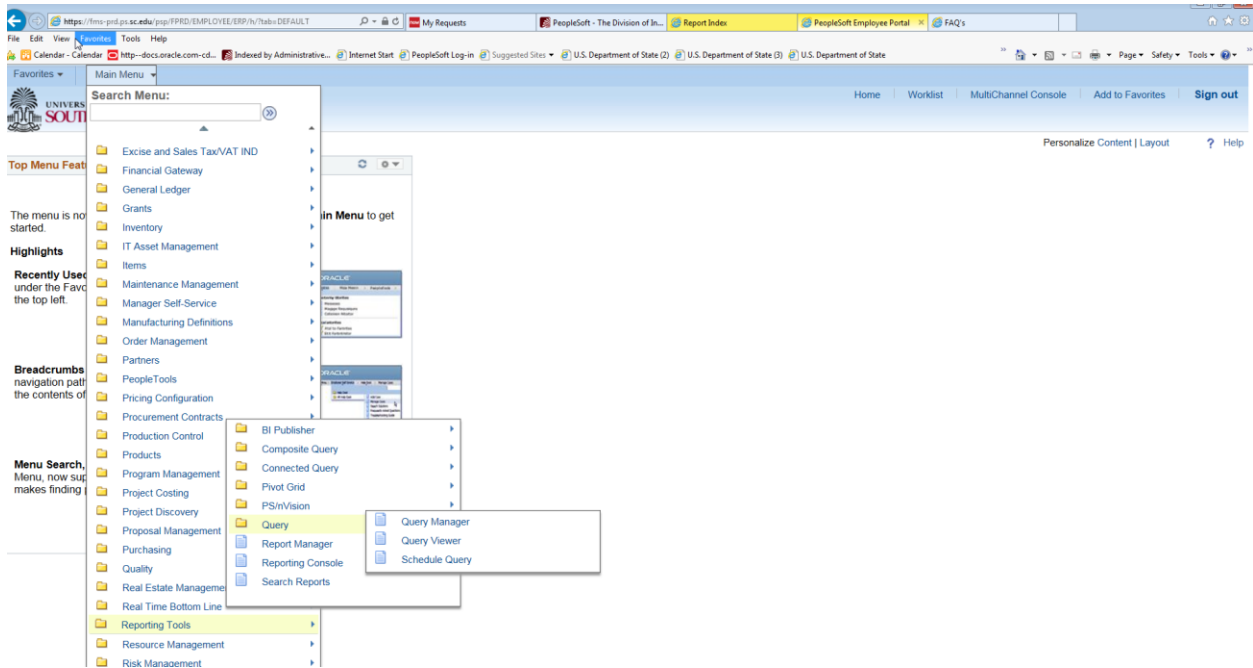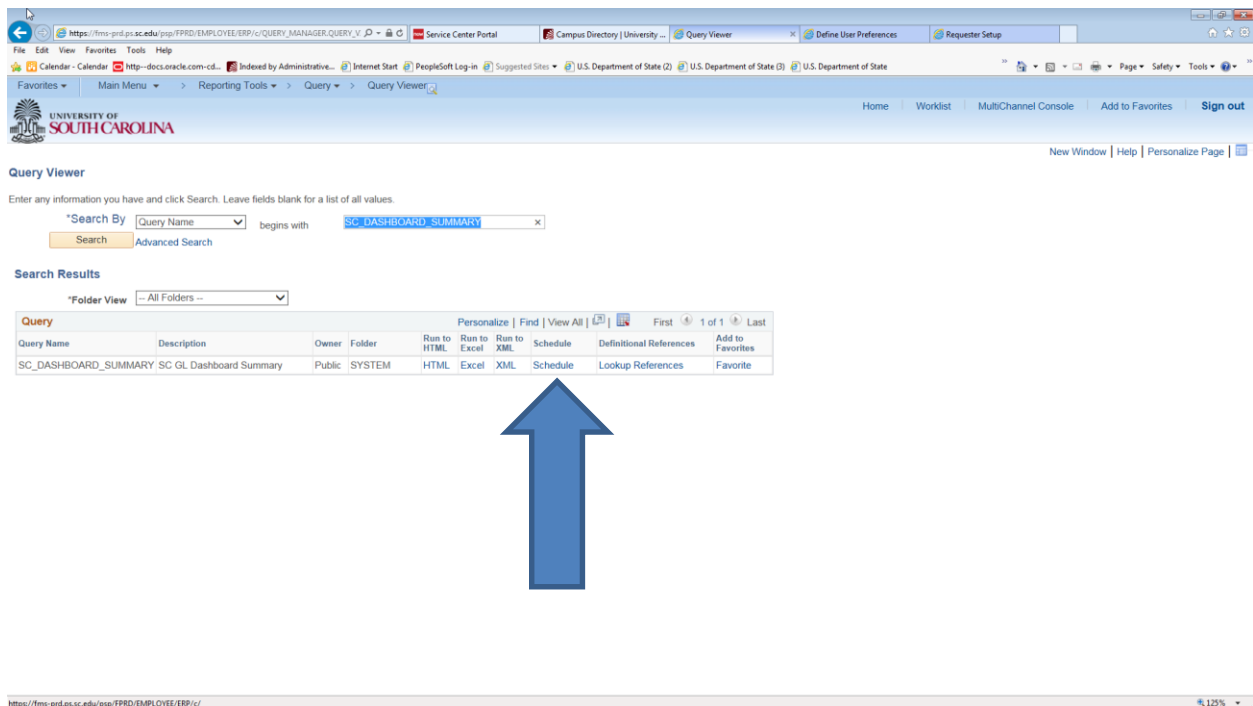Main Menu > Reporting Tools>Query>Query Viewer
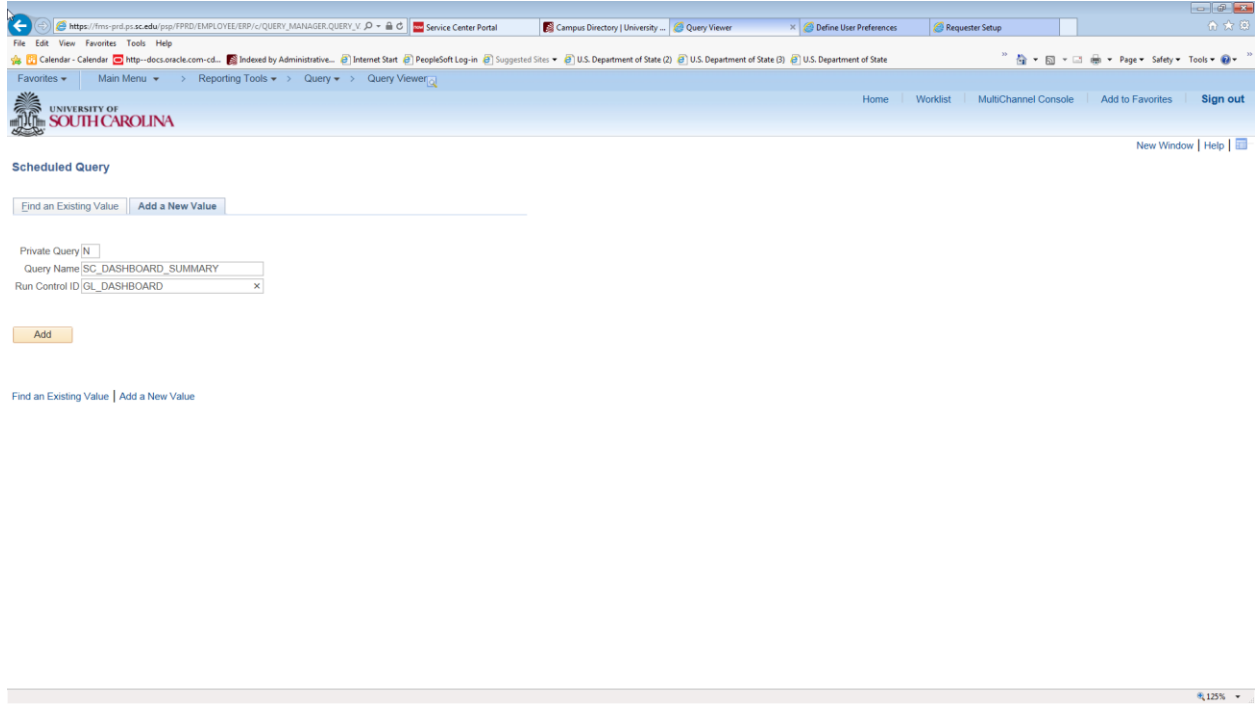

Then enter the query name "SC_GL_DASHBOARD_SUMMARY" and press "Search"


You then click the "Schedule"

You then type a name for your Run Control ID, in the example, "GL Dashboard" was used.   The user can choose the name. The name can't have spaces. Then press "ADD"

You can then enter the fiscal year, accounting period, operating unit, department, fund code, class field, or project. You can fill in any or all of these fields. The more you enter the more specific data. After you enter your fields press "OK". For the example, fiscal year, accounting period, department, fund were entered.
