UNIVERSITY OF TEXAS ARLINGTON

Business Technology Services

Reports and Queries
Run Control ID

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Run Control ID

Run Control ID Overview

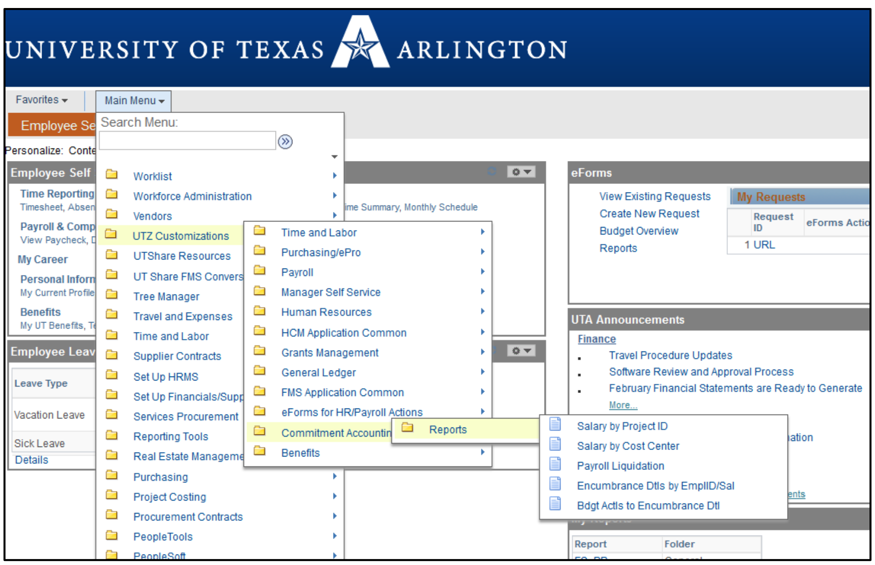
To run a process or job in UT Share, a set of parameters must be provided. Those parameters are attached to a **Run Control ID** name. The Run Control ID name only needs to be created and saved the first time you run the report, it can then be re-used the next time the report is generated.

- 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.
- Once the reports are created, they will be available to view using Report Manager.

Create a Run Control ID

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

1. Click on **Main Menu - UTZ Customizations - Commitment Accounting - Reports.**



A list of reports presents.

2. Select a report to create a run control ID.
3. Two tabs display; Find an **Existing Value and Add a New Value**.
4. Use one of the following options:

Existing Run Control ID

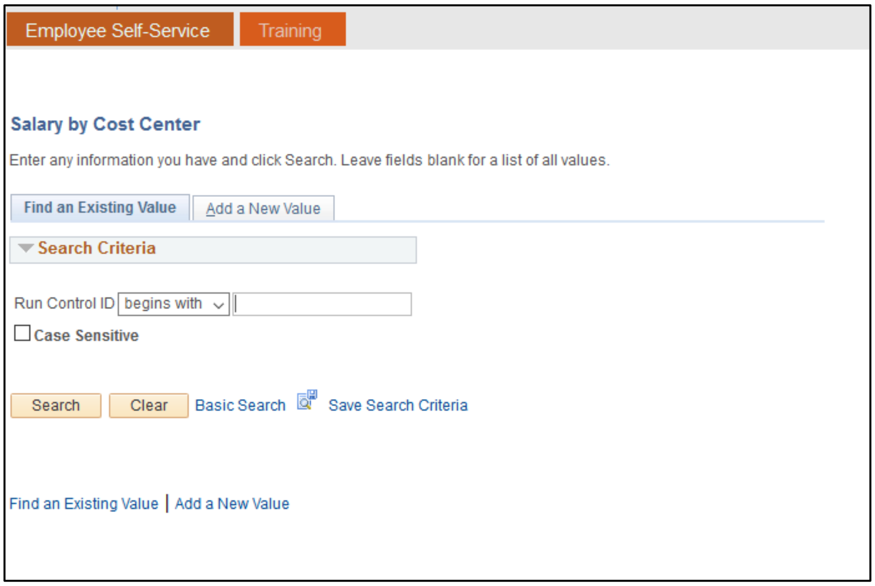
<u>Find an Existing Value tab</u> - Use the Find Existing Value tab to search for an existing Run Control ID that was created before.

a) Click the **Find an Existing Value** tab.
b) Choose a condition option beside **the Run Control ID** field.

c) Enter the Run Control ID name. (use the % as a wildcard to help find the Run Control). **OR** leave the field blank.

d) Click the **Search** button. Proceed to Step 4.

