

[Travel](#)

[User Inquiry](#)

Header Info | Line Info

Procurement Card -- Enter Purchases

Header Details


Trans #:	NEXT	Quick Card:	07-021	Purchase Date:	
		Arbuckle, Dan E			
Total Lines:	1	Total Charges:	0.00		


Line Details [Find](#) | [View](#)

Line Number: 1  State Charges Approved  Charges Pre-Approved  Line  Private Funds Required  Private Funds Received

Qty:  Unit of Measure:  Unit Price:  Total Price:

Item Purchased:

There is no  (cancel) button. When finished with a transaction, simply navigate away from the panel.

There is no  (change window content) button for redisplaying the navigation icons. Use the [KU\\_PROCESSES](#) link instead.

### System Feedback

Navigator - Microsoft Internet Explorer

File Edit View Favorites Tools Help

ORACLE

Home | Worklist | Add to Favorites | Sign out

[KU\\_PROCESSES](#)

[Billing & Receiving](#)

[Budgets](#)

[BPC](#)

[Central Office](#)

[Financial Reports](#)

[Grant Information](#)

[IDB](#)

[Journal Voucher Request](#)

[Manage Assets](#)

[Requisition & Receiving](#)

[Software Compliance](#)

[Travel](#)

[Travel Processes](#)

[Travel Approval](#)

[Travel Approval Update/Inq](#)

[Travel Entry](#)

[Travel Entry Update/Inq](#)

[User Inquiry](#)

Travel ID: 00015501 Date Entered: 05/22/2008 Voucher Status: **Saved**

Travel Type: Out State Entered By: Wilson, Susan Gates Voucher ID:

Traveler Info

Vendor ID: 0000014484 Address Sequence: 1

Add Vndr Field, Thomas R Prime Dept: 08101

2009 W. 42nd Ave. Kansas City, KS

State Help 66103 Vendor Suffix: 00

Travel Dates

Day Trips Only Chg Dates

Departure Date: 05/29/2008 Return Date: 06/02/2008

Departure Time: 8:30AM Return Time: 10:30PM

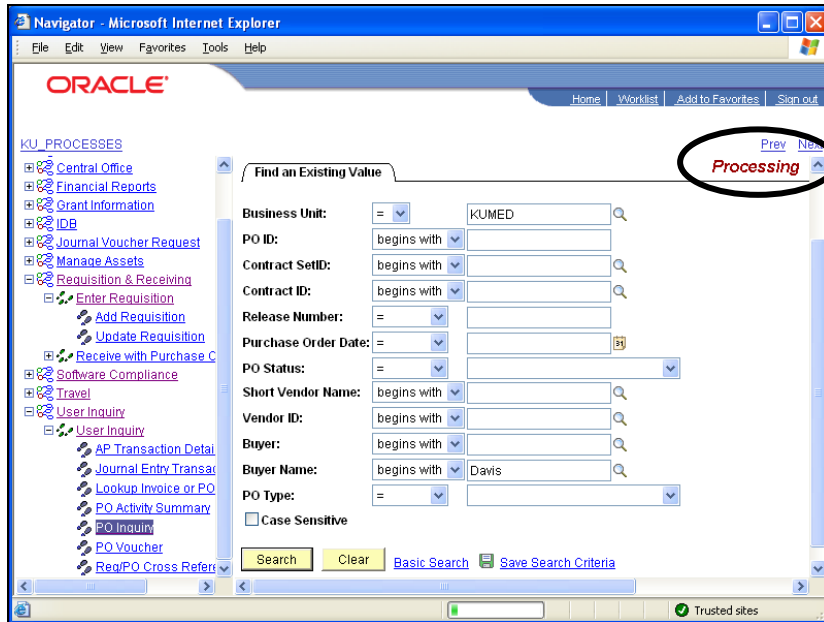
Air Travel Seminar Print Request Print Voucher

Save Return to Search Previous in List Next in List

The save button does not turn gray as an indication that the transaction has been saved. The word "Saved" appears briefly in the upper right corner of the screen.

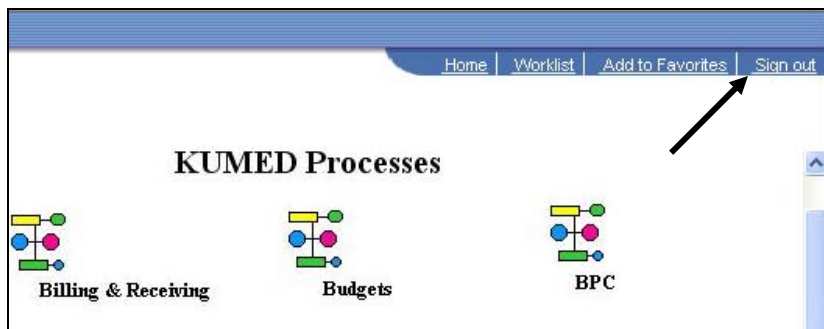
## CHANGES IN USER INTERACTION

### System Feedback (continued)



PeopleSoft Financials 8.9 does not display an hourglass while processing. Instead, the word "Processing" flashes in the upper right corner of the screen.