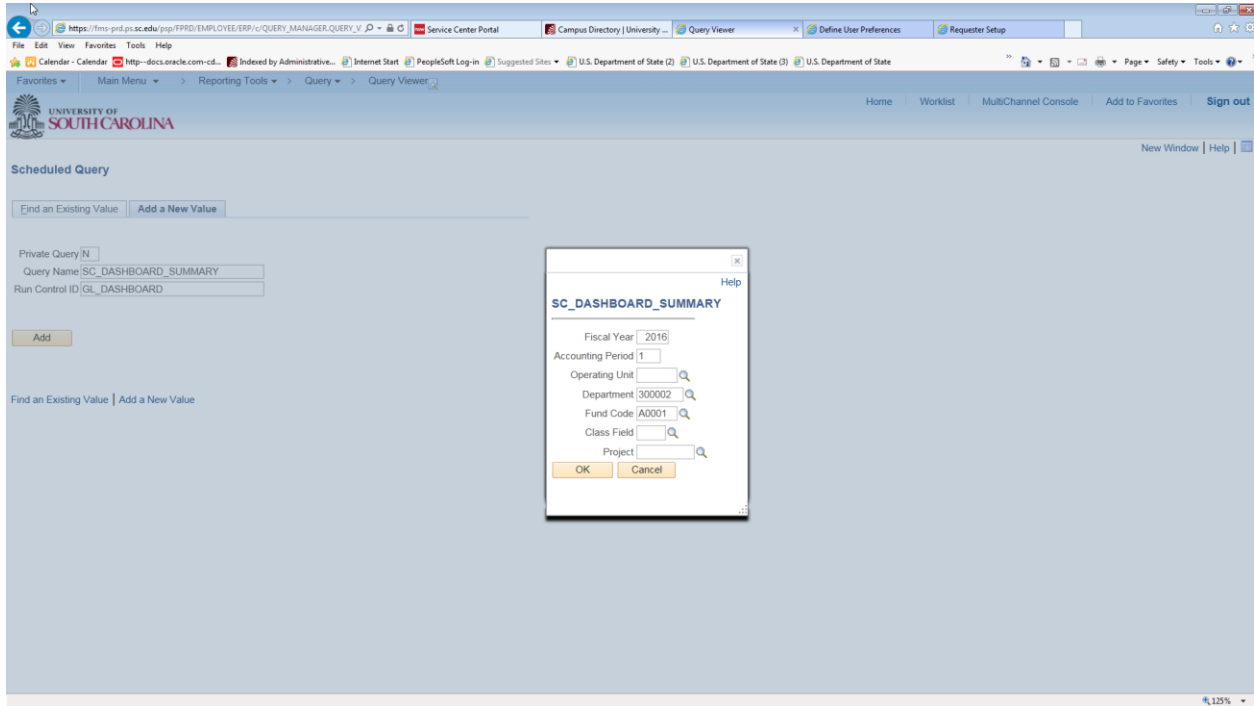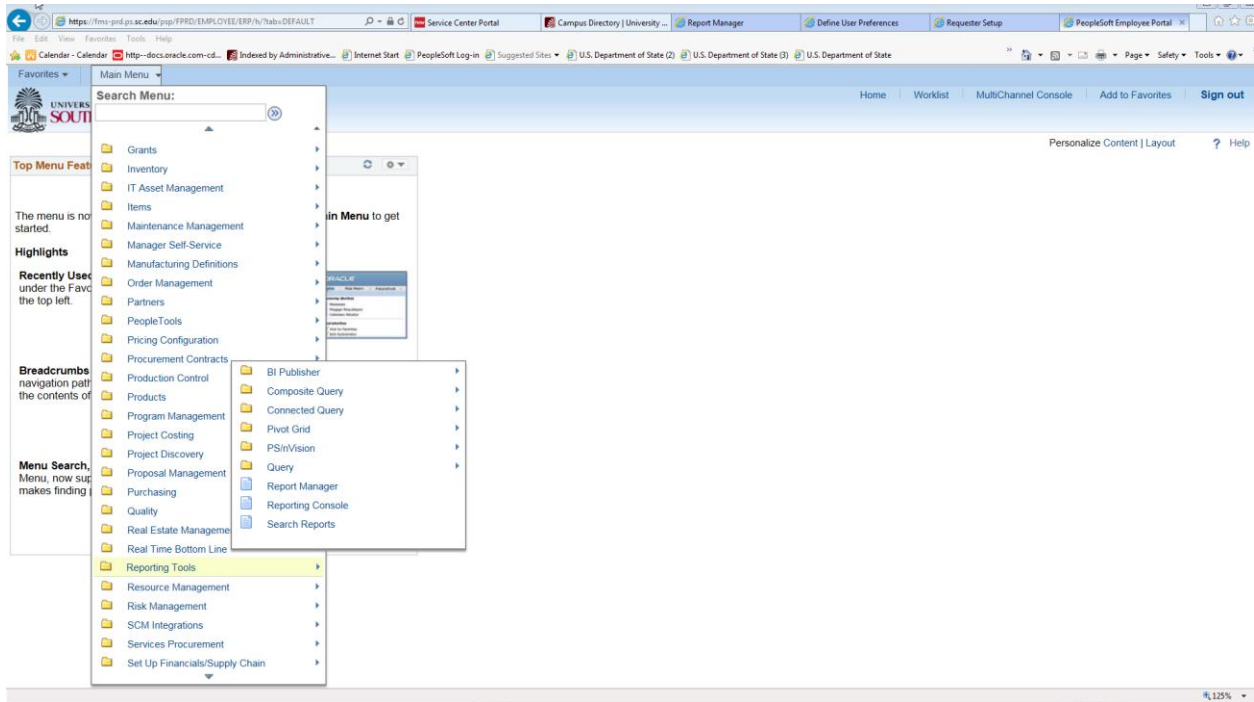

The schedule Query screen will ask for a "Description" and you name it anything you prefer and press "OK"
