Setting Up Run Controls

This cheat sheet provides basic instructions for running SQR reports, as well as guidelines for information needed to complete run controls for SQR reports.

### Running SQR Reports

<table>
<thead>
<tr>
<th>Step</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Log into the Finance Reporting Database with your Finance Username and Password.</td>
</tr>
<tr>
<td>Step 2</td>
<td>Navigate to Report Center &gt; Finance or Grants.</td>
</tr>
<tr>
<td>Step 3</td>
<td>Click the hyperlink for the appropriate report.</td>
</tr>
<tr>
<td>Step 4</td>
<td>Find an existing Run Control ID or add a new Run Control ID.</td>
</tr>
<tr>
<td>Step 5</td>
<td>Follow the directions for the appropriate report listed on the following pages to complete the Run Control.</td>
</tr>
<tr>
<td>Step 6</td>
<td>Click the Run button.</td>
</tr>
<tr>
<td>Step 7</td>
<td>Leave the Server Name blank.</td>
</tr>
<tr>
<td>Step 8</td>
<td>Click the OK button.</td>
</tr>
<tr>
<td>Step 9</td>
<td>Click the Process Monitor link.</td>
</tr>
<tr>
<td>Step 10</td>
<td>Click the Refresh button until the Run Status is “Success” and the Distribution Status is “Posted.”</td>
</tr>
<tr>
<td>Step 11</td>
<td>Click the Details link to the right of the appropriate process instance.</td>
</tr>
<tr>
<td>Step 12</td>
<td>Click the View Log/Trace link.</td>
</tr>
<tr>
<td>Step 13</td>
<td>Click the PDF or XLS link to view the report in the appropriate format.</td>
</tr>
</tbody>
</table>
Run Controls

UMGL7062 Report

Step 1. Enter the following information:
♦ Business Unit
  Defaults based on your user security.
♦ Ledger
  Select the appropriate Ledger.
♦ Beginning Period
  Insert the time period in which to begin the report.
♦ Beginning Fiscal Year
  Insert the fiscal year in which to begin the report.
♦ Ending Period
  Insert the time period in which to end the report.
♦ Ending Fiscal Year
  Insert the fiscal year in which to end the report.

Step 2. Enter the following information in the Sort By section:
♦ 1. Dept Tree
  Insert the tree name Rpt_Department.
♦ 2. Chart Field
  Insert DEPTID.
♦ 3. Chart Field
  Insert PROJECT_ID or FUND_CODE.

Step 3. Select the appropriate checkboxes in the Reports Printing section.

Step 4. Enter the following information in the Selection Criteria section:
♦ Chartfield
  Insert the appropriate Chartfield.
♦ Node/Value
  Select Node or Value.
♦ From Value/Tree Name
  Select the appropriate Value/Tree Name.
♦ To Value/Tree Node
  Select the appropriate Value/Tree Node.

NOTE: Click + to insert a row or - to delete a row.

UMGL7079 Report

Step 1. Enter the Business Unit, if necessary.

Step 2. Enter the following information in the Time Period section:
♦ From Period 1 Thru Period
  Insert the period in which to end the report.
♦ Fiscal Year
  Insert the Fiscal Year in which to run the report.

Step 3. Enter the following information in the Sort By section:
♦ 1. Dept Tree
  Insert the tree name Rpt_Department.
♦ 2. Chart Field
  Insert DEPTID.
♦ 3. Chart Field
  Insert PROJECT_ID or FUND_CODE.

Step 4. Enter the following information in the Selection Criteria section:
♦ Chartfield
  Insert the appropriate Chartfield.
♦ Node/Value
  Select Node or Value.
♦ From Value/Tree Name
  Select the appropriate Value/Tree Name.
♦ To Value/Tree Node
  Select the appropriate Value/Tree Node.

NOTE: Click + to insert a row or - to delete a row.
UMGL7053 Report

Step 1. Enter the Business Unit, if necessary.

Step 2. Enter the following information in the Time Period section:
- **Begin Period** Insert the period in which to begin the report.
- **End Period** Insert the period in which to end the report.
- **Fiscal Year** Insert the fiscal year in which to run the report.

Step 3. Enter the following information in the Sort By section:
- **1. Dept Tree** Insert the tree name `Rpt_Department`
- **2. Chart Field** Insert `PROJECT_ID`, `FUND_CODE`, or `DEPTID`.