### Signing Out



When finished using PeopleSoft Financials 8.9, click the **Sign out** link before closing the browser window.

## CHANGES IN USER INTERACTION

### Working with Multiple Lines

Header Info Line Info

Procurement Card -- Enter Purchases

Header Details

Trans #: NEXT Quick Card: 08/11/2008

Arbuckle, Dan E

Total Lines: 4

Navigation Bar

Line Details Find | View All First 1 of 4 Last

Line Number: 1  State Charges Approved  Charges Pre-Approved  Line Interfaced  
 Private Funds Required  Private Funds Received

Qty: 1.0000 Unit of Measure: DOZ Unit Price: 10.68000 Total Price: 10.680

\*Item Purchased: Ballpoint pens, #PAP87111 SC

KUMED

\*SpeedType: APP60101 \*Account: 3710 \*State Contract Number: 10583 or NONE

Header Info Line Info

Procurement Card -- Enter Purchases

Header Details

Trans #: NEXT Quick Card: 07-021 Purchase Date: 08/11/2008

Arbuckle, Dan E

Total Lines: 4 Total Charges: 56.37

Show next row

Line Details Find | View All First 2 of 4 Last

Line Number: 2  State Charges Approved  Charges Pre-Approved  Line Interfaced  
 Private Funds Required  Private Funds Received

Qty: 2.0000 Unit of Measure: EA Unit Price: 9.29000 Total Price: 18.580

\*Item Purchased: Mechanical Pencil .7mm #PIL36104 SC


KUMED

\*SpeedType: APP60101 \*Account: 3710 \*State Contract Number: 10583 or NONE

When there are multiple rows in a transaction, use the navigation bar to move from line to line.

Find | View All First 1 of 4 Last

Note the transaction to the left has 4 lines, and the first line is currently displayed.

Clicking the  (Show next row) button displays the next line of the transaction.

## CHANGES IN USER INTERACTION

### Working with Multiple Lines (continued)

Header Info Line Info

Procurement Card -- Enter Purchases

Header Details

Trans #: NEXT	Quick Card: 07-021	Purchase Date:
Arbuckle, Dan E		
Total Lines: 4	Total Charges: 56.37	

**View All link**

Line Details Find | View All First 1 of 4 Last

Line Number: 1  State Charges Approved  Charges Pre-Approved  Line Interfaced  
 Private Funds Required  Private Funds Received

Qty: 1.0000 Unit of Measure: DOZ Unit Price: 10.68000 Total Price: 10.680

'Item Purchased: Ballpoint pens, #PAP87111 SC  
KUMED

'SpeedType: APP60101 'Account: 3710 'State Contract Number: 10583 or NONE

Controller Stationery and Office Supplies

Line Details Find | View 1 First 1-4 of 4 Last

Line Number: 1  State Charges Approved  Charges Pre-Approved  Line Interfaced  
 Private Funds Required  Private Funds Received

Qty: 1.0000 Unit of Measure: DOZ Unit Price: 10.68000 Total Price: 10.680

'Item Purchased: Ballpoint pens, #PAP87111 SC  
KUMED

'SpeedType: APP60101 'Account: 3710 'State Contract Number: 10583 or NONE

Controller Stationery and Office Supplies

---

Line Number: 2  State Charges Approved  Charges Pre-Approved  Line Interfaced  
 Private Funds Required  Private Funds Received

Qty: 2.0000 Unit of Measure: EA Unit Price: 9.29000 Total Price: 18.580

'Item Purchased: Mechanical Pencil .7mm #PIL36104 SC  
KUMED

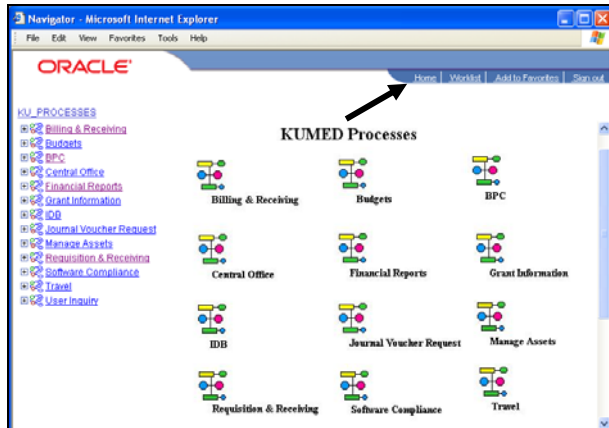
'SpeedType: APP60101 'Account: 3710 'State Contract Number: 10583 or NONE

To see all of the lines of the transaction at the same time, click the **View All** link.