Note: *If you don't remember the Run Control ID, leave the field blank and press Search.*



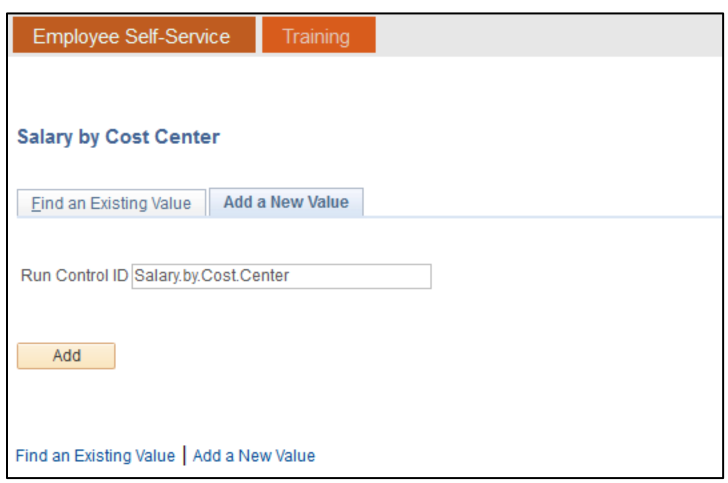
Add a New Run Control ID

1. Add a New Value tab: - Use the Add a New Value tab to create a new Run Control ID if this is your first time generating the report.
   a) Click the **Add a New Value** TAB.
   b) Name the **Run Control ID**.

Note: *The name should correspond with the process/job you are running:*

- *It is user specific and cannot be shared.*
- *It is case sensitive.*
- *Cannot contain spaces.*
- *30 characters is the maximum.*
- *Dashes, periods, underscores are allowed.*

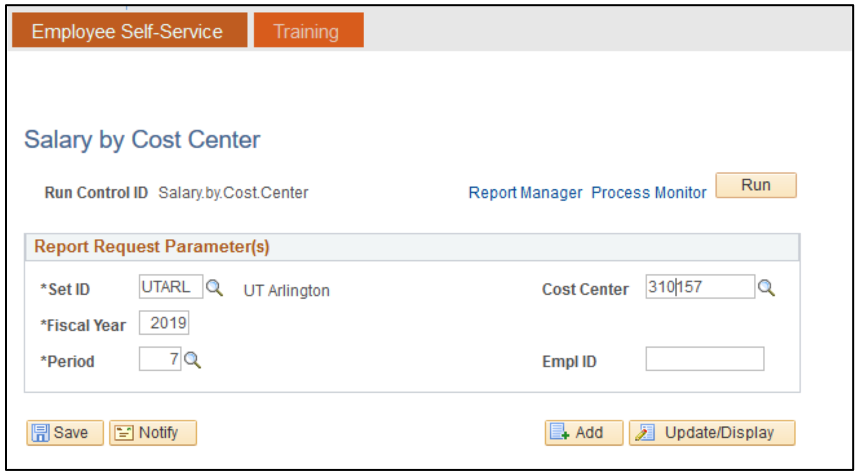
2. Click the **ADD** button.



Report Parameters

The report parameters page is displayed. At the top-left corner of the page, you will notice the name of your Run Control ID.
The **Report Request Parameters** section contains the parameter values necessary to run a report. These will vary by report. The parameter values determine what information appears in the report. Fields with an asterisk (*) are required.

