

Running ChartField Reports

Created on 2/19/2013 5:30:00 PM

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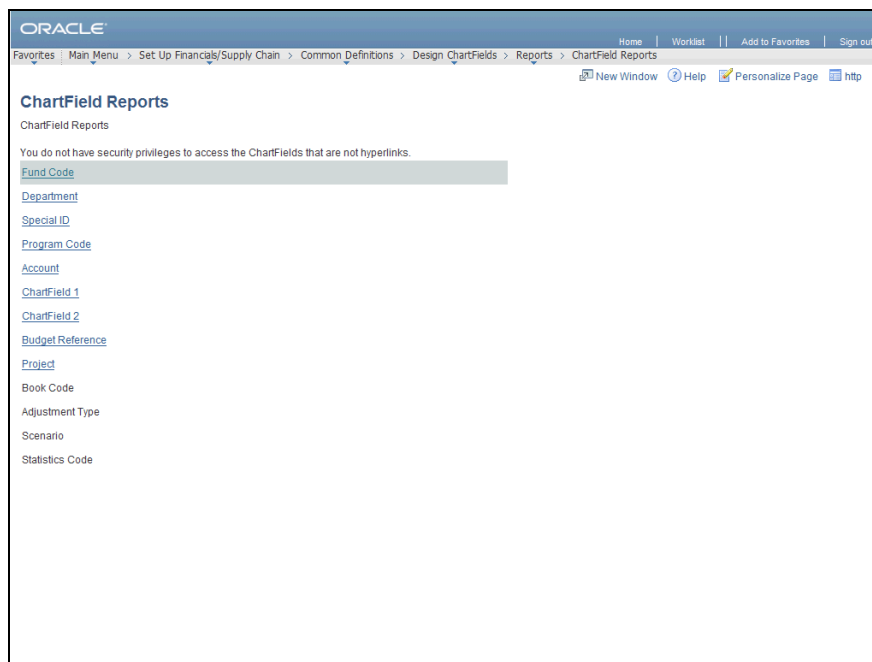



In Core-CT 9.1 reports are available to be run as Crystal reports (the form used in Core-CT 8.9) or as XML reports (Process Type, BI Publisher). Both processes appear on the Process List on the **Process Scheduler Request** page.

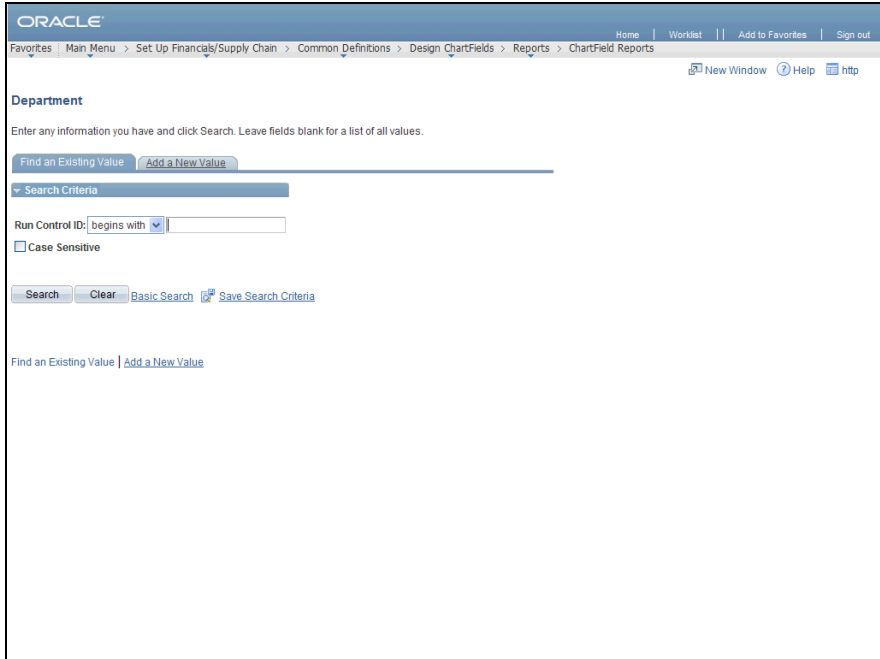
The pdf file for XML reports cannot be viewed from the **View Log/Trace** page. These reports can only be viewed using the **Report Manager** component.

