Creating a Run Control, Running a Process, Monitoring a Process, and Checking Output (Reports) and Errors

Creating a Run Control

In order to complete the work of some business processes, it is sometimes necessary for individuals to run on-demand processes in PeopleSoft Financials. In order to run a process (like generating a report, for example), each person who has access to that functionality must create their own Run Control—Run Controls are unique to each user of the system.

Follow the instructions for the process you are preparing to run (instructions for each process differ). Some Run Controls require that a number of fields be completed. Others need no specific information (there aren't any variables). The procedures for the process you're going to run should include information on how to complete any needed fields on the Run Control.

Be aware that all fields on a Run Control are important. The Run Control contains parameters that the system uses to select and process data. If you aren't completely sure of how to set up a Run Control, or what it does, consult the training materials or procedure documents that have been provided to you. If you have questions or need clarification, contact the University Financial Helpline for assistance (they may need to re-direct your call to a specific Business Process Owner unit).

Naming conventions: Run Controls need a name. The name you give the Run Control is its name "forever" so take a few minutes to thoughtfully name your Run Control. Some people use an abbreviation of the module or process they're working with. For example, TVL_EMPL_EXP_RPT could be a name of a Run Control for generating an employee expense report. There are a few restrictions on naming your Run Controls: no spaces; only letters/numbers, dashes, and underscores are allowed.

Once you've created a Run Control, you can re-use it each time you run the process.

Running a Process

Procedures for the process you're running should instruct you on where/when/why to run the process. Once you reach that place (and access or create your Run Control for it), this is how you kick-off the process.

1. Review the Run Control settings one more time!
2. Click SAVE button in the lower left corner of the screen after changes have been made (safety first). Yes, the first step of running any process is that the system saves the Run Control information, but better to be safe than sorry.
3. Click RUN button in the upper right corner of the screen. You still have not actually run the process at this point. There is one more screen to review before the process starts.
4. Review the second screen of the Run Control. It may list one or more items that will run once the process starts. Your procedures, training materials, or instructions should tell you how to configure this screen—many processes require no additional steps at this point, but some do require you to pay attention to this second screen.
    a. Check the server name on which the process will run (default is blank). Most processes that run need to use the Unix server. If the process is intended to produce a Crystal report, then it MUST run on the NT server. Again, consult your instructions, procedures, or training materials for the proper setting.
    b. Check the list of things that will run once the process starts, located on the lower portion of the screen. Most processes only have one item on the list. Ensure the check box at the left of the item is selected for those processes that need to run.
    c. Click OK button in the lower right corner. This is what actually starts the process running.

   d. The system will take you back to your Run Control. You should see a Process Instance number in the upper right corner near the RUN button. Go to the Monitoring a Process section of this document.

Monitoring a Process

Monitor progress of the process: click Process Monitor link next to the RUN button. To navigate to the Process Monitor: Menu > PeopleTools > Process Scheduler > Process Monitor

The Process Monitor defaults to looking at processes triggered by your Internet ID, for the last day. You should see your process instance and the name of the process you're running on the list. The far right side of the list shows the run date/time and progress.

The Run Status column shows if the process is queued up to run, running/processing, failed or has errors, has a warning, or has completed successfully.

A note of caution: "Success" in the Run Status column doesn't always mean the process produced the intended results. It means the PeopleSoft process completed its steps without failures in the processing. You still need to check the output of the process, the report produced, etc.

Check the Distribution Status column. It may contain "N/A" (usually when the process hasn't run yet), or In Progress, Posting, Posted, etc. It needs to say "Posted" for you to be certain everything is done processing.

Checking Output (Reports) and Errors

On the far right of the Process Monitor screen is the Details column. Once your process is done running/posted, you can click Details link to see more information. In the lower right corner of the Details screen, you will see links to these items:

1. Parameters – doesn't provide much information for end users. If there is a problem, it may provide clues to system support staff to aid in resolution.
2. Message Log – isn't normally too helpful, unless there is an error/warning or other issue with the process, then it may provide clues about what is happening.
3. Batch Timings – when your process completes, there is nothing to view here. When in-progress, this link will tell you what's running.
4. View Log/Trace – extremely valuable for troubleshooting! It also will allow you to view *some* reports produced by *some* processes (normally you need to access the Report Monitor to view report output).
   a. Message Log– provides information for troubleshooting problems.
   b. Trace File – provides information for troubleshooting problems or checking output of some processes.
   c. Other items that might appear are reports for *some* processes. Click on the link for the report to view it, if a link is available.

To view a Report, if you're on your Run Control, click on the Report Manager link in the upper right corner near the RUN button. If you need to navigate: Menu > Reporting Tools > Report Manager.

Click Administration tab at the top of the screen. As a default it will list reports generated by your ID for the last day. To view the report, click Description link of the item you'd like to view.