
SCHEDULING AND MAINTAINING RECURRING REPORTS

Overview

PeopleSoft Financials contains predefined recurrences used to schedule reports and queries to run at different times of the day, week or month. Scheduling recurring reports automates the report distribution process, which reduces the effort needed to manually run regular reports.

Once users schedule report recurrences, users can cancel and/or edit these recurrences at any time. Additionally, users can manually run a report between scheduled recurrences, if needed.

This documentation provides instructions on the following:

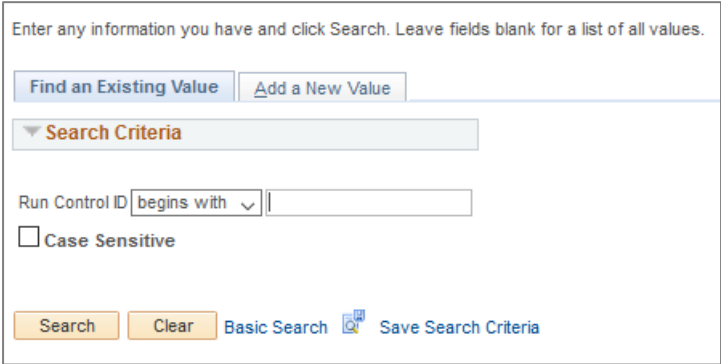
- Scheduling Recurring Reports
- Canceling a Recurring Report
- Editing a Recurring Report
- Running a Report Manually between Scheduled Recurrences
- Running the BOR_USER_RECURRENCES query to review past and future recurrences

Procedures

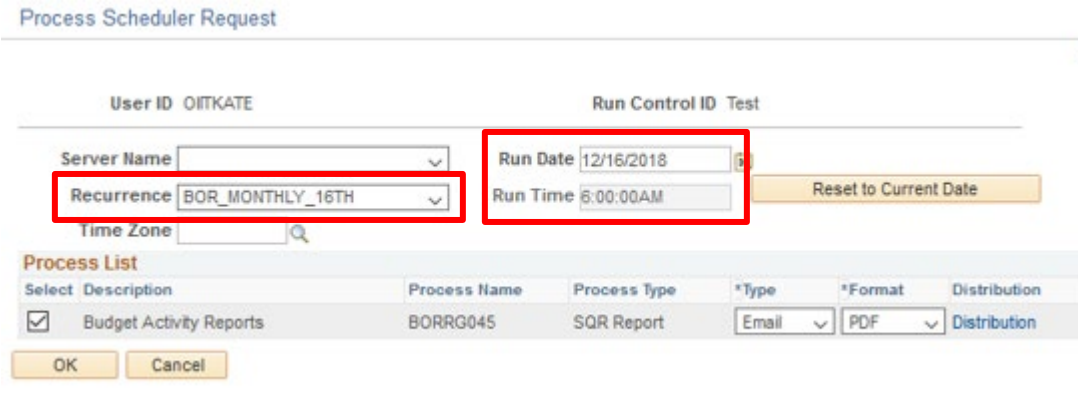
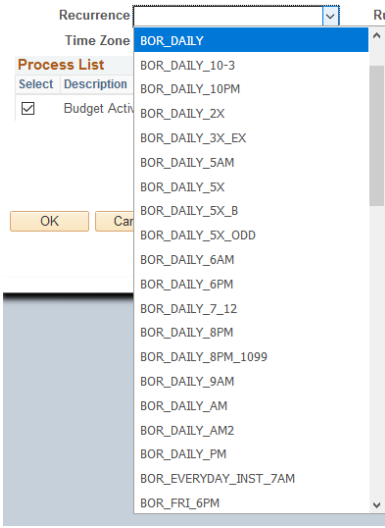
Scheduling Recurring Reports

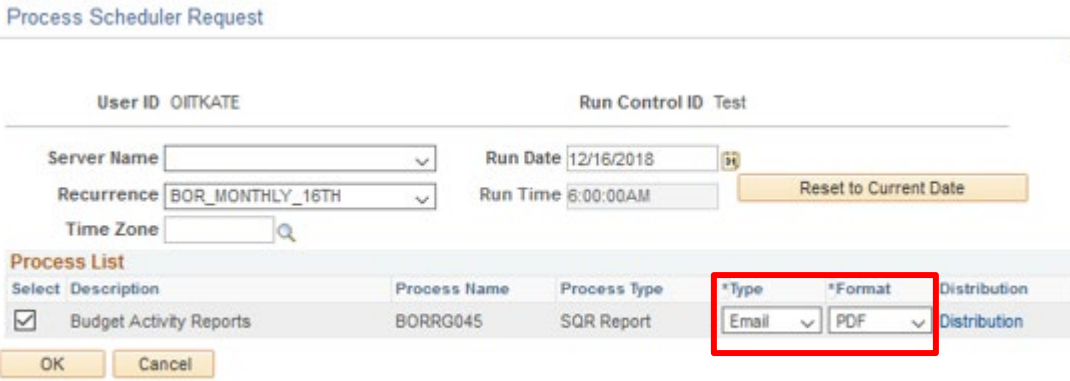
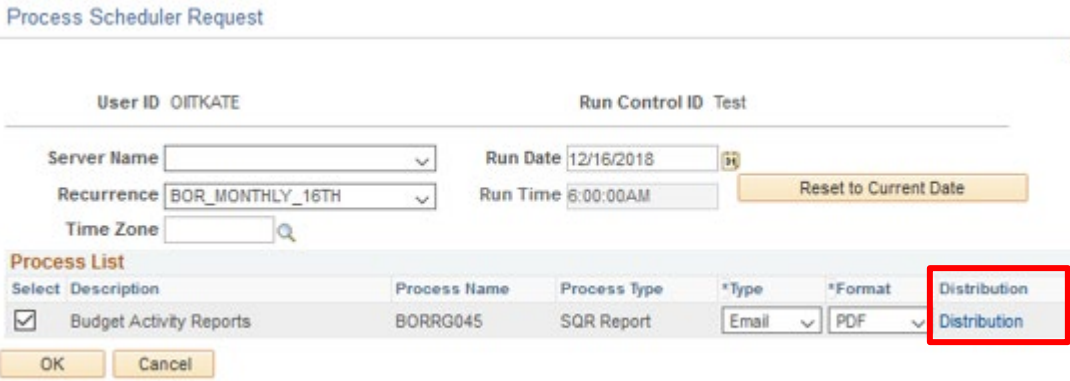
Scheduling recurring reports automates the report distribution process, which reduces the effort needed to manually run regular reports. When the recurrence runs at the scheduled day/time, recipients will receive an email with a copy of the report results attached to open the report directly without having to log in to PeopleSoft Financials. However, the system does not create an archived copy of the report within PeopleSoft Financials.

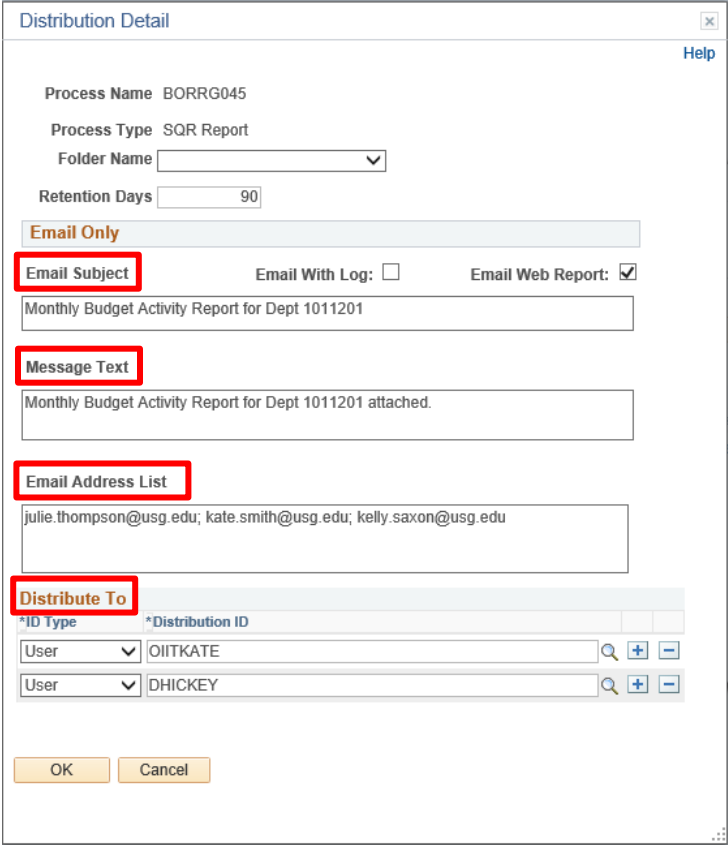
Below are step-by-step instructions on how to schedule a recurring report. This procedure can be used to schedule many reports within PeopleSoft Financials. In Steps 1 – 6 users select which report to schedule. The instructions below demonstrate how to schedule a recurring Budget Activity Report.

