How to Schedule a Report to Run Monthly

1) Navigate to the report, and setup your Run Control and criteria for the report to be scheduled.

2) To schedule the report to run, click on the Run button after you have saved the Run Control.

3) You will be taken to the Process Scheduler Request page. Most reports only have one report that will run. In that case, then the Select box in front of the Report name is normally checked.

If you have a report with multiple options, as in this example, then you have a choice to run the Open Encumbrance Report (details of POs) or the Open Encumbrance Summary Rpt (totals of encumbrances). Put a check mark in the Select box in front of the report that you want to schedule to run. I would recommend the Open Encumbrance Report because it has details of the PO #.
4) Next, you need to choose when you want your report to run. You need to decide what day of the month that you want your report to run. The 1st, 5th, are some examples. Let’s say that I want my report to run on the 1st of every month. It is currently in January, so I’d schedule my report to start on February 1st, but changing the date in the Run Date field. (Note: keep the Server Name box blank. You no longer need to choose a server.)

5) Now you need to choose a Recurrence. A Recurrence tells PS Financials how often that you want to run the report. Choose a Recurrence from the drop down menu. Note: a lot of users choose the BOR_MONTHLY to run the report each month. The recurrences that start with a ‘D’, run every day. The recurrences that start with ‘M’, run once a month. Also, each recurrence has a time that it runs (mostly at night). Some of the recurrences include the time in the name of the recurrence. For this example, I’ll choose the BOR_MONTHLY recurrence. It does not include a run time in its name, but once you choose it, then you will notice that the Run Time changes to 6PM.
6) Next, you can setup the Distribution for the report. This will allow you to receive an email after the report runs. This is a great way to prompt yourself to reconcile or review the report. Click on the Distribution hyperlink by the Open Encumbrance Report line.
7) If you want to receive an email message with a link to your report when it runs, then click on the Email Web Report checkboxes. Fill in the Subject that you want your email message to have under the Email Subject, and you can even write a Note to yourself under the Message Text.

You then go to the Distribution Detail. Notice that your UserID is listed under the Distribute To. This means that you will receive the email under your email address. If you want to send this report to additional users, then click on the + sign to add another user. You will have to choose user in the ID Type drop-down, and enter their USERID in the Distribution ID field.

When you have completed these steps, then click on OK.
8) Now to schedule the report, click on the OK button at the Process Scheduler Request screen.
9) If you want to see the scheduled report, go to Process Monitor. This is a hyperlink by the Run button on the Open Encumbrance Report Run control. OR you can navigate to it at: PeopleTools > Process Scheduler Request > Process Monitor.

Notice, under the Process Monitor, you will see your Open Encumbrance Report (MCG0005-), and that it is scheduled to run on 02/01/2015 at 6PM. Once this report runs to success, then it will reschedule itself to run on 03/01/2015 at 6PM.

You can tell reports that are setup as a recurring report by noticing the green circle arrow by the job.