

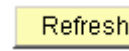


## Setting Up Run Controls



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

- Step 1.** Log into the Finance Reporting Database with your Finance Username and Password.
- Step 2.** Navigate to **Report Center > Finance** or **Grants**.
- Step 3.** Click the hyperlink for the appropriate report.
- Step 4.** Find an existing **Run Control ID** or add a new **Run Control ID**.
- Step 5.** Follow the directions for the appropriate report listed on the following pages to complete the **Run Control**.
- Step 6.** Click the  button.
- Step 7.** Leave the **Server Name** blank.
- Step 8.** Click the  button.
- Step 9.** Click the [Process Monitor](#) link.
- Step 10.** Click the  button until the **Run Status** is "Success" and the **Distribution Status** is "Posted."
- Step 11.** Click the [Details](#) link to the right of the appropriate process instance.
- Step 12.** Click the [View Log/Trace](#) link.
- Step 13.** Click the PDF or XLS link to view the report in the appropriate format.



## 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.