



# Running Reports User Procedure

Statewide Management, Accounting and Reporting Tool



## Running Reports



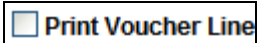
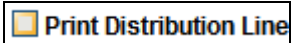
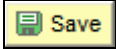
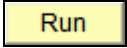

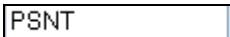
Step	Action
1.	<p>Begin by navigating to the report you want to run. For this simulation, go to the <b>Voucher Register</b> page.</p> <p>Click the <b>Accounts Payable</b> link.</p> <p><a href="#">Accounts Payable</a></p>
2.	<p>Click the <b>Reports</b> link.</p> <p><a href="#">Reports</a></p>
3.	<p>Click the <b>Vouchers</b> link.</p> <p><a href="#">Vouchers</a></p>
4.	<p>Click the <b>Voucher Register</b> link.</p> <p><a href="#">Voucher Register</a></p>
5.	<p>A <b>Run Control ID</b> is an identifier that, when paired with your <b>User ID</b>, uniquely identifies the process you are running. The <b>Run Control ID</b> defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values. When running a report in SMART, you can:</p> <ul style="list-style-type: none"><li>• Reuse an existing Run Control ID</li><li>• Create a new Run Control ID</li></ul>
6.	<p>Use the <b>Find Existing Value</b> page to search for a Run Control ID that you have already saved. Use the <b>Add a New Value</b> page to create a new Run Control ID. For this simulation, create a new Run Control ID.</p> <p>Click the <b>Add a New Value</b> tab.</p> <p><a href="#">Add a New Value</a></p>
7.	<p>Enter a short description for your new <b>Run Control ID</b>. The character limit for this field is 30 characters (letters and numbers). Creating a <b>Run Control ID</b> that is relevant to the process and is dated may help you remember it for future use.</p> <p>Click in the <b>Run Control ID</b> field.</p> <p><input type="text"/></p>
8.	<p>Enter the desired information into the <b>Run Control ID</b> field.</p> <p>For this simulation, enter a valid value e.g. "<b>Voucher_Register_20090722</b>".</p>
9.	<p>Click the <b>Add</b> button to create your new <b>Run Control ID</b>.</p> <p><a href="#">Add</a></p>



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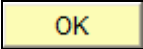


Step	Action
10.	<p>After adding or opening your <b>Run Control ID</b>, the <b>run control</b> page for the report displays. This page looks a little different for every report you choose to run. However, all run control pages use <b>parameters</b> and <b>criteria</b> to control how and what data displays for this Run Control ID. The parameters and criteria are the selections you make to define the content included in your report.</p> <p><b>Note:</b> You can only choose from the criteria or parameters included on the report page.</p>
11.	<p>The <b>run control</b> page for the <b>Voucher Register</b> report gives you the option to choose to run the report for a specific business unit, date range, and print options. Use the <b>page controls</b> to change the <b>parameters</b> for this <b>Run Control ID</b>.</p>
12.	<p>Notice the <b>Business Unit</b> field defaults based on your security.</p>
13.	<p>For this simulation, use the <b>date prompt button</b> to adjust the <b>From Date</b> to the beginning of the month of July.</p> <p>Click the <b>Choose a date</b> button.</p> <p><b>Quicktip!</b> You can also press <b>Alt+5</b> to choose a date.</p> 
14.	<p>Click the <b>1</b> link.</p> 
15.	<p>For this simulation, use the checkboxes to include the <b>Print Voucher Line</b> and <b>Print Distribution Line</b> options when running the <b>Run Control ID</b>.</p> <p>Click the <b>Print Voucher Line</b> checkbox.</p> 
16.	<p>Click the <b>Print Distribution Line</b> checkbox.</p> 
17.	<p>Click the <b>Save</b> button to save your <b>parameters</b> for the <b>Run Control ID</b>.</p> 
18.	<p>Click the <b>Run</b> button to open the <b>Process Scheduler Request</b> page.</p> 
19.	<p>Use the <b>Process Scheduler Request</b> page to select the report you want to run.</p>
20.	<p>Use the fields at the top of the <b>Process Scheduler Request</b> page to choose the server and timing of your report.</p>
21.	<p>For this simulation, choose the <b>PSNT</b> server to run your report.</p> <p>Click the <b>Server Name</b> drop-down list.</p> 
22.	<p>Click the <b>PSNT</b> item from the drop-down list.</p> 



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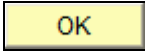
Step	Action
23.	<p>Make sure the checkbox is selected for the report you want to run. For this simulation, the <b>Voucher Register</b> checkbox is selected.</p> <p><b>Note:</b> Some reports may have more than one checkbox. This means you can run multiple versions, such as summary and detail, of the same report at one time.</p>
24.	<p>The <b>Description</b> field displays the name of the report you have chosen to run. Remember, in this simulation, you are running the <b>Voucher Register</b> report.</p>
25.	<p>The <b>Process Name</b> field displays the SMART name for the report. You can use this name to help find your report on the <b>Process Monitor</b> or in <b>Report Manager</b>.</p>
26.	<p>The <b>Process Type</b> field displays the type of process being run, such as Crystal, SQR, etc. This determines the server used to run the report.</p>
27.	<p>Use the <b>Type</b> field to select the type of output you want to generate for this job. Your four choices are "File", "Printer", "Email", or "Web." For this simulation, accept the default, "Web."</p>
28.	<p>Use the <b>Format</b> field to define the output format for the report. The values are dependent upon the <b>Process Type</b> you have selected. For this simulation, accept the default, "PDF."</p>
29.	<p>Click the <b>OK</b> button to start running your report.</p> 
30.	<p>Notice that SMART assigns a <b>Process Instance</b> number when you run a report. Use this number to track the status of your report on the <b>Process Monitor</b> or <b>Report Manager</b> page.</p>
31.	<p>Click the <b>Process Monitor</b> link to display the status of your report.</p> <p>Click the <b>Process Monitor</b> link.</p> 
32.	<p>Use the <b>Process List</b> page to see the status of your <b>Voucher Register</b> report. If several rows display, use the <b>Process Name</b> or <b>Process Instance Number</b> fields to find your report. For this simulation, there is only one request in the <b>Process List</b>.</p>
33.	<p>Some processes may take several minutes to run. Use the <b>Refresh</b> button to check the <b>Run Status</b> and <b>Distribution Status</b> of you process.</p> <p><b>Note:</b> Best practice is to allow SMART some time to process your request before refreshing.</p> <p>Click the <b>Refresh</b> button.</p> 



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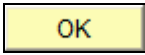
Step	Action
34.	<p>The process is finished running when the <b>Run Status</b> is "Success" and the <b>Distribution Status</b> is "Posted. Once your report has successfully run and posted, you can click the <b>Details</b> link for your <b>process instance number</b> to open the <b>Process Detail</b> page.</p> <p>Click the <b>Details</b> link. <a href="#">Details</a></p>
35.	<p>Use the <b>Process Detail</b> page to select the process you want to view.</p> <p>Click the <b>View Log/Trace</b> link. <a href="#">View Log/Trace</a></p>
36.	<p>Use the <b>View Log/Trace</b> page to open your report. Click the link with the correct <b>process name</b> and <b>process instance number</b> to open your report.</p>
37.	<p>You can also view the report using <b>Report Manager</b>. For this simulation, go to the <b>Report Manager</b> page to view the status of your report and open the output.</p> <p>Click the <b>Return</b> button. </p>
38.	<p>Click the <b>OK</b> button. </p>
39.	<p>Click the scrollbar for the menu pagelet.</p>
40.	<p>Click the <b>Reporting Tools</b> link. <a href="#">Reporting Tools</a></p>
41.	<p>Click the <b>Report Manager</b> link. <a href="#">Report Manager</a></p>
42.	<p><b>Report Manager</b> is like your personal "inbox" of reports you have run. The status of your report requests and access to the output is viewed from the <b>Administration</b> page of Report Manager.</p>
43.	<p>Click the <b>Administration</b> tab. <a href="#">Administration</a></p>
44.	<p>Use the <b>Administration</b> page to see the posting status of your reports, securely view report outputs, and review content detail messages about your reports.</p>
45.	<p>Go to the <b>Report Detail</b> page to view the output of your report.</p> <p>Click the <b>Details</b> link. <a href="#">Details</a></p>
46.	<p>Click the link with the correct <b>process name</b> and <b>process instance number</b> to open your report.</p> <p>Click the <b>APY1010- 8869.PDF</b> link. <a href="#">APY1010- 8869.PDF</a></p>



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Step	Action
47.	Your report opens in a new window. In the simulation, the report opens as a PDF because of our selection on the <b>Process Scheduler Request</b> page.
48.	To better view your report, you should expand the new window.  Click the <b>Maximize/Restore</b> button. 
49.	When you are finished reviewing your report, close the new window.  Click the <b>Close</b> button. 
50.	Click the <b>OK</b> button to go back to the <b>Administration</b> page of <b>Report Manager</b> . 
51.	<b>Excellent!</b> You have successfully completed the <b>Running Reports</b> topic. <b>End of Procedure.</b>