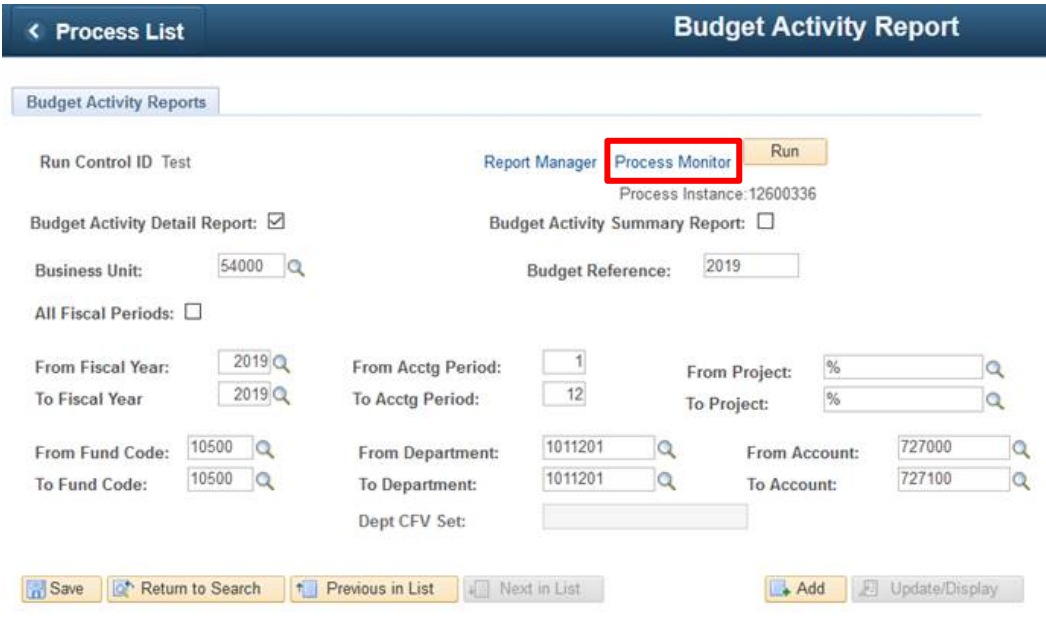
Step	Action
1.	Click the NavBar to navigate.
2.	Click the Navigator icon.
3.	Click the BOR Menus link .
4.	Click the BOR General Ledger link .
5.	Click the BOR GL Reports link .
6.	Click the Budget Activity Report link .
7.	<p>If the report has been run before, search for an existing Run Control ID as shown below:</p> <div data-bbox="500 1310 1216 1671" data-label="Form">  </div> <p>If a run control does not exist click Add a New Value tab, enter the desired Run Control ID, then click the Add button as shown below:</p>

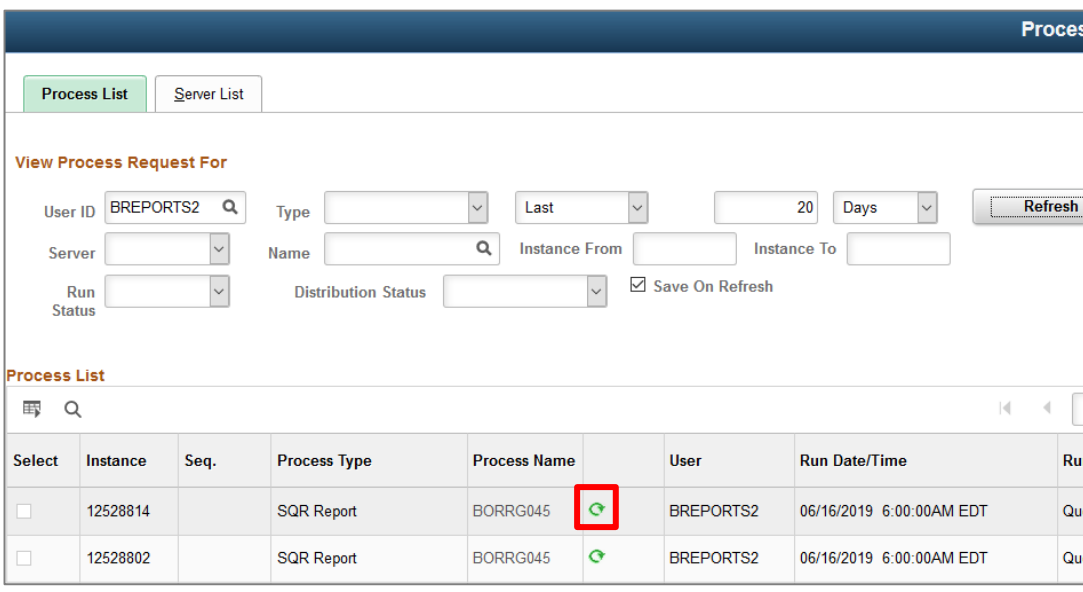
Step	Action
	<div data-bbox="604 256 1110 525" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between;"> Find an Existing Value Add a New Value </div> <p>Run Control ID <input type="text" value="(Enter Run Control here)"/></p> <div style="text-align: center;"> Add </div> </div> <p><i>Note: make sure to create a descriptive Run Control ID that represents report results to ensure the Run Control ID can be easily identified at a later time.</i></p>
8.	<p>Enter applicable report request parameters and click the Save button. The example below will run for Business Unit 5400, Budget Reference 2019, Fiscal Year 2019, Accounting Periods 1 – 12, Fund 10500, Department 1011201 and Accounts 72700 - 727100.</p> <div data-bbox="324 928 1401 1591" style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; background-color: #2c4e64; color: white; padding: 5px;"> < Employee Self Service Budget Activity Report </div> <div style="padding: 10px;"> <p>Budget Activity Reports</p> <p>Run Control ID Test Report Manager Process Monitor Run</p> <p>Budget Activity Detail Report: <input checked="" type="checkbox"/> Budget Activity Summary Report: <input type="checkbox"/></p> <p>Business Unit: <input type="text" value="54000"/> <input type="button" value="🔍"/> Budget Reference: <input type="text" value="2019"/></p> <p>All Fiscal Periods: <input type="checkbox"/></p> <p>From Fiscal Year: <input type="text" value="2019"/> <input type="button" value="🔍"/> From Acctg Period: <input type="text" value="1"/> From Project: <input type="text" value="%"/> <input type="button" value="🔍"/></p> <p>To Fiscal Year: <input type="text" value="2019"/> <input type="button" value="🔍"/> To Acctg Period: <input type="text" value="12"/> To Project: <input type="text" value="%"/> <input type="button" value="🔍"/></p> <p>From Fund Code: <input type="text" value="10500"/> <input type="button" value="🔍"/> From Department: <input type="text" value="1011201"/> <input type="button" value="🔍"/> From Account: <input type="text" value="727000"/> <input type="button" value="🔍"/></p> <p>To Fund Code: <input type="text" value="10500"/> <input type="button" value="🔍"/> To Department: <input type="text" value="1011201"/> <input type="button" value="🔍"/> To Account: <input type="text" value="727100"/> <input type="button" value="🔍"/></p> <p>Dept CFV Set: <input type="text"/></p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> </div> </div> </div>

