Scheduling PeopleSoft Queries and Reports

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<table>
<tr><th>Excerpted from the QY1 guide
How to Schedule a Query</th><th>How to Schedule a Report</th></tr>
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1. Search for the desired query. In the results area, click Schedule.
2. On the Scheduled Query page, you will be taken to the Add a New Value tab. Enter a Run Control ID with no spaces (TIP: Simply copy/paste the query name). Click Add.
3. If conditions are required, select values for each prompt. Click OK.
4. On the Schedule Query page, type a Description (TIP: Simply copy/paste the query name). Verify the values, then click Apply. CLICKING APPLY IS IMPORTANT!
▪ Apply = Schedules the query CLICK THIS!
▪ OK = Saves the Run Control ID but does not schedule the query
5. The Process Scheduler Request window will appear. This is where you set the recurrence and distribution. Enter the following:
▪ Recurrence: Select the desired recurrence. Example: M-F at 7:30 am. Notice the run time changes based on the value you select.
▪ Run Date: Select the date.
▪ Format: Queries are typically XLS. However you can select XLS, PDF, HTM, TXT, and so on.
▪ Distribution: Click the Distribution link so you can email yourself a link to the query output. Select Email Web Report, enter an email subject and message text. If desired, you can also add additional recipients by clicking the + sign in the Distribute To area. Click OK to return to the Process Scheduler Request window. NOTE: You must have a valid email address attached to your User Profile in order to receive the email message.
▪ Click OK. An email is immediately sent to you with a link to the output. This one is not the recurrence.
6. Click Process Monitor.
7. Make sure the query is scheduled to run with the selected recurrence.
▪ Click on the green circular arrow icon on the Process Monitor page to view recurrence details, put it on hold or cancel.
▪ To “pick up” a query that says Success, Posted, you can click the Details link and click View Log/Trace to view the output.
▪ What happens next? The query will run on recurrence for the selected time and send you an email link. For example, for a query scheduled to run M-F at 7:30 am, you will receive an email at 7:30 am with a link that you can click to then view the output.
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1. Navigate to the desired report.
2. Add/find a Run Control as usual and enter the desired parameters.
3. Click Run.
4. The Process Scheduler Request window will appear. This is where you set the recurrence and distribution. Enter the following:
▪ Recurrence: Select the desired recurrence. Example: M-F at 7:30 am. Notice the run time changes based on the value you select.
▪ Format: Reports are typically PDF. However you can select XLS, PDF, HTM, TXT, and so on.
▪ Distribution: Click the Distribution link so you can email yourself a link to the query output. Select Email Web Report, enter an email subject and message text. If desired, you can also add additional recipients by clicking the + sign in the Distribute To area. Click OK to return to the Process Scheduler Request window. NOTE: You must have a valid email address attached to your User Profile in order to receive the email message.
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Emails will be sent from SDFP92@sdcoe.net (Finance) and SDHP92@sdcoe.net (HCM).

Emails are sent to your email address entered on your User Profile. Go to Portal (red screen - https://peoplesoft.erp.sdcoe.net) > Main Menu > My System Profile to update/enter your user email address.

Useful Screens for Scheduling Queries & Reports

Main Menu > Reporting Tools > Query > Query Viewer

- This is the Query Viewer screen where you can search for queries that begin with M_ or FAR_.
  NOTE: If your district has staff authorized to create queries, they might begin with something different.
- Upon finding a query you can schedule it using the Schedule link.

Main Menu > Reporting Tools > Query > Schedule Query

- Use the Schedule Query screen to find the run controls that you have created for scheduled queries.
- You can modify the previously entered parameters and re-run the query to schedule it.
- If desired, you can add a new run control to schedule a query from this screen (instead of from Query Viewer).
- Also use this screen to get to the Report Manager screen: (1) Find the run control, (2) click Report Manager.

Main Menu > PeopleTools > Process Scheduler > Process Monitor

- This is the direct navigation to the Process Monitor to view run status, details, and output generated by scheduled processes (i.e., PSQUERY process that generates query results).
- Use this screen to cancel a report or query that is on a recurrence. You need to know the name of the process or when it is scheduled to run (click Details to see the Run Control ID and recurrence you used). Click the green circular arrow to Stop ("halt the current request from recurring a new request") or Hold ("suspend initiating and recurring the current queued request").

Main Menu > Reporting Tools > Report Manager > Administration tab

- Use the Report Manager (Administration tab) to see queries and reports that have previously run and access the results: (1) Click Administration tab, (2) enter the # of days (Last 10 days, for example) and refresh, (3) review the reports/queries using the links.

Main Menu > PeopleTools > Process Scheduler > Recurrences

- All employees have read-only access to the Recurrence Definitions. Go to this screen to get details on a recurrence (which days, which times, etc.).