Step 4. Select the appropriate radio button in the Ledger section.

Step 5. Enter the following information in the Selection Criteria section:
- **Chartfield** Insert the appropriate Chartfield.
- **Node/Value** Select Node or Value.
- **From Value/Tree Name** Select the appropriate Value/Tree Name.
- **To Value/Tree Node** Select the appropriate Value/Tree Node.

NOTE: Click + to insert a row or - to delete a row.

UMGM7003 Report

Step 1. Enter the following information:
- **Business Unit** Defaults based on your user security.
- **Award ID** Insert the appropriate Award ID.

Step 2. Select the Include AR/Billing Info checkbox, if necessary.

Step 3. Enter the following information:
- **Begin Period** Insert the time period in which to begin the report.
- **Begin Fiscal Year** Insert the fiscal year in which to begin the report.
- **End Period** Insert the time period in which to end the report.
- **End Fiscal Year** Insert the fiscal year in which to end the report.
UMGM7062 Report

Step 1. Enter the following information:
♦ Business Unit Defaults based on your user security.
♦ Ledger Select the appropriate Ledger.
♦ Beginning Period Insert the time period in which to begin the report.
♦ Beginning Fiscal Year Insert the fiscal year in which to begin the report.
♦ Ending Period Insert the time period in which to end the report.
♦ Ending Fiscal Year Insert the fiscal year in which to end the report.

Step 2. Enter the following information in the Sort By section:
♦ Dept Tree Insert the tree name Rpt_Department.
♦ Chart Field Insert PROJECT_ID, FUND_CODE, or DEPTID.

Step 3. Select the appropriate checkboxes in the Reports Printing section.

Step 4. Enter the following information in the Selection Criteria section:
♦ Chartfield Insert the appropriate Chartfield.
♦ Node/Value Select Node or Value.
♦ From Value/Tree Name Select the appropriate Value/Tree Name.
♦ To Value/Tree Node Select the appropriate Value/Tree Node.

NOTE: Click to insert a row or to delete a row.

UMGM7047 Report

Step 1. Enter the following information:
♦ Business Unit Defaults based on your user security.
♦ Ledger Select the appropriate Ledger.
♦ Begin Period Insert the time period in which to begin the report.
♦ Begin Fiscal Year Insert the fiscal year in which to begin the report.
♦ End Period Insert the time period in which to end the report.
♦ End Fiscal Year Insert the fiscal year in which to end the report.

Step 2. Enter the following information in the Sort By section:
♦ Dept Tree Insert the tree name Rpt_Department.
♦ Chart Field Insert PROJECT_ID, FUND_CODE, or DEPTID.

Step 3. Select the Sort by Class Field checkbox, if applicable.

Step 4. Enter the following information in the Selection Criteria section:
♦ Chartfield Insert the appropriate Chartfield.
♦ Node/Value Select Node or Value.
♦ From Value/Tree Name Select the appropriate Value/Tree Name.
♦ To Value/Tree Node Select the appropriate Value/Tree Node.

NOTE: Click to insert a row or to delete a row.
### UMGM7079 Report

**Step 1.** Enter the *Business Unit*, if necessary.

**Step 2.** Enter the following information in the *Time Period* section:
- **To Period**
  - Insert the period in which to end the report.
- **Range To Fiscal Year**
  - Insert the fiscal year in which to run the report.

**Step 3.** Enter the following information in the *Sort By* section:
- **Dept Tree**
  - Insert the tree name `Rpt_Department`.
- **Chart Field**
  - Insert `PROJECT_ID`, `FUND_CODE`, or `DEPTID`.

**Step 4.** Enter the following information in the *Selection Criteria* section:
- **Chartfield**
  - Insert the appropriate `Chartfield`.
- **Node/Value**
  - Select `Node` or `Value`.
- **From Value/Tree Name**
  - Select the appropriate `Value/Tree Name`.
- **To Value/Tree Node**
  - Select the appropriate `Value/Tree Node`.

**NOTE:** Click `+` to insert a row or `-` to delete a row.

### UMGM7014 Report

**Step 1.** Enter the following information in the *Report Request Parameters* section:
- **Business Unit**
  - Defaults based on your user security.
- **Award**
  - Insert the appropriate `Award`.
- **Project ID**
  - Insert the appropriate `Project ID` or leave blank.