
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:

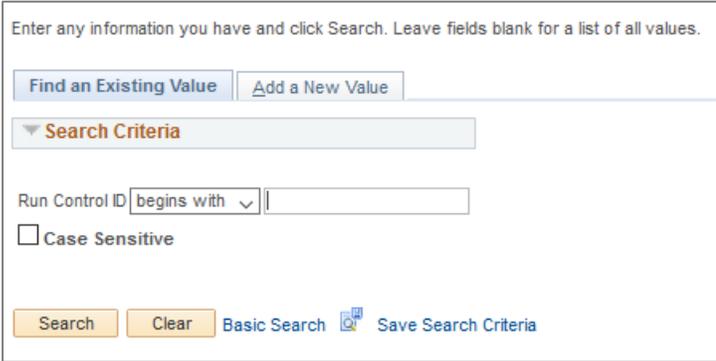
- Scheduling Recurring Reports
- Canceling a Recurring Report
- Editing a Recurring Report
- Running a Report Manually between Scheduled Recurrences
- Running the BOR_USER_RECURRENCES query to review past and future recurrences

Procedures

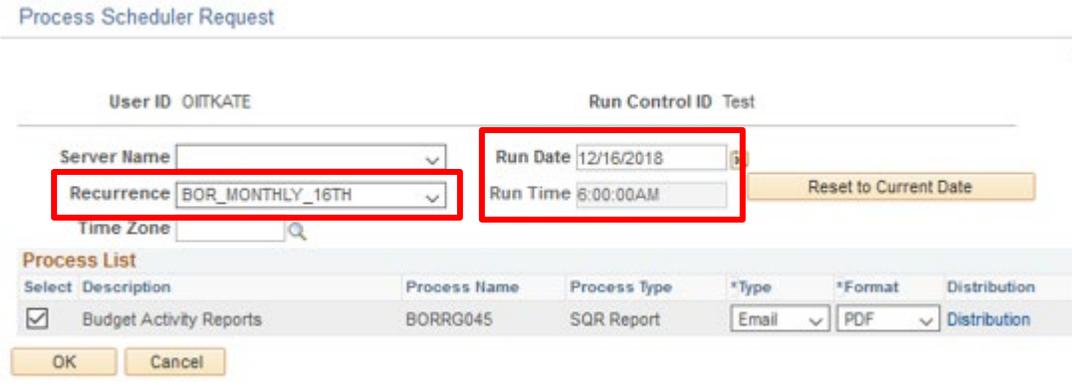
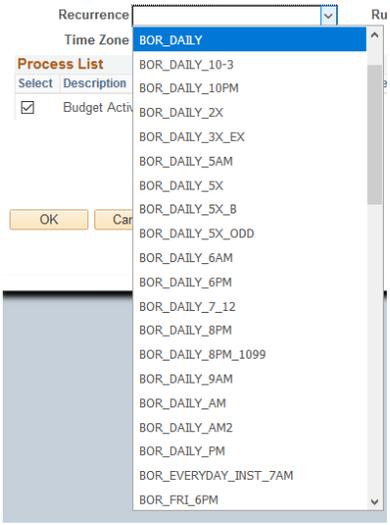
Scheduling Recurring Reports

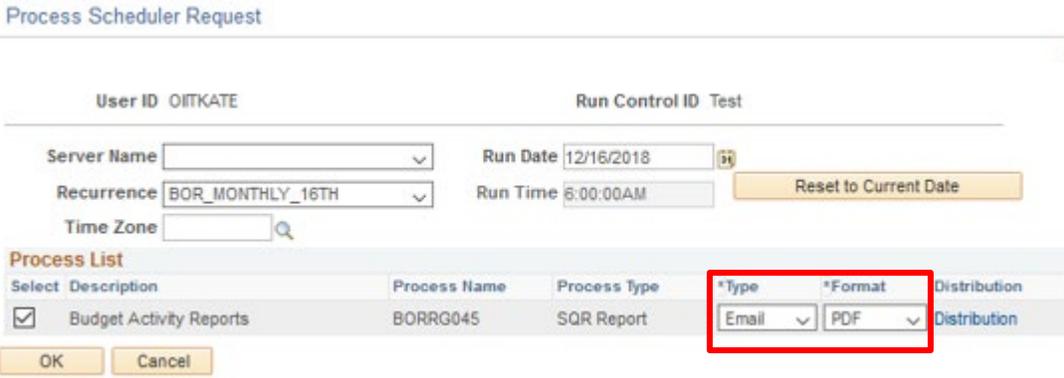
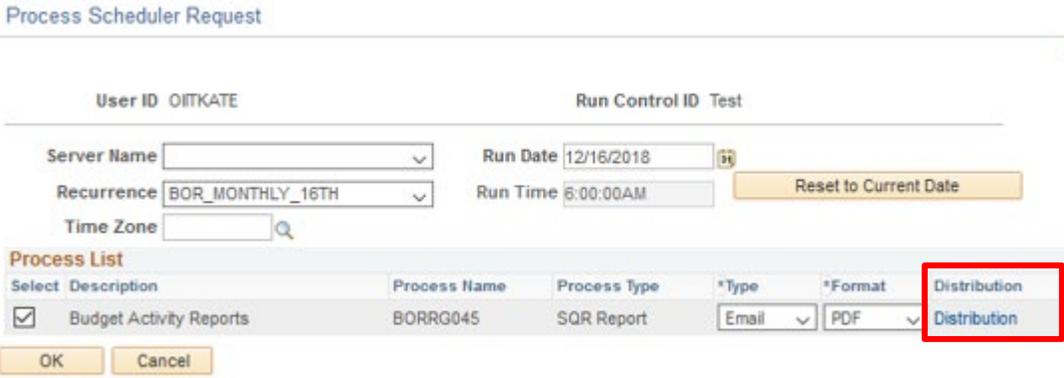
Scheduling recurring reports automates the report distribution process, which reduces the effort needed to manually run regular reports. When the recurrence runs at the scheduled day/time, recipients will receive an email with a copy of the report results attached to open the report directly without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

