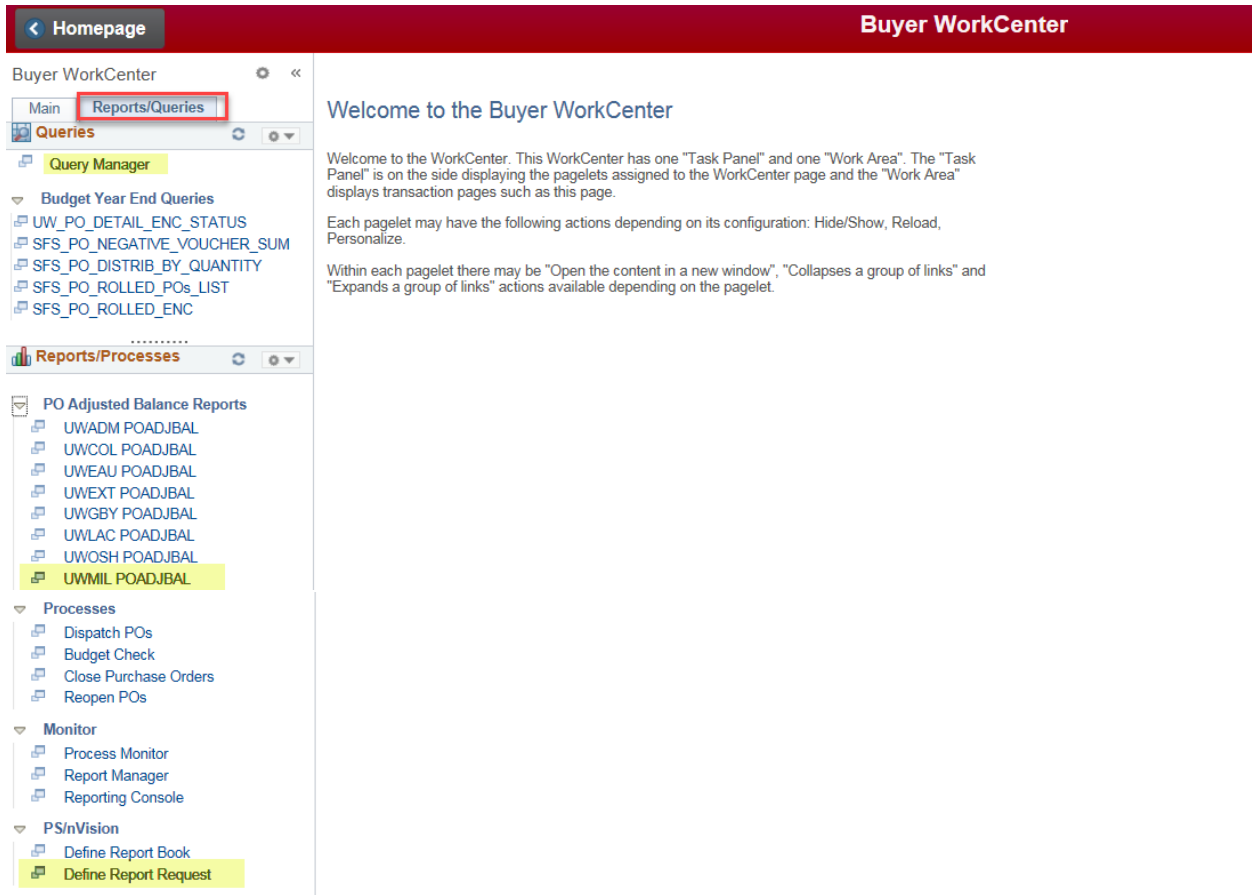


Scheduling Queries and/or nVision Reports

Access Query and/or nVision reports from a WorkCenter. Example includes Buyer WorkCenter.



OR

Access Query and/or nVision reports through Navigation.

Queries: Navigator: Reporting Tools > Query > Query Manager

nVision Reports: Navigator: Reporting Tools > PS/nVision > Define Report Request

Scheduling Queries and/or nVision Reports

Scheduling Queries

Search for the Query you want to schedule:

Select the Query and select the *SCHEDULE* Link

[New Window](#) | [Help](#) | [Personalize Page](#) | 1

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.
[Find an Existing Query](#) | [Create New Query](#)

*Search By begins with
 [Advanced Search](#)

Search Results

*Folder View

*Action

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input checked="" type="checkbox"/>	UW_ENC_KK_CHK_BY_BU	KK check	Private		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UW_ENC_KK_CHK_BY_BU_ACCT_FUND	KK check	Private		Edit	HTML	Excel	XML	Schedule	Lookup References

Enter the Run Control ID. It can be the name of the query. Click ADD

Scheduled Query

Private Query

Query Name

Run Control ID

|

Scheduling Queries and/or nVision Reports

Enter the Description. It can be the Query Name.

