

# Scheduling One-Time and Recurring Processes

**OBJECTIVE:** Provide an overview on how to schedule processes for future runs and retrieve their output.

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<a href="#"><u>LESSON 3: RETRIEVING OUTPUT VIA PROCESS MONITOR.....</u></a>	<a href="#"><u>PG. 7</u></a>

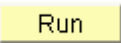
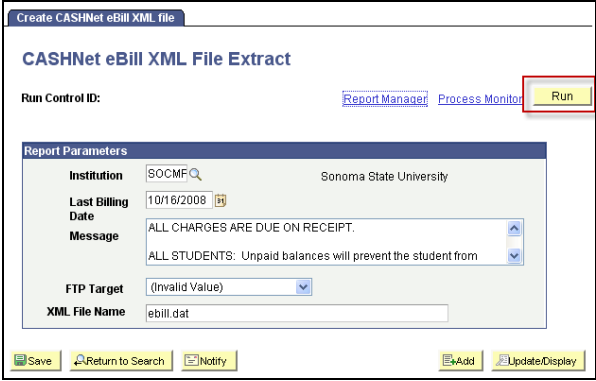
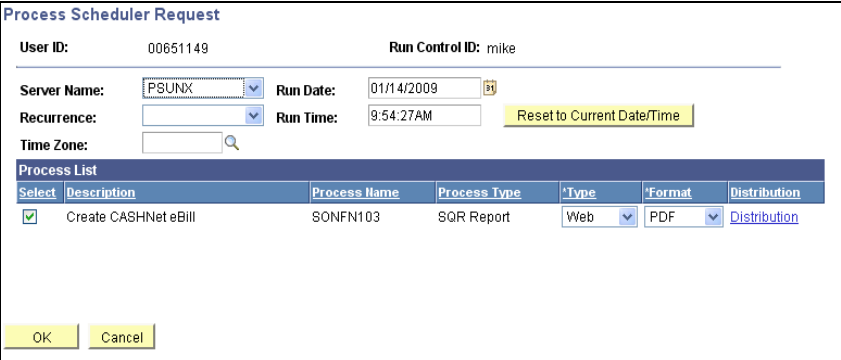
### ***NEED ADDITIONAL INFORMATION?***

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **CAMPUS COMMUNITY FUNCTIONAL LEAD** under Student Administration.

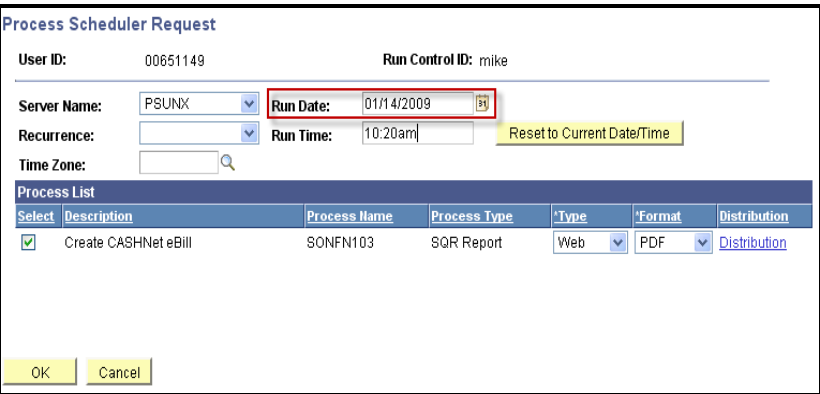
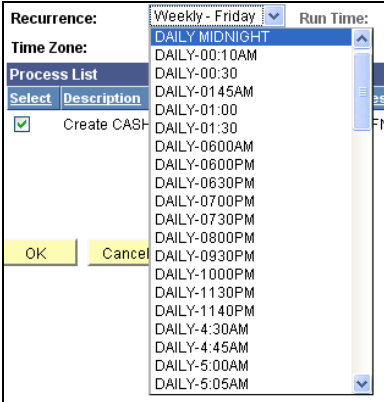
# Lesson 1: Scheduling a Process

Introduction: Many day-to-day processes can be scheduled for future runs, including off business hours, allowing for more efficient use of time and system resources. In addition to scheduling a single instance of a process to run, you can also schedule processes to have a future recurring schedule. The table below explains how to schedule processes.