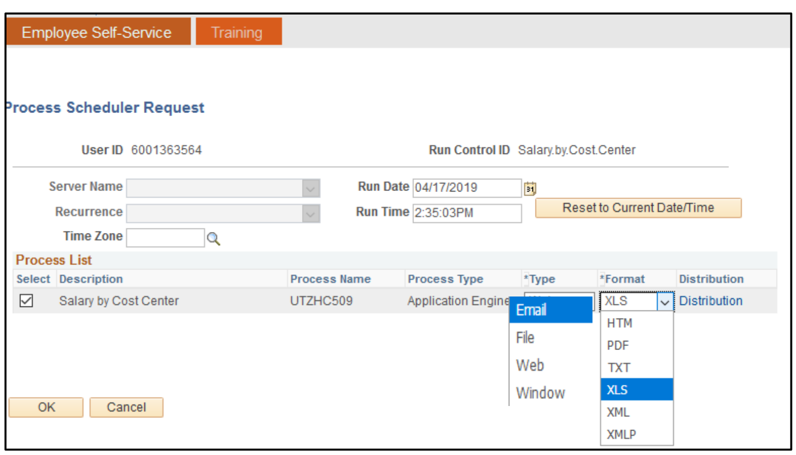
1. Enter UTARL in the **Set ID** field.
2. Enter the **Fiscal Year**.
3. Enter the **Period.**
4. Enter or search for the **Cost Center**.
5. Enter the **Empl ID** if needed, this is optional.
6. Click the **Save** button.
7. Click the **Run** button to run the process/job with the parameters entered.



Note: *In some cases, a process/job may not have any parameters, but a Run Control ID is still required to run the report (e.g. Birthday Report, Emergency Contact Report, etc.).*

The Process Scheduler Request opens, and the process/job displays. You can have the report sent directly to your email, **OR** view the report through the Report Manager function or through your home page Report pagelet.

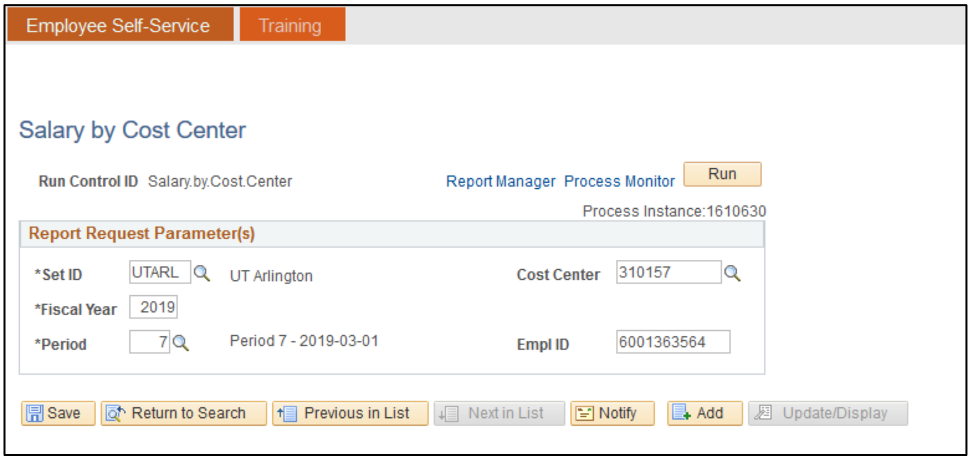
8. Select the **Type** from the drop down list.
    - Email will send the report directly to your email when it has processed.
    - Web will make the report available through the Report Manager.
9. Select the **Format** from the drop down list. Recommend to choose XLS or PDF.
10. Press **OK**



Process Monitor

A Process Instance number is assigned. This is like a tracking number for your process/job.

