Running Delivered Reports, Jobs or Queries

Purpose: Use this document as a reference on running delivered Reports, Jobs, and delivered Queries in ctcLink.

Audience: All College Staff in Finance, Human Capital Management (HCM), and Campus Solutions (CS) functions. *The procedures listed below may be limited based on security access.*

Want more information on searching for and running queries. See the **ctcLink PeopleSoft Query and Reporting End User Training Materials and Courses** section of the ctcLink Reference Center.

What are ctcLink Reports, Jobs, and Queries?

A **Report** in ctcLink is an existing report that has defined elements. **Jobs** are collections of ctcLink processing tasks. The term job and process are often used interchangeably. A report is considered a job, so the directions for running a report and job are the same. A **Query** is a tool used to retrieve selected data.

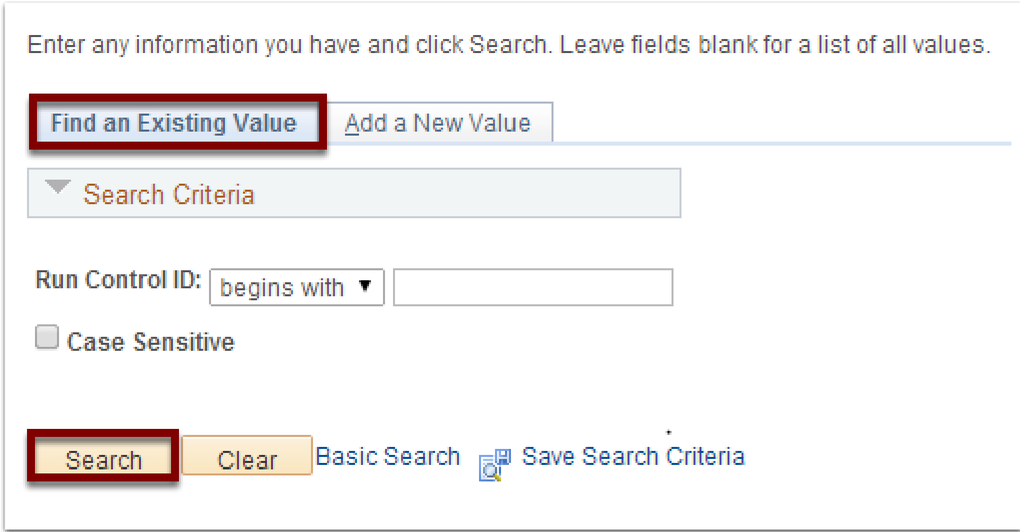
Who will use ctcLink Reports, Jobs, and Queries?

Finance, HCM, and CS staff when functional reports or data are needed. Usage is based on security access.

Running a Report or Job

Navigation: Function -> Sub-function -> Reports -> Report Title

1. Select **Add a New Value** if this is the first time running this job.
2. **Run Control IDs** are tied to an individual user ID and are visible only to the creator. Instead of entering the same values each time a report is run (such as when the report should run and prompts such as BUSINESS_UNIT); a **Run Control** can be saved with these settings. The next time the report is run, a **Run Control ID** is selected (in **Find an Existing Value**), and the system completes the settings with previously defined parameters. Be aware that certain Reports and Jobs may need to have a new **Run Control** depending on the parameters used. Type a **Run Control ID**, using alpha numeric characters with no spaces. Underscore can be used for spacing i.e. ***AP1_LastName.***



