



Office of Information
Technology
KNOWLEDGE SERVICES

Run Control ID Overview Training Guide

Table of Contents

Run Control ID Overview	8
Create a Run Control ID.....	8
Use Existing Run Control ID	9
Report Parameters	10
Considerations regarding Report Parameters:.....	10
Running Reports	10
Distribute Reports to Additional Recipients.....	12
Process Monitor	14
Report Manager	16
Administration Tab.....	17
Open “OpenXML” Report in Excel	18
For Windows	19
For Apple Computers	21

Run Control ID Overview

Many of the reports above run a process in UTShare, and a set of parameters must be provided. Those parameters are attached to a Run Control ID. The Run Control ID must be created and saved the first time you run the report. Run Control IDs are unique to users, meaning they cannot be shared (you cannot run another user’s Run Control ID). Once a Run Control ID has been created, it can then be reused the next time the report is generated.

- Creating a Run Control is a preliminary step that must be completed before you run any process or report in UT Share.
- The parameters specify what information should appear on the report. Instead of entering the same values each time you run the report, a run control is created and saved with those settings. This includes any Distribution settings that are added to make the report available to other users.
- Once the reports are created, they will be available to view using Report Manager.

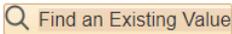
Note: *Run Control IDs can become corrupted. If you are unable to run a report using an existing Run Control ID, please create a new Run Control ID and rerun the report.*

Create a Run Control ID

Starting from the UTShare Main Menu, you will navigate to the desired page that requires a Run Control ID.

1. Select a report to create a run control ID.
2. The Find an Existing Value page displays. Click the **Add a New Value** button at the top-right of the page.

3. Give your Run Control ID a **name**. Run Control IDs are limited to 30 characters, cannot contain spaces, and can contain an underscore but no other special characters.



Add a New Value

*Run Control ID



4. With the name entered, click the **Add** button.
5. The report parameters page will open.

Use Existing Run Control ID

Starting from the UTShare Main Menu, you will navigate to the desired page that requires a Run Control ID.

1. The page will default to **Find an Existing Value**.
2. If you know the desired **Run Control ID name**, type it in the Run Control ID field. If you do not know the Run Control ID name, leave this field blank to return all available Run Control IDs.
3. Click the **Search** button.
4. A search results table of all matching will populate. Click on the row for the desired Run Control ID.



Find an Existing Value

▼ **Search Criteria**

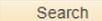
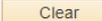
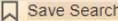
Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches   Saved Searches 

Search by: Run Control ID begins with

▼ [Show more options](#)

Case Sensitive

▼ **Search Results**

19 rows

Run Control ID	Language Code	
311086	English	>
BudgEnc	English	>

View All |  First  1-10 of 19  Last



5. The report parameters page will populate.

Report Parameters

The report parameters page is displayed once a Run Control ID is opened. At the top-left corner of the page, you will notice the name of your Run Control ID.

The Report Request Parameters page contains the criteria values needed to run a report. These will vary by report. In some cases, a report may not have any parameters, but a Run Control ID is still required to run the report (e.g. Emergency Contact Report).

The parameter values determine what information returns on the report. Fields with an asterisk (*) are required.

Considerations regarding Report Parameters:

- If the parameters ask for Department in addition to Cost Center or Project, enter *either* the Department *or* the Cost Center or Project; do not enter both. You can run the report for an entire Department (by entering the Department ID) or for a specific Cost Center or Project (by entering the specific Cost Center or Project Number).
- The Business Unit value will vary depending on the type of account that is being used.
 - For reports run for Cost Centers, Business Unit should be "UTARL"
 - For reports run for Sponsored Projects, Business Unit should be "UTASP"
 - For reports run for Plant Fund Projects, Business Unit "UTAPF" should be used.
- On HRMS reports, if the parameters ask for "Company", use "ARL".
- For "Fiscal Year", use the 4-digit fiscal year. UTA's fiscal year runs from September 1 through August 31, and is named for the year in which they end.
- For "Accounting Period", enter the number of the month in the fiscal year. For example, Accounting Period 1 (one) is September, Accounting Period 2 (two) is October, and Accounting Period 3 (three) is November.