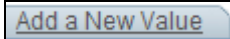
Procedure

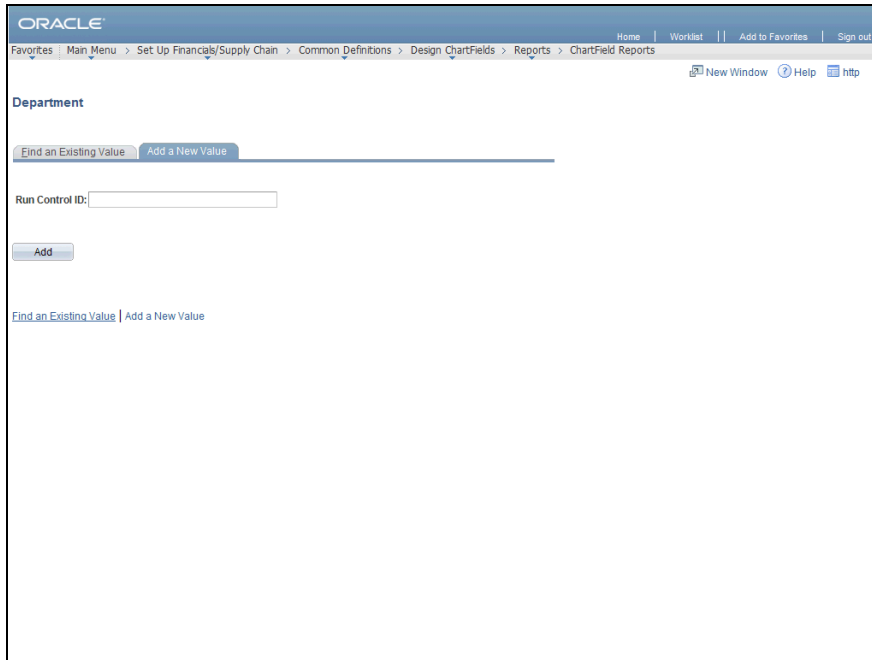
Navigation: Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Reports > ChartField Reports

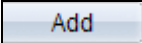


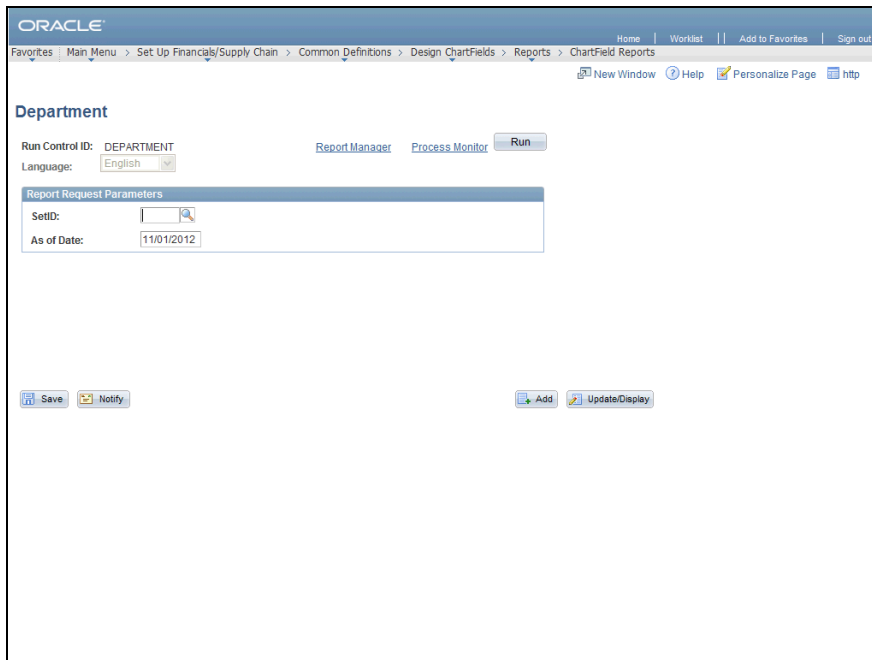
Step	Action
1.	Click the Department link. 

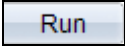


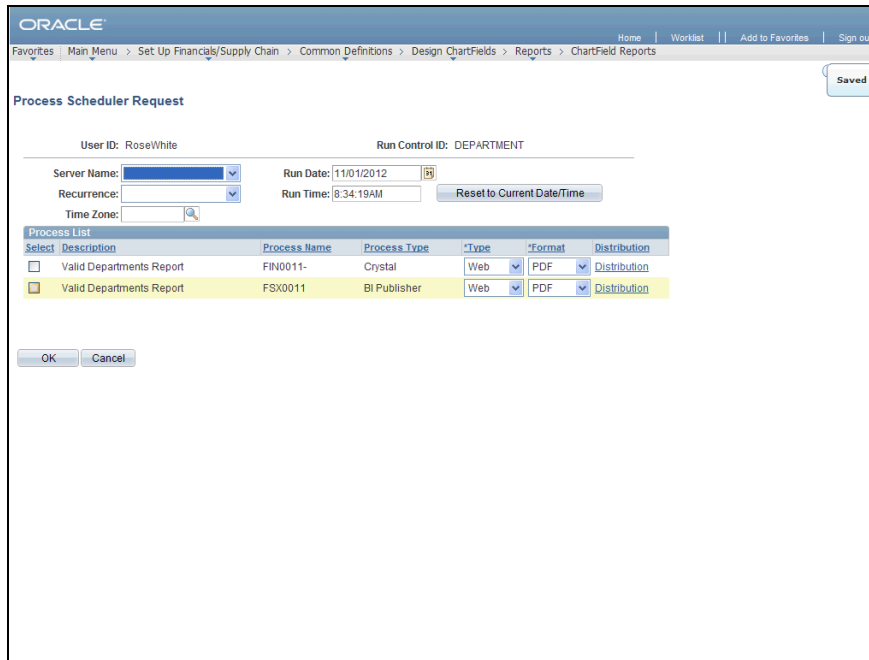
Step	Action
2.	Enter a Run Control ID if one does not exist for the report. A Run Control ID is an identification code that represents a set of selection criteria for a report or process. Once created, it can be used repeatedly for the report. Click the Add a New Value tab. 



Step	Action
3.	Enter DEPARTMENT into the Run Control ID field.
4.	Click the Add button. 



Step	Action
5.	Enter STATE into the SetID field.
6.	Click the Run button. 



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Process Scheduler Request

User ID: RoseWhite Run Control ID: DEPARTMENT


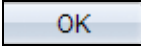
Server Name: [dropdown] Run Date: 11/01/2012 [calendar icon]

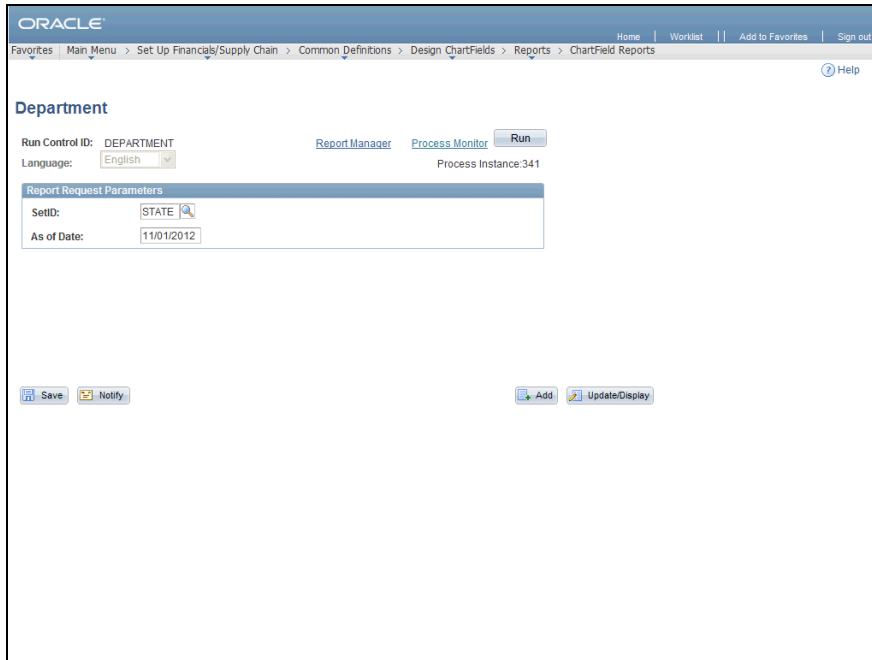
Recurrence: [dropdown] Run Time: 8:34:19AM [Reset to Current Date/Time]