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

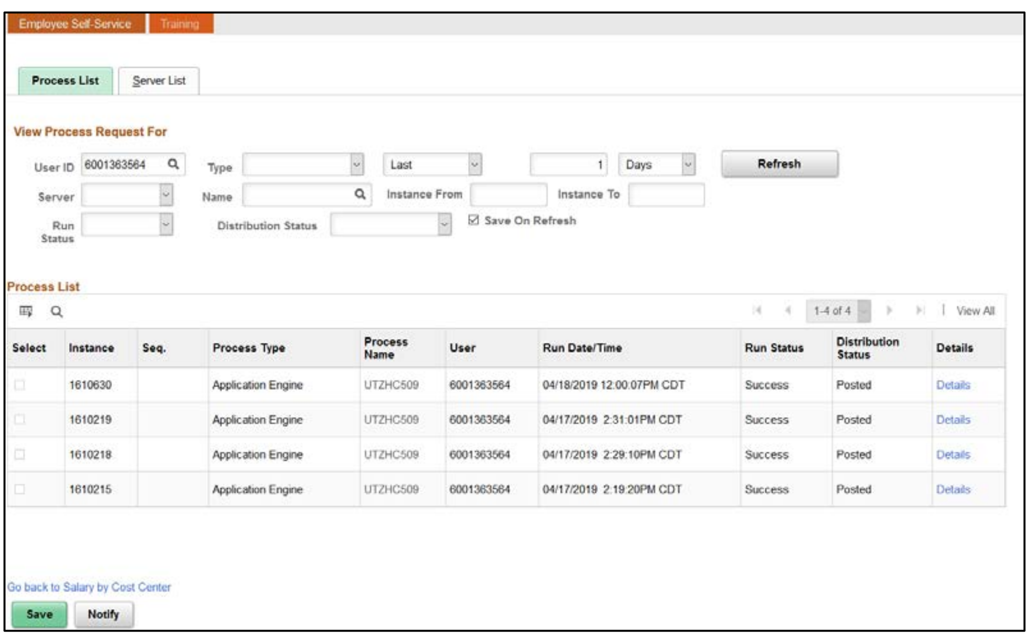


The most recent job appears in the list. The initial status of the report status is "Queued" and the Distribution Status is N/A. The report is complete when *the **Run Status** becomes Success, and the **Distribution Status** is Posted*. Once the report is complete go to step 13.

Note: *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.*

2. Click the blue "Go back to …." link at the bottom of the page to go back.

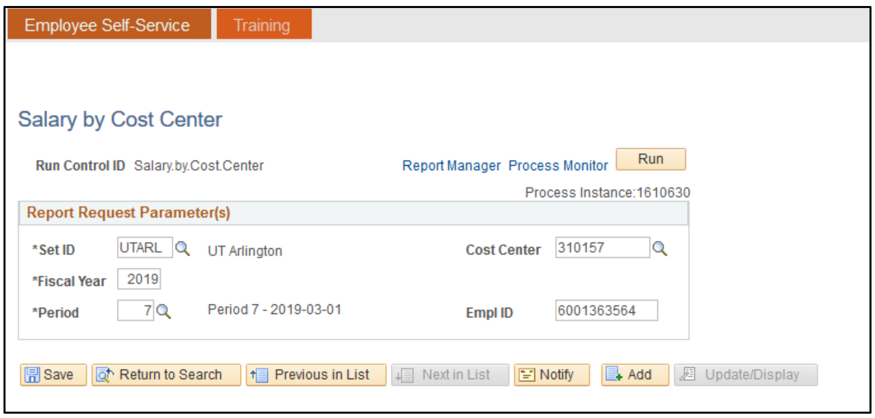
***Note**: the "Go back to…." will vary depending on the job/process you are running.*



