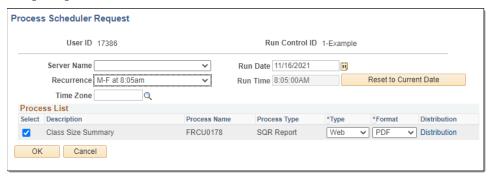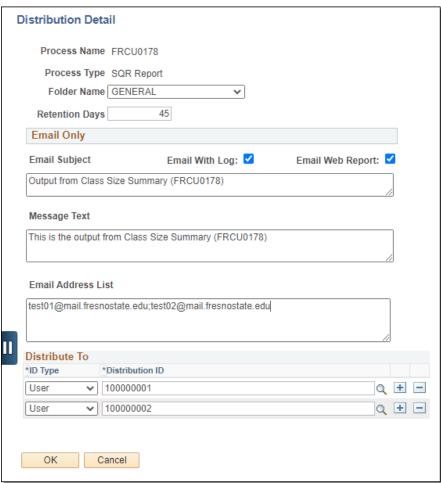# Running Standard Process and Reports in PeopleSoft

When Running a Standard PeopleSoft Process or Report,

- After a <u>Run Control ID</u> is selected or created and after the request page fields are populated, click the **[Run]** button.
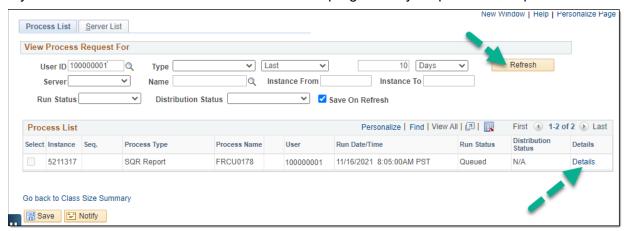
Process Scheduler Request

User ID 17386			Run Control ID 1-Example	

Server Name		Run Date 11/16/2021
Recurrence M-F at 8:05am		Run Time 8:05:00AM — Reset to Current Date
Time Zone		

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Class Size Summary	FRCU0178	SQR Report	Web	PDF	Distribution

OK   Cancel

- Leave the Server Name blank
- You *may* schedule the process or report to run in the future by changing the **Run Date** or **Run Time**
- You *may* schedule this report to run repeatedly, by selecting the appropriate **Recurrence**
- You *may* change where the output goes by changing the **Type** to **Web** or **Email**
- If you selected **Email** for the **Type,** you would get an email notification that the process completed.
- If you need to *email yourself a link to the output,* use **Web** for the **Type** and then click on the **Distribution** link.
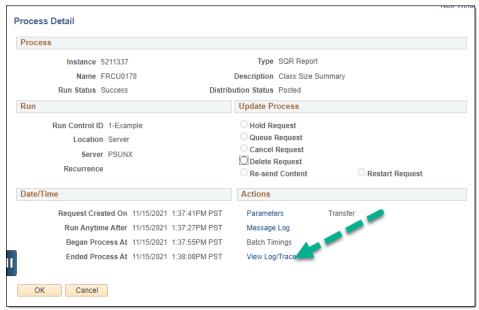
Distribution Detail

Process Name FRCU0178

Process Type SQR Report

Folder Name GENERAL

Retention Days 45

Email Only

Email Subject   Email With Log: ☑   Email Web Report: ☑

Output from Class Size Summary (FRCU0178)

Message Text

This is the output from Class Size Summary (FRCU0178)

Email Address List

test01@mail.fresnostate.edu;test02@mail.fresnostate.edu

Distribute To

*ID Type	*Distribution ID		
User	100000001		🔍 ➕ ➖
User	100000002		🔍 ➕ ➖

OK   Cancel

- Verify the **Email Web Report** is checked
  - Enter what you need for the **Email Subject** and **Message Text**
  - Enter all the email addresses for the people who need to receive the email (separated by semicolons)
  - ***Note***: *If you are sending a link to the file, add additional users EMPLIDS to the "Distribute To" list (so they will have access to view the output files).*
  - Click on the **[OK]** button
- Click on the **[OK]** button (to return to the main page)

You may click on the **Process Monitor** link to view the progress of your process or report.
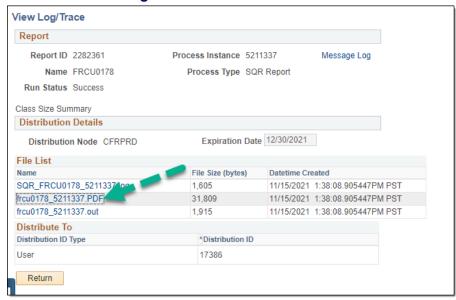

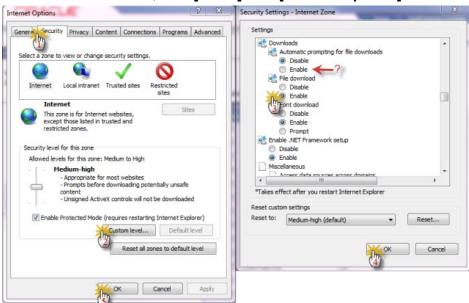(Occasionally click the **[Refresh]** button to update the display).
- When the *Run Status* indicates **Success,** and the *Distribution Status* indicates **Posted** your process is complete.
- If you did **not** send the output to yourself in an email:
  - click on the **Details** link

- click on the **View Log/Trace** line
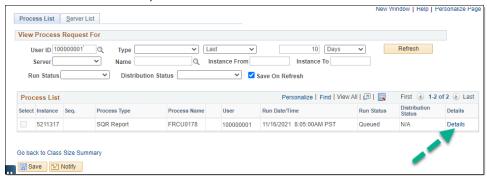

- click on the name of your file (ex: **<your_file_name>.xls**) link
- *If you are prompted for allowing Pop-Ups, it is OK to allow All popups from this web site.*
- *If you are prompted if it is OK to open a file from a different format, click the [OK] or [Yes] or [Allow] button to open the report.*
- In Internet Explorer you may have to modify setting to allow the report to download;
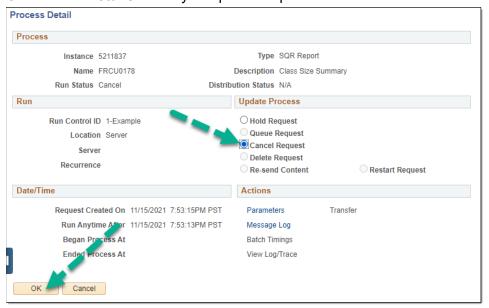 - On the IE menu, click **[Tools]** then **[Internet Options]**

- Click on the [Security Tab] then [Custom level...] button
- Scroll down to the "Downloads" area and click on the File download [Enable] button. Click both [OK] buttons to save your changes and exit out of the setup pages
  - *If this does not correct the problem, try also checking the "Automatic prompting for file downloads" button (see red arrow above).*
  - *If you still are having browser problems, contact the help desk and ask for desktop support.*

Stopping/Cancelling a Standard PeopleSoft Process or Report.

- To stop a running, queued or reoccurring report click on the **Process Monitor** link as above
- (Make sure that your data at the top of the page has your User ID and Last 3-10 Days, all other fields should be blank.)

- Click on the **Details** link of your queued report.

- Click the "**Cancel Request**" radio button
- Click the [**OK**] button.
- When you click the [**Refresh**] button on the Main Process monitor page, you should see your process cancelling, and after a few seconds it should be cancelled.