Running Reports

1. Once the Run Control ID has been selected and the report parameters entered, click the **Run** button at the top right of the page.

2. The **Process Scheduler Request** page will open, displaying the process information. This page allows the user to determine how the report will be generated.
 - a. Select the **Type** from the drop-down list.
 - i. **Email** will send the report directly to your email when it has processed.

Please note, running a report to email will not store the report in the Report Manager; it will only be available through the email. Also, not all reports will generate an email. If you run a report to email and do not receive an emailed report, you will need to go back and run the report to the Web type.
 - ii. **Web** will make the report available through the Report Manager.
 - b. Select the **Format** from the drop-down list.
 - i. Choose XLS to run the report as an Excel document.
 - ii. Choose PDF to run the report as a PDF.

Process Scheduler Request

User ID 6001132971 Run Control ID recon

Server Name [dropdown] Run Date 08/03/2023 [calendar icon]

Recurrence [dropdown] Run Time 4:09:14PM [Reset to Current Date/Time]

Time Zone [dropdown]

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Monthly Recon Rpt	UTZFL514	Application Engine	Web	XLS	Distribution

OK Cancel

3. Click OK to run the report.

Distribute Reports to Additional Recipients

When reports are run, they can be shared with others. The reports are sent to other users using the Distribution link on the Process Scheduler Request page. When the report process is run to Success and the report is Posted, if the report was run to the Type “Web”, the additional user will see the report populate in their Report Manager page (tile available on the Employee Self Service Homepage). If the report was run to the Type “Email”, the additional user will receive an email with the report.

1. When [Running a Report](#), on the Process Scheduler Request page, click the blue **Distribution** link.

Process Scheduler Request

User ID 6001132971 Run Control ID recon

Server Name [dropdown] Run Date 08/04/2023 [calendar icon]

Recurrence [dropdown] Run Time 10:35:34AM [Reset to Current Date/Time]

Time Zone [dropdown]

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Monthly Recon Rpt	UTZFL514	Application Engine	Web	XLS	Distribution

OK Cancel

The Distribution Detail page is displayed. This page is used to specify the recipients who are to receive the report. You can also set the number of Retention Days to keep the report available to the recipients.

2. Enter the number of days to retain the report in the Retention Days field.
3. Click the **plus** button (+) in the bottom **Distribute To** panel to add additional users.

Note: Your Empl ID will automatically default on the first line. It is recommended that you leave that default value.

4. Select **User** from the ID Type drop down field.
5. Enter or search for the Employee ID# in the Distribution ID field.
6. Click **OK**.

Distribution Detail [x] Help

Process Name UTZFL514

Process Type Application Engine

Folder Name [dropdown]

Retention Days [45]

Email Only

Email Subject [text area] Email With Log: Email Web Report:

Message Text [text area]

Email Address List [text area]

Override Sender Email Id:

Distribute To

*ID Type	*Distribution ID		
User	6007654321	[search]	[+]
User	1001234567	[search]	[+]

OK Cancel

- This will return you to the Process Scheduler Request page. Continue to make your report **Type** and **Format** selections, then click **OK** to run the report.
- The Report Index page that contains the link to the report output will list the users to whom the report was distributed.

Report Index

Report

Report ID 13839131 Process Instance 12455956 [Message Log](#)
 Name XMLP Process Type XML Publisher
 Run Status Success

UTZ_FL514 - UTARL_470086_12455956.xlsx

Distribution Details

Distribution Node PS-HTTP Expiration Date 09/18/2023

File List

Name	File Size (bytes)	Datetime Created
UTARL_470086_12455956.xlsx	10,283	08/04/2023 11:00:03.120893AM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	1001234567
User	6001234567

[Return](#)

Note: The Run Control ID will contain the Distribution selection until it is changed, meaning every time the report is run using the specific Run Control ID on which the additional user was added, the report will be provided to the additional user.