Step	Action
9.	<p>Click the Run button. The Process Scheduler Request window displays as shown below:</p>  <p>The screenshot shows the 'Process Scheduler Request' window. At the top, it displays 'User ID OITKATE' and 'Run Control ID Test'. Below this are fields for 'Server Name', 'Run Date' (12/16/2018), 'Recurrence' (BOR_MONTHLY_16TH), and 'Run Time' (6:00:00AM). A 'Reset to Current Date' button is visible. Below the form is a 'Process List' table with columns: Select, Description, Process Name, Process Type, *Type, *Format, and Distribution. The table contains one row: [x] Budget Activity Reports, BORRG045, SQR Report, Email, PDF, Distribution. 'OK' and 'Cancel' buttons are at the bottom.</p>
10.	<p>Select a Recurrence from the dropdown menu. The predefined Recurrences are named with the date or time they occur. For example, BOR_DAILY_5AM runs daily at 5:00 AM as shown below:</p>  <p>The screenshot shows a dropdown menu for 'Recurrence'. The 'BOR_DAILY' option is selected. The list of options includes: BOR_DAILY_10-3, BOR_DAILY_10PM, BOR_DAILY_2X, BOR_DAILY_3X_EX, BOR_DAILY_5AM, BOR_DAILY_5X, BOR_DAILY_5X_B, BOR_DAILY_5X_ODD, BOR_DAILY_6AM, BOR_DAILY_6PM, BOR_DAILY_7_12, BOR_DAILY_8PM, BOR_DAILY_8PM_1099, BOR_DAILY_9AM, BOR_DAILY_AM, BOR_DAILY_AM2, BOR_DAILY_PM, BOR_EVERYDAY_INST_7AM, and BOR_FRI_6PM. 'OK' and 'Cancel' buttons are visible at the bottom left of the dropdown.</p> <p>Note 1: If users select a Recurrence from the dropdown menu, then the Run Date and Run Time automatically updates to the first scheduled run time. If users do not select a Recurrence and prefer to run the report once at a future date/time, choose the specific date and time in the Run Date and Run Time fields.</p> <p>Note 2: If users wish to run the report immediately, set the Run Date to a month prior to when the report recurrence should begin. For example, if a user wanted to run the report on 1/16/2019, the user would input</p>

Step	Action														
	<p>12/16/2018 in the Run Date field. This will distribute the report immediately and queue the future report for 1/16/2019.</p>														
<p>11.</p>	<p>Click the *Type dropdown menu and select Email. Click the *Format dropdown menu and select PDF.</p>  <p>The screenshot shows the 'Process Scheduler Request' form. At the top, it displays 'User ID OITKATE' and 'Run Control ID Test'. Below this, there are fields for 'Server Name', 'Run Date' (12/16/2018), 'Recurrence' (BOR_MONTHLY_16TH), and 'Run Time' (6:00:00AM). A 'Reset to Current Date' button is also present. The 'Process List' table below contains the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Budget Activity Reports</td> <td>BORRG045</td> <td>SQR Report</td> <td>Email</td> <td>PDF</td> <td>Distribution</td> </tr> </tbody> </table> <p>Buttons for 'OK' and 'Cancel' are located at the bottom of the form.</p>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input checked="" type="checkbox"/>	Budget Activity Reports	BORRG045	SQR Report	Email	PDF	Distribution
Select	Description	Process Name	Process Type	*Type	*Format	Distribution									
<input checked="" type="checkbox"/>	Budget Activity Reports	BORRG045	SQR Report	Email	PDF	Distribution									
<p>12.</p>	<p>Click the Distribution Link next to the report to open the Distribution Detail window.</p>  <p>This screenshot is identical to the previous one, but the 'Distribution' link in the 'Process List' table is highlighted with a red box.</p>														

Step	Action						
13.	<p>Users can customize information sent to recipients by modifying the fields in the Distribution Detail window as shown below. To change these fields, edit the email subject in the Email Subject field and the message text in the Message Text box. To modify who receives the report, add/remove email addresses in the Email Address List, or add/remove User IDs in the Distribute To section.</p> <p><i>Note: If sending the report to multiple recipients, separate email addresses with a semicolon in the Email Address List. Additionally, if users would like to send the report once to recipients, input the recipients' information in either the Email Address List or the Distribute To section. If users input recipients' information in both sections, the report distributes twice.</i></p>  <p>The screenshot shows the 'Distribution Detail' window with the following details:</p> <ul style="list-style-type: none"> Process Name: BORRG045 Process Type: SQR Report Folder Name: [Dropdown] Retention Days: 90 Email Only section: <ul style="list-style-type: none"> Email Subject: Monthly Budget Activity Report for Dept 1011201 Email With Log: <input type="checkbox"/> Email Web Report: <input checked="" type="checkbox"/> Message Text: Monthly Budget Activity Report for Dept 1011201 attached. Email Address List: julie.thompson@usg.edu; kate.smith@usg.edu; kelly.saxon@usg.edu Distribute To section: <table border="1"> <thead> <tr> <th>*ID Type</th> <th>*Distribution ID</th> </tr> </thead> <tbody> <tr> <td>User</td> <td>OIITKATE</td> </tr> <tr> <td>User</td> <td>DHICKEY</td> </tr> </tbody> </table> 	*ID Type	*Distribution ID	User	OIITKATE	User	DHICKEY
*ID Type	*Distribution ID						
User	OIITKATE						
User	DHICKEY						
14.	Click the OK button.						

Step	Action
15.	<p>Select the Process Monitor link, shown below, to view the queued report instances.</p> 

16.	<p>The system runs and distributes the report immediately, as well as schedules the future recurrence at the day/time selected when the recurrence was set up. The future recurring process appears in the Process Monitor with a Run Status of Queued and has a green circular arrow to indicate it is a recurring process as shown below.</p>  <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>12528814</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>BREPOR2S</td> <td>06/16/2019 6:00:00AM EDT</td> <td>Que</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12528802</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>BREPOR2S</td> <td>06/16/2019 6:00:00AM EDT</td> <td>Que</td> </tr> </tbody> </table>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run	<input type="checkbox"/>	12528814		SQR Report	BORRG045	BREPOR2S	06/16/2019 6:00:00AM EDT	Que	<input type="checkbox"/>	12528802		SQR Report	BORRG045	BREPOR2S	06/16/2019 6:00:00AM EDT	Que
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run																		
<input type="checkbox"/>	12528814		SQR Report	BORRG045	BREPOR2S	06/16/2019 6:00:00AM EDT	Que																		
<input type="checkbox"/>	12528802		SQR Report	BORRG045	BREPOR2S	06/16/2019 6:00:00AM EDT	Que																		

Canceling a Recurring Report

If an existing recurring report needs to be changed or is no longer needed, users must cancel the recurrence. If preferred, users can recreate the recurrence using the same Run Control ID, but with new parameters or distribution details.

Below are step-by-step instructions on how to cancel a recurring report.

Step	Action
1.	Click the NavBar to navigate.
2.	Click the Navigator icon.
3.	Click the PeopleTools link.
4.	Click the Process Scheduler link.
5.	Click the Process Monitor link.
6.	In the Process Monitor, select the Run Status of Queued. A green circular arrow appears indicating this is a recurring process.

The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below that, there are search filters for 'View Process Request For', including fields for 'User ID' (BREPORTS2), 'Type', 'Last', 'Days' (20), and a 'Refresh' button. The 'Run Status' dropdown is set to 'Queued' and is highlighted with a red box. Below the filters, there is a 'Process List' table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, and Run Status. The first row of the table has a green circular arrow icon in the 'Run Status' column, which is also highlighted with a red box.