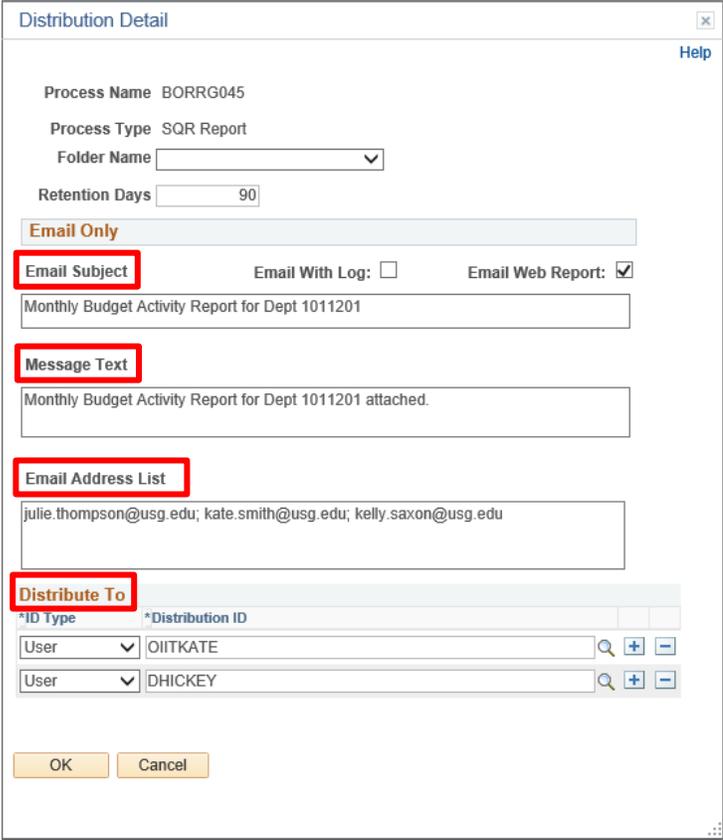
Below are step-by-step instructions on how to schedule a recurring report. This procedure can be used to schedule many reports within PeopleSoft Financials. In Steps 1 – 6 users select which report to schedule. The instructions below demonstrate how to schedule a recurring Budget Activity Report.

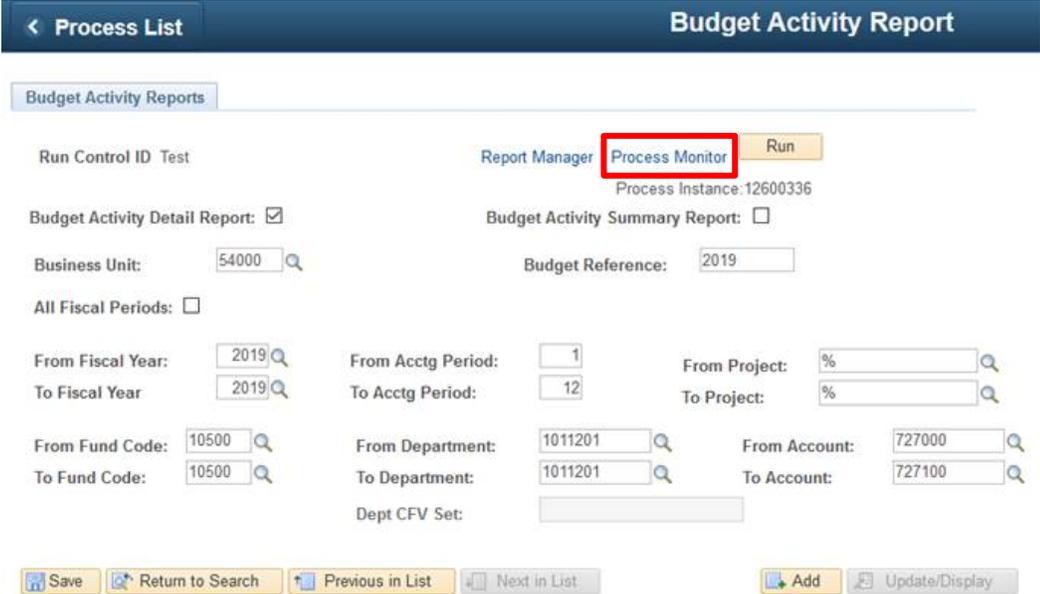
Step	Action
1.	Click the NavBar to navigate.
2.	Click the Navigator icon.
3.	Click the BOR Menus link .
4.	Click the BOR General Ledger link .
5.	Click the BOR GL Reports link .
6.	Click the Budget Activity Report link .
7.	<p>If the report has been run before, search for an existing Run Control ID as 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>