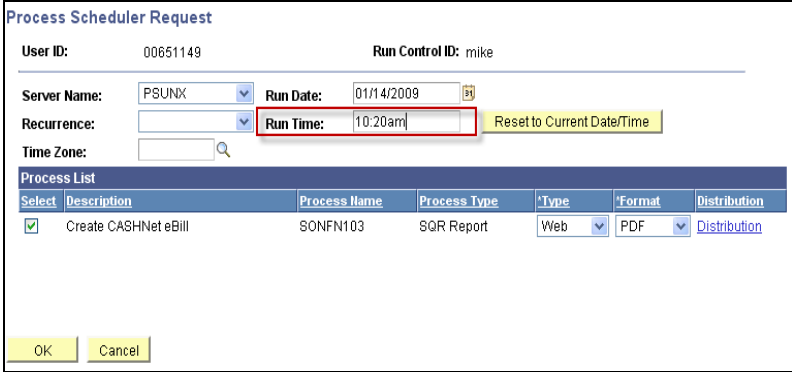
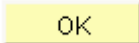
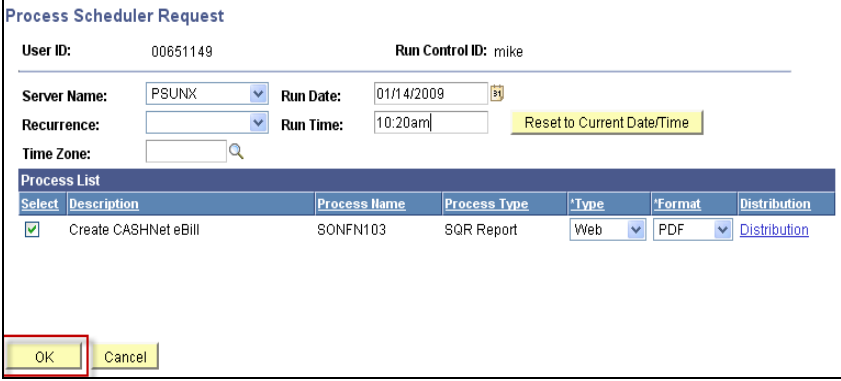
## Scheduling a Process

Step	Action	Screenshot
1	Click <b>Run</b> on the Run Control screen of the process you are scheduling. 	
2	This takes you to the process scheduler request screen for the process you wish to schedule for a future time.	

*Continued on the next page...*

<p>3</p> <p>Enter the date for the process to run into the <b>Run Date</b> field.</p> <p>NOTE: If your process will be recurring enter the first date the process should run.</p>									
<p>4</p>	<table border="1"> <thead> <tr> <th data-bbox="215 747 836 793">If</th> <th data-bbox="836 747 1487 793">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="215 793 836 919">The process will be run multiple times and can be scheduled ahead of time...</td> <td data-bbox="836 793 1487 919">Go to step 5.</td> </tr> <tr> <td data-bbox="215 919 836 1050">The process will be run a single time and can be scheduled ahead of time...</td> <td data-bbox="836 919 1487 1050">Go to step 6.</td> </tr> <tr> <td data-bbox="215 1050 836 1180">The process will be run a single time and must be run immediately...</td> <td data-bbox="836 1050 1487 1180">Continue to run the process as you would normally.</td> </tr> </tbody> </table>	If	Then	The process will be run multiple times and can be scheduled ahead of time...	Go to step 5.	The process will be run a single time and can be scheduled ahead of time...	Go to step 6.	The process will be run a single time and must be run immediately...	Continue to run the process as you would normally.
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The process will be run a single time and must be run immediately...	Continue to run the process as you would normally.								
<p>5</p> <p>Select the appropriate recurrence from the <b>Recurrence</b> drop down menu.</p> <p>Skip to step 6.</p>									