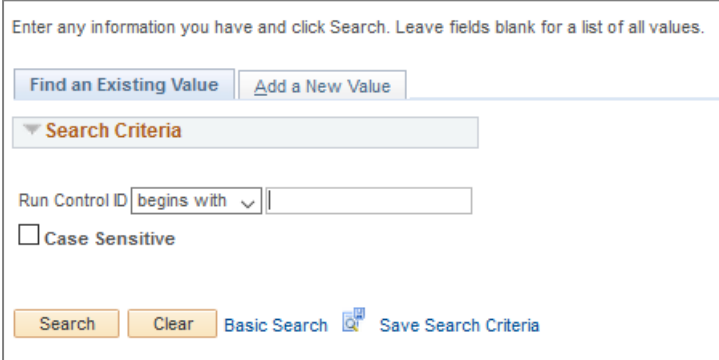
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status
<input type="checkbox"/>	12528814		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Queued
<input type="checkbox"/>	12528802		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Queued
<input type="checkbox"/>	12528801		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Queued
<input type="checkbox"/>	12528797		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Queued

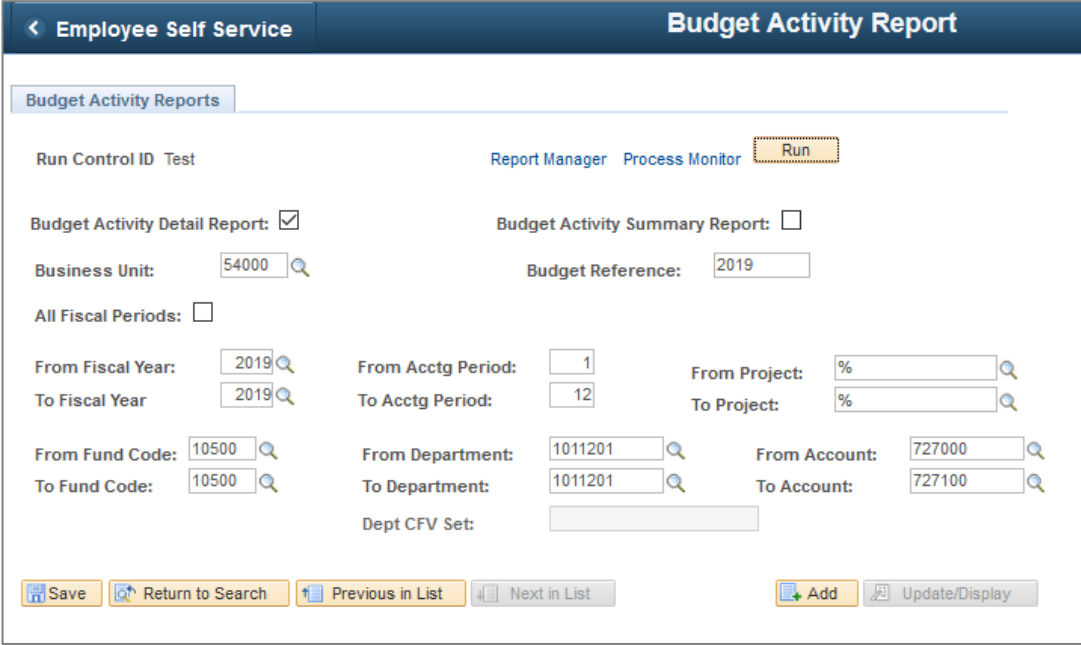
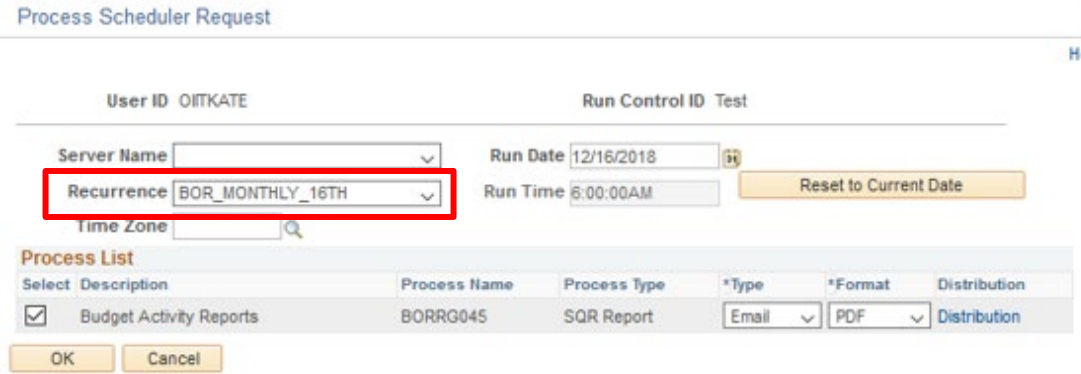
Step	Action																				
7.	<p>Locate the Run Control ID.</p> <p>Note: <i>If users maintain a few scheduled recurrences, the most efficient method to locate a Run Control ID is Option 1. If users maintain numerous scheduled recurrences and need to locate a Run Control ID among multiple Process Instances, the most efficient method is Option 2.</i></p> <p>Option 1: Click the Details link on the right hand side of the Process Monitor to view each queued report instance and to locate the Run Control ID to cancel.</p> <div data-bbox="574 667 1175 1318" data-label="Image"> <p>The screenshot shows the 'Process Monitor' interface. At the top, there is a header 'Process Monitor'. Below it, there are filters for 'Days' (a dropdown menu) and a 'Refresh' button. Below the filters, there is a 'To' input field. At the bottom of the filters, there is a pagination control showing '1-50 of 149' and a 'View 100' link. Below the pagination, there is a table with the following columns: 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. The table contains four rows of data, all with 'Queued' status and 'N/A' distribution status. The 'Details' link in the first row is highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>06/16/2019 6:00:00AM EDT</td> <td>Queued</td> <td>N/A</td> <td>Details</td> </tr> <tr> <td>06/16/2019 6:00:00AM EDT</td> <td>Queued</td> <td>N/A</td> <td>Details</td> </tr> <tr> <td>06/16/2019 6:00:00AM EDT</td> <td>Queued</td> <td>N/A</td> <td>Details</td> </tr> <tr> <td>06/16/2019 6:00:00AM EDT</td> <td>Queued</td> <td>N/A</td> <td>Details</td> </tr> </tbody> </table> </div> <p>Option 2: Run the BOR_USER_RECURRENCES query to locate the Run Control ID. See Appendix A: Running the BOR_USER_RECURRENCES Query for instructions on how to run this query.</p>	Run Date/Time	Run Status	Distribution Status	Details	06/16/2019 6:00:00AM EDT	Queued	N/A	Details	06/16/2019 6:00:00AM EDT	Queued	N/A	Details	06/16/2019 6:00:00AM EDT	Queued	N/A	Details	06/16/2019 6:00:00AM EDT	Queued	N/A	Details
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06/16/2019 6:00:00AM EDT	Queued	N/A	Details																		
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06/16/2019 6:00:00AM EDT	Queued	N/A	Details																		