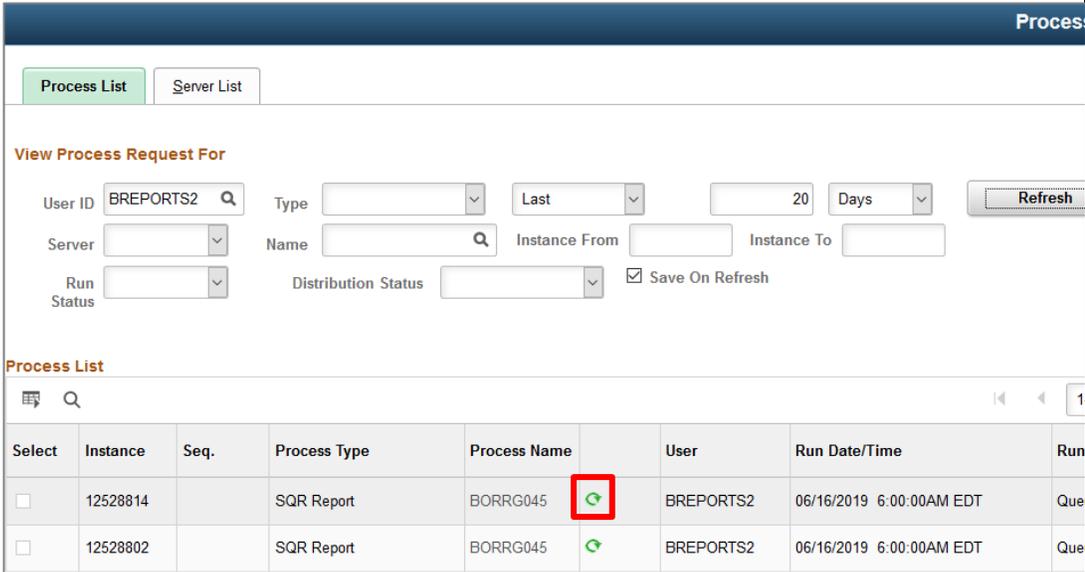
Step	Action
	<div data-bbox="604 256 1110 525" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between;"> Find an Existing Value Add a New Value </div> <p>Run Control ID <input type="text" value="(Enter Run Control here)"/></p> <div style="text-align: center; margin-top: 10px;"> 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="321 926 1401 1591" style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 10px;"> < Employee Self Service Budget Activity Report </div> <div style="margin-bottom: 10px;"> Budget Activity Reports </div> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>Run Control ID Test</p> <p>Budget Activity Detail Report: <input checked="" type="checkbox"/></p> <p>Business Unit: <input type="text" value="54000"/></p> <p>All Fiscal Periods: <input type="checkbox"/></p> <p>From Fiscal Year: <input type="text" value="2019"/> To Fiscal Year: <input type="text" value="2019"/></p> <p>From Fund Code: <input type="text" value="10500"/> To Fund Code: <input type="text" value="10500"/></p> </div> <div style="width: 45%;"> <p>Report Manager Process Monitor Run</p> <p>Budget Activity Summary Report: <input type="checkbox"/></p> <p>Budget Reference: <input type="text" value="2019"/></p> <p>From Acctg Period: <input type="text" value="1"/> To Acctg Period: <input type="text" value="12"/></p> <p>From Department: <input type="text" value="1011201"/> To Department: <input type="text" value="1011201"/></p> <p>From Project: <input type="text" value="%"/> To Project: <input type="text" value="%"/></p> <p>From Account: <input type="text" value="727000"/> To Account: <input type="text" value="727100"/></p> <p>Dept CFV Set: <input type="text"/></p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Save Return to Search Previous in List Next in List Add Update/Display </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, 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 visible next to the Run Time field. Below these fields is a 'Process List' table with columns: Select, Description, Process Name, Process Type, *Type, *Format, and Distribution. The table contains one entry: Budget Activity Reports, BORRG045, SQR Report, Email, PDF, Distribution. At the bottom are 'OK' and 'Cancel' buttons.</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 menu is open, displaying a list of predefined recurrences. The first item is 'BOR_DAILY'. Below it are various other recurrences including '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'. The background shows parts of the 'Process List' table and 'OK'/'Cancel' buttons.</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' window. 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 left of the window.</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> 
14.	Click the OK button.

Step	Action
15.	<p>Select the Process Monitor link, shown below, to view the queued report instances.</p>  <p>The screenshot shows the 'Budget Activity Report' page. At the top, there is a navigation bar with a back arrow and 'Process List' on the left, and 'Budget Activity Report' on the right. Below this is a section titled 'Budget Activity Reports'. There are several input fields and buttons: 'Run Control ID Test', 'Report Manager' (with a 'Process Monitor' link highlighted in red), 'Run', 'Budget Activity Detail Report: <input checked="" type="checkbox"/>', 'Budget Activity Summary Report: <input type="checkbox"/>', 'Business Unit: 54000', 'Budget Reference: 2019', 'All Fiscal Periods: <input type="checkbox"/>', 'From Fiscal Year: 2019', 'To Fiscal Year: 2019', 'From Acctg Period: 1', 'To Acctg Period: 12', 'From Project: %', 'To Project: %', 'From Fund Code: 10500', 'To Fund Code: 10500', 'From Department: 1011201', 'To Department: 1011201', 'From Account: 727000', 'To Account: 727100', and 'Dept CFV Set:'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'.</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>  <p>The screenshot shows the 'Process Monitor' page. At the top, there is a navigation bar with 'Process List' and 'Server List'. Below this is a section titled 'View Process Request For' with various input fields: 'User ID: BREPORTS2', 'Type', 'Last', '20 Days', 'Refresh', 'Server', 'Name', 'Instance From', 'Instance To', 'Run Status', 'Distribution Status', and 'Save On Refresh'. Below this is a section titled 'Process List' with a search bar and a table of process instances.</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>BREPORTS2</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>BREPORTS2</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 	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
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																		

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.