Process Monitor

Once a report has been requested to run, a Process Instance number is assigned. This is like a tracking number for your process/job.

- Click the blue Process Monitor link to see the status of your process/job.

Monthly Reconciliation Report

Run UTZFL514

Run Control ID recon Report Manager **Process Monitor** Run

Process Instance: 12451931

Process Options

*Business Unit: UT Arlington

*From Fiscal Year: *From Acct Period: FEB

*To Fiscal Year: *To Acct Period: APR

*Report Format:

Enter one of the following parameters

Department:

Project ID:

Cost Center:

Save Return to Search Previous in List Next in List Notify Add Update/Display

2. The most recent job appears in the list. The initial status of the Report Status is “Queued” and the Distribution Status is N/A. The report is complete when the Run Status becomes Success, and the Distribution Status is Posted.

If the job is not completed, press the Refresh button. Refresh does not speed up the process of generating the report, it just refreshes the screen.

Process Monitor

Process List Server List

View Process Requests

User ID: Type: Last: Days: Refresh

Server: Name: Instance: Range: Clear

Run Status: Distribution Status: Save On Refresh Report Manager Reset

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12451931		recon	Application Engine	UTZFL514	60001101	08/03/2023 4:09:14PM CDT	Success	Posted	Details	Actions
<input type="checkbox"/>	12451781		sahara_summary	Application Engine	UTZ_ARA_SMRT	60001101	08/03/2023 3:58:09PM CDT	Success	Posted	Details	Actions
<input type="checkbox"/>	12448781		BP0001877838	Application Engine	FS_BP	60001101	08/03/2023 10:11:05AM CDT	Success	Posted	Details	Actions

Run Status Definitions

- Queued – The process is waiting to run
- Initiated – The process has started.
- NA – The process is still running.
- Processing – The process is running.
- Posted – The report has posted.
- No Success – The process did not run. Make sure the report parameters are correct

Distribution Status Definitions

- NA – The process is still running.
- Not Posted – The report did not post.

- Warning – The process ran, but there may be a problem.
- Success – The process ran successfully.

Report Manager

The Report Manager provides a framework to view existing reports. It is a central access point for reports in UTShare. Several reports populate into the Report Manager.

1. From the Process Monitor page, click the blue **Report Manager** link to view the report.
 Alternately, if not on the Process Monitor page, navigate to the Report Manager by clicking on the My Reports tile on the Employee Self-Service homepage.
2. The Report Manager page will open on the List tab. Click the report that matches the Process Instance number and the **output file** that you selected earlier.

Report List

List | Explorer | Administration | Archives

View Reports For

Folder Instance to Refresh

Name Created On Last 1 Days

Reports Personalize Find View All 						
Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance	
1	UTZFL563 - UTZFL563.xlsx	General	08/03/23 4:41PM	13835338	12452164	
2	UTZFL563	General	08/03/23 4:41PM	13835333	12452164	
3	UTZ_FL514_D - UTARL_470086_12451931_DTL.xlsx	General	08/03/23 4:13PM	13835088	12451931	
4	UTZ_FL514 - UTARL_470086_12451931.xlsx	General	08/03/23 4:13PM	13835087	12451931	
5	UTZFL514	General	08/03/23 4:13PM	13835081	12451931	
6	UTZ_ARA_SMRT	General	08/03/23 3:58PM	13834915	12451781	
7	FS_BP	General	08/03/23 10:11AM	13831712	12448781	
8	FS_BP	General	08/03/23 10:10AM	13831691	12448762	
9	FS_BP	General	08/03/23 9:08AM	13831215	12448305	

[Go back to Process Requests](#)

Save

[List](#) | [Explorer](#) | [Administration](#) | [Archives](#)

Note: Depending on your browser and/or the file type, you may be presented with a dialog box prompting you to Save or Open the report; or the report will open immediately in a new window.

3. The **Report Index** page displays. This screen displays information for the output file such as:
 - a. The report file name.
 - b. The expiration date (usually 14 days from the report run date).
 - c. The report distribution information which lists the employee(s) receiving the report, and other associated logs or message files.
 - d. Datetime the report was created.
4. Click on the blue report name link you want to view.

Report Index

Report

Report ID 13835087	Process Instance 12451931	Message Log
Name XMLP	Process Type XML Publisher	
Run Status Success		

UTZ_FL514 - UTARL_470086_12451931.xlsx

Distribution Details

Distribution Node PS-HTTP	Expiration Date 09/17/2023
---------------------------	----------------------------

File List		
Name	File Size (bytes)	Datetime Created
UTARL_470086_12451931.xlsx	10,281	08/03/2023 4:13:12.887047PM CDT

Distribute To

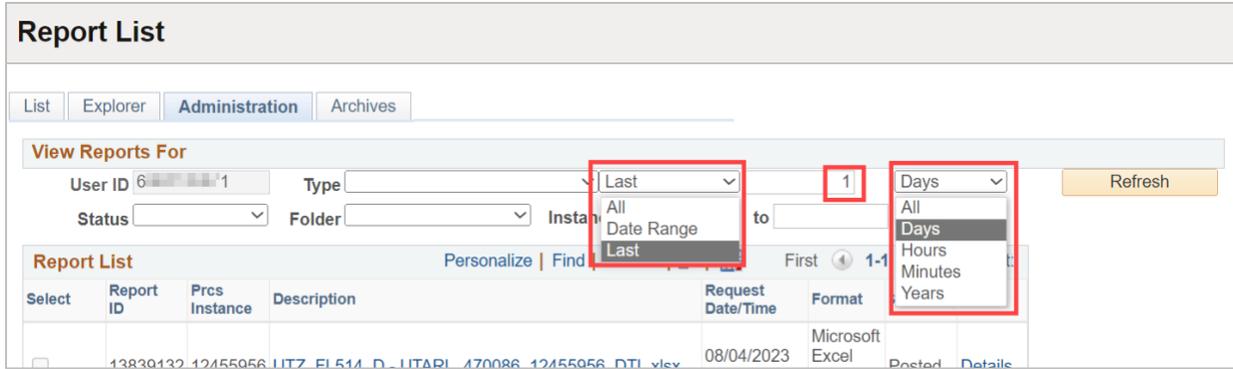
Distribution ID Type	*Distribution ID
User	6007654321

