

Running Reports in eUMB

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This document details the steps you will follow to run reports in eUMB. For the purpose of this document, we are using the Payroll Register Report as an example. Keep in mind that all eUMB reports are run following the same steps. In most cases you will be required to enter search criteria which may differ from report to report.

Reports are stored throughout eUMB under 'Report' menus. In most cases, reports will be located along the same breadcrumb you would use to view or update similar data in eUMB.

The following breadcrumbs will help you locate payroll and commitment accounting reports in eUMB:

Payroll-Related Reports:

Payable Status Report - used to identify approved or needs approval for a pay period:

[Home](#) > [Administer Workforce](#) > [Capture Time and Labor](#) > [Reports](#) > **Payable Status Report**

Payroll Register – used to verify employees' gross and net pay for each pay period before checks are processed:

[Home](#) > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 2](#) > **Payroll Register**

Cost Center Report - used to verify employees' gross and net pay for each pay period:

[Home](#) > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 1](#) > **Cost Center**

Check Register - used to verify employees' pay stubs/advices before checks are distributed:

[Home](#) > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 1](#) > **Check Register**

Leave Accrual Report - used to view employees' leave balances:

[Home](#) > [Compensate Employees](#) > [Administer Base Benefits](#) > [Report](#) > **Leave Accrual**

Commitment Accounting Reports:

Funding Summary Report - used to verify funding profiles by individual employee or by department:

[Home](#) > [Define Business Rules](#) > [Define Commit Accounting\(US\)](#) > [Report](#) > **Funding Summary Report**

Payroll Charges Detail Report –Used to view how salary-related expenses were allocated across specific account codes (as of the date you run the report):

[Home](#) > [Define Business Rules](#) > [Define Commit Accounting\(US\)](#) > [Report](#) > **UMB Payroll Charges Detail Rpt**

Retro Charges Detail Report –Used to view detail on only those expenses that were reallocated as the result of a retroactive EFP:

[Home](#) > [Define Business Rules](#) > [Define Commit Accounting\(US\)](#) > [Report](#) > **UMB Retro Charges Detail Rpt**

Summary of Basic Steps for Running a Report in eUMB:

- **Locate** the report in eUMB (using the breadcrumbs above)
- Select an available **Run Control ID** (new or existing) *
- Enter **Setup Criteria** (if applicable)
- Run the **Report**
- (Optional) **Monitor** the report's progress and observe its status
- Click on links to **view** the report in Adobe Acrobat Reader
- (Optional) **Print** the report from Adobe Acrobat Reader

* **REMINDER:** A Run Control ID is "available" when it is not being used in a report request that is still processing. If a Run Control ID is being used in a report request that has not completed to "Success" or "Error", then select or create another Run Control ID.

Step 1: Locate the report in eUMB.

Navigate to the report desired following the appropriate breadcrumb (see list on page 1). For our example here, we'll run the **Funding Summary Report**. Other reports may differ in setup, but the steps to run the report will be the same.

Step 2: Select an available Run Control ID (or Create a New Run Control ID)

The **Find an Existing Value** page will display. Create a new Run Control ID or Search for an existing, available Run Control ID. (See REMINDER above for definition of "available".)

If you are unsure whether or not you have created a Run Control ID – OR – you would like to select a Run Control ID created previously, click the **Search** button. This will retrieve a list of Run Control IDs that you have created. If the desired Run Control ID is there – and it is not being used in a report request that is still processing – select the ID you wish to use. If you wish to create a new Run Control ID, follow directions at the end of this document.

HINT: You must select a Run Control ID that is available. Run Control IDs can be re-used, but they can only be used to process one report request at a time. If a Run Control ID is re-used prior to completion of a report's processing, it will produce results for the last report request made. It will not produce results for the initial report request. (For more information, see the section "Recommended Options for Running Reports Concurrently" at the end of this document.)

Step 3: A report setup page will display (sample shown below).

(Remember that this handout displays the Payroll Register Report as the sample report. Other eUMB reports are run following the same general steps. In most cases you will be required to enter different search criteria.)

Home > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 2](#) > [Payroll Register](#)

Payroll Register

Run Control ID: Payroll_Register

[Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameter(s)

On-Cycle Run

Pay Run ID: 03-17

2/9-2/22

or

Off-Cycle Pay Calendar

Company:

Pay Group:

Pay End Date:

Process:

Page #: Thru:

Payroll Cycle

On-Cycle Off-Cycle Both

Save Add Update/Display

Step 4: Enter setup criteria (i.e., tell eUMB which records to select and how to sort them)

In our sample report, the **Pay Run ID** is used. After you enter the Pay Run ID, press [TAB]. The dates associated with the ID will display under the Pay Run ID.

Click the **Run** button.

Step 5: Confirm that the Type is 'Web' and the Format is 'PDF'. Click **OK**.