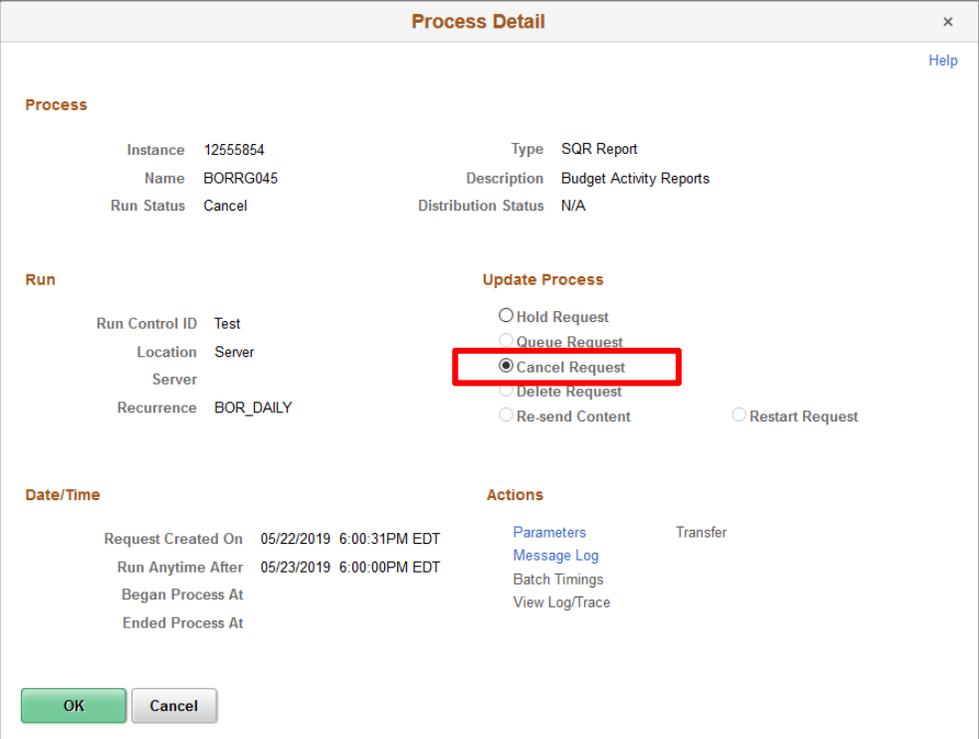
Below are step-by-step instructions on how to cancel a recurring report.

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 '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

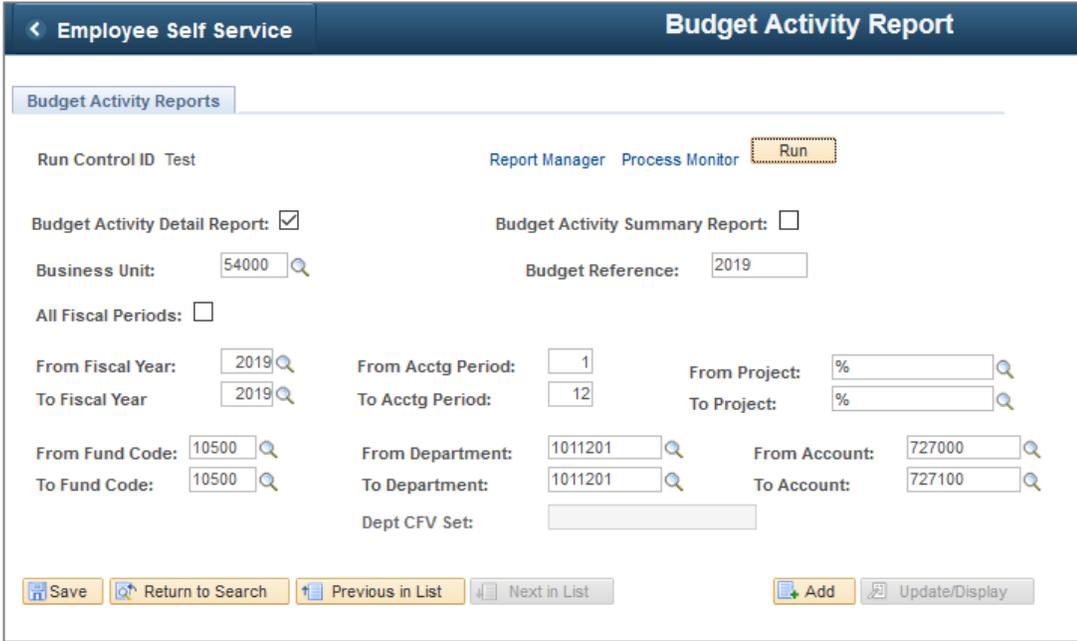
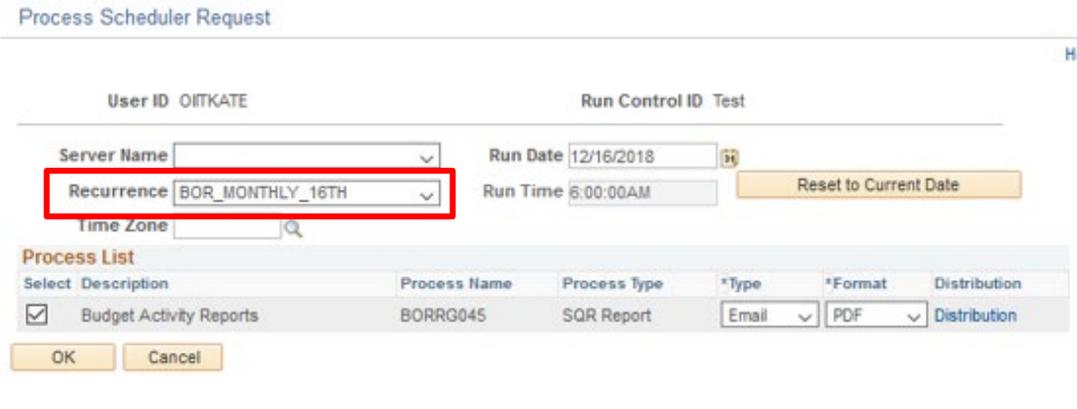
Step	Action																				
7.	<p>Locate the Run Control ID.</p> <p>Note: <i>If users maintain a few scheduled recurrences, the most efficient method to locate a Run Control ID is Option 1. If users maintain numerous scheduled recurrences and need to locate a Run Control ID among multiple Process 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. The main part of the screenshot 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 a 'Run Status' of 'Queued' and a 'Distribution Status' of 'N/A'. 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
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																		