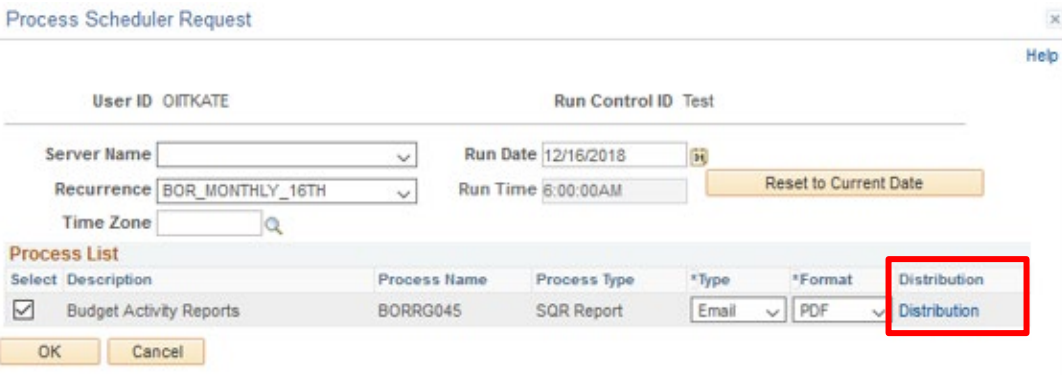
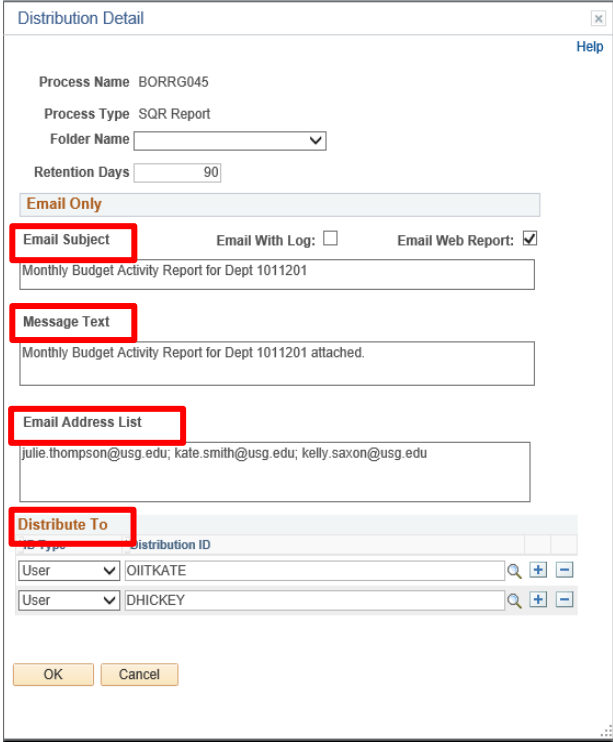
Step	Action
8.	<p>The system displays the Process Detail window. Under the Update Process section, select the Cancel Request radio button as shown below.</p> 
9.	Click the OK button.

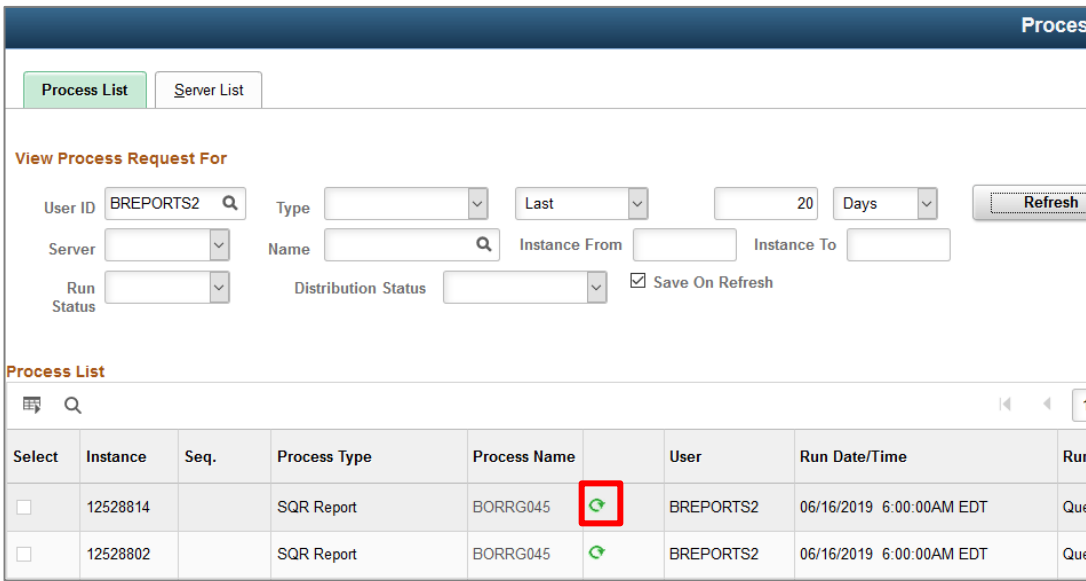






Editing a Recurring Report

Below are step-by-step instructions on how to edit a recurring report. This procedure can be used to edit many scheduled reports within PeopleSoft Financials. In Steps 2 – 7 users select which report to edit. The instructions below demonstrate how to edit a recurring Budget Activity Report.

Step	Action
1.	To edit a recurring report, first cancel the existing queued report by following the steps in the section titled “Canceling a Recurring Report.”
2.	Click the NavBar to navigate.
3.	Click the Navigator icon.
4.	Click the BOR Menus link.
5.	Click the BOR General Ledger link.
6.	Click the BOR GL Reports link.
7.	Click the Budget Activity Report link.
8.	<p>Search for the existing Run Control ID as shown below.</p> 

Step	Action
9.	<p>If needed, update the parameters of the report as shown below. The example below will run for Business Unit 5400, Budget Reference 2019, Fiscal Year 2019, Accounting Periods 1 – 12, Fund 10500, Department 1011201 and Accounts 72700 - 727100.</p> 
10.	Click the Save button.
11.	Click the Run button.
12.	<p>Select a Recurrence from the Recurrence dropdown menu.</p> 

Step	Action
13.	<p>Click the Distribution link.</p> 
14.	<p>Users can customize information sent to recipients by modifying the fields in the Distribution Detail window as shown below. To change these fields, edit the email subject in the Email Subject field and the message text in the Message Text box. To modify who receives the report, add/remove email addresses in the Email Address List, or add/remove User IDs in the Distribute To section.</p> <p>Note: If sending the report to multiple recipients, separate email addresses with a semicolon in the Email Address List.</p> 

Step	Action																								
15.	Click the OK button.																								
16.	Click the Save button.																								
17.	<p>The system runs and distributes the report immediately, as well as schedules the future recurrence at the day/time selected when the recurrence was set up. The future recurring process appears in the Process Monitor with a Run Status of Queued and has a green circular arrow to indicate it is a recurring process as shown below.</p>  <p>Process List</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>12528814</td> <td></td> <td>SQR Report</td> <td>BORRG045 </td> <td>BREPOR2S2</td> <td>06/16/2019 6:00:00AM EDT</td> <td>Que</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12528802</td> <td></td> <td>SQR Report</td> <td>BORRG045 </td> <td>BREPOR2S2</td> <td>06/16/2019 6:00:00AM EDT</td> <td>Que</td> </tr> </tbody> </table>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run	<input type="checkbox"/>	12528814		SQR Report	BORRG045 	BREPOR2S2	06/16/2019 6:00:00AM EDT	Que	<input type="checkbox"/>	12528802		SQR Report	BORRG045 	BREPOR2S2	06/16/2019 6:00:00AM EDT	Que
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run																		
<input type="checkbox"/>	12528814		SQR Report	BORRG045 	BREPOR2S2	06/16/2019 6:00:00AM EDT	Que																		
<input type="checkbox"/>	12528802		SQR Report	BORRG045 	BREPOR2S2	06/16/2019 6:00:00AM EDT	Que																		

Running a Report Manually between Scheduled Recurrences

The system allows one specific Run Control ID in status of Queued or Processing to run at a time, therefore users need to place a recurrence on hold to run the report with a specific Run Control ID in between recurrences.