Time Zone: [dropdown]

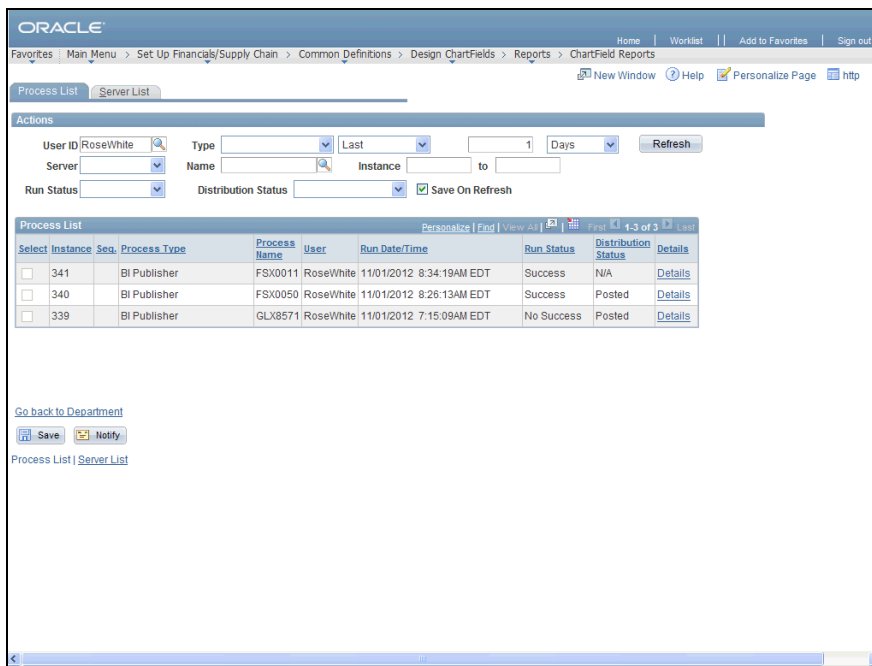
Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Valid Departments Report	FIN0011-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Valid Departments Report	FSX0011	BI Publisher	Web	PDF	Distribution

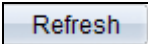
OK Cancel

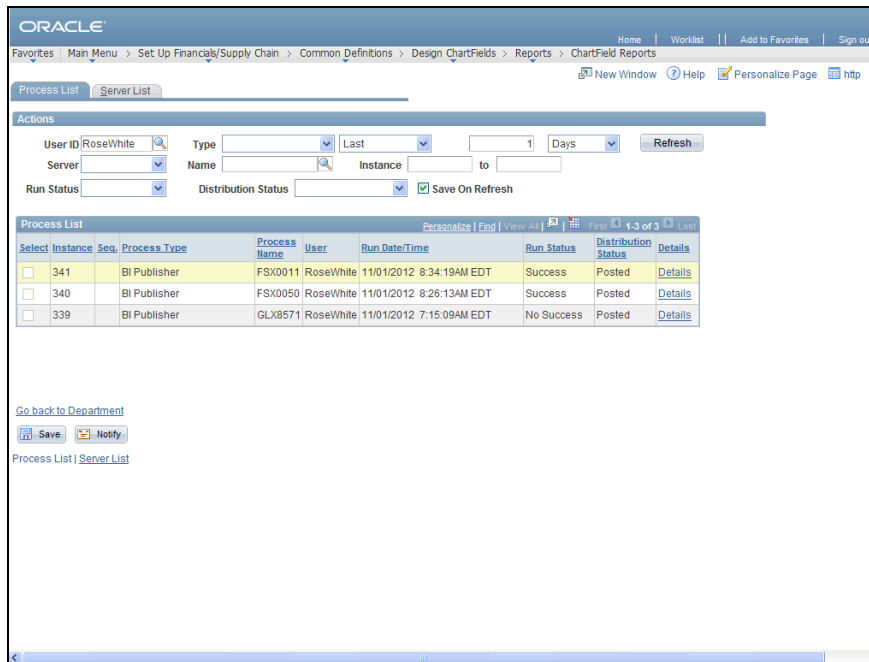
Step	Action
7.	In Core-CT 9.1 there is an option to produce the report through the BI publisher, as an XML report. Some reports will still have the option to publish reports through Crystal. Click the Select option. 
8.	Click the OK button. 