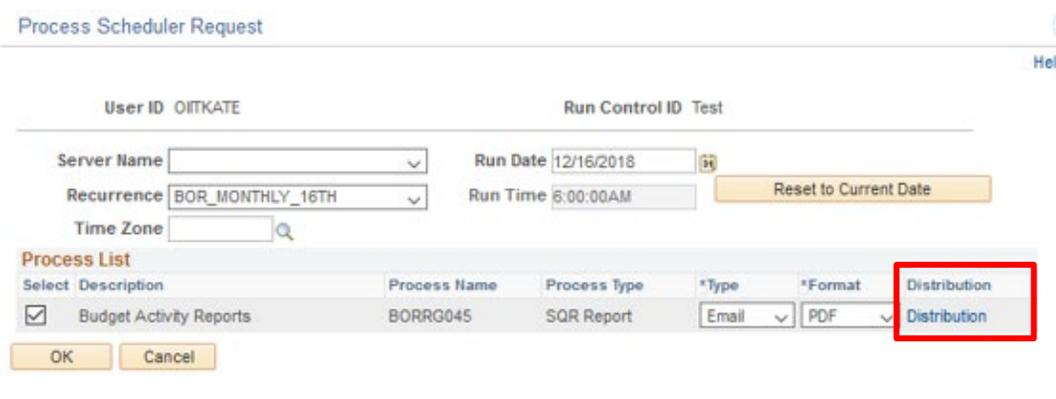
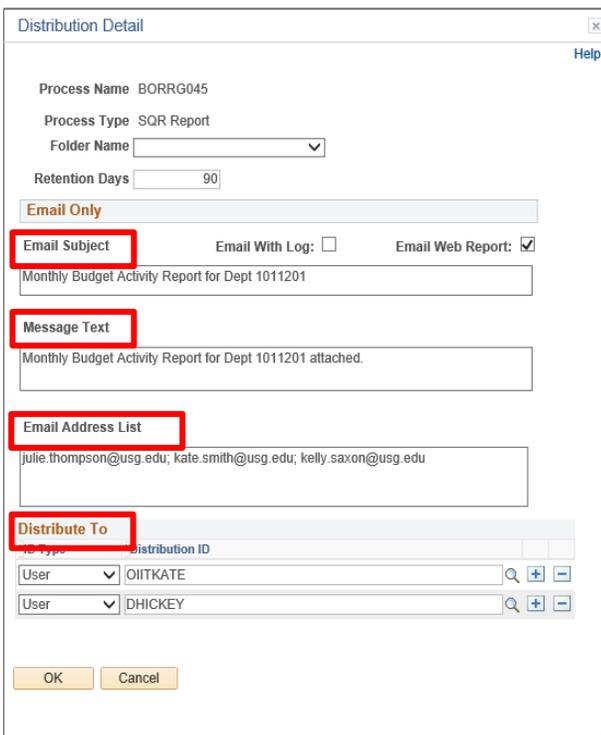
Step	Action
8.	<p>The system displays the Process Detail window. Under the Update Process section, select the Cancel Request radio button as shown below.</p> 
9.	Click the OK button.

