

Running Standard Process and Reports in PeopleSoft

When Running a Standard PeopleSoft Process or Report,

- After a Run Control ID is selected or created and after the request page fields are populated, click the **[Run]** button.

The screenshot shows the 'Process Scheduler Request' form. At the top, it displays 'User ID 17386' and 'Run Control ID 1-Example'. Below this, there are fields for 'Server Name' (a dropdown menu), 'Run Date' (11/16/2021), 'Recurrence' (M-F at 8:05am), and 'Run Time' (8:05:00AM). A 'Time Zone' field with a search icon is also present. A 'Reset to Current Date' button is located next to the Run Time field. Below these fields is a 'Process List' table with columns for 'Select', 'Description', 'Process Name', 'Process Type', '*Type', '*Format', and 'Distribution'. The table contains one row: 'Class Size Summary' (selected), 'FRCU0178', 'SQR Report', 'Web', 'PDF', and 'Distribution'. At the bottom of the form are 'OK' and 'Cancel' buttons.

- 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.

The screenshot shows the 'Distribution Detail' form. It contains fields for 'Process Name' (FRCU0178), 'Process Type' (SQR Report), and 'Folder Name' (GENERAL). There is a 'Retention Days' field set to 45. Below this is a section titled 'Email Only' with a blue header. It includes 'Email Subject' (Output from Class Size Summary (FRCU0178)), 'Email With Log' (checked), and 'Email Web Report' (checked). There is a 'Message Text' field containing 'This is the output from Class Size Summary (FRCU0178)'. Below that is an 'Email Address List' field containing 'test01@mail.fresnostate.edu;test02@mail.fresnostate.edu'. At the bottom is a 'Distribute To' table with columns for '*ID Type' and '*Distribution ID'. It lists two entries: 'User' with ID '100000001' and 'User' with ID '100000002'. Each entry has a search icon, a plus sign, and a minus sign. At the bottom of the form are 'OK' and 'Cancel' buttons.

- 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.

The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below this is a search section titled 'View Process Request For' with fields for User ID (100000001), Type, Last, 10 Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A 'Refresh' button is highlighted with a green arrow. Below the search section is a table titled 'Process List' with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with Instance 5211317, Process Type SQR Report, Process Name FRCU0178, User 100000001, Run Date/Time 11/16/2021 8:05:00AM PST, Run Status Queued, and Distribution Status N/A. A 'Details' link is visible in the last column of this row, also highlighted with a green arrow. At the bottom, there are buttons for 'Save' and 'Notify'.

(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

The screenshot shows the 'Process Detail' view. It is divided into several sections: 'Process' (Instance 5211337, Type SQR Report, Name FRCU0178, Description Class Size Summary, Run Status Success, Distribution Status Posted), 'Run' (Run Control ID 1-Example, Location Server, Server PSUNX, Recurrence), 'Update Process' (Hold Request, Queue Request, Cancel Request, Delete Request, Re-send Content, Restart Request), 'Date/Time' (Request Created On 11/15/2021 1:37:41PM PST, Run Anytime After 11/15/2021 1:37:27PM PST, Began Process At 11/15/2021 1:37:55PM PST, Ended Process At 11/15/2021 1:38:08PM PST), and 'Actions' (Parameters, Transfer, Message Log, Batch Timings, View Log/Trace). A green arrow points to the 'View Log/Trace' link. At the bottom, there are 'OK' and 'Cancel' buttons.

- 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/Canceling 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.)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5211317		SQR Report	FRCU0178	100000001	11/16/2021 8:05:00AM PST	Queued	N/A	Details

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

Process Detail

Process

Instance 5211837 Type SQR Report
Name FRCU0178 Description Class Size Summary
Run Status Cancel Distribution Status N/A

Run **Update Process**

Run Control ID 1-Example
Location Server
Server
Recurrence

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Re-send Content Restart Request

Date/Time **Actions**

Request Created On 11/15/2021 7:53:15PM PST [Parameters](#) [Transfer](#)
Run Anytime After 11/15/2021 7:53:13PM PST [Message Log](#)
Began Process At [Batch Timings](#)
Ended Process At [View Log/Trace](#)

- 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.