Step	Action
9.	<p>Confirm that the process has begun with the appearance of a Process Instance number. In this example it is 341.</p> <p>Click the Process Monitor link.</p> <p>Process Monitor</p>



Step	Action
10.	Click the Refresh button until the Run Status is Success and the Distribution Status is Posted. 



Step	Action
11.	Crystal reports are accessed by selecting Details link and navigating to the View Log/Trace page. The Chartfield Reports are distributed under Report Manager .
12.	Click the Details link. 

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Process Detail

Process	
Instance	341
Type	BI Publisher
Name	FSX0011
Description	Valid Departments Report
Run Status	Success
Distribution Status	Posted

Run	Update Process
Run Control ID DEPARTMENT	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSNT	<input type="radio"/> Cancel Request
Recurrence	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On 11/01/2012 8:34:25AM EDT	Parameters Transfer
Run Anytime After 11/01/2012 8:34:19AM EDT	Message Log View Locks
Began Process At 11/01/2012 8:34:33AM EDT	Batch Timings
Ended Process At 11/01/2012 8:35:01AM EDT	View Log/Trace

OK Cancel

Step	Action
13.	Click the View Log/Trace link. View Log/Trace

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View Log/Trace

Report	
Report ID:	5457040
Process Instance:	341
Name:	FSX0011
Process Type:	XML Publisher
Run Status:	Success

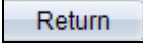
Valid Departments Report [Message Log](#)

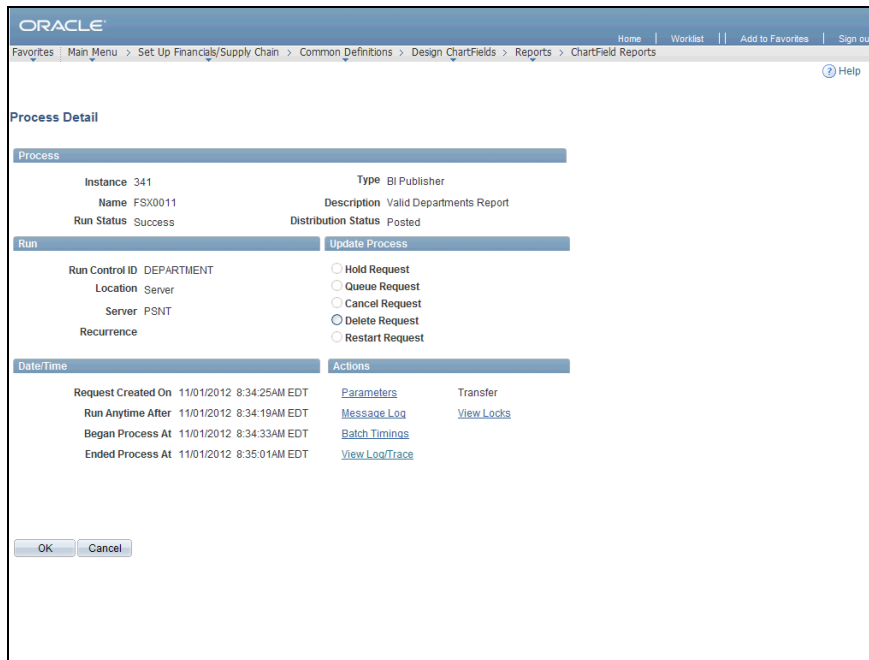
Distribution Details	
Distribution Node:	PRODRPTFTP
Expiration Date:	01/30/2013