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Process Scheduler Request

User ID: BMERRICK Run Control ID: Payroll_Register

Server Name: [] Run Date: 07/20/2003 []

Recurrence: [] Run Time: 12:36:22PM

Time Zone: [] **Reset to Current Date/Time**

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	Payroll Register	PAY002	SQR Report	Web	PDF

CAUTION!
When **RUNNING REPORTS** make sure that...
• Type = Web
• Format = PDF
To **PRINT REPORTS**, run the report, then view and print from **Adobe Acrobat Reader**.

OK **Cancel**

Step 6: Click the [Process Monitor](#) link to monitor progress of your report.

Home > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 2](#) > [Payroll Register](#)

Payroll Register

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

Process Instance:1455

HINT: Report results are saved in eUMB for 20 calendar days! Once your report is submitted, you can do other work in eUMB or elsewhere. You can even log out of eUMB. When you return, log back in to eUMB, navigate to the Process Monitor page (**Home > PeopleTools > Process Monitor > Inquire > Process Requests**). In the Last: box, enter the correct number of days since you last logged in. Click the **Refresh** button and continue, beginning with Step 7.

Step 7: Observe the Run Status column.

As your report is processed by eUMB, it will display a new Report Status (Queued, Posting, Success, Error, etc.).

To check Run Status, click the **Refresh** button. When the Run Status displays **“Success”**, you may view your report.

Notice that the breadcrumb changed to the Process Monitor menu. You are no longer on the Payroll Register Report breadcrumb.

NOTE: IF the Run Status displays “Error”, there was a problem running your report. Call the ASC Help Desk at 6-HELP (410-706-4357).

Step 8: View your report by taking the following actions:

Once the Run Status displays **“Success”**, click the [Details](#) link. The Process Detail page displays:

- Click the [View Log/Trace](#) link.

- The PeopleSoft Report/Log Viewer page will display.

Report/Log Viewer

Instance:	1359	Type:	SQR Report
Name:	PAY002	Run Cntl ID:	Pay-Reg-Bz
Status:	Success	Submitted By:	BMERRICK
Server:	PSUNX	Recurrence:	

[Payroll Register](#)

Name	Size	CreationDate
Message Log	1177 bytes	2003-02-24 17:23:01
Trace File	653 bytes	2003-02-24 17:22:55
pay002_1359.PDF	927220 bytes	2003-02-24 17:23:01

- Click on the **.PDF link** in the lower left corner. (The file name will end in .PDF): This action will launch Adobe Acrobat Reader. Your report will display in Adobe Acrobat Reader.
- View and/or print your report from Adobe Acrobat Reader.

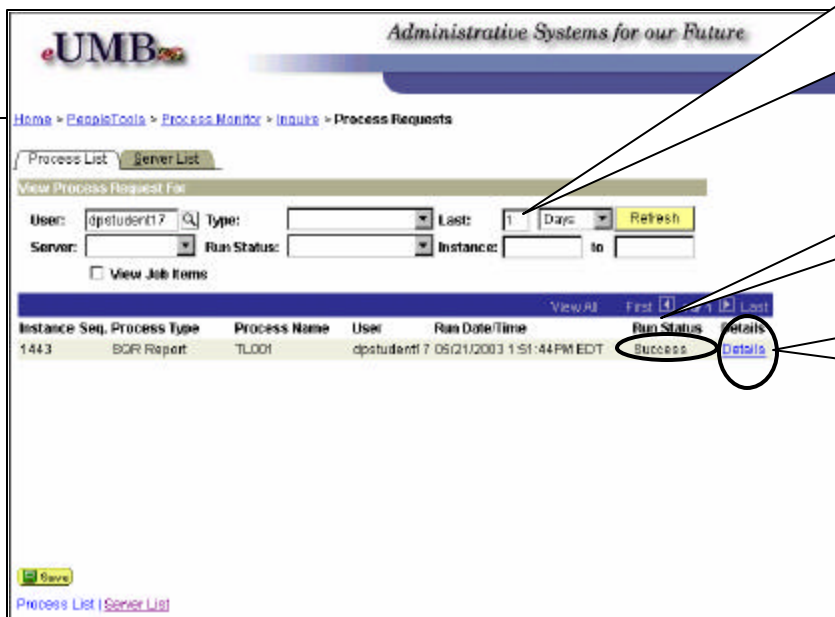
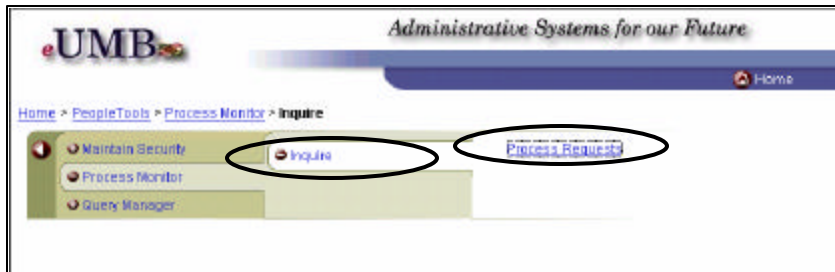
Opening/Viewing/Printing a Report

After you have run a report, you may wish to do other things and return to check on its progress. Or, you may wish to return to it and view/print at a later time. You can use the Process Monitor to:

- 1) check the status (initiated, processing, success) of your report after you have run the report
- 2) view and/or print a report that you have run within the last 20 days

Navigate to the **Process Requests** page along the following breadcrumb. Once there, view or print your report by referring to **Step 8** (earlier in this handout).

