

QUICK REFERENCE GUIDE

Scheduling Queries

June 27, 2012

SWIFT allows you to schedule queries and reports to be run at a specific time, instead of at the moment you request them. You can also schedule queries to run on a recurring basis, for example, daily, weekly, or monthly at a set date and time. This Guide covers using the Process Scheduler feature to schedule a query to run one time or on a recurring basis.

Financial Management System

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

Home | Print | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search By: Query Name begins with

Search | Advanced Search

Search Results

Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
M_PO_GBL_OPEN_POS_BY_BUYER	Open POs by Buyer & PO Date	Public	PURCHASE ORDER	HTML	Excel	XML	Schedule	Favorite

Locate the query you wish to schedule:

- The most common search method is by the query name **(A)**.
- Click the “Schedule” link **(B)** for the query you want.

Financial Management System

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

Home | Print | Worklist

Scheduled Query

Query Name:

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

To schedule a query you must use a Run Control ID. If you have run this query on a schedule before, you should use the same Run Control ID you used then.

- To use an existing Run Control ID, click the “Find an Existing Value” tab **(A)**, then search for the Run Control ID.

If this is the first time you are running this query on a schedule, you must create a new Run Control ID.

- Enter the new Run Control ID **(B)**. Remember, you may need to use this value again if you schedule the query again, so the Run Control ID should be something meaningful.
- Click the **Add** button.

The screenshot shows the 'Query Viewer' interface for the query 'M_PO_GBL_OPEN_POS_BY_BUYER'. It features two input fields: 'PO Bus Unit (% for all BUs):' with the value 'B2201' and 'Buyer ID (% for all Buyers):' with the value '00248912'. Below the fields are 'OK' and 'Cancel' buttons. The interface includes a top navigation bar with 'Home', 'Print', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out' options, and a breadcrumb trail: 'Favorites | Main Menu > Reporting Tools > Query > Query Viewer'.

After creating a new Run Control ID (or selecting and using an existing Run Control ID), you then enter the parameters for your query. The layout of this screen depends on the query you selected. The screenshot shown is just an example based on the specific query used for this Guide.

- Enter the necessary query parameters.
- Click the **OK** button.

The screenshot shows the 'Schedule Query' page for the query 'M_PO_GBL_OPEN_POS_BY_BUYER'. The 'Run Control ID' is 'CB'. The 'Query Name' is 'M_PO_GBL_OPEN_POS_BY_BUYER' and the 'Description' is 'POs By Buyer'. Below these fields is an 'Update Parameters' link and a table of parameters. The table has two columns: 'Prompt Name' and 'Value'. The parameters are 'BUSINESS_UNIT' with value 'B2201' and 'BUYER_ID' with value '00248912'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons. Red callouts A, B, and C point to the 'Update Parameters' link, the 'Description' field, and the 'Query Name' field respectively. The interface includes a top navigation bar with 'Home', 'Print', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out' options, and a breadcrumb trail: 'Favorites | Main Menu > Reporting Tools > Query > Query Viewer'.

Prompt Name	Value
BUSINESS_UNIT	B2201
BUYER_ID	00248912

On the “Schedule Query” page, SWIFT displays the query parameters you selected, and asks for a description of the query to be run.

- Review the query parameters **(A)**.
- If you need to make changes, click the “Update Parameters” link **(B)** and correct the values.

- Enter a description of this query **(C)**. The description should be indicative of what you are querying. It will appear in the search results if you run the query again and search for an existing Run Control ID.
- Click the **Apply** button to navigate to the Process Scheduler Request page.

Financial Management System