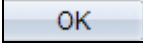
File List		
Name	File Size (bytes)	Datetime Created
AE_FSX0011_341.log	370	11/01/2012 8:35:01.330795AM EDT
AE_FSX0011_341.trc	3,854	11/01/2012 8:35:01.330795AM EDT

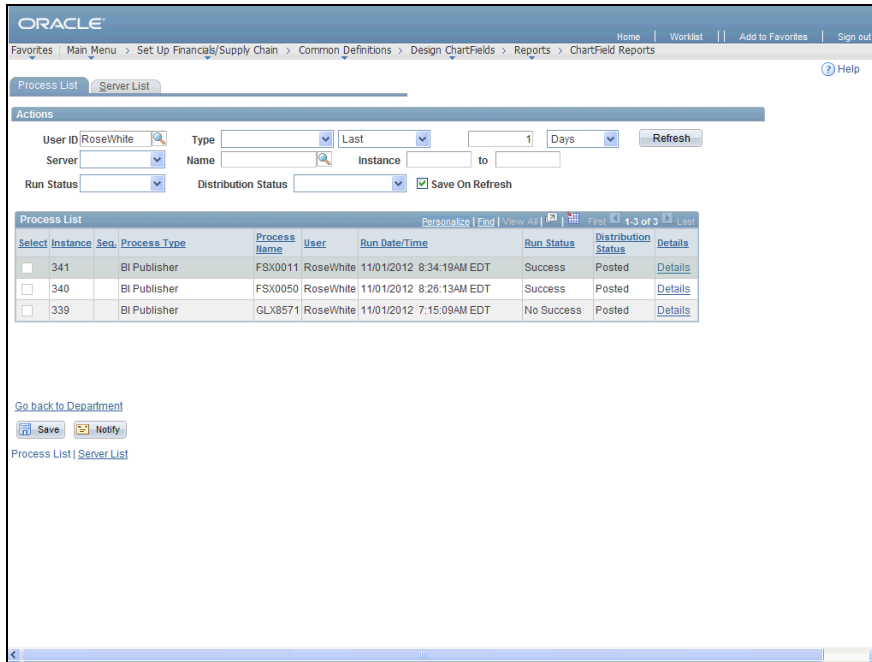
Distribute To	
Distribution ID Type	*Distribution ID
User	RoseWhite

Return

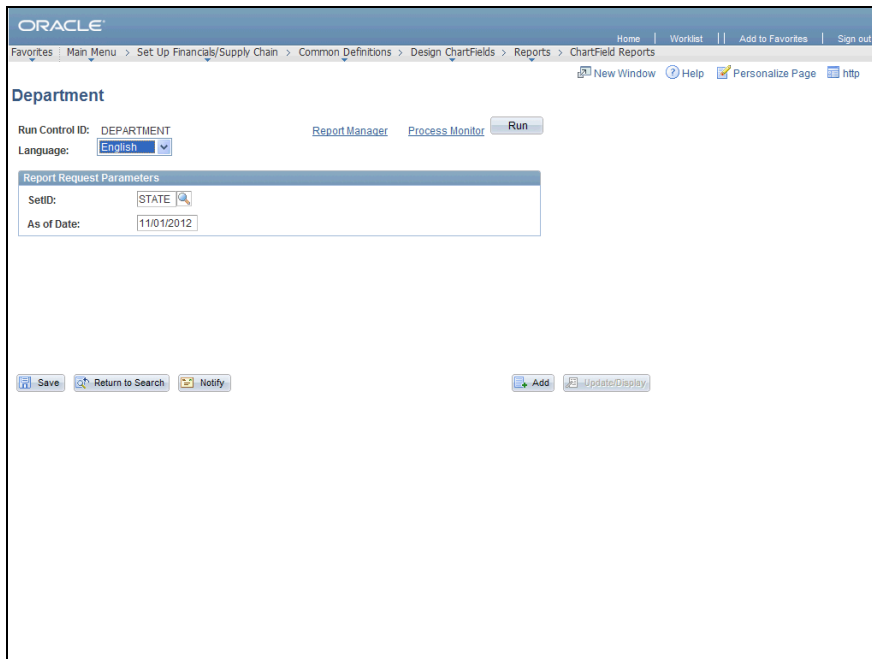
Step	Action
14.	The pdf for the report does not appear in the File List grid. XML reports cannot be viewed from the View Log/Trace page This report must be viewed from Report Manager .
15.	Click the Return button. 