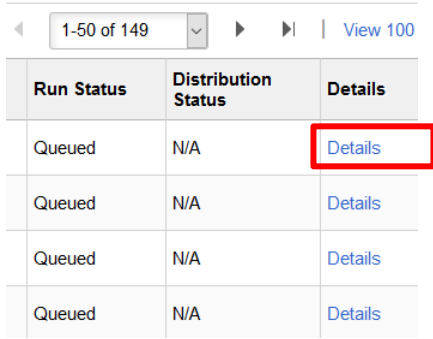
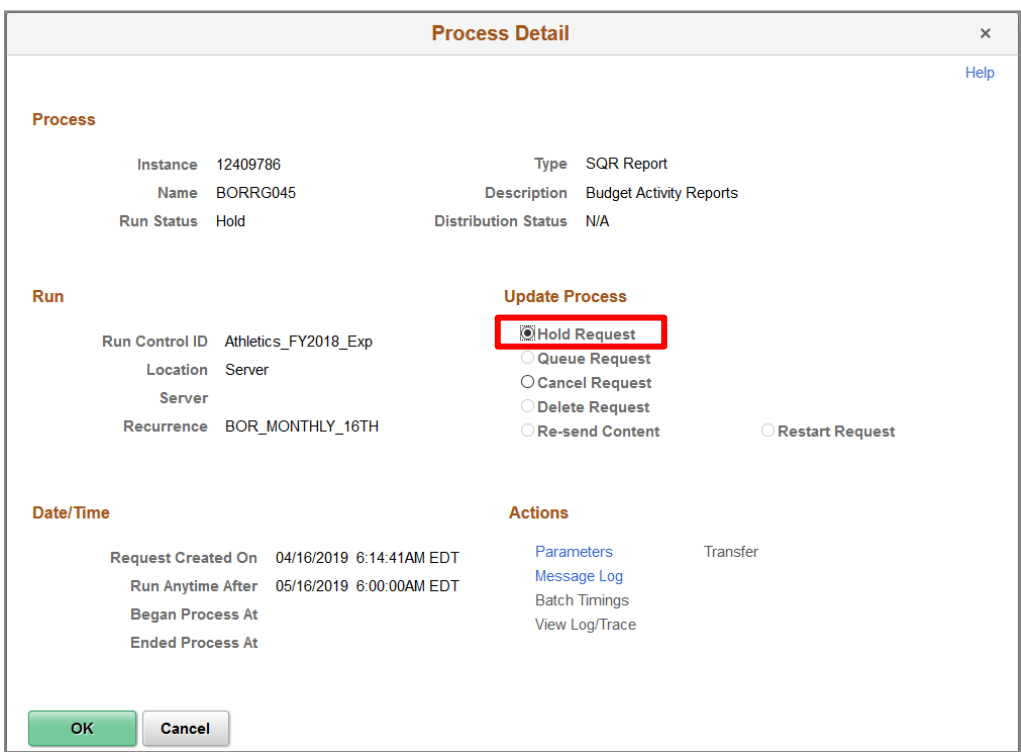
Note: Attempting to manually run a report with a Run Control ID that was set up as a recurrence without following the steps below to place the process on Hold results in the report running to No Success.

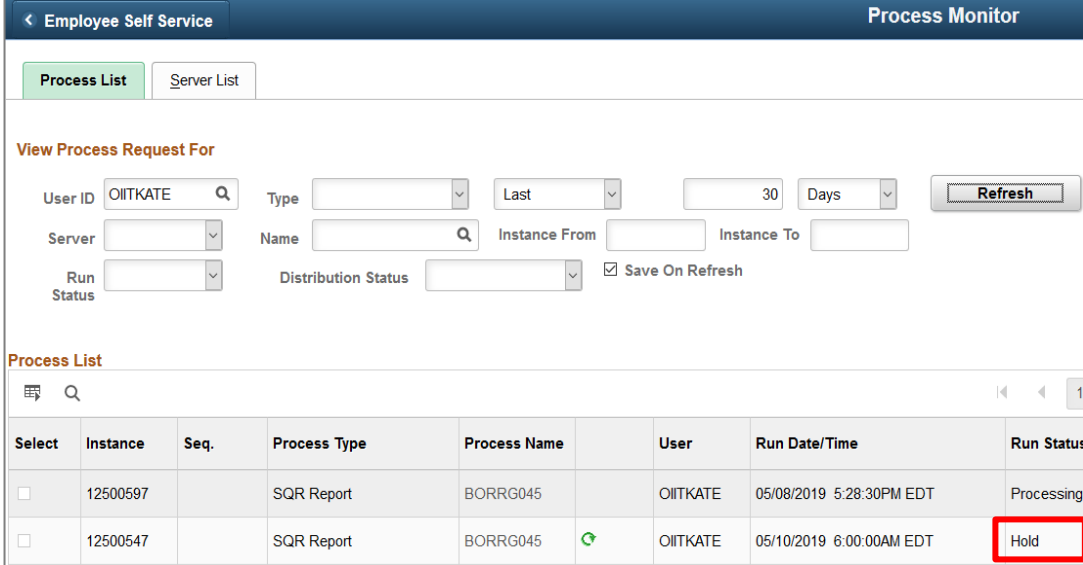
Below are step-by-step instructions on how to run a report manually between scheduled recurrences.

Step	Action
1.	Click the NavBar to navigate.
2.	Click the Navigator icon.
3.	Click the PeopleTools link.
4.	Click the Process Scheduler link.
5.	Click the Process Monitor link.
6.	Select the Run Status of Queued to view all Queued processes scheduled to run in the future.

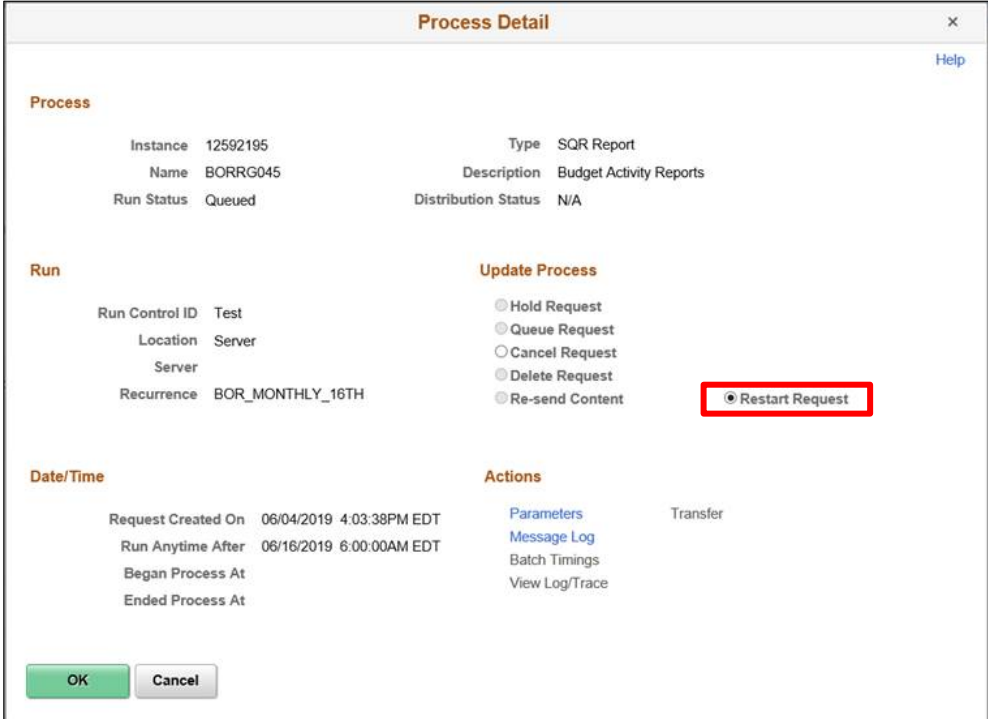
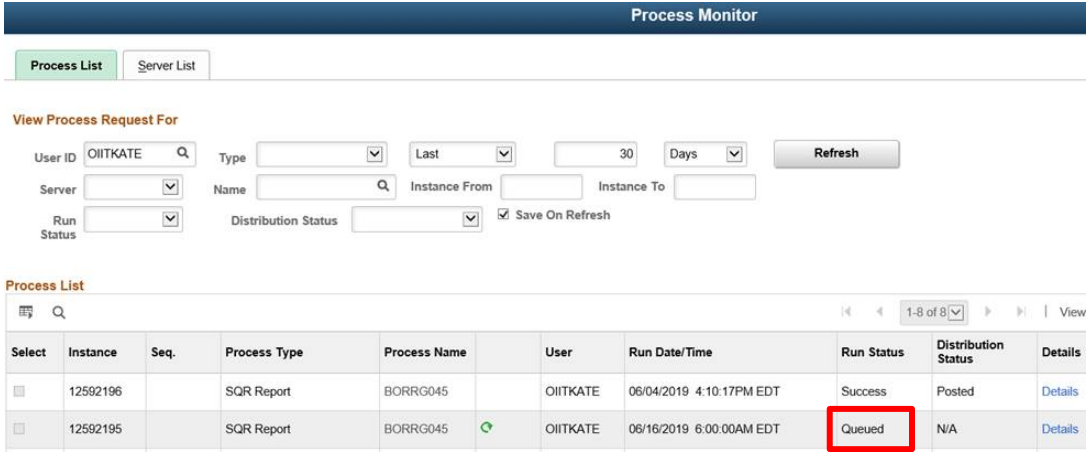
The screenshot shows the 'Process Monitor' page in PeopleSoft. The 'Run Status' dropdown menu is highlighted with a red box and set to 'Queued'. Below it is a table of process instances.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run
<input type="checkbox"/>	12528814		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Que
<input type="checkbox"/>	12528802		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Que
<input type="checkbox"/>	12528801		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Que
<input type="checkbox"/>	12528797		SQR Report	BORRG045	BREPORTS2	06/16/2019 6:00:00AM EDT	Que

