



## Navigation

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

## **How to Schedule a Report or Process to Run**

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FINAL

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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.

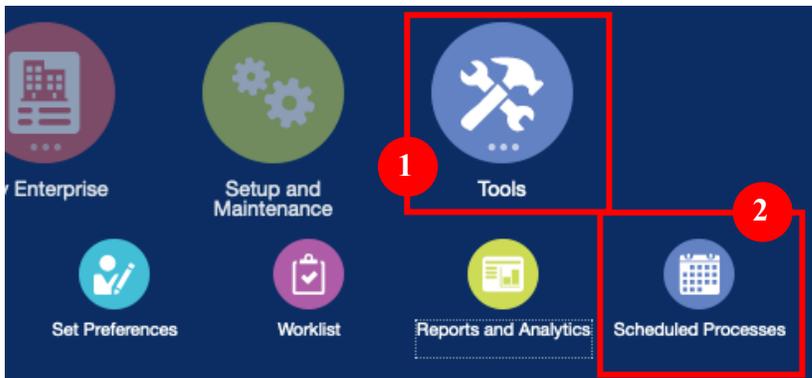
Reports can be generated through scheduled processes. Most processes will already be scheduled to run automatically on a periodic basis. However, you have the ability to manually create scheduled processes to generate reports either as a one-time or recurring transaction, process, or report. You can 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

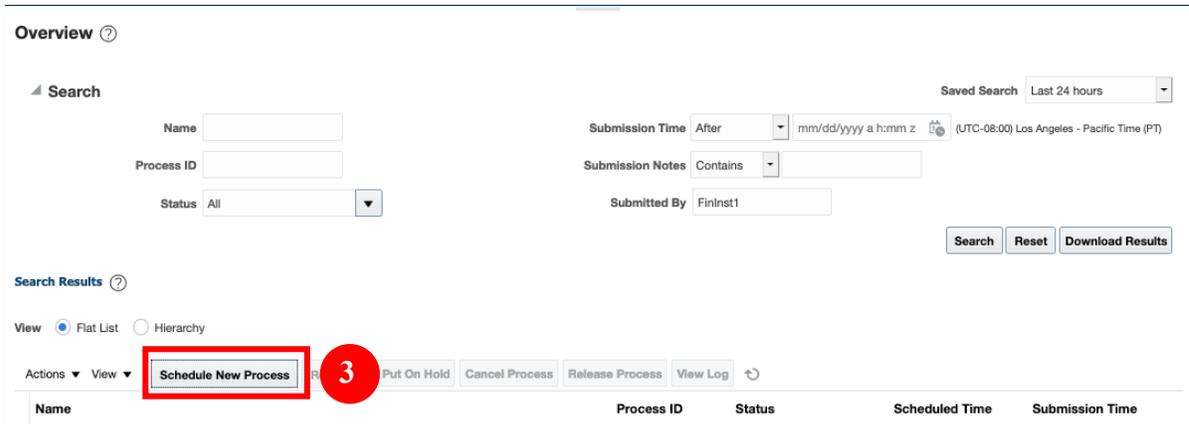
**Tools >> Scheduled Processes >> Schedule New Process**

### 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



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 New Process**

Type  Job  Job Set

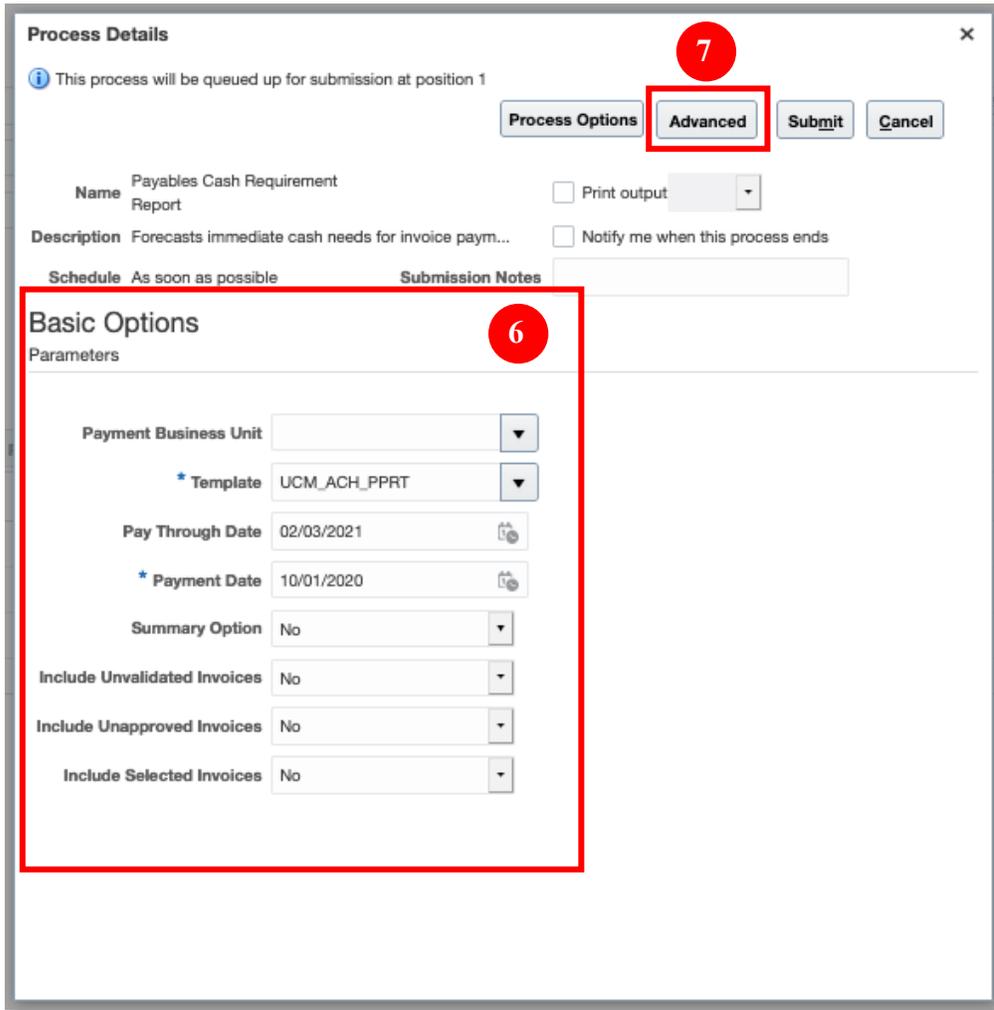
Name Payables Cash Requirement Report 4

Description Forecasts immediate cash needs for invoice payments.

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



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**

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

The screenshot shows the 'Process Details' window for a report named 'Payables Cash Requirement Report'. The 'Advanced Options' section is highlighted with a red border and contains the following settings:

- Run:**  As soon as possible,  Using a schedule
- Frequency:** Monthly
- Repeat:**  By day,  By date
- Date selection grid:**

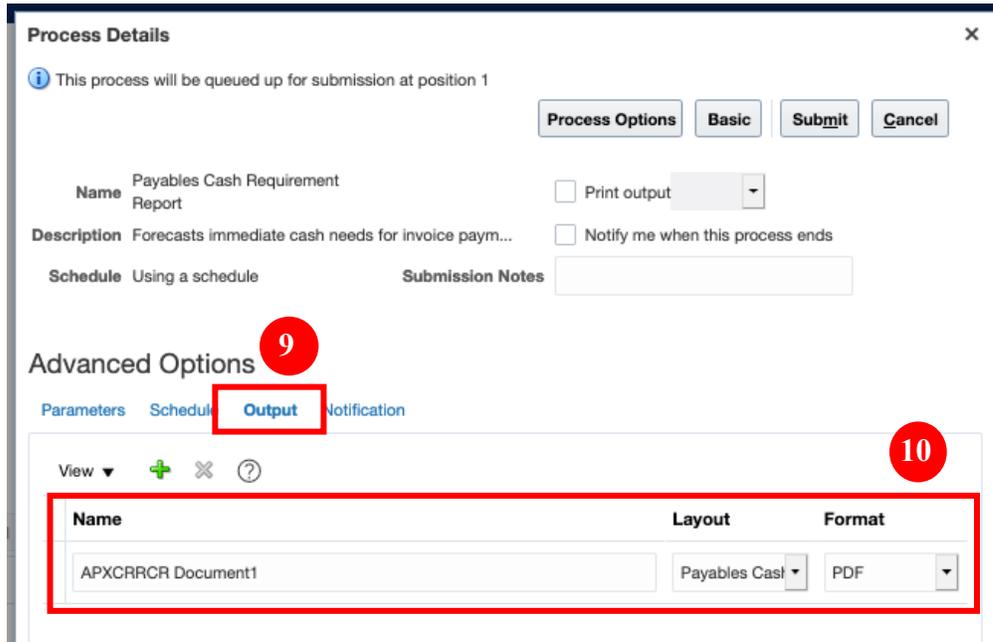
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- Last day of month:**

A red circle with the text '8a1' is located in the top right corner of the Advanced Options section.

- 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.

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**

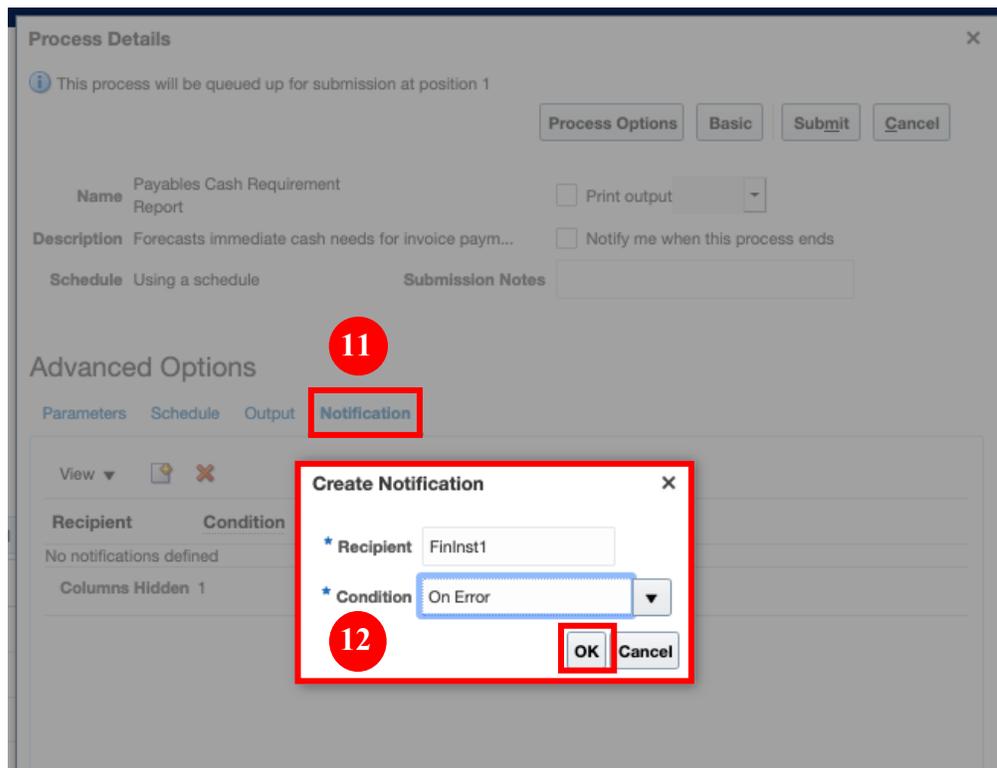


11. In the **Advanced Options** section of the **Process Details** pop-up window, click the **Notification** tab hyperlink to designate if any **Notifications** are needed

**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



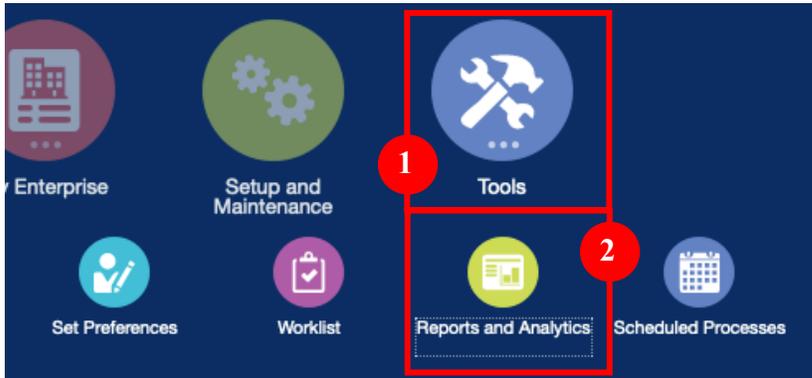
13. In the **Confirmation** pop-up window, click the **OK** button to acknowledge the process has been successfully scheduled and complete this process.