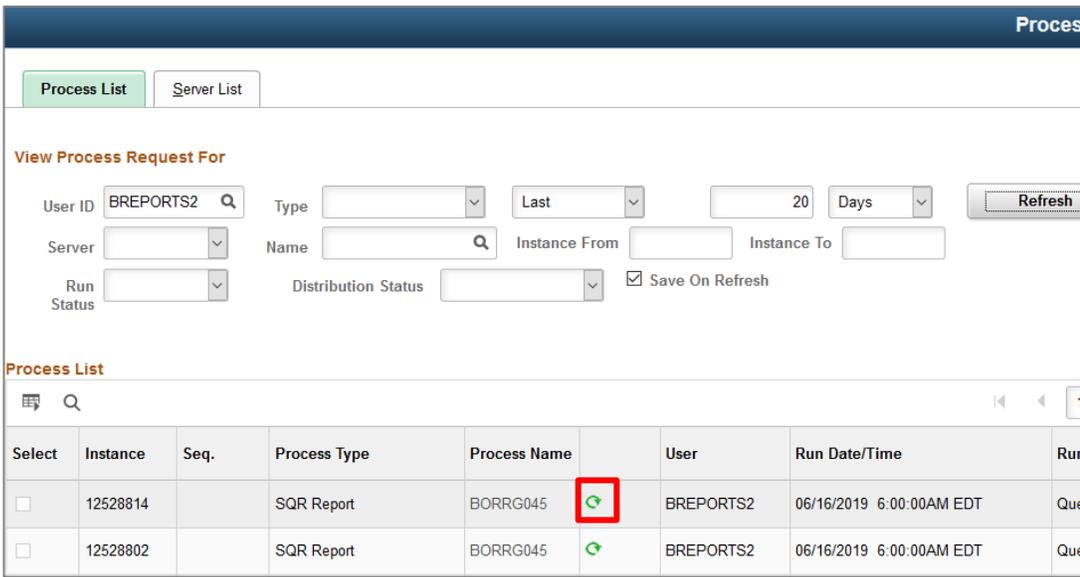
Editing a Recurring Report

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.	Search for the existing Run Control ID as shown below. <div data-bbox="500 1003 1214 1360" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p> <input type="button" value="Search Criteria"/> </p> <p> Run Control ID <input type="text" value="begins with"/> </p> <p> <input type="checkbox"/> Case Sensitive </p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/> </p> </div>

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>  <p>The screenshot shows the 'Process Scheduler Request' window. At the top, it displays 'User ID OIITKATE' 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 'Process List' table is visible with 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>The 'Distribution' link in the last column of the table is highlighted with a red box.</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									
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>  <p>The screenshot shows the 'Distribution Detail' window. It displays 'Process Name BORRG045' and 'Process Type SQR Report'. Below these are fields for 'Folder Name', 'Retention Days' (90), and an 'Email Only' section with checkboxes for 'Email Subject', 'Email With Log', and 'Email Web Report'. The 'Email Subject' field contains 'Monthly Budget Activity Report for Dept 1011201'. The 'Message Text' field contains 'Monthly Budget Activity Report for Dept 1011201 attached.'. The 'Email Address List' field contains 'julie.thompson@usg.edu; kate.smith@usg.edu; kelly.saxon@usg.edu'. The 'Distribute To' section shows a list of users: 'User OIITKATE' and 'User DHICKEY'. The 'Email Subject', 'Message Text', 'Email Address List', and 'Distribute To' sections are highlighted with red boxes.</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> 

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.

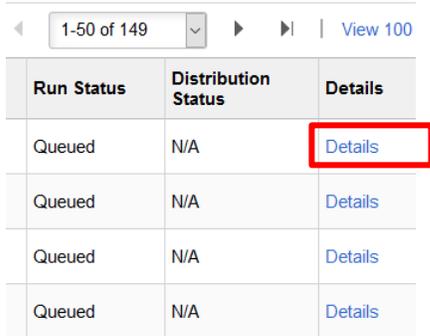
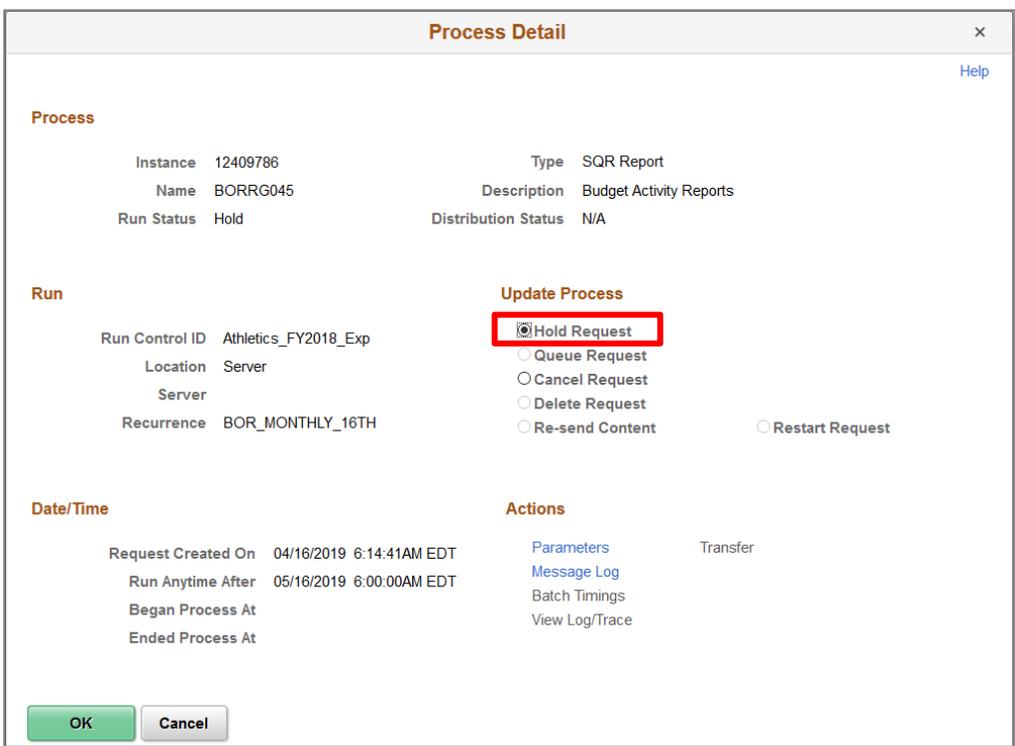
Note: Attempting to manually run a report with a Run Control ID that was set up as a recurrence without following the steps below to place the process on Hold results in the report running to No Success.