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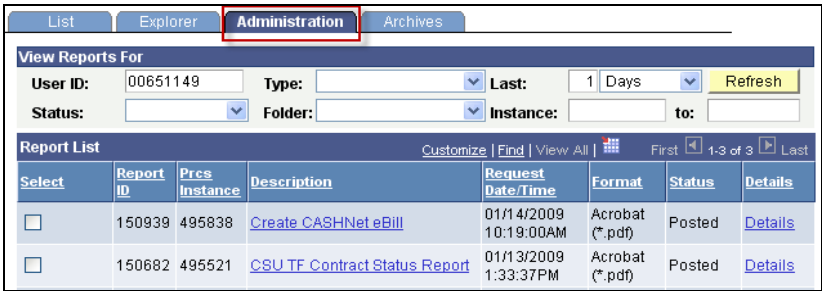
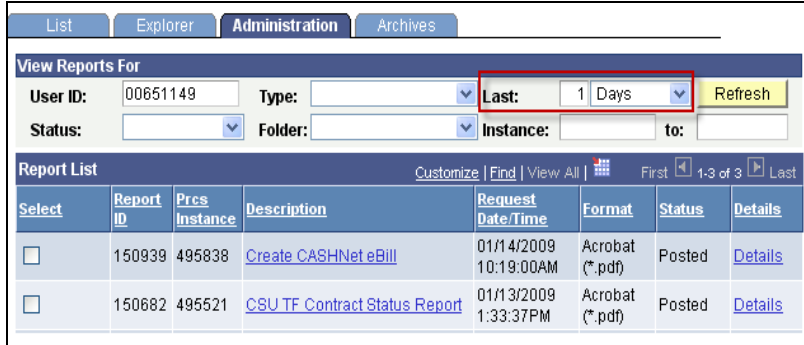
<p>6</p>	<p>Enter the time the process should run in the <b>Run Time</b> field.</p> <p>NOTE: Selection of a recurrence will default the <b>Run Time</b> to the specified recurrence.</p>	 <p>The screenshot shows the 'Process Scheduler Request' form. The 'Run Time' field is highlighted with a red box and contains the value '10:20am'. Other fields include 'Server Name: PSUNX', 'Run Date: 01/14/2009', and 'Recurrence:'. A table below lists the process details: 'Create CASHNet eBill' (SONFN103, SQR Report, Web, PDF, Distribution).</p>
<p>7</p>	<p>Click on the <b>Ok</b> button.</p> <p></p>	 <p>The screenshot shows the same 'Process Scheduler Request' form as above, but the 'OK' button at the bottom left is highlighted with a red box.</p>

## Lesson 2: Retrieving a Report via Report Manager

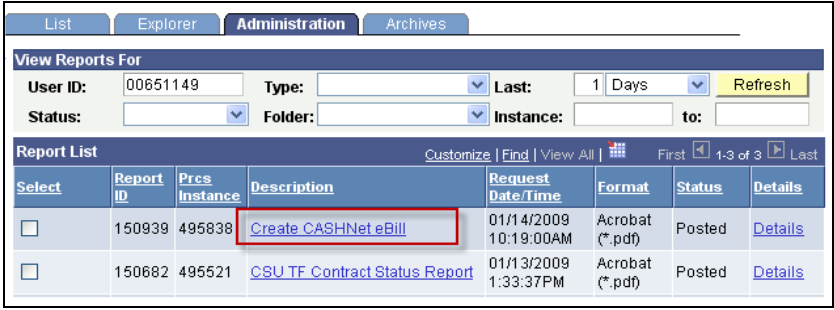
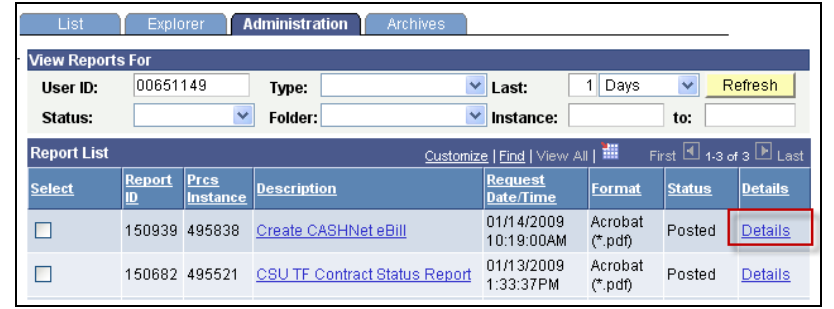
**Navigation:** Reporting Tools > Report Manager

Introduction: Once report processes are scheduled, it is necessary to navigate to the Report Manager to retrieve output. The Report Manager will organize processes by User ID so it isn't necessary to remember a specific run control ID. If the output is something other than reports, continue to Lesson 3. The table below will explain the process to access the process monitor or report manager.

### Retrieving a Report via Report Manager

Step	Action	Screenshot
1	<p>Navigate to Reporting Tools&gt; Report Manager</p> <p>NOTE: Make sure the screen is on the <i>Administration</i> tab.</p>	
2	<p>Enter the appropriate number in the <b>Last</b> box to display reports created using your specific user id during a specified time period.</p> <p>NOTE: Most processes and reports are only maintained for 7 days after their generation</p>	