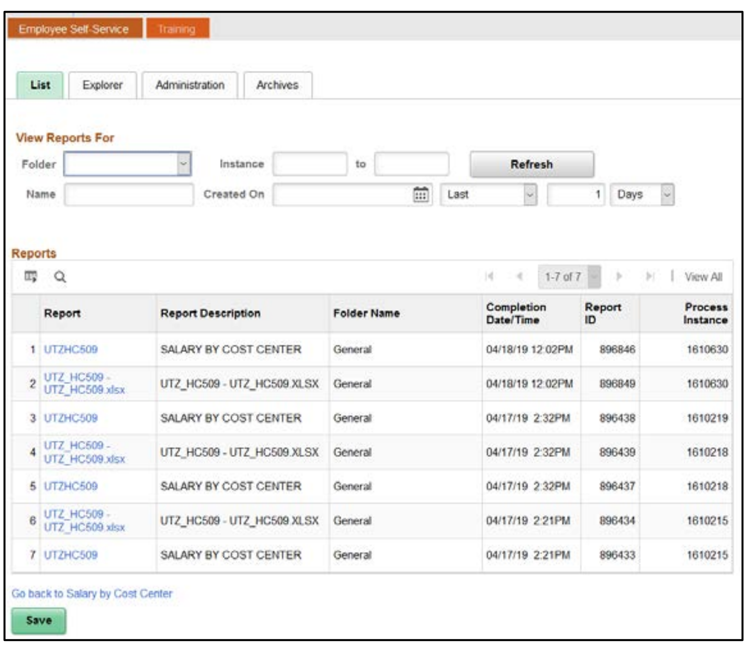
Run Status Definitions	Distribution Status Definitions
Queued – The process is waiting to run.	**Queued** – The process is waiting to run**.**
Initiated – The process has started.	**NA** – The process is still running.
Processing – The process is running.	**Posted** – The report has posted.
No Success – The process did not run. Make sure the report parameters are correct.	**Not Posted** – The report did not post.
Warning – The process ran, but there may be a problem.	
Success – The process ran successfully.	

Report Manager

1. Click the blue Report Manager link to view the report.

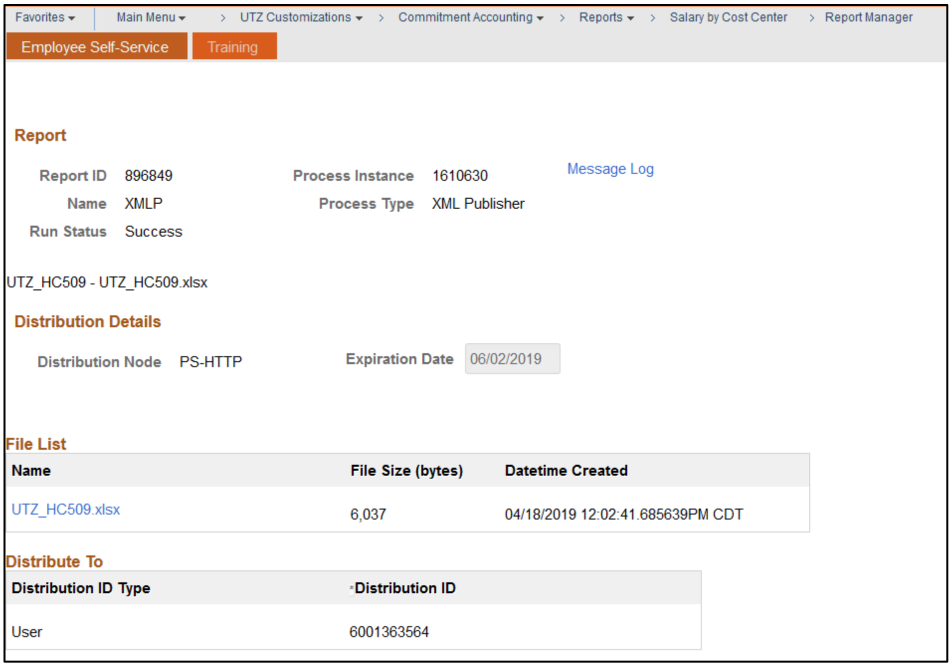


2. Click the report that matches the Process Instance number and the output file that you selected earlier.



The **Report Index** page may display depending on the tab you use.

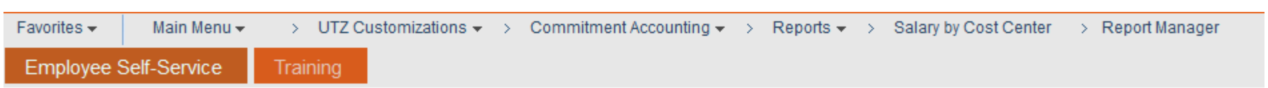
3. Click on the **blue report name link** you want to view.