5. Export the report to save the file, format and print as needed.

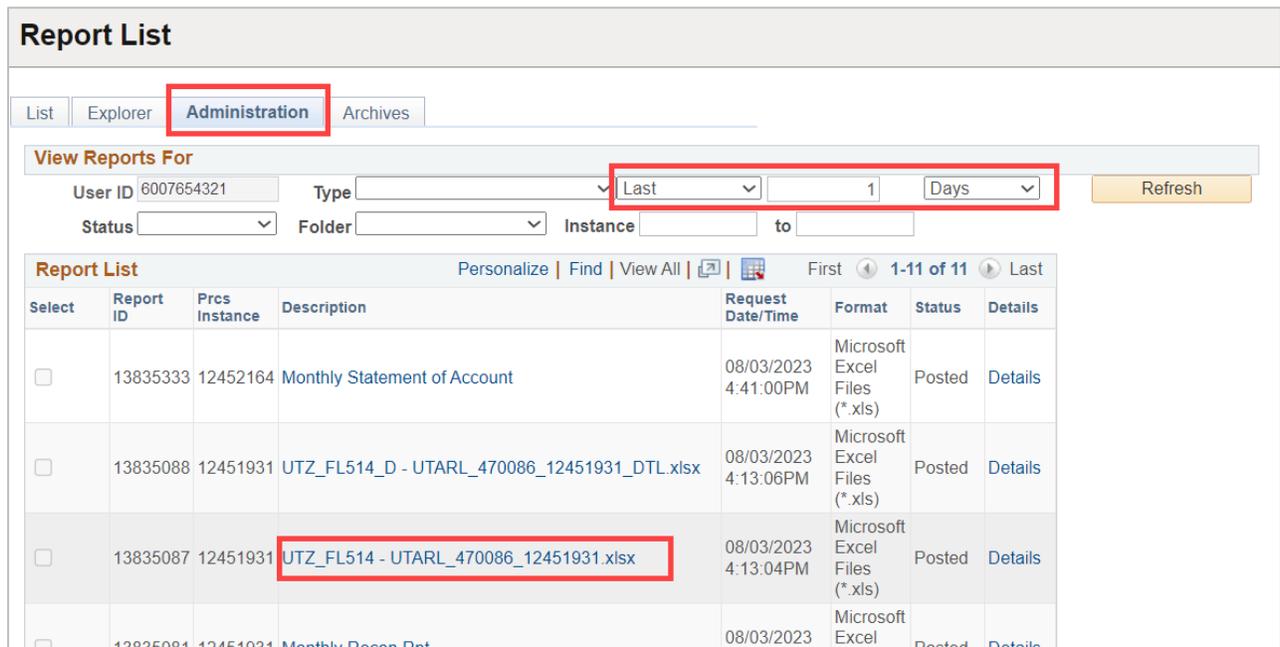
Administration Tab

The Administration tab view opens the report without taking you to the Report Index.

Please note, by default, the Administration tab will display reports for the last 1 day. This can be affected by changing the filter parameters. Then click the Refresh button to update the Report list.



1. Confirm the filtered date range includes the desired report.
2. Click on the blue report name link to open the report.
3. Export the report to save the file, format, and print as needed.



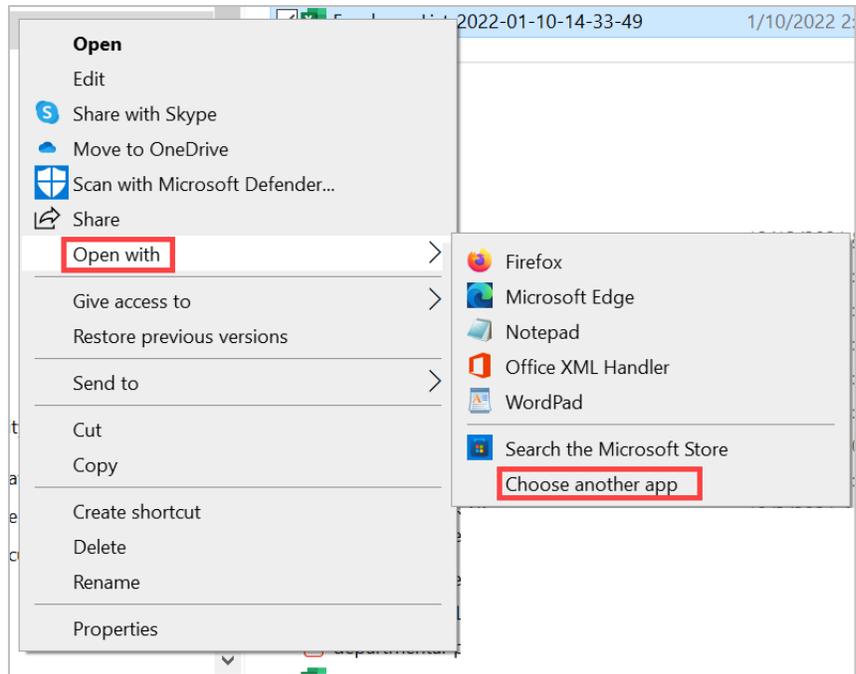
Note: Depending on your browser and/or the file type, you may be presented with a dialogue box prompting you to **Save** or **Open** the report.