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

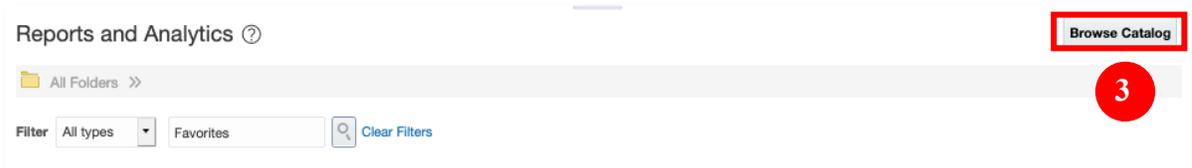
To perform this task, log into Oracle Cloud

#### System Steps:

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

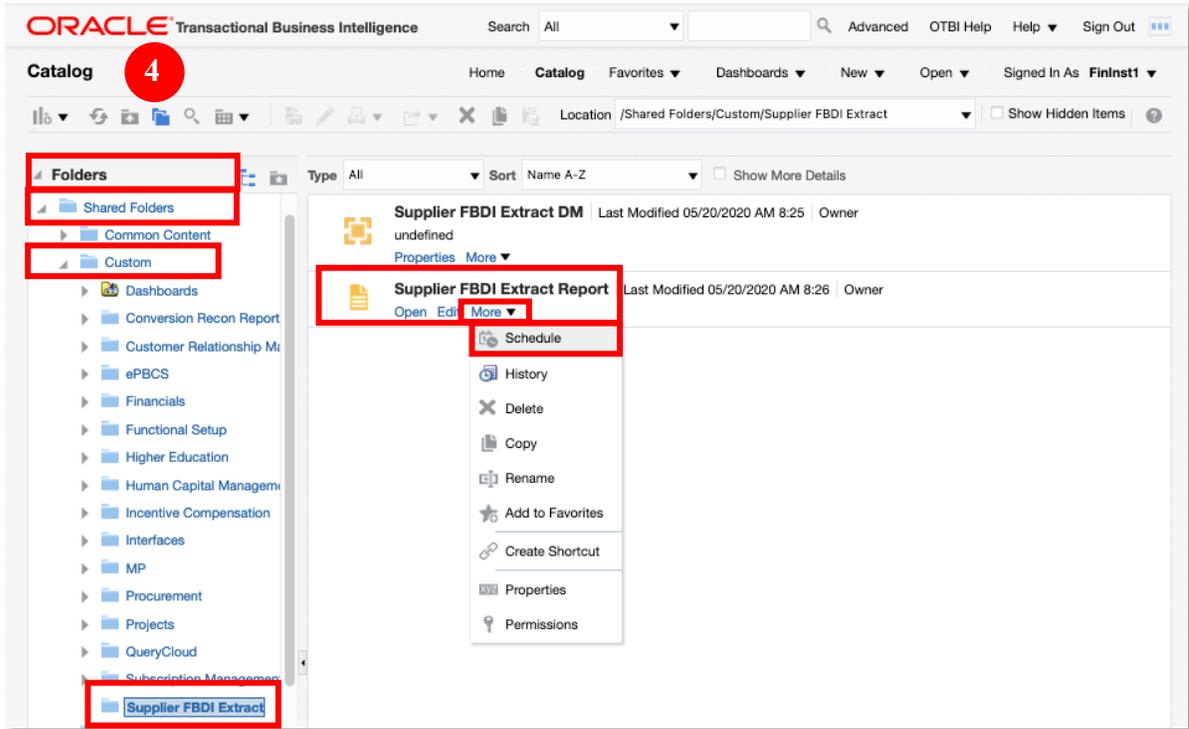


3. In the **Reports and Analytics** page, click the **Browse Catalog** button

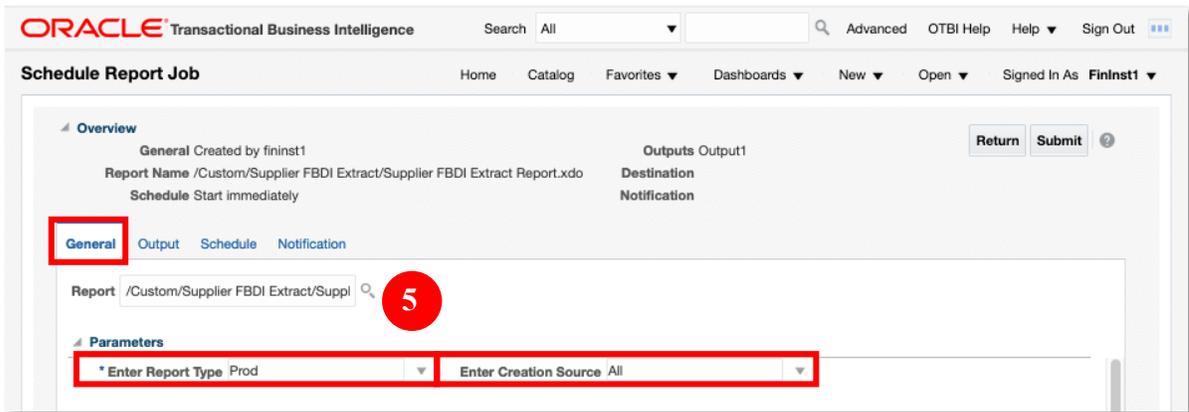


4. In the **Folders** section of the **Oracle Transactional Business Intelligence (OTBI) Catalog** page, navigate to location for the report/ process you are looking to schedule and click the **More** hyperlink >> and then click the **Schedule** option

**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)



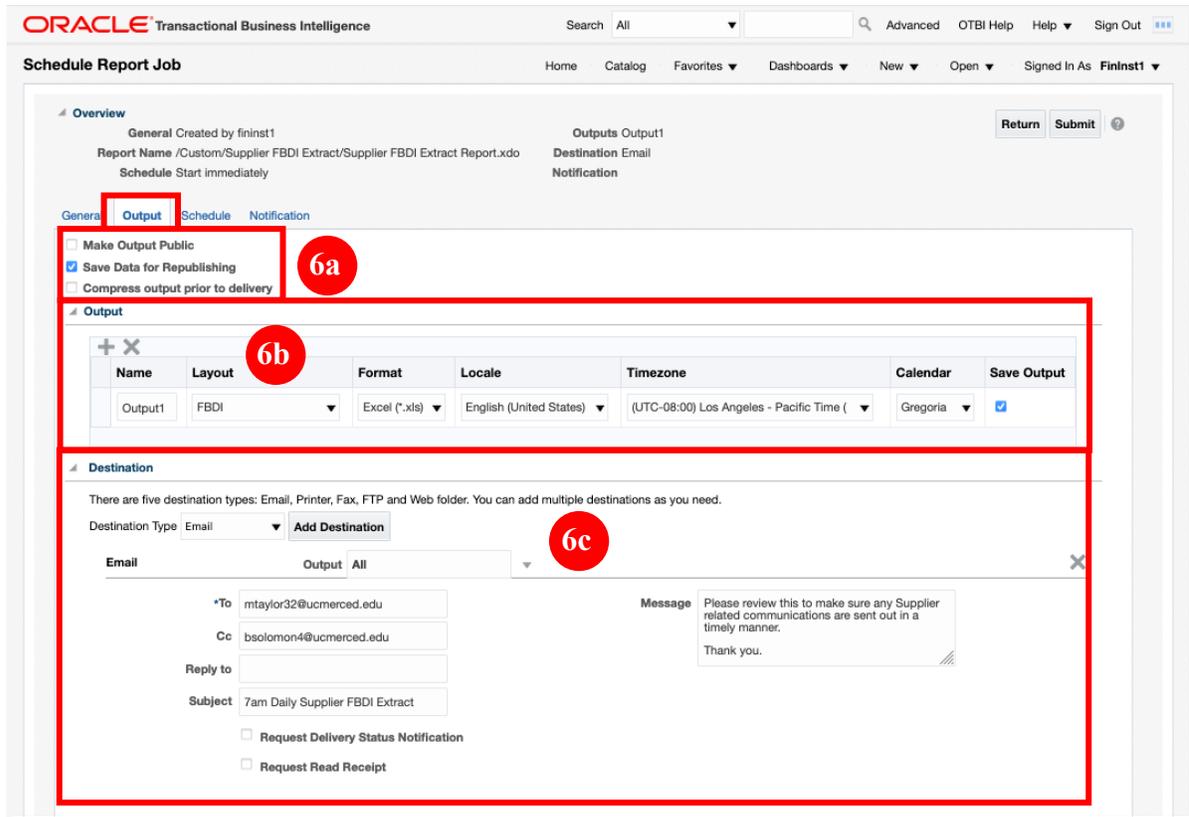
5. Click the **General** tab hyperlink on the **Schedule Report Job** page, enter the **Parameter** values for this report example (\***mandatory** data fields are indicated by an asterisk):
  - a. \***Enter Report Type:** select **PROD** from drop-down list
  - b. **Enter Creation Source:** value defaults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



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

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

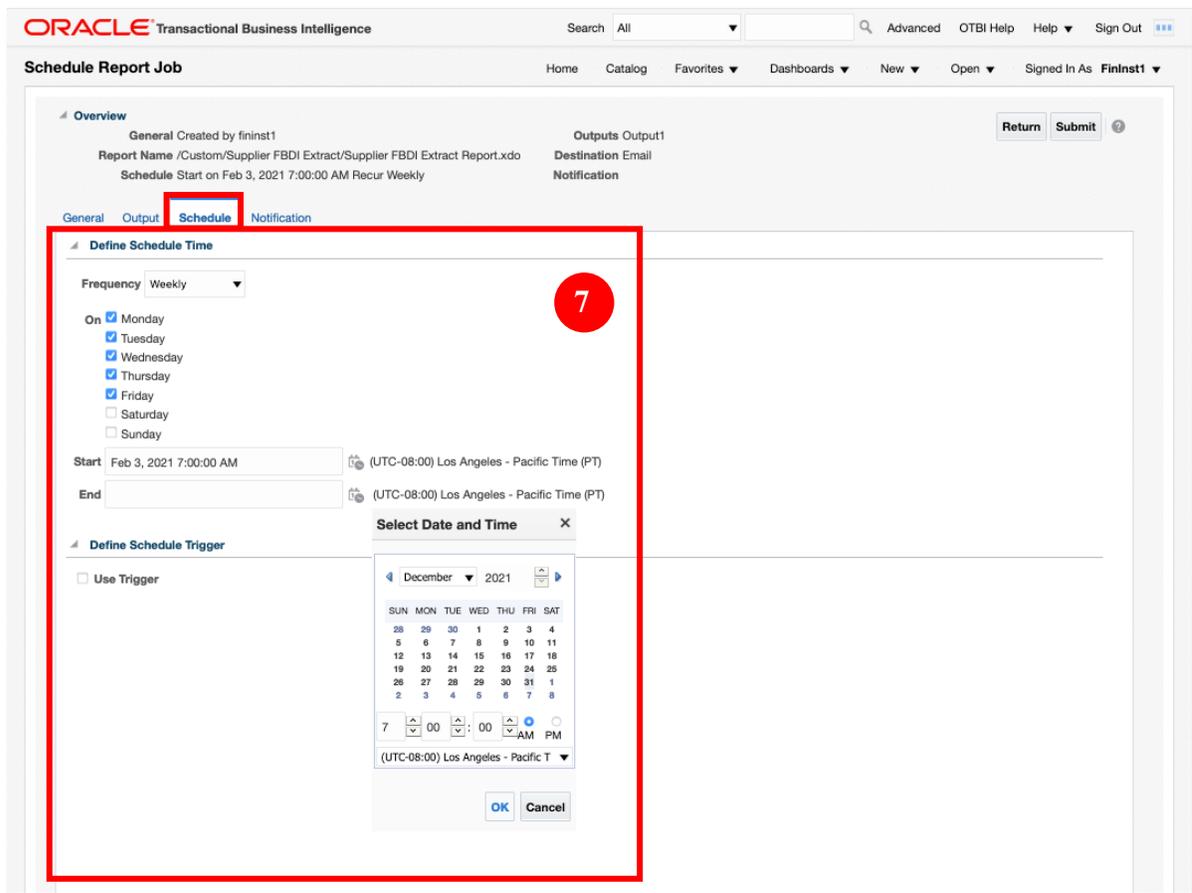
1. in this example, we are creating the 7am daily week day schedule

- 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



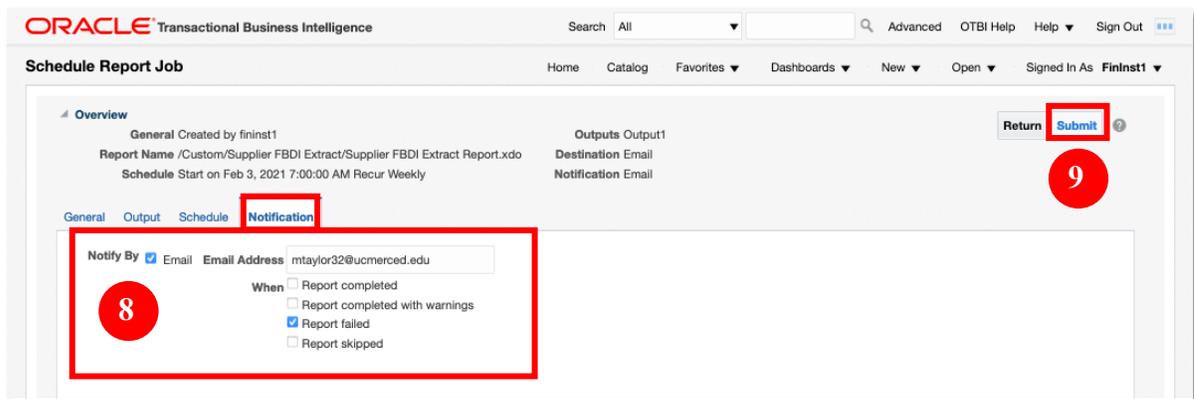
- 8. Click the **Notification** tab hyperlink on the **Schedule Report Job** page, enter the **Parameter** values for this report example (\***mandatory** data fields are indicated by an asterisk):

a. **Notify By:**

- i. **Email:** value defaults to **Unchecked** but can be changed if needed

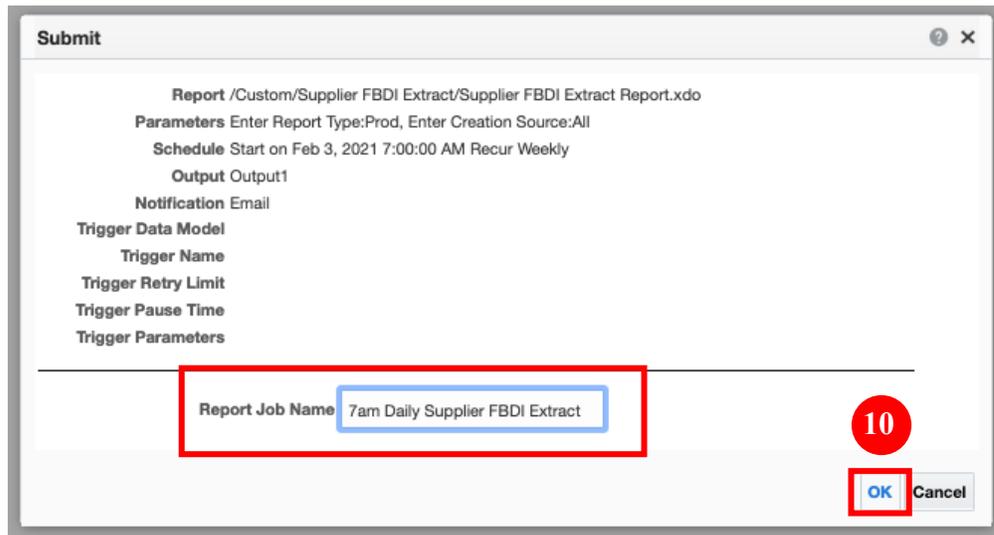
1. **Email Address:** enter the email address of the person to receive the notification indicated below
  2. **When:**
    - a. **Report completed:** value defaults to **Unchecked** but can be changed if needed
    - b. **Report completed with warnings:** value defaults to **Unchecked** but can be changed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



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



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