Enter parameters, if any.

Click OK

Schedule Query

Run Control ID UW_ENC_KK_CHK_BY_BU Report Manager Process Monitor

Query Name

*Description

Update Parameters

Prompt Name	Value
FISCAL_YEAR	2018

- Enter Description
- If your query has parameters, you will be prompted to enter a value.
- Click Apply
- Click OK

Schedule Reoccurring Query

From the Process Scheduler Request page, use drop down to select Recurrence. Thursday 2 AM is selected in the below example.

Select Type= Email. Select Format= XLS (if excel); PDF (if you want a pdf), TXT, etc.

Process Scheduler Request x

[Help](#)

User ID 00856855 Run Control ID UW_ENC_KK_CHK_BY_BU

Server Name Run Date

Recurrence Run Time

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Email	XLS	Distribution

Scheduling Queries and/or nVision Reports

Schedule One Time Query

Follow the same instructions for reoccurring for One Time, except Reoccurrence will be blank. In the below example the query is being scheduled to run at 10:50 13 AM

Process Scheduler Request

User ID 00856855 Run Control ID UW_ENC_KK_CHK_BY_BU

Server Name: PSUNX Run Date: 10/29/2018
Recurrence: One Time Run Time: 10:50:13AM
Time Zone: [Search]

Reset to Current Date/Time

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Email	TXT	Distribution

OK Cancel

After updating the above for Reoccurring or One Time, Click the Distribution link.

Enter Distribution Details. Email Subject, Message Text, and Email Address List. Use semicolon to enter multiple email address.

Distribution Detail

Process Name NVSRUN
Process Type nVision-Report
Folder Name [Dropdown]
Retention Days 90

Email Only

Email Subject POADJBAL Report Email With Log: Email Web Report:
Message Text POADJBAL REPORT
Email Address List dmc.donald@uwsa.edu

Distribute To

*ID Type	*Distribution ID
User	00856855

OK Cancel

Scheduling Queries and/or nVision Reports

Results from query, will be emailed to addresses listed in Email Address List

Select Ok and OK

Navigate to the Process Monitor to view the status of the query. Process Monitor can be accessed from the Buyer WorkCenter or through Navigation (PeopleTools > Process Scheduler > Process Monitor).

The screenshot shows the 'Process List' tab in the Process Monitor. At the top, there are search filters for User ID (00856855), Type, Last, 2 Days, and a Refresh button. Below that are fields for Server, Name, Instance From, Instance To, Run Status, and Distribution Status, with a 'Save On Refresh' checkbox. The main table has columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. One row is visible with Instance 10166843, Process Type Application Engine, Process Name PSQUERY, User 00856855, Run Date/Time 10/29/2018 11:05:19AM CDT, Run Status Processing, and Distribution Status N/A. A red box highlights the 'Processing' and 'N/A' cells, and a red arrow points to the 'Details' link in the same row. Below the table are 'Save' and 'Notify' buttons and a link 'Process List | Server List'.

To get more information on what query is queued – click the Details link


The screenshot shows the 'Process Detail' window. It displays the following information: Instance 10166843, Type Application Engine, Name PSQUERY, Description PSQUERY, Run Status Success, and Distribution Status Posted. Below this, there are sections for 'Run' and 'Update Process'. The 'Run' section shows Run Control ID UW_ENC_KK_CHK_BY_BU, Location Server, Server PSUNX, and Recurrence. The 'Update Process' section has radio buttons for Hold Request, Queue Request, Cancel Request, Delete Request, Re-send Content, and Restart Request. The 'Date/Time' section shows Request Created On 10/29/2018 11:05:26AM CDT, Run Anytime After 10/29/2018 11:05:19AM CDT, Began Process At 10/29/2018 11:05:39AM CDT, and Ended Process At 10/29/2018 11:05:59AM CDT. The 'Actions' section has links for Parameters, Transfer, Message Log, View Locks, Batch Timings, and View Log/Trace. At the bottom are 'OK' and 'Cancel' buttons.


Scheduling Queries and/or nVision Reports



The sample Email that comes through will look like this in your inbox.

FROM	SUBJECT	RECEIVED	SIZE
uwsaproblemsolvers... Message from Process Scheduler running on system microburst, using database SFS: <end>	Output from PSQUERY (#10166843)	Mon 10/29/2018 11:06 AM	50 KB

The spreadsheet will be an attachment in your email

 Mon 10/29/2018 11:06 AM
uwsaproblemsolvers@maillist.uwsa.edu
Output from PSQUERY (#10166843)

To  Denise Mcdonald

 Message  UW_ENC_KK_CHK_BY_BU-10166843.xlsx (4 KB)

Message from Process Scheduler running on system microburst, using database SFS:

Scheduling Queries and/or nVision Reports

Scheduling nVision Report

Search for the nVision report you want to schedule.