Note that after scrolling down on the screen both lines 1 and 2 are currently visible.

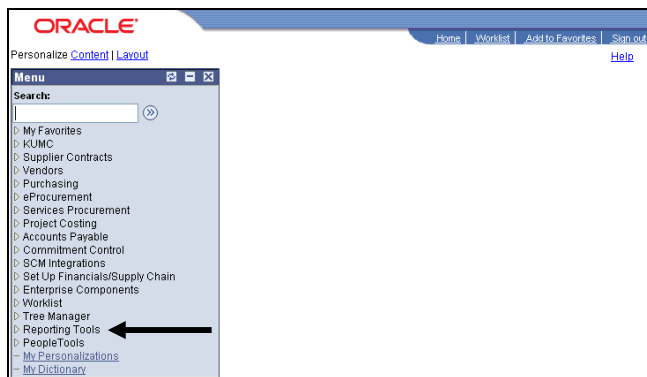
# CHANGES IN USER INTERACTION

## Query Manager



Query Manager is accessed from the main menu.

1. If the navigation icons are displayed, click the [Home](#) link.



2. Click **Reporting Tools**.




3. Click **Query Manager** link.


## CHANGES IN USER INTERACTION


### Query Manager (continued)

The screenshot shows the Oracle Query Manager interface. On the left is a navigation menu with categories like 'My Favorites', 'KUMC', 'Supplier Contracts', etc. The main area is titled 'Query Manager' and contains a search form. The search criteria dropdown is set to 'Query Name' and the search text is empty. There are 'Search' and 'Advanced Search' buttons.

 **Step 4** Can also change **Search By** criteria to search by description. Use % as the wildcard character to broaden the search.

The screenshot shows the Oracle Query Manager interface with search results. The search criteria dropdown is set to 'Query Name' and the search text is 'JPO\_PO\_LINE'. The search results table is displayed below.

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel
<input type="checkbox"/>	JPO_PO_LINE_INFO_AR_SGA	PO Inq by Speedtype & Date	Public			<a href="#">HTML</a>	<a href="#">Excel</a>
<input type="checkbox"/>	JPO_PO_LINE_INFO_DET_AR_SGA	PO Inq Speedtype & Date detls	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>

4. Enter the name of the query to run. 
5. Click **Search** .

6. Click [HTML](#) link to run the query and view the results in a browser window.  
OR  
Click [Excel](#) link to run the query and view the results Excel.

## RUN CONTROLS AND RUNNING REPORTS

Run controls are still used in PeopleSoft Financials 8.9, and they provide the same information to the system as in Financials 7.5: what data to include in a report and how to run it. You might need to create new run controls after the upgrade. Some of your FIN7.5 run controls might come forward after the upgrade.

### Checking for Existing Run Controls

ORACLE  
Home | Worklist | Add to Favorites | Sign out

KU\_PROCESSES [New Window](#) | [Help](#) |

**AM 90/91 Report**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**AM 90/91 Report**  
Enter any information you have and click Search. Leave fields blank

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

**AM 90/91 Report**  
Enter any information you have and click Search. Leave fields blank

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

**Search Results**  
View All First 1-2 of 2 Last

<a href="#">Run Control ID Language Code</a>
<a href="#">BPC Log English</a>
<a href="#">Reports English</a>

After choosing the report you want to run, PeopleSoft displays a set of pages - one for finding an existing run control, and one for adding a new run control.

To check for existing run controls, click [Search](#).

PeopleSoft displays the message “No matching values were found” if there are no existing run controls.

See the next page for steps to create a run control.

If there are existing run controls in the system, PeopleSoft displays a list of Search Results. Simply click the run control you want to use and PeopleSoft will continue to the criteria page for the report.

## RUN CONTROLS AND RUNNING REPORTS

Regardless of whether you have existing run controls in the system, you can always create a new one. However, since there is no way to delete a run control, you will want to limit the number of new ones you create.

### Creating a Run Control

#### AM 90/91 Report

Enter any information you have and click Search. Leave fields blank

Find an Existing Value

Add a New Value

Run Control ID: begins with

Case Sensitive

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

#### AM 90/91 Report

Find an Existing Value

Add a New Value

Run Control ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

**Step 2** Run control names cannot contain spaces or special characters.

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

2. Enter a name for the run control.

3. Click **Add**.

# RUN CONTROLS AND RUNNING REPORTS

## Running the Report

Run AM 90/91

Run Control ID: Reports [Report Manager](#) [Process Monitor](#) **Run**

**Run AM 90/91 Report** The Report Will Be E-Mailed To You

'Business Unit: KUMEC ?

'Report Date: 08/08/2008

Set Process Scheduler Request As Follows:  
Server Name = PSUNX Type = FILE  
Format = PDF  
See Process Monitor For Run Status

Sort Report By  
 SpeedType  
 MailDistrib Code  
 Department

Options  
 AM90 Only  Show Budgets For Revenue Speedtypes (Revenue Not Shown)  
 Open Commitments Only  
 Skip Mail Code 99999

Report Selection Options  
 Select SpeedTypes  
APP60201 From SpeedType:  
APP60201 To SpeedType:

Process Scheduler Request

User ID: LSCHROEDER Run Control ID: Reports

Server Name: PSUNX Run Date: 08/13/2008  
Recurrence: Recurrence Run Time: 4:19:44PM [Reset to Current Date/Time](#)  
Time Zone: Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Run User AM 90/91 Report	JGL038C	SQR Report	File	PDF

OK Cancel

Run AM 90/91

Run Control ID: Reports [Report Manager](#) [Process Monitor](#) **Run**

Process Instance:761961

**Run AM 90/91 Report** The Report Will Be E-Mailed To You

'Business Unit: KUMEC ?

'Report Date: 08/08/2008

Set Process Scheduler Request As Follows:  
Server Name = PSUNX Type = FILE  
Format = PDF  
See Process Monitor For Run Status

Sort Report By  
 SpeedType  
 MailDistrib Code  
 Department

Options  
 AM90 Only  Show Budgets For Revenue Speedtypes (Revenue Not Shown)  
 Open Commitments Only  
 Skip Mail Code 99999

Report Selection Options  
 Select SpeedTypes  
APP60201 From SpeedType:  
APP60201 To SpeedType:

1. After entering the criteria for the report, click **Run**.

2. No changes are needed on this page. The default settings are correct for any report that you run.

Server Name = PSUNX

3. Click **OK**.

PeopleSoft returns to the criteria page. You know that you have run the report because the **Process Instance** number appears below the Run button.

An optional step is to check the progress of the report through the Process Monitor. This is optional because the report will be emailed to you automatically when it is complete.

# RUN CONTROLS AND RUNNING REPORTS

## Process Monitor

Run AM 90/91

Run Control ID: Reports [Report Manager](#) [Process Monitor](#) [Run](#)

Process Instance: 761961

**Run AM 90/91 Report** The Report Will Be E-Mailed To You

'Business Unit:  ?

'Report Date:

Set Process Scheduler Request As Follows:

Server Name = PSUNX Type = FILE  
Format = PDF  
See Process Monitor For Run Status

Sort Report By

SpeedType  
 Mail/Distrib Code  
 Department

Options

AM90 Only  Show Budgets For Revenue SpeedTypes (Revenue Not Shown)  
 Open Commitments Only  
 Skip Mail Code 99999

Report Selection Options

Select SpeedTypes

From SpeedType:  
 To SpeedType:

Process List

View Process Request For

User ID:  Type:  Last:  Days [Refresh](#)

Server:  Name:  Instance:  to

Run Status:  Distribution Status:   Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) 1 of 1

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status
<input type="checkbox"/>	761961		SQR Report	JGL038C	LSCHROEDER	08/13/2008 4:19:44PM CDT	Processing	N/A

1. To check the progress of the report, click the **Process Monitor** link.

2. Note the **Run Status**.

Run Status	Description
Queued	Report is in line to be processed
Initiated	Report has started
Processing	Report is in process
Posting	Report is being finalized
Success	Report has been emailed

Click [Refresh](#) until Run Status displays *Success*. Expect to see the report in your email.

Click [KU PROCESSES](#) to return to the navigations icons, or click [Sign out](#) to end your PeopleSoft session.

## APPENDIX

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### Assistance

#### **Using PeopleSoft**

Questions regarding how to utilize PeopleSoft, how to navigate within PeopleSoft, and how to add or change your access to PeopleSoft modules should be directed to PeopleSoft Support at ext. **8-1121**.

The office is usually staffed from 7:30 AM to 4:30 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and we will return your call.

#### **Computer Problems**

Questions regarding PeopleSoft installation or network and printer connectivity issues should be directed to the IT Helpdesk at ext. **8-7995**.