Step	Action
7.	<p>Click the Details link on the right hand side of the Process Monitor to view each queued Process Instance and to locate the Run Control ID to run between recurrences.</p>  <p>The screenshot shows a table with the following columns: Run Status, Distribution Status, and Details. The first row has 'Queued' in the Run Status column, 'N/A' in the Distribution Status column, and a 'Details' link in the Details column. This 'Details' link is highlighted with a red rectangular box. Above the table, there is a pagination control showing '1-50 of 149' and a 'View 100' link.</p>
8.	<p>The system displays the Process Detail window. Under Update Process, select the Hold Request radio button as shown below.</p>  <p>The screenshot shows the 'Process Detail' window. It contains several sections: 'Process' with fields for Instance (12409786), Name (BORRG045), Run Status (Hold), Type (SQR Report), Description (Budget Activity Reports), and Distribution Status (N/A); 'Run' with fields for Run Control ID (Athletics_FY2018_Exp), Location (Server), and Recurrence (BOR_MONTHLY_16TH); 'Date/Time' with fields for Request Created On (04/16/2019 6:14:41AM EDT), Run Anytime After (05/16/2019 6:00:00AM EDT), Began Process At, and Ended Process At; 'Actions' with links for Parameters, Message Log, Batch Timings, and View Log/Trace; and 'Update Process' with radio buttons for Hold Request (selected and highlighted with a red box), Queue Request, Cancel Request, Delete Request, Re-send Content, and Restart Request. At the bottom, there are 'OK' and 'Cancel' buttons.</p>
9.	Click the OK button.
10.	Navigate to the report that needs to run in between recurrences and run the report.


Step	Action																								
11.	<p>Select the Process Monitor link. The system assigns the manually run report a new Process Instance in the Process Monitor and the recurring report remains in Hold status as shown below.</p>  <p>The screenshot shows the 'Process Monitor' interface with the following details:</p> <ul style="list-style-type: none"> Navigation: Employee Self Service > Process Monitor Tabs: Process List (selected), Server List Section: View Process Request For Filters: User ID (OIITKATE), Type (dropdown), Last (dropdown), 30 Days (dropdown), Refresh button Additional filters: Server (dropdown), Name (dropdown), Instance From (dropdown), Instance To (dropdown), Run Status (dropdown), Distribution Status (dropdown), Save On Refresh (checkbox) Section: Process List Table: <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>12500597</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>05/08/2019 5:28:30PM EDT</td> <td>Processing</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12500547</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>05/10/2019 6:00:00AM EDT</td> <td>Hold</td> </tr> </tbody> </table> 	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	<input type="checkbox"/>	12500597		SQR Report	BORRG045	OIITKATE	05/08/2019 5:28:30PM EDT	Processing	<input type="checkbox"/>	12500547		SQR Report	BORRG045	OIITKATE	05/10/2019 6:00:00AM EDT	Hold
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status																		
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<input type="checkbox"/>	12500547		SQR Report	BORRG045	OIITKATE	05/10/2019 6:00:00AM EDT	Hold																		
12.	Click the Refresh button until the report runs to Success.																								

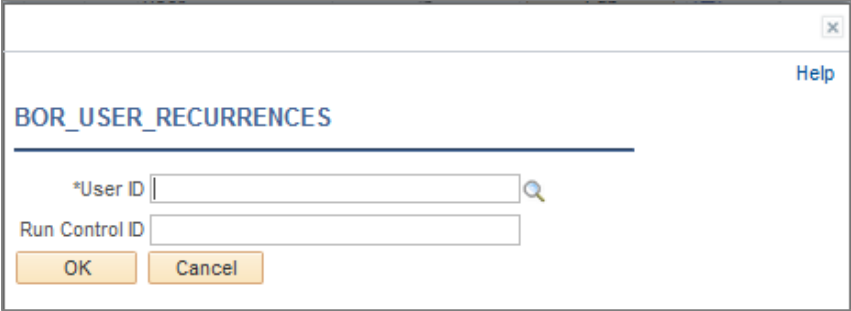
Step	Action																																																																																										
13.	<p>Select the Details link next to the process previously placed on Hold as shown below.</p> <p>Process Monitor</p> <p>Process List Server List</p> <p>View Process Request For</p> <p>User ID: OIITKATE Type: Last: 30 Days Refresh</p> <p>Server: Name: Instance From: Instance To: </p> <p>Run Status: Distribution Status: <input checked="" type="checkbox"/> Save On Refresh</p> <p>Process List</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>12592196</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>06/04/2019 4:10:17PM EDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592195</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>06/16/2019 6:00:00AM EDT</td> <td>Hold</td> <td>N/A</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592194</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>05/16/2019 6:00:00AM EDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592193</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>04/16/2019 6:00:00AM EDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592192</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>03/16/2019 6:00:00AM EDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592191</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>02/16/2019 6:00:00AM EST</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592190</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>01/16/2019 6:00:00AM EST</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>12592189</td> <td></td> <td>SQR Report</td> <td>BORRG045</td> <td>OIITKATE</td> <td>12/16/2018 6:00:00AM EST</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> </tbody> </table>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	<input type="checkbox"/>	12592196		SQR Report	BORRG045	OIITKATE	06/04/2019 4:10:17PM EDT	Success	Posted	Details	<input type="checkbox"/>	12592195		SQR Report	BORRG045	OIITKATE	06/16/2019 6:00:00AM EDT	Hold	N/A	Details	<input type="checkbox"/>	12592194		SQR Report	BORRG045	OIITKATE	05/16/2019 6:00:00AM EDT	Success	Posted	Details	<input type="checkbox"/>	12592193		SQR Report	BORRG045	OIITKATE	04/16/2019 6:00:00AM EDT	Success	Posted	Details	<input type="checkbox"/>	12592192		SQR Report	BORRG045	OIITKATE	03/16/2019 6:00:00AM EDT	Success	Posted	Details	<input type="checkbox"/>	12592191		SQR Report	BORRG045	OIITKATE	02/16/2019 6:00:00AM EST	Success	Posted	Details	<input type="checkbox"/>	12592190		SQR Report	BORRG045	OIITKATE	01/16/2019 6:00:00AM EST	Success	Posted	Details	<input type="checkbox"/>	12592189		SQR Report	BORRG045	OIITKATE	12/16/2018 6:00:00AM EST	Success	Posted	Details
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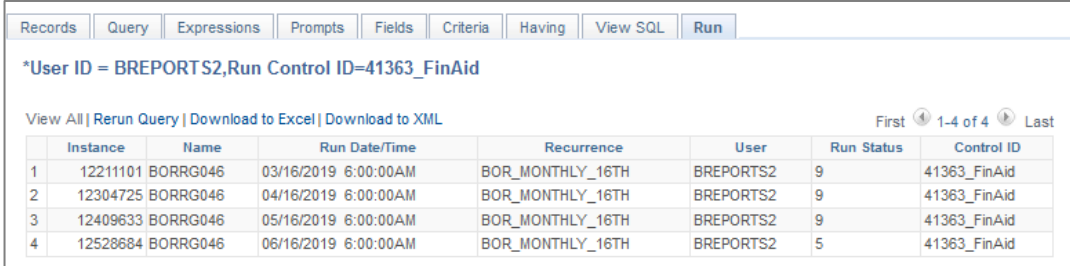
Step	Action
14.	<p>The system displays the Process Detail window. Under Update Process, select the Restart Request radio button.</p> 
15.	Click the OK button.
16.	<p>The process returns to Queued status and will run at the date/time of the selected recurrence.</p> 

APPENDIX A: RUNNING THE BOR_USER_RECURRENCES QUERY

The BOR_USER_RECURRENCES query lists all recurring reports and queries by User ID. The query results contain past and future scheduled recurrences and users can run this query to quickly view all recurrences set up for a User ID.