Step	Action
16.	Click the OK button. 



Step	Action
17.	Click the Go back to Department link. Go back to Department



Step	Action
18.	Click the Report Manager link. Report Manager

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Favorites | Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Reports > ChartField Reports

List | Explorer | Administration | Archives

New Window | Help | Personalize Page | http

View Reports For

Folder: Instance: to: Refresh

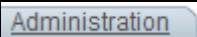
Name: Created On: Last 1 Days

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 FSX0011 - FSX0011.pdf	FSX0011 - FSX0011.PDF	General	11/01/12 8:35AM	5457041	341
2 FSX0050 - FSX0050.pdf	FSX0050 - FSX0050.PDF	General	11/01/12 8:29AM	5457039	340

Go back to Department

Save

List | Explorer | Administration | Archives

Step	Action
19.	Click the Administration tab to view reports. 

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Favorites | Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Reports > ChartField Reports

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View Reports For

User ID: Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5457041	341	FSX0011 - FSX0011.pdf	11/01/2012 8:34:54AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	5457039	340	FSX0050 - FSX0050.pdf	11/01/2012 8:28:59AM	Acrobat (*.pdf)	Posted	Details

Select All Deselect All

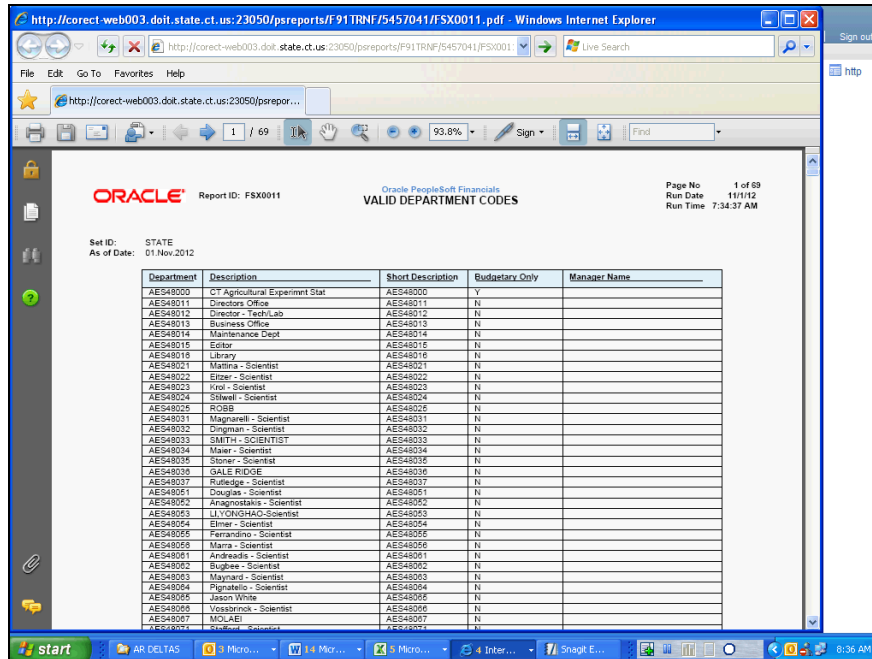
Delete Click the delete button to delete the selected report(s)

Go back to Department

Save

List | Explorer | Administration | Archives

Step	Action
20.	Click the FSX0011 - FSX0011.pdf link. FSX0011 - FSX0011.pdf



Step	Action
21.	The ChartField Report displays in a new window.
22.	End of Procedure.