Running ChartField Reports Created on 2/19/2013 5:30:00 PM

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Running ChartField Reports

Core-

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

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ChartField Reports				
ChartField Reports				
You do not have security privileges to access the ChartFields that are not hyperlinks.				
Fund Code				
Department				
Special ID				
Program Code				
Account				
ChartField 1				
ChartField 2				
Budget Reference				
Project				
Book Code				
Adjustment Type				
Scenario				
Statistics Code				

Step	Action
1.	Click the Department link.
	Department

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nter any mormation you have and click Search. Leave lields blank for a list of all values.				
Find an Existing Value Add a New Value				
Search Criteria				
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Case Sensitive				
Search Clear Basic Search 🖼 Save Search Otheria				
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ind an Existing Value Add a New Value				

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.
	Add a New Value

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Favorites Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Reports > ChartField Reports	New Window	(7) Help 🔲 http
Department	_	
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Run Control ID:		
Add		
Eind an Existing Value Add a New Value		

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

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

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Favorites	s Main Menu > Set Up Financials/S	Supply Chain > Common	Definitions > Design	ChartFields >	Reports > (ChartField Reports			
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Proces	ss Scheduler Request								
	User ID: RoseWhite		Run Control ID	: DEPARTME	NT				
	Server Name:	Run Date: 11	/01/2012						
	Recurrence:	Run Time: 8:	34:19AM	Reset to Cu	rrent Date/Tir	me			
	Time Zone:								
Proc	ess List								
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	Valid Departments Report	FIN0011-	BLPublisher	Web		Distribution			
-	valid Departments Report	POADUTI	DIPUDISIICI	Web	• FDF	Distribution			
0	K 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.
8.	Click the OK button.

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ORACLE						
Favorites Main M	4enu > Set Up Financials/Supply Chain :	Common Definitions >	Design ChartFields > Reports >	ChartField Reports		
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Departmen	nt					
Run Control ID:	DERARTMENT	Banart Managar	Process Manitar Run			
Kan Control ID.	English	Report manager	Process Monitor			
Language:			Process Instance:341			
Report Reques	st Parameters					
SetID:	STATE					
As of Date:	11/01/2012					
T Save 😭	Notty		Add	Jupdate/Display		

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

ORACLE					Home Worklist	II Add to Favorites I Sign out
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Server	Name Name	<u></u> In	to			
Run Status	Distribution	Status	Save On Refr	esh		
Process List			Personalize Find	View Al 🗖 🛗	First 🕅 1-3 of 3 🖸 Last	
Select Instance Se	g. Process Type	Process Name User R	Run Date/Time	Run Status	Distribution Status	
341	BI Publisher	FSX0011 RoseWhite 1	11/01/2012 8:34:19AM EDT	Success	N/A Details	
340	BI Publisher	FSX0050 RoseWhite 1	11/01/2012 8:26:13AM EDT	Success	Posted Details	
339	BI Publisher	GLX8571 RoseWhite 1	11/01/2012 7:15:09AM EDT	No Success	Posted Details	
Go back to Departm	ent itr- List					

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

ORACLE						Add to Favorites Sign out
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340	BI Publisher	FSX0050 RoseWhite	11/01/2012 8:26:13AM EDT	Success P	osted <u>Details</u>	
339	BI Publisher	GLX8571 RoseWhite	11/01/2012 7:15:09AM EDT	No Success P	osted Details	
Go back to Departme	nt V					
Process List <u>Server L</u>	ist					

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. Details

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

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Name: FSX0011 Process Type: XML Publisher	
Run Status: Success	
Valid Departments Report	
Distribution Details	
Distribution Node: PRODRPTFTP Expiration Date: 01/30/2013	
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Dahua	
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.

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Ended Process At 11/01/2012 8:35:01AM EDT	View Log/Trace					
OK Cancel						

Step	Action
16.	Click the OK button.



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

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

ites Main Menu	> Set Up Financials/Supply Ch	ain > Common Defi	nitions > Design ChartFiel	ds > Repo	orts > ChartField	Home Reports	Worklist	Add to Fi	avorites Si
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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				
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Step	Action
19.	Click the Administration tab to view reports.
	Administration

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		5457039	340	FSX0050 - FSX0050.pdf	11/01/2012 8:28:59AM	Acrobat (*.pdf)	Posted	Details					
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	Select All	Deselec	t All										
	Delete	lick the delete b	utton to de	lete the selected report(s)									
Go	back to D	epartment											
	Save												
List	Explorer	Administration	Archives										

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

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5.6.	Set ID: As of Date:	STATE 01 Nov 2012					
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?		AES48011	Directors Office	AES48011	N		
		AES48012	Director - Tech/Lab	AES48012	N		
		AES48013	Business Office	AES48013	N		
		AES48014	Maintenance Dept	AES48014	N		
		AES48015	Editor	AES48015	N		
		AES48016	Library	AES48016	N		
		AES48021	Mattina - Scientist	AES48021	N		
		AES48022	Eitzer - Scientist	AES48022	N		
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Step	Action
21.	The ChartField Report displays in a new window.
22.	
	End of Procedure.