[Home](#) > [PeopleTools](#) > [Process Monitor](#) > [Inquire](#) > [Process Requests](#)



1. Report results are saved in eUMB for 20 calendar days.

To view a report you ran up to 20 days ago, change to the correct number of days and click the Refresh button. eUMB will display a list of all the reports you ran within the requested timeframe.

2. When Run Status changes to Success, it's time to view your report.

3. Click the [Details](#) link to open the report, view details and/or print results. (For more information, refer to **Step 8** in this handout.)

What is a Run Control ID? (...and Why Should I Care?)

From a user's perspective, the Run Control ID is a tool used to save a report's default settings – a *very useful* purpose! (Technical support teams would name even more uses, but for now we'll focus on what's of most interest to us as users of eUMB.)

Run Control IDs can be used to:

- Save basic settings and search criteria that you'll use when you run a report. This saves time on those reports that you run repeatedly
- Identify which *version* of a report you've run. This saves time and effort when viewing similar reports you've submitted with different search or sort criteria.

Now you know what a Run Control ID is. Let's create one.

How To Create a Run Control ID

If you have not created a Run Control ID for the report you desire, follow these steps:

- Navigate to the report using the appropriate breadcrumb.
- At the Find an Existing Value page, click the [Add a New Value](#) link.

Home > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 2](#) > [Payroll Register](#)

Payroll Register

→ **Find an Existing Value**

Run Control ID:

Case Sensitive

→ [Search](#) [Clear](#) [Basic Search](#)

→ [Add a New Value](#)

- **Enter a name** for your Run Control ID (names cannot have spaces - see details on following page).

Home > [Compensate Employees](#) > [Manage Payroll Process \(US\)](#) > [Report 2](#) > [Payroll Register](#)

Payroll Register

Add a New Value

Run Control ID:

→ [Add](#)

[Find an Existing Value](#)

- Click [Add](#).
- If the report has a setup page, it will appear. (The Employee Funding Summary, Payroll Charges Detail and Retro Charges Detail Reports all have setup pages where you define search and sort criteria..)

TIPS FOR CREATING RUN CONTROL NAMES:

With a few restrictions, you can use any name for a Run Control ID. Here are a few suggestions and guidelines:

- **Name the Run Control ID for the report** you wish to run: PayrollChargesDetail or Cost_Center
- **Names for Run Control IDs CANNOT have spaces between words. Use dashes (-), underscores (_) or capital letters to separate words:** 'Cost-Center-Report' or 'Cost_Center_Report' or 'CostCenterReport'.
- **Number your Run Control IDs** if you regularly need to submit different versions of a report: PCD_1, PCD_2, PCD_3 or CostCenter1, CostCenter2, CostCenter3.
- **Plan to re-use your Run Control IDs:** Use 'Cost_Center' (no specific date) instead of 'Cost_Center_082004' (which designates a specific run date)
- **Choose names wisely and type carefully...**you cannot delete a Run Control ID!

SAMPLES:

SUSAN (user's name)

Funding_Summary_PayPeriod (brief description of report with selection criteria noted)

CheckRegister (different format - brief description using capital letters to divide words)

ROVER (names do not have to be related to eUMB; can be used to run any report)

Recommended Options for Running Reports Concurrently

As you already learned, Run Control IDs can only be used to process one report request at a time. If you have a need to run reports concurrently (one right after another), without waiting for the first report to complete processing, try one of the following recommended options:

1. Pick a different run control ID for each report you are submitting.
2. Create more than one Run Control ID for reports if you often need to submit more than one version of the report at a time. Example: Create EmplPrePrint_1, EmplPrePrint_2, EmplPrePrint_3, etc.)
3. Where applicable, submit one report for your entire department. When you open the report in Acrobat, choose to print only those pages that you need.

A Few Tips for Running Reports More Effectively

TIP #1: Avoid submitting duplicate reports!

If your report doesn't run as quickly as you'd hoped, DON'T submit another one! Wait for the first report to complete. Submitting a second, third (or tenth) report request merely slows the system even more. If you experience very slow system response when running a report, please contact the ASC Help Desk at 6-HELP (6-4357). (Your quick calls have often helped speed solutions and will continue to do so!)

TIP #2: Don't submit your report at the same time everyone else does.

If you know that many others on campus will be running the same report at the same time (such as the Cost Center Report during payroll processing weeks), consider waiting to submit your

report request. Your report will probably process more quickly and your frustration level will stay low! Remember, you can also submit a report just before you leave to go to a meeting, to lunch or home. Let the report run while you are out of the office and look at it when you return.

To view a report you ran up to 20 calendar days ago, navigate to Home > PeopleTools > Process Monitor > Inquire > Process Requests. Change the number of days in the 'Last' box to include the day on which you ran the report. Click the Refresh button. eUMB will display a list of all the reports you ran within the requested timeframe.