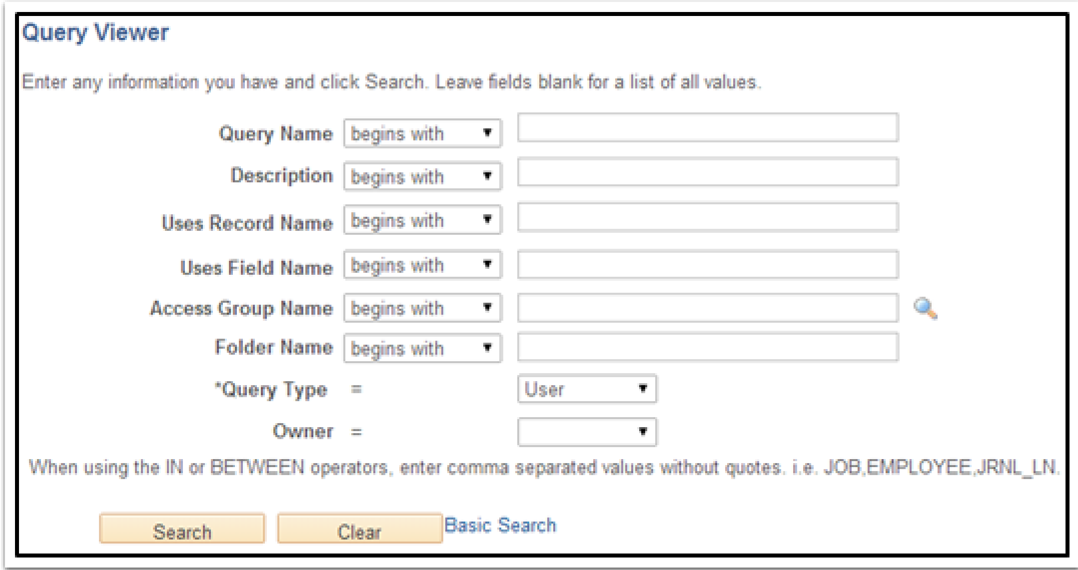
3. Click **Add.**
4. Select parameters for the job. Parameters will vary depending on the job. The next time this job is run, the **Run Control ID** is entered and the saved parameters will appear.
5. Click **Save**.
6. Click **Run** to add the job to the **Process Scheduler** queue of jobs awaiting execution.
7. The **Process Scheduler Request** requires additional choices on how the report/job will run. These choices are **Server Name**, **Recurrence** (leave blank if one-time occurrence), and **Run Date/Time** (when report will run)**.**
8. Select report from the **Process List.** From the dropdowns, choose the Type (email / File / Printer / Web) and **Format** (HTM / PDF / RTF / XLS) then click OK
9. After scheduling a job to run, the **Run Control Page** will display a unique **Process Instance** number. Please note the number; it will be helpful for troubleshooting if needed. The **Process Monitor** is generally used to track the progress of a job and insure its success. **Report Manager** is generally used to review the job output of a report.
10. In **Process Monitor**, the filters can be used to limit the **Process List** or the existing **Process List** to see the recent jobs that have been run. The **Process List** includes **Process Type, Process Name, UserID, Run Date/Time, Run Status** (Queued, Initiated, Canceled, Success)**, Distribution Status** (N/A, None, Generated, Not Posted, Posting, or Posted), and **Details**. If the **Run Status** indicates Success, the reports can be viewed in **Report Manager**. The **Process Detail** page contains the **Message Log** which helps troubleshooting if the report did not run successfully.
11. Click **Report Manager** to view the reports you have run. Click the **Administration** tab to see successfully run reports. Click the **Details** link to view the report. Reports can be deleted on this page for staff with this authorization.

Running a Delivered Query

Use the following process to run a delivered query in ctcLink.

Navigation: Reporting Tools -> Query -> Query Viewer

1. Click **Advanced Search** to find queries based on selected filters.
2. Enter filters for **Query Name, Description, Uses Record Name, Uses Field Name, Access Group Folder** (functional query security group), **and Folder Name.** Within these filters, selections include **, ≤, =, , ≥, begins with, between, contains, in,** and **not.** The percentage sign (%) is used as a wildcard character.



3. Additional filters include: **Query Type** by **Archive, Process, Role**, or **User** and **Owner** by **Private** or **Public**. Private queries will be listed and can be run only if the query owner has granted access.
4. After the filters are selected, click **Search**.
5. The **Search Results** grid displays queries based on the selected filters. The query can be run as **HTML** (web-based), **Excel**, **XML,** or **Schedule** a time for the query to run using **Run Control ID**. The query can be added to favorites for future quick access.

Additional Information

- Click on the magnify glass to see available look-up options.
- When searching for queries or reports, it is recommended to use **Contains** for search parameters in **Description**.
- Descriptors in Name or Description are often shortened, such as Vendor to VNDR, so multiple searches may be needed.