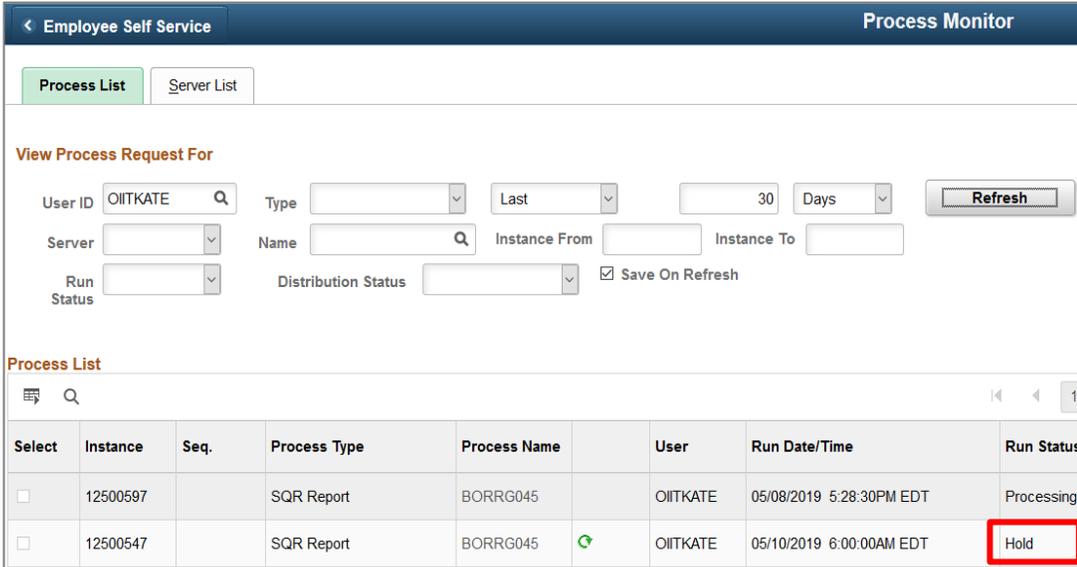
Below are step-by-step instructions on how to run a report manually between scheduled recurrences.

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.

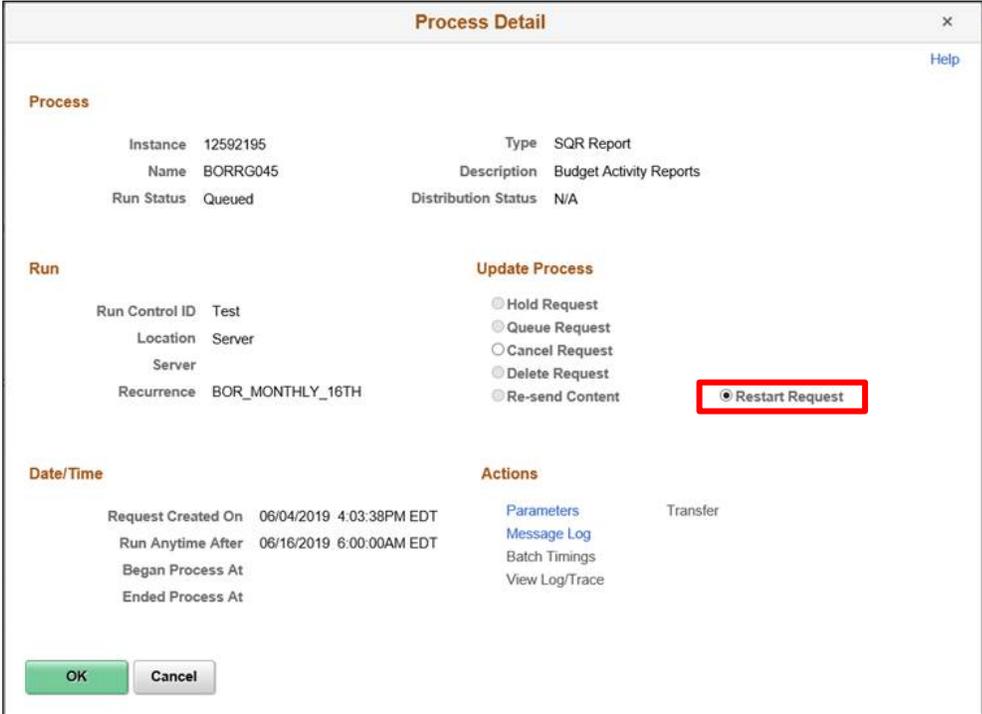
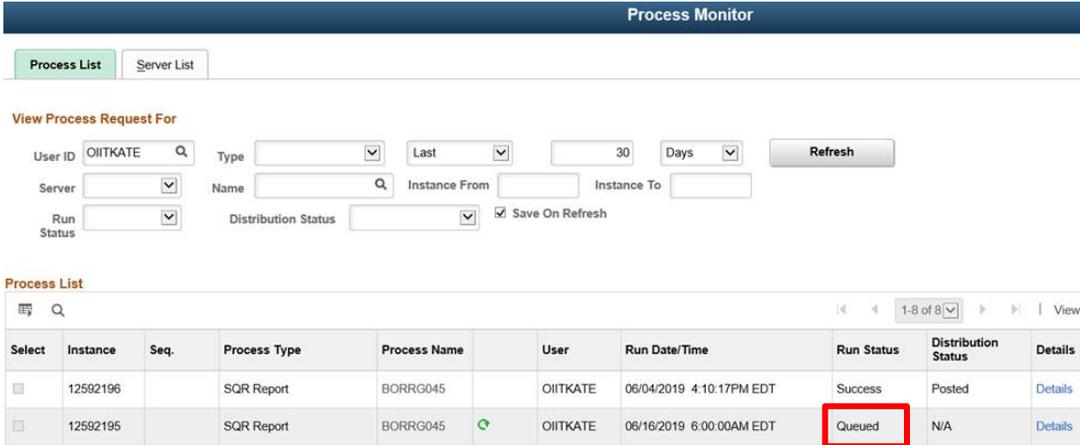
The screenshot shows the 'Process Monitor' interface in PeopleSoft. At the top, there are tabs for 'Process List' and 'Server List'. Below that, there are search filters for 'View Process Request For', including 'User ID' (BREPORTS2), 'Type', 'Last', 'Days' (20), and 'Refresh'. The 'Run Status' dropdown is highlighted with a red box and set to 'Queued'. Below the filters is a table titled 'Process List' with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, and Run. The table contains four rows of data for 'SQR Report' processes with instance numbers 12528814, 12528802, 12528801, and 12528797, all scheduled for 06/16/2019 at 6:00:00AM EDT.