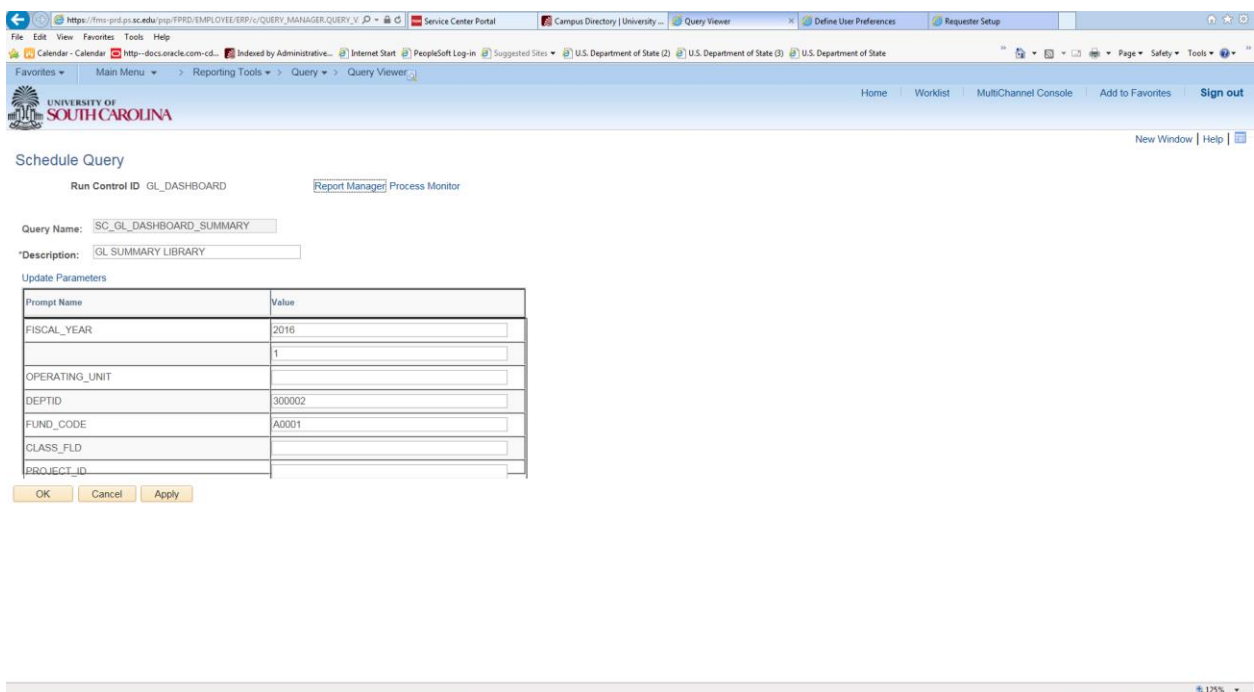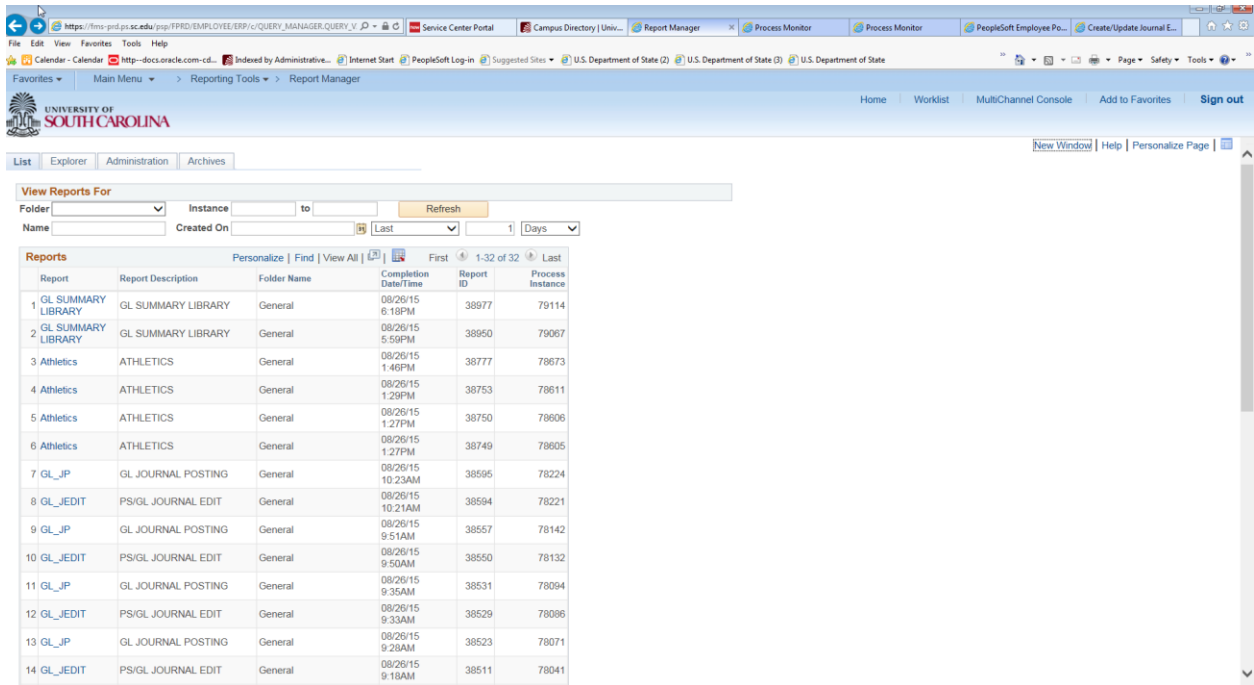
Change the Format to "XFORM" and put SC_GL_DASHBOARD_SUMMARY in transformation field and press "OK".
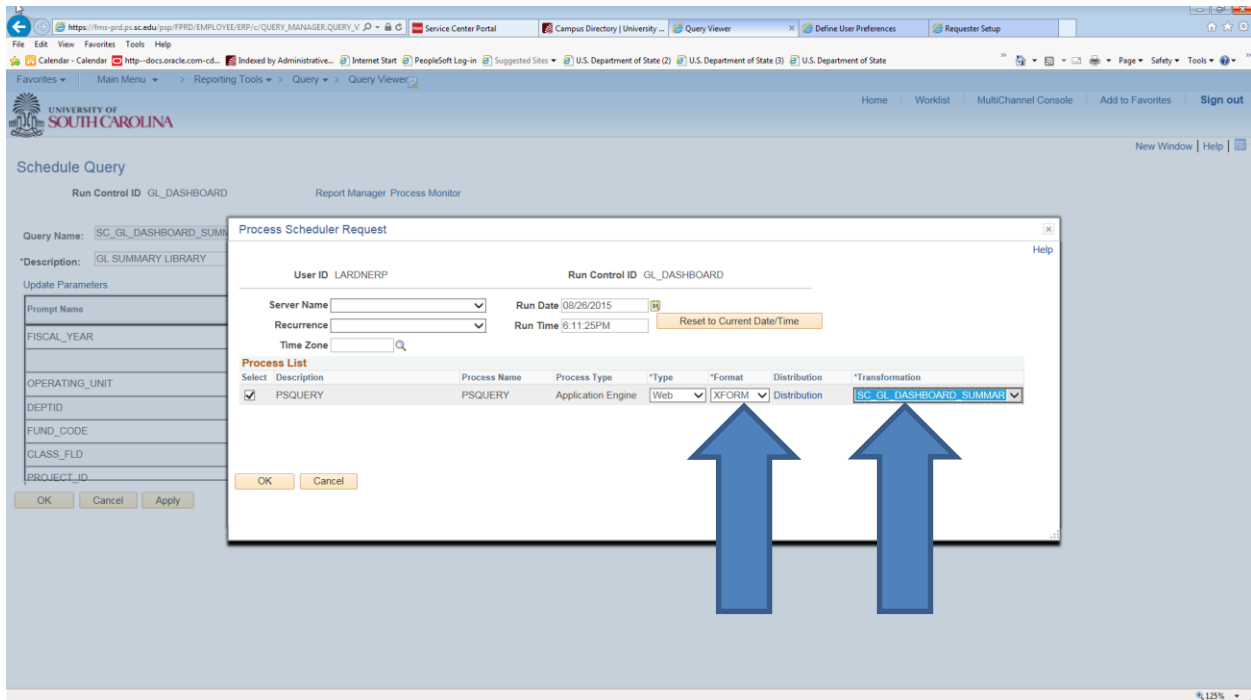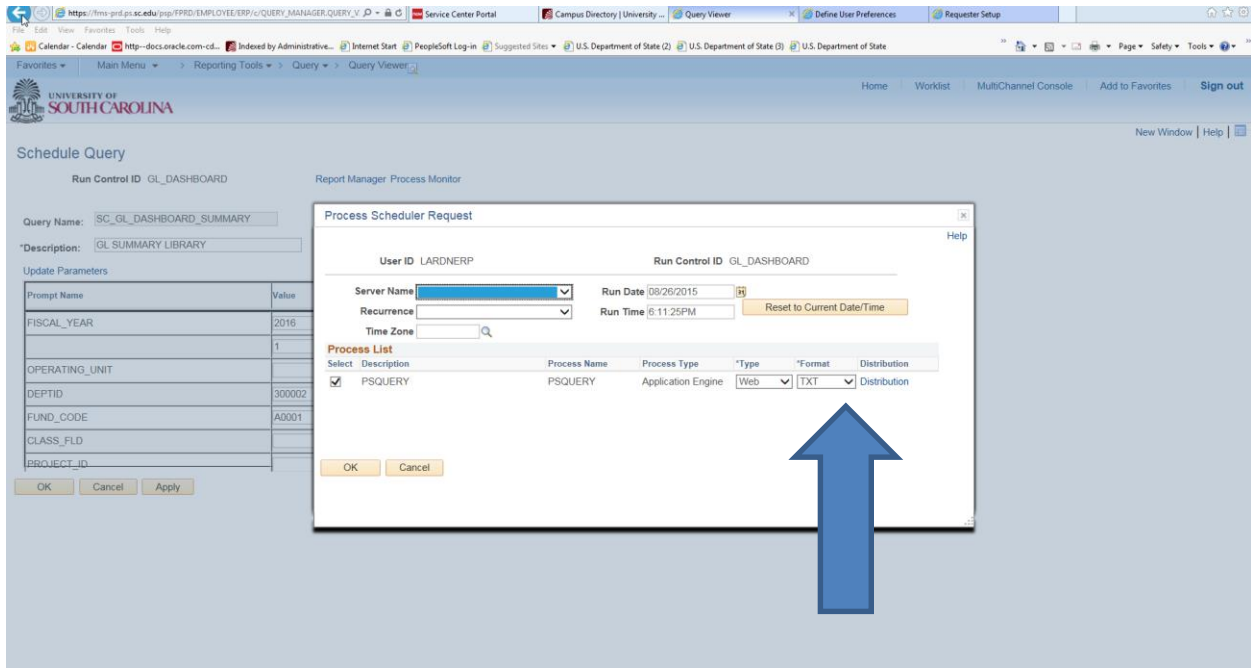
To view the report go Main menu >Reporting Tool>Report Manager

The report manager will have your report listed in the example "GL SUMMARY LIBRARY" and you click on the link. You don't see the report in your list hit the "refresh" button until you see the report listed.

When you get to the screen below, you want to choose the SC_GL_DASHBOARD_SUMMARY link.

Your report should come up on your screen.