



## Navigation

# **Oracle Navigation Step-by-Step Guide**

## How to Schedule a Report or Process to Run

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### How to Schedule a Report/ Process to Run

UC Merced's employees will use these steps to schedule a report or process to run.

Reports can be generated through scheduled processes. Most processes will already be scheduled to run automatically on a periodic basis. However, you have the ability to manually create scheduled processes to generate reports either as a one-time or recurring transaction, process, or report. You can access your Reports and Analytics page and your Scheduled Processes page under the Tools section in your Navigator.

To perform this task, log into Oracle Cloud

#### Tools >> Scheduled Processes >> Schedule New Process

#### **System Steps:**

- 1. Click the **Tools** infolet
- 2. Click the Scheduled Processes sub-infolet



#### 3. In the **Overview** page, click the **Schedule New Process** button

Overview (?)								
Search							Saved Sear	rch Last 24 hours -
Name				Submission Time	After	<ul> <li>mm/dd/yyyy a h:mm z</li> </ul>	000 (UTC-08:0	00) Los Angeles - Pacific Time (PT)
Process ID				Submission Notes	Contains	-		
Status	All	•		Submitted By	FinInst1			
							Search	Reset Download Results
Search Results (?)								
View   Flat List  Hierarchy	,							
Actions View View	le New Process	Put On Hold	Cancel Process	Release Process Vi	ew Log 🕤			
Name				Process ID	Status	s Sch	eduled Time	Submission Time



- 4. In the **Schedule New Process** pop-up window, enter the values for this process schedule example (**\*mandatory** data fields are indicated by an asterisk):
  - a. Type: select Job or Job Set based on process being scheduled
  - b. **Name:** enter the report/ process to schedule, or click the drop-down arrow to access the **Search** option if you are unsure of the report/ process name
- 5. Click the **OK** button

[	Schedule N	ew Process
	Туре	Job Job Set
	Name	Payables Cash Requirement Report
	Description	Forecasts immediate cash needs for invoice payments.
ľ		
		5 OK Cancel

6. In the **Process Details** pop-up window, enter the **Basic Options Parameters** for this process schedule example (**\*mandatory** data fields are indicated by an asterisk):

Note: the parameters will vary based on the report/ process being scheduled

7. Click the Advanced button to enable the Advanced Options menus



Process Details		<b>7</b> ×
<ol> <li>This process will be queued up</li> </ol>	p for submission at position	on 1
		Process Options Advanced Sub <u>m</u> it <u>C</u> ancel
Name Report	luirement	Print output -
Description Forecasts immedia	te cash needs for invoice pa	paym Notify me when this process ends
Schedule As soon as possibl	e Submissi	sion Notes
Basic Options Parameters		6
Payment Business Unit		•
* Template	UCM_ACH_PPRT	•
Pay Through Date	02/03/2021	û⊚
* Payment Date	10/01/2020	ΰø
Summary Option	No	7
Include Unvalidated Invoices	No	•
Include Unapproved Invoices	No	•
Include Selected Invoices	No	•
L		
		I

- 8. In the **Advanced Options** section of the **Process Details** pop-up window, click the **Schedule** tab hyperlink to create the schedule for this report/ process:
  - a. Run:
    - i. As soon as possible: defaults to selected but can be changed if needed
    - ii. **Using a schedule:** when selected the following settings open up depending on the **Frequency** value chosen
      - 1. **Frequency:** defaults to **Once** but in this example we are going to schedule the report to run on the 10<sup>th</sup>, 20<sup>th</sup>, 25<sup>th</sup> and the last day of each month at 6am.
        - a. Select **Monthly** from the drop-down list
        - b. **Repeat:** defaults to **By day** but in this example we are going to schedule the report to run **By date**



Process Details	×
This process will be queued up for submission at position 1	
Process Options Basic Sub <u>m</u> it C	ancel
Name Payables Cash Requirement Print output	
Schedule Using a schedule Submission Notes	
Advanced Options Parameters Schedule Output Notification 8a1	
Run 🔿 As soon as possible	
Using a schedule	
Frequency Monthly	
Repeat O By day	- 11
<ul> <li>By date</li> </ul>	- 11
Date 1 2 3 4 5 6 7	
8 9 🗹 10 11 12 13 14	
_ 15 _ 16 _ 17 _ 18 _ 19 <b>√</b> 20 _ 21	
I 29 I 30 I 31 ✓ Last day of month	

c. Date: check the boxes for 10, 20, 25 and Last day of the month

- 2. **\*Start Date:** use the Calendar icon to specify the date and time you want this schedule to run
- 3. **\*End Date:** use the Calendar icon to specify the date and time you want this schedule to run until. Currently, the system will not let you schedule a report/ process to run forever (i.e. no end date)
  - a. In this example, we are going to have the end date be 6am on December 31, 2021.

**Note:** I would need to place a reminder on my calendar to review my scheduled reports/ processes **before** the schedule stops running to see which ones are still needed and/ or might need to have the schedules adjusted for the new year.



Process D	etails				×
i) This proc	ess will be queued up for submission at position 1				
		Process Options	Basic Sub <u>m</u> it	<u>C</u> ancel	
Name	Payables Cash Requirement Report	Print output	•		
Description	Forecasts immediate cash needs for invoice paym	Notify me wh	en this process ends		
Schedule	Using a schedule Submission Note:	5			
Advance Parameters Run () A () U	Schedule       Output       Notification         As soon as possible       Jsing a schedule         Date       1       2       3       4         8       9       10       11       11         15       16       17       18       18         22       23       24       25       29         30       31       31	5 6 1 12 13 1 19 ₹ 20 2 26 27 5	7 14 21 28 Last day of month		
* Start D	ate       02/10/2021 AM 6:00       Image: Control of the second s	eles - Pacific Time (	РТ) РТ) 8а2		

- 9. In the **Advanced Options** section of the **Process Details** pop-up window, click the **Output** tab hyperlink to designate how/ if the output will be handled
- 10. Click the **Add Output Document** icon to add the report/ process output value defaults for **Name**, **Layout**, and **Format**



Process De	tails		×
(i) This proce	ss will be queued up for submission at position 1		
		Process Options Basic Su	b <u>m</u> it <u>C</u> ancel
Name	Payables Cash Requirement Report	Print output	
Description	Forecasts immediate cash needs for invoice paym	Notify me when this process en	ds
Schedule	Using a schedule Submission Note	S	
Advance	ed Options		
Parameters	Scheduk Output Notification		
View <b>v</b>	<b>+</b> × (?)		10
Name		Layout	Format
APXC	RCR Document1	Payables Cast •	PDF •

11. In the **Advanced Options** section of the **Process Details** pop-up window, click the **Notification** tab hyperlink to designate if any **Notifications** are needed

#### Note: the Notification will show up in the Recipient's Oracle Worklist

#### 12. Click the Create Notification icon

- a. In the **Create Notification** pop-up window, enter the values for this example (\*mandatory data fields are indicated by an asterisk):
  - i. **\*Recipient:** enter the user ID that the recipient uses to sign in
  - ii. **\*Condition:** select the **Condition** the **Notification** will get sent to the **Recipient** once/ if satisfied
- b. Click the **OK** button



Process Details		×
(i) This process will be queued up for	r submission at position 1	
	Process Options Basic Sub <u>m</u> it <u>C</u> ancel	
Name Payables Cash Require Report	ment Print output	,
Description Forecasts immediate c	ash needs for invoice paym Notify me when this process ends	
Schedule Using a schedule	Submission Notes	
Parameters Schedule Output	Notification           Create Notification	
Recipient Condition No notifications defined	* Recipient FinInst1	
Columns Hidden 1	* Condition On Error	
	12 OK Cancel	

13. In the **Confirmation** pop-up window, click the **OK** button to acknowledge the process has been successfully scheduled and complete this process.



#### **Oracle Transactional Business Intelligence (OTBI) Report/ Process**

To perform this task, log into Oracle Cloud

#### **System Steps:**

- 1. Click the **Tools** infolet
- 2. Click the Reports and Analytics sub-infolet



#### 3. In the **Reports and Analytics** page, click the **Browse Catalog** button

Reports and Analytics ⑦	Browse Catalog
All Folders »	3
Filter All types   Favorites  Favorites  Clear Filters	

4. In the **Folders** section of the **Oracle Transactional Business Intelligence (OTBI) Catalog** page, navigate to location for the report/ process you are looking to schedule and click the **More** hyperlink >> and then click the **Schedule** option

**Note:** the navigation to select **and** the parameters to run the OTBI report desired will be different for each report. For this example we will be using the **Supplier FBDI Extract** report **(Shared Folders >> Custom >> Supplier FBDI Extract >> More >>** click the **Schedule** option)





- 5. Click the **General** tab hyperlink on the **Schedule Report Job** page, enter the **Parameter** values for this report example (**\*mandatory** data fields are indicated by an asterisk):
  - a. \*Enter Report Type: select PROD from drop-down list
  - b. Enter Creation Source: value defaults to All but can be changed if needed

	Search All	•	(	Advanced	OTBI Help	Help 🔻	Sign Out
chedule Report Job	Home Catalo	g Favorites <b>v</b>	Dashboards 🔻	New 🔻	Open 🔻 S	igned In As	FinInst1 🔻
Overview     General Created by fininst1     Report Name /Custom/Supplier FBDI Extract/Supplier F     Schedule Start immediately     General     Output Schedule Notification	BDI Extract Report.)	Output: do Destination Notification	s Output1 1		Retur	n Submit	0
Report /Custom/Supplier FBDI Extract/Suppl o							
* Enter Report Type Prod v	Enter Creation S	ource All	Ŧ				

- 6. Click the **Output** tab hyperlink on the **Schedule Report Job** page, enter the **Parameter** values for this report example as required (**\*mandatory** data fields are indicated by an asterisk):
  - a. **Output** header:





- i. **Make Output Public:** value defaults to **Unchecked** but can be changed if needed
- ii. **Save Data for Republishing:** value defaults to **Checked** but can be changed if needed
- iii. **Compress Output prior to delivery:** value defaults to **Unchecked** but can be changed if needed
- b. **Output** section:
  - i. Name: leave default value as is
  - ii. Layout: leave default value as is
  - iii. Format: leave default value as is
  - iv. Locale: leave default value as is
  - v. Timezone: leave default value as is
  - vi. Calendar: leave default value as is
  - vii. Save Output: value defaults to Checked but can be changed if needed
- c. **Destination** section:
  - i. **Destination Type:** defaults to **Email**, click the **Add Destination** button if you would like the output emailed to a specific address(es) **each time this specific schedule is run** 
    - 1. Output: defaults to All
    - 2. Email section:
      - a. **\*To:** enter the email address(es) you want the report/ process output sent **To**
      - b. **Cc:** enter the email address(es) you want the report/ process output sent as **Cc** if needed
      - c. Reply to: enter the email address(es) you want the recipients to Reply to if needed. The Oracle server sends out the emails based on the indicated output destination the server cannot receive emails back if there are questions related to the output that was emailed.
      - d. **Subject:** enter a subject for the email (i.e. 7am Daily Supplier FBDI Extract)
      - e. Request Delivery Status Notification: check if desired
      - f. Request Read Receipt: check if desired
      - g. **Message:** enter additional details if helpful to compliment the output results that will be attached to the email message

**Note:** the **Message** needs to be generic related to the report/ process output in general because each email sent for this



dule Report Job			Home Ca	atalog Favorites <b>v</b>	Dashboards 🔻	New <b>v</b> Open	<ul> <li>Signed In As F</li> </ul>	inInst
Coverview General Created by Report Name /Custom/Si Schedule Start imme Genera Make Output Schedule Make Output Public Save Data for Republishing Compress output prior to d	fininst1 upplier FBDI Extract/ diately Notification	Supplier FBDI Extra	Outputs ct Report.xdo Destination Notification	a Output1 1 Email 1			Return Submit	0
✓ Output								
+ X Name Layout	<u>6b</u>	Format	Locale	Timezone		Calendar	Save Output	
Output1 FBDI	•	Excel (*.xls) 🔻	English (United States) 🔻	(UTC-08:00) Los An	geles - Pacific Time ( 🔻	Gregoria 🔻		
Destination								
There are five destination ty Destination Type Email	Pes: Email, Printer, F	ax, FTP and Web fo	Ider. You can add multiple destir	nations as you need.				
Email	Output	All	- UC				×	
*To Cc Beply to	mtaylor32@ucmerc	ed.edu ced.edu		Message Please related timely Thank	e review this to make sure a communications are sent manner. you.	any Supplier out in a		
	7am Daily Supplier	FBDI Extract						
Subject								

## report/ process during the schedule will include the **Message** created here

- 7. Click the **Schedule** tab hyperlink on the **Schedule Report Job** page, enter the **Parameter** values for this report example (**\*mandatory** data fields are indicated by an asterisk):
  - a. **Define Schedule Time** section:
    - i. **Frequency:** value defaults to **Once** but can be changed if needed
      - 1. in this example we are going to schedule the report to run 3 times per **week** day
        - a. Select Weekly from the drop-down list
        - b. **On:** select the week days to schedule this report/ process to run on
    - ii. **Run Now:** value defaults to **Enabled**, but this will change or be removed from the display based on the **Frequency** value chosen
    - iii. **Start:** use the **Calendar** icon to specify the date and time you want this schedule to run
      - 1. in this example, we are creating the 7am daily week day schedule



- iv. **End:** use the **Calendar** icon to specify the date and time you want this schedule to run **until.** Currently, the system will **not** let you schedule a report/ process to run forever (i.e. no end date)
  - 1. In this example, we are going to have the end date be 7am on December 31, 2021.

**Note:** I would need to place a reminder on my calendar to review my scheduled reports/ processes **before** the schedule stops running to see which ones are still needed and/ or might need to have the schedules adjusted for the new year.

- b. Define Schedule Trigger section:
  - i. Use Trigger: value defaults to Unchecked but can be changed if needed

Overview				
General Created by fininst1 Report Name /Custom/Supplier FBDI Extra	act/Supplier FBDI Extract Report.xdo	Outputs Output Destination Email	1	Return Submit
Schedule Start on Feb 3, 2021 7:00:00	) AM Recur Weekly	Notification		
General Output Schedule Notification				
Define Schedule Time				
Frequency Weekly				
On V Monday				
<ul> <li>Tuesday</li> <li>Wednesday</li> </ul>				
Thursday Friday				
Saturday				
Start E-b 0 0001 7:00:00 AM	the (UTC 09:00) Les Angeles - Ree	ifia Time (PT)		
Start F60 3, 2021 7:00:00 AM	to Aligeres - Paci			
End	Collect Date and Time	anic Time (PT)		
Define Schedule Trigger	Select Date and Time	~		
Use Trigger	▲ December ▼ 2021	· •		
	SUN MON TUE WED THU FR	I SAT		
	28 29 30 1 2 3 5 6 7 8 9 10	4		
	12 13 14 15 16 17 19 20 21 22 23 24 26 27 28 29 30 31	18 25 1		
	2 3 4 5 6 7	8		
	7 🗘 00 🗘: 00 🏹	O PM		
	(UTC-08:00) Los Angeles - Pacifi	ic T 🔻		
	OK C	ancel		
	UK C	ancer		

- 8. Click the **Notification** tab hyperlink on the **Schedule Report Job** page, enter the **Parameter** values for this report example (**\*mandatory** data fields are indicated by an asterisk):
  - a. Notify By:
    - i. **Email:** value defaults to **Unchecked** but can be changed if needed



- 1. **Email Address:** enter the email address of the person to receive the notification indicated below
- 2. When:
  - a. **Report completed:** value defaults to **Unchecked** but can be changed if needed
  - b. **Report completed with warnings:** value defaults to **Unchecked** but can be changed if needed
  - c. **Report failed:** value defaults to **Unchecked** but can be changed if needed

**Note:** receiving an email when the report/ process fails can be helpful to give users a heads up that something needs to be looked into and/ or potentially fixed for the next run of the report/ process to be successful

d. **Report skipped:** value defaults to **Unchecked** but can be changed if needed

#### 9. Click the **Submit** button

	Search	All	•		Q Advanced	OTBI Help	Help 🔻	Sign Out	
Schedule Report Job	Home 0	Catalog	Favorites <b>v</b>	Dashboards 🔻	New 🔻	Open 🔻	Signed In As	s FinInst1	•
Overview     General Created by fininst1     Report Name /Custom/Supplier FBDI Extract/Supplier FBDI Extract Report.xdo     Schedule Start on Feb 3, 2021 7:00:00 AM Recur Weekly      General Output Schedule Nettification      Notify By © Email Email Address Intaylor32@ucmerced.edu      When Report completed     Report failed     Report failed     Report skipped	Outpu Destinatio Notificatio	ts Output1 n Email n Email				Re	sturn Subm	it @	

10. In the **Submit** pop-up window, enter the **Report Job Name** value for this scheduled request and then click the **OK** button

**Note:** it is good to name the schedule something intuitive so if you ever have to look the schedule up you'll be able to find it easily



Submit		0	×
F	Report /Custom/Supplier FBDI Extract/Supplier FBDI Extract Report.xdo		
Paran	neters Enter Report Type:Prod, Enter Creation Source:All		
Sch	edule Start on Feb 3, 2021 7:00:00 AM Recur Weekly		
0	Output Output1		
Notifi	cation Email		
Trigger Data	Model		
Trigger	Name		
Trigger Retry	/ Limit		
Trigger Pause	Time		
Trigger Paran	neters		
	Report Job Name 7am Daily Supplier FBDI Extract		
	ОК	anc	el

11. In the **Confirmation** pop-up window, click the **OK** button to acknowledge the process has been successfully scheduled and complete this process.