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); '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'; and '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. There are also 'Parameters', 'Message Log', 'Batch Timings', and 'View Log/Trace' links, and an 'OK' button at the bottom left.</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. At the top, there are tabs for 'Process List' (selected) and 'Server List'. Below this is a search section titled 'View Process Request For' with fields for User ID (OIITKATE), Type, Last, 30 Days, and a Refresh button. There are also fields for Server, Name, Instance From, Instance To, Run Status, and Distribution Status, with a 'Save On Refresh' checkbox. Below the search section is a table titled 'Process List' with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, and Run Status. The table contains two rows: one with Instance 12500597, Process Type SQR Report, Process Name BORRG045, User OIITKATE, Run Date/Time 05/08/2019 5:28:30PM EDT, and Run Status Processing; and another with Instance 12500547, Process Type SQR Report, Process Name BORRG045, User OIITKATE, Run Date/Time 05/10/2019 6:00:00AM EDT, and Run Status Hold. The 'Hold' status is highlighted with a red box.</p>
12.	Click the Refresh button until the report runs to Success.

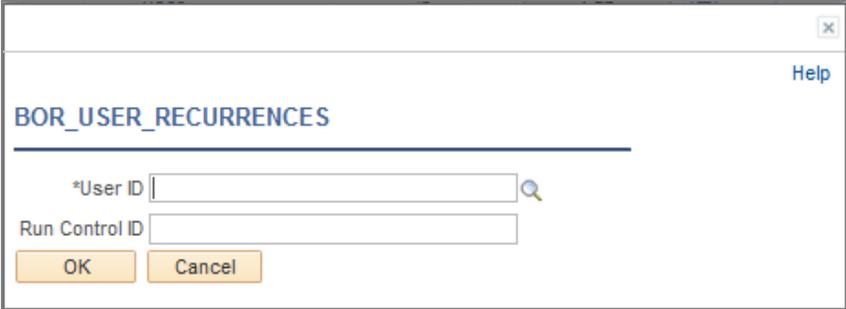
Step	Action																																																																																																	
13.	<p>Select the Details link next to the process previously placed on Hold as shown below.</p> <p>Process Monitor</p> <p>Process List Server List</p> <p>View Process Request For</p> <p>User 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></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></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></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></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></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></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></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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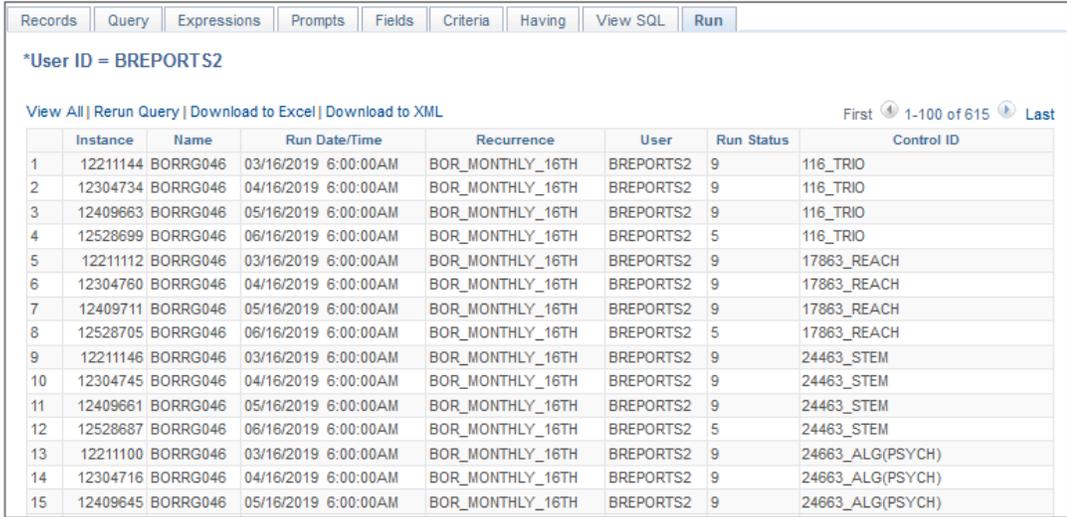
Step	Action
14.	<p>The system displays the Process Detail window. Under Update Process, select the Restart Request radio button.</p> 
15.	Click the OK button.
16.	<p>The process returns to Queued status and will run at the date/time of the selected recurrence.</p> 

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. 
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>  <p><i>Figure 2: Query Results When Run with User ID and Run Control ID</i></p>  <p>Each Run Status value corresponds to a process status. See Appendix B: Run Status Key for reference.</p>

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