Step	Action
1.	Click the NavBar to navigate.
2.	Click the Navigator icon.
3.	Click the Reporting Tools link.
4.	Click the Query link.
5.	Click the Query Manager link.
6.	To locate the query, type BOR_USER_RECURRENCES in the “begins with” box and click the Search button.  <p>The screenshot shows the 'Query Manager' interface. At the top, there's a 'Fields' tab and a 'Query Manager' title. Below that, a search area is visible with a dropdown for 'Query Name' and a text box containing 'BOR_USER_RECURRENCES'. A 'Search' button is present. Below the search area, there's a 'Search Results' section with a 'Folder View' dropdown set to '-- All Folders --'. There are 'Check All' and 'Uncheck All' buttons, and an '*Action' dropdown set to '-- Choose --' with a 'Go' button. At the bottom, a table lists search results. The table has columns: 'Select', 'Query Name', 'Descr', 'Owner', 'Folder', 'Edit', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', and 'Definitional References'. One result is shown: 'BOR_USER_RECURRENCES', 'Recurring Rpts-Queries by User', 'Public', with 'Edit', 'HTML', 'Excel', 'XML', 'Schedule', and 'Lookup References' links.</p>
7.	Choose to view query results in a browser by selecting the HTML link or an Excel Spreadsheet by selecting the Excel link.

Step	Action
8.	<p>The query prompts users to enter the User ID and Run Control ID. The query may be run with User ID only, or with both User ID and Run Control ID to narrow the results. Additionally, User ID is required while Run Control ID is optional.</p> <div data-bbox="435 453 1281 762" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;">  </div>

Step	Action																																																																																																																																																			
9.	<p>Click the OK button. The system generates query results to view, but it generates different results depending on information input in the previous step. An example of both type of query results are below:</p> <p><i>Figure 1: Query Results When Run with User ID Only</i></p>  <table border="1"> <thead> <tr> <th>Instance</th> <th>Name</th> <th>Run Date/Time</th> <th>Recurrence</th> <th>User</th> <th>Run Status</th> <th>Control ID</th> </tr> </thead> <tbody> <tr><td>1</td><td>12211144 BORRG046</td><td>03/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>116_TRIO</td></tr> <tr><td>2</td><td>12304734 BORRG046</td><td>04/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>116_TRIO</td></tr> <tr><td>3</td><td>12409663 BORRG046</td><td>05/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>116_TRIO</td></tr> <tr><td>4</td><td>12528699 BORRG046</td><td>06/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>5</td><td>116_TRIO</td></tr> <tr><td>5</td><td>12211112 BORRG046</td><td>03/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>17863_REACH</td></tr> <tr><td>6</td><td>12304760 BORRG046</td><td>04/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>17863_REACH</td></tr> <tr><td>7</td><td>12409711 BORRG046</td><td>05/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>17863_REACH</td></tr> <tr><td>8</td><td>12528705 BORRG046</td><td>06/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>5</td><td>17863_REACH</td></tr> <tr><td>9</td><td>12211146 BORRG046</td><td>03/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>24463_STEM</td></tr> <tr><td>10</td><td>12304745 BORRG046</td><td>04/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>24463_STEM</td></tr> <tr><td>11</td><td>12409661 BORRG046</td><td>05/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>24463_STEM</td></tr> <tr><td>12</td><td>12528687 BORRG046</td><td>06/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>5</td><td>24463_STEM</td></tr> <tr><td>13</td><td>12211100 BORRG046</td><td>03/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>24663_ALG(PSYCH)</td></tr> <tr><td>14</td><td>12304716 BORRG046</td><td>04/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>24663_ALG(PSYCH)</td></tr> <tr><td>15</td><td>12409645 BORRG046</td><td>05/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>24663_ALG(PSYCH)</td></tr> </tbody> </table> <p><i>Figure 2: Query Results When Run with User ID and Run Control ID</i></p>  <table border="1"> <thead> <tr> <th>Instance</th> <th>Name</th> <th>Run Date/Time</th> <th>Recurrence</th> <th>User</th> <th>Run Status</th> <th>Control ID</th> </tr> </thead> <tbody> <tr><td>1</td><td>12211101 BORRG046</td><td>03/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>41363_FinAid</td></tr> <tr><td>2</td><td>12304725 BORRG046</td><td>04/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>41363_FinAid</td></tr> <tr><td>3</td><td>12409633 BORRG046</td><td>05/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>9</td><td>41363_FinAid</td></tr> <tr><td>4</td><td>12528684 BORRG046</td><td>06/16/2019 6:00:00AM</td><td>BOR_MONTHLY_16TH</td><td>BREPORTS2</td><td>5</td><td>41363_FinAid</td></tr> </tbody> </table> <p>Each Run Status value corresponds to a process status. See Appendix B: Run Status Key for reference.</p>	Instance	Name	Run Date/Time	Recurrence	User	Run Status	Control ID	1	12211144 BORRG046	03/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	116_TRIO	2	12304734 BORRG046	04/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	116_TRIO	3	12409663 BORRG046	05/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	116_TRIO	4	12528699 BORRG046	06/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	5	116_TRIO	5	12211112 BORRG046	03/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	17863_REACH	6	12304760 BORRG046	04/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	17863_REACH	7	12409711 BORRG046	05/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	17863_REACH	8	12528705 BORRG046	06/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	5	17863_REACH	9	12211146 BORRG046	03/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	24463_STEM	10	12304745 BORRG046	04/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	24463_STEM	11	12409661 BORRG046	05/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	24463_STEM	12	12528687 BORRG046	06/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	5	24463_STEM	13	12211100 BORRG046	03/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	24663_ALG(PSYCH)	14	12304716 BORRG046	04/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	24663_ALG(PSYCH)	15	12409645 BORRG046	05/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	24663_ALG(PSYCH)	Instance	Name	Run Date/Time	Recurrence	User	Run Status	Control ID	1	12211101 BORRG046	03/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	41363_FinAid	2	12304725 BORRG046	04/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	41363_FinAid	3	12409633 BORRG046	05/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	9	41363_FinAid	4	12528684 BORRG046	06/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	5	41363_FinAid
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4	12528684 BORRG046	06/16/2019 6:00:00AM	BOR_MONTHLY_16TH	BREPORTS2	5	41363_FinAid																																																																																																																																														

APPENDIX B: RUN STATUS VALUE KEY

After users run the BOR_USER_RECURRENCES query, the system returns all recurring reports and queries by User ID. Under the Run Status column for each Process Instance the system generates a value which corresponds to the process status. A full list of values and statuses are below:

Value	Status
1	Cancel
2	Delete
3	Error
4	Hold
5	Queued
6	Initiated
7	Processing
8	Cancelled
9	Success
10	No Success
11	Posted
12	Not Posted
13	Resend
14	Posting
15	Generated
16	Pending
17	Warning
18	Blocked
19	Restart