Report Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Business Unit

Report ID

Description

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1 of 1 Last

Business Unit	Report ID	Description
UWMIL	POADJBAL	UWMIL_POADJBAL

[Find an Existing Value](#) | [Add a New Value](#)

Click Run Report

[nVision Report Request](#) | [Advanced Options](#) | [Query Prompts](#)

Business Unit: UWMIL Report ID: POADJBAL [Copy to Another Business Unit / Clone](#)
[Delete This Report Request](#)

Report Title: [Transfer to Report Books](#)
[Process Monitor](#)
[Report Manager](#)

*Layout: [Share This Report Request](#)

Report Date Selection

*As Of Reporting Date:
*Tree As Of Date:
 Override Tree As of Date if Specified in Layout

Output Options [Scope and Delivery Templates](#)

*Type:
*Format:

[nVision Report Request](#) | [Advanced Options](#) | [Query Prompts](#)

Scheduling Queries and/or nVision Reports

Schedule Reoccurring nVision Report

From the Process Scheduler Request page, use drop down to select Recurrence. Thursday 2 AM is selected in the below example.

Select Type= Email. Select Format= XLS (if excel); PDF (if you want a pdf), TXT, etc.

The screenshot shows the 'Process Scheduler Request' dialog box. The 'Recurrence' dropdown is highlighted with a red box and contains 'Thursday 2 AM'. A red arrow points to the 'Distribution' link in the 'Process List' table.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	nVision Report	NVSRUN	nVision Report	Email	XLS	Distribution

Schedule One Time nVision Report

Follow the same instructions for Reoccurring for One Time, except Reoccurrence will be blank. In the below example the report is being scheduled to run at 11:22 27 AM

The screenshot shows the 'Process Scheduler Request' dialog box. The 'Recurrence' dropdown is empty. The 'Run Date' is '10/29/2018' and the 'Run Time' is '11:22:27AM'.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	nVision Report	NVSRUN	nVision Report	Email	XLS	Distribution

After updating the above for Reoccurring or One Time, Click the Distribution link.

Scheduling Queries and/or nVision Reports

Enter Distribution Details. Email Subject, Message Text, and Email Address List. Use semicolon to enter multiple email address.

Distribution Detail x

[Help](#)

Process Name NVSRUN

Process Type nVision-Report

Folder Name

Retention Days

Email Only

Email Subject Email With Log: Email Web Report:

Message Text

Email Address List

Distribute To

*ID Type	*Distribution ID
User	00856855

OK Cancel

Results from report, will be emailed to addresses listed in the Email Address List

Select Ok and OK

Navigate to the Process Monitor to view status of report. Process Monitor can be accessed from the Buyer WorkCenter or through Navigation (PeopleTools > Process Scheduler > Process Monitor).

Scheduling Queries and/or nVision Reports

Process List | Server List

View Process Request For

User ID: 00856855 | Type: [] | Last: [] | 2 Days | Refresh

Server: [] | Name: [] | Instance From: [] | Instance To: []

Run Status: [] | Distribution Status: [] | Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	10166843		Application Engine	PSQUERY	00856855	10/29/2018 11:05:19AM CDT	Processing	N/A	Details

Save | Notify

Process List | Server List

To get more information on the report, click the Details link

Process Detail

Process

Instance: 10166843 | Type: Application Engine
 Name: PSQUERY | Description: PSQUERY
 Run Status: Success | Distribution Status: Posted

Run

Run Control ID: UW_ENC_KK_CHK_BY_BU
 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: 10/29/2018 11:05:26AM CDT
 Run Anytime After: 10/29/2018 11:05:19AM CDT
 Began Process At: 10/29/2018 11:05:39AM CDT
 Ended Process At: 10/29/2018 11:05:59AM CDT

Actions

Parameters | Transfer
 Message Log | View Locks
 Batch Timings
 View Log/Trace


OK | Cancel


Scheduling Queries and/or nVision Reports



The sample Email that comes through will look like this in your inbox

FROM	SUBJECT	RECEIVED	SIZE
uwsaproblemsolvers... Message from Process Scheduler running on system microburst, using database SFS: <end>	Output from PSQUERY (#10166843)	Mon 10/29/2018 11:06 AM	50 KB

The spreadsheet will be an attachment in your email

 Mon 10/29/2018 11:06 AM
uwsaproblemsolvers@maillist.uwsa.edu
Output from PSQUERY (#10166843)

To  Denise Mcdonald

 Message  UW_ENC_KK_CHK_BY_BU-10166843.xlsx (4 KB)

Message from Process Scheduler running on system microburst, using database SFS: