Job Aid –

Schedule Production Reports

State of Kansas

Sunflower Project

Distribute Reports to Multiple Users

The purpose of this job aid is to explain how to schedule a recurring PeopleSoft report.

The following steps can be performed on any report available to the user. Keep in mind that reports may **not** be scheduled outside of system availability hours. Report recipients automatically receive the report once the report is generated via Report Manager.

Schedule PeopleSoft Report

The following steps can be performed on any report, the screenshots contained within this document are for instructional purposes and are not restricted solely to the report depicted.

For the purpose of this job aid, the primary user is executing the Req and PO Budgetary Activity Report (POS8001), as depicted below:

The report request parameters page is filled out by the user with desired criteria. At this point, the user is ready to execute the report.

1. Click "Run". The system will redirect the user to the Process Scheduler Request page.

2. Click on the dropdown labeled "Recurrence." In this case, the user intends to set the recurrence to the 1st day of each month.

3. The run time will automatically set to 7:30am on the first Day of each month.

Process Scheduler Request

| User ID: | NE00ALK | | Run Control ID: | test |

Server Name:		Run Date:	11/18/2010	
Recurrence:	1st Day of Month	Run Time:	7:30:00AM	Reset to Current Date/Time
Time Zone:				

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Procurement Budgetary Activity	POS8001	SQR Report	Web	PDF	Distribution
☐	Requisition Budgetary Activity	POS8002	SQR Report	Web	PDF	Distribution

OK   Cancel

4. Click OK to execute the report. The screen reverts back to the run control page. On the top of the page click the "Process Monitor" link. The Process Monitor displays and shows a green recurrence symbol next to the report request.

Process List   **Server List**

View Process Request For

User ID: NE00ALK	Type:		Last:	1	Minutes	Refresh
Server:	Name:		Instance:		to	
Run Status:	Distribution Status		☑ Save On Refresh			

Process List   Customize | Find | View All | 　　　First ◄ 1-2 of 2 ► Last

Select	Instance	Seq.	Process Type	Process Name		User	Run Date/Time	Run Status	Distribution Status	Details
☐	288094		SQR Report	POS8001	⟳	NE00ALK	12/01/2010 7:30:00AM CST	Queued	N/A	Details