

Procedures for Requesting PeopleSoft Reports, Report Modifications and Ad Hoc Queries

Users will determine whether they need a formatted report or an ad hoc query. If a user needs a formatted report, he/she will need to complete a ***PeopleSoft Report Request*** form and the report will be written in Crystal, nVision or SQR. For ad hoc reports, an e-mail describing the information needed will serve as the request. Ad hoc queries will be written by the Controller's Office. These queries can be run to a listbox, to Excel (nVision) or to a Crystal Reports screen, however, they *will not* receive any special formatting in either Excel (nVision) or Crystal. The user will be responsible for creating any reports from the data retrieved. Ad hoc queries will provide a quick means of looking up individual balances or retrieving a smaller number of lines from a table.

Formatted Reports

The ***PeopleSoft Report Request*** form should be completed and forwarded to Jack George in the Controller's Office. Jack will review the form for completeness, including authorizing signature and determine the status (accepted or rejected) of the request based on the reports currently available. Rejected requests will be returned to the requestor with an explanation of where the requested information can be obtained. For accepted requests, the report format will be determined (Crystal, nVision or SQR). Crystal and nVision reports will be assigned a sequential report number and will be written by the Controller's Office, while SQR requests will be forwarded to Ron Randa. Ron will assign the SQR request a report number and will forward it to the appropriate programmer/analyst. Once the report is complete, a copy of the report (Crystal, nVision or SQR), along with the original PeopleSoft Report Request form will be forwarded to Ron for a final signature. Upon Ron's signature, the report request will be returned to Jack George, where it will remain on file. Jack will contact the requestor with the appropriate report number, instructions on running, etc

Ad hoc Queries

An e-mail will be forwarded to Jack George in the Controller's Office via an alias (psreports@po.cwru.edu). The e-mail will be in the following format:

Requestor Name:
Date Needed:
Description of Information Desired:
Prompts Needed:

Rejected requests will be returned to the requestor via e-mail with an explanation of where the information can be obtained. Accepted requests will be recorded in the ad hoc queries database and assigned a query number of the following format: USERnnnn – Descr., where nnnn represents a four-digit sequentially assigned number and Descr

represents a brief descriptive name for the query. Once the query is written, the requestor will be notified of the new query name via e-mail. This query will remain available through the PeopleTools / Query menu within PeopleSoft.

It is anticipated that ad hoc queries will comprise the majority of all requests. Since most ad hoc queries are relatively simple and much less time consuming, they will be encouraged over formatted reports. Ad hoc queries will be easier to request and should result in faster turn around.



PeopleSoft General Ledger Report Request



This form should be used to request a revision to a current report or to request a new Crystal, nVision or SQR report. Do not request ad hoc queries on this form.

Request Type

New Report
 Revision to Report _____
Report No.

Brief Description of Request:
 (Indicate layout, including row/column titles, sorts, etc.)

Purpose of Request:

Requested by: _____ E-mail: _____ Date: _____

Department: _____ Ext. _____ Date Needed: _____

Approval: _____ Date: _____
(Management Center)

CONTROLLER'S OFFICE USE ONLY

TYPE: nVision Crystal SQR

Received on: _____ Assigned to: _____ Date: _____

Accepted Priority: _____

Rejected Reason: _____