Open “OpenXML” Report in Excel

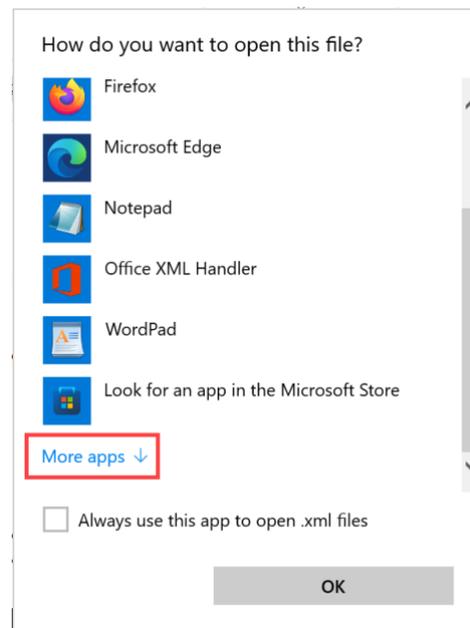
If a report is run to the Type “Email” and for the Format “XML” or “XLS”, the file may be sent in an “XLM” file format. The instructions below will detail how to open the XML file as an Excel Spreadsheet. Instructions are provided for both Windows and Apple computers, as the process does differ based on operating type.

For Windows

1. Download the file and Save it to your computer.
2. Go to the file in File Explorer on your computer.
3. Right-click on the downloaded file and select “Open With”.
4. If Excel is not an option, click on “Chose another app”.