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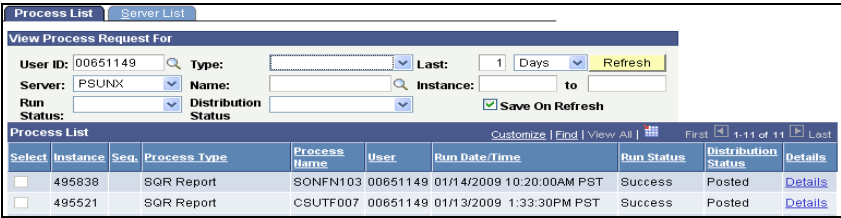
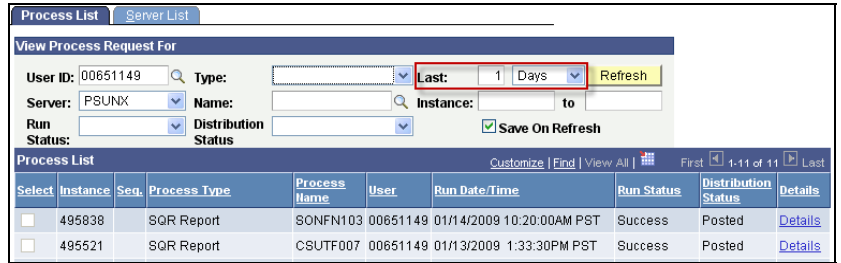
<p>3</p>	<p>To view a specific report click on the blue underlined <b>Description</b> link.</p>	 <p>The screenshot shows the 'View Reports For' section with filters for User ID (00651149), Type, Last (1 Days), Status, Folder, Instance, and to. Below is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The first row, 'Create CASHNet eBill', has its 'Description' cell highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Report ID</th> <th>Prcs Instance</th> <th>Description</th> <th>Request Date/Time</th> <th>Format</th> <th>Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>150939</td> <td>495838</td> <td>Create CASHNet eBill</td> <td>01/14/2009 10:19:00AM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>150682</td> <td>495521</td> <td>CSU TF Contract Status Report</td> <td>01/13/2009 1:33:37PM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> </tbody> </table>	Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details	<input type="checkbox"/>	150939	495838	Create CASHNet eBill	01/14/2009 10:19:00AM	Acrobat (*.pdf)	Posted	Details	<input type="checkbox"/>	150682	495521	CSU TF Contract Status Report	01/13/2009 1:33:37PM	Acrobat (*.pdf)	Posted	Details
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<p>4</p>	<p>To view additional details, such as a trace file or message log, click on the blue underlined <b>Details</b> link.</p>	 <p>The screenshot is identical to the previous one, but the 'Details' link in the first row of the 'Report List' table is highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Report ID</th> <th>Prcs Instance</th> <th>Description</th> <th>Request Date/Time</th> <th>Format</th> <th>Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>150939</td> <td>495838</td> <td>Create CASHNet eBill</td> <td>01/14/2009 10:19:00AM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>150682</td> <td>495521</td> <td>CSU TF Contract Status Report</td> <td>01/13/2009 1:33:37PM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> </tbody> </table>	Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details	<input type="checkbox"/>	150939	495838	Create CASHNet eBill	01/14/2009 10:19:00AM	Acrobat (*.pdf)	Posted	Details	<input type="checkbox"/>	150682	495521	CSU TF Contract Status Report	01/13/2009 1:33:37PM	Acrobat (*.pdf)	Posted	Details
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# Lesson 3: Retrieving Process Output via Process Monitor

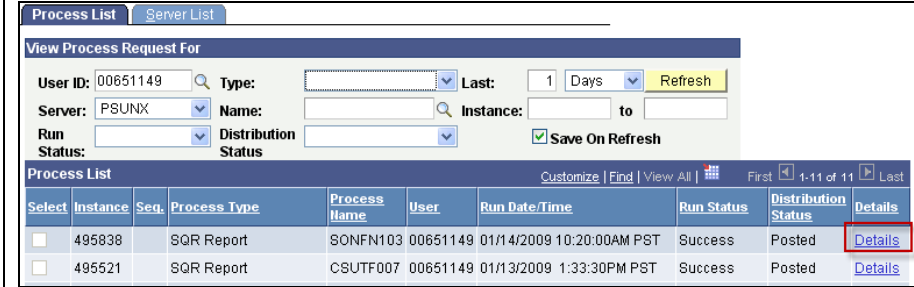
**Navigation:** PeopleTools > Process Scheduler > Process Monitor

Introduction: Once processes are scheduled, it is necessary to navigate to the Process Monitor to retrieve output. The Process Monitor will organize processes by User ID so it isn't necessary to remember a specific run control ID. The table below will explain the process to access the process monitor or report manager.

## Retrieving Output via Process Monitor

Step	Action	Screenshot
1	Navigate to PeopleTools > Process Scheduler > Process Monitor.	
2	Enter the appropriate number in the <b>Last</b> box to display reports created using your specific Peoplesoft user id during the specified time period NOTE: Most processes and reports are only maintained for 7 days after their generation	

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<p>3</p>	<p>To view output for a specific process click on the blue underlined <b><i>Details</i></b> button.</p>	
<p>4</p>	<p>Click on any of the blue underlined links to view the associated information.</p>	