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.*

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

To return to a specific page in the process, click a link in the navigation path at the top (breadcrumb trail).

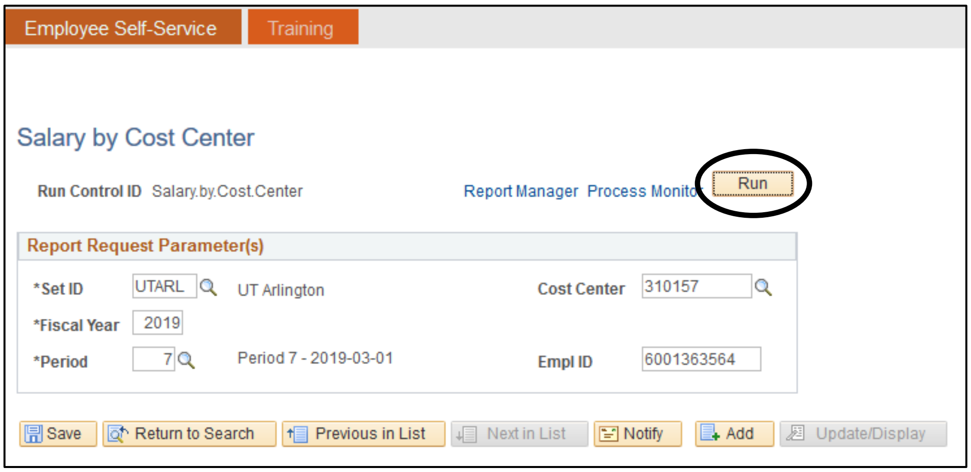


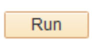
Optional

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 when it is available. Starting from the UT Share Main Menu, navigate to the desired page and enter a run control ID. Once the report parameters page is displayed, update the conditions for the report (if necessary).

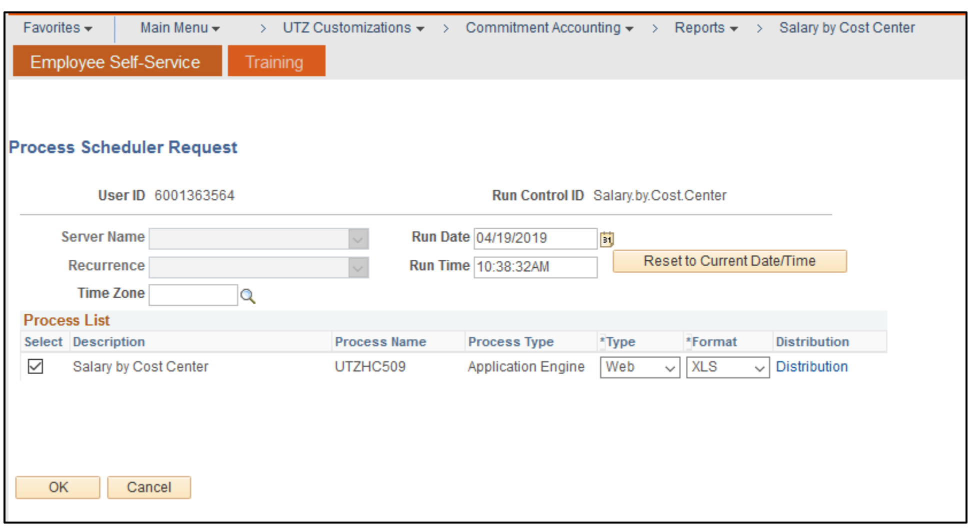
1. In this example, the parameters for the report have already been entered. You are ready to generate the report.



2. Click the **Run**  button.

The Process Scheduler Request page displays. This is the page used to indicate the report output format (e.g. PDF or XLS) and to distribute the report to additional recipients.

3. Click the blue Distribution link.



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.

4. Enter the number of days to retain the report in the **Retention Days** field.
5. Click the icon 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.*

6. Select User or Role from the **ID Type** drop down field.
7. Enter or search for the Employee ID# in the **Distribution ID** field.
8. Click the **OK** OK button.