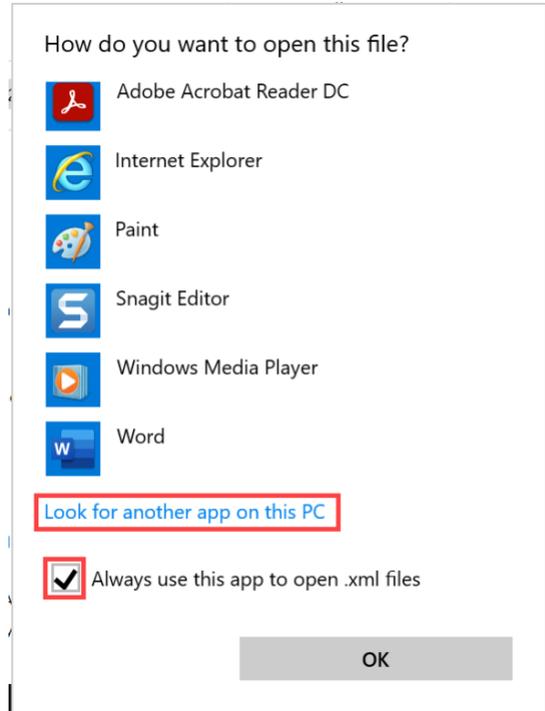


5. Select the “More Apps” link.

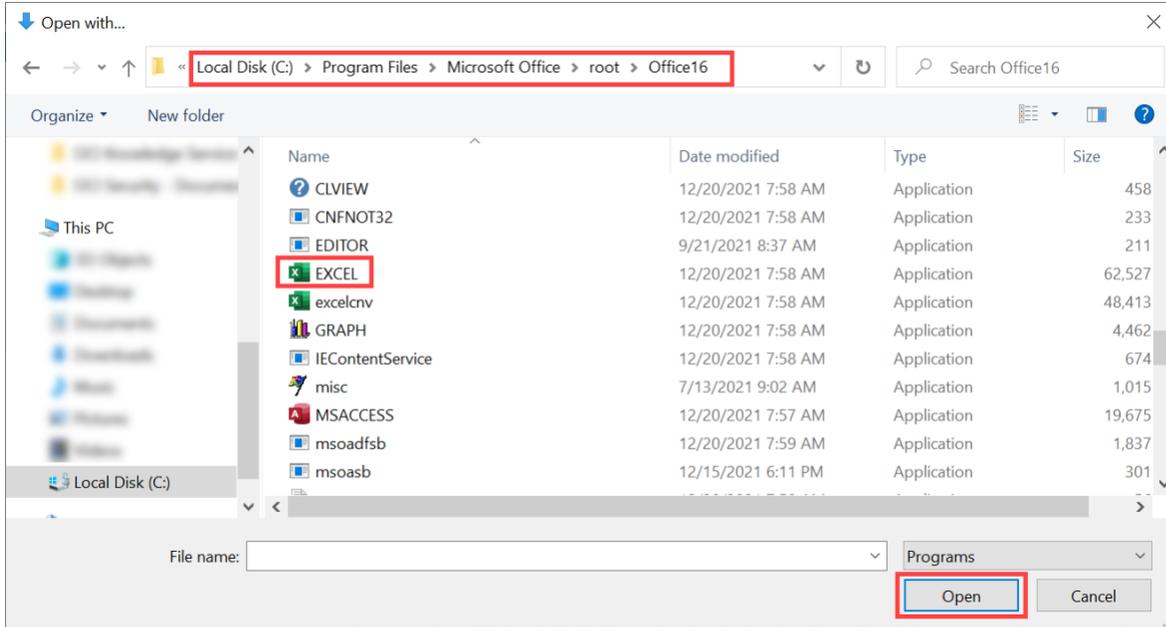


6. From here select Excel.
 - a. If Excel is listed on the More Apps page, click Excel.

- i. Click the box for click the box for “Always use this app to open .xml files”.
 - ii. Click the “OK” button.
- b. If Excel is not listed on the More Apps page, click the checkbox for “Always use this app to open .xml files” then click the “Look for another app” link.

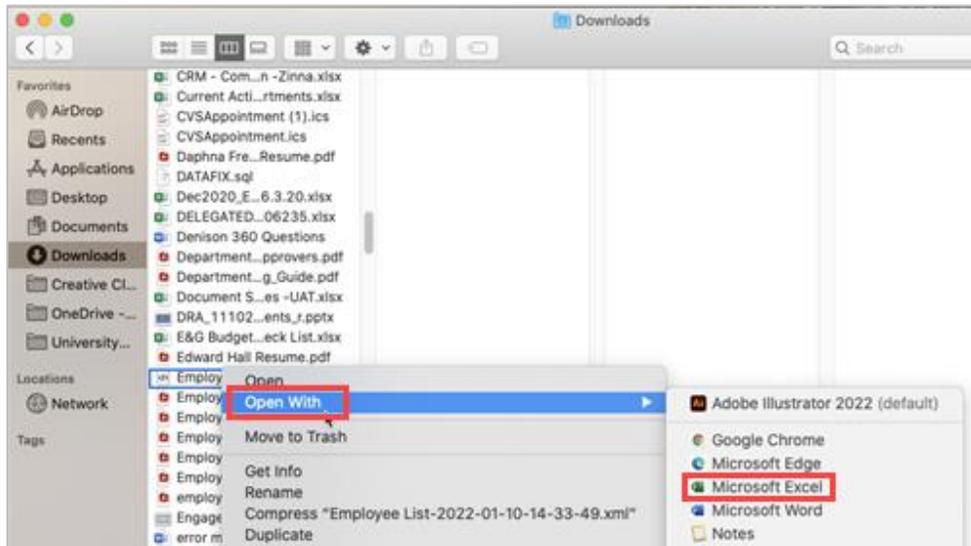


- i. Navigate to the Office16 folder at: Local Disc (C:) > Program Files > Microsoft Office > Root > Office 16.
- ii. Find and Click on “Excel”.
- iii. Click the “Open” button.



For Apple Computers

1. Download the file and Save it to your computer.
2. Click on **Finder**. 
3. **Right click** on the downloaded file and select **“Open With”**
4. Select **Excel**.



- a. If Excel is not listed as an option, click **“Other...”**
- b. In the Applications screen, find and click on Microsoft Excel.
- c. Click the **“Always Open With”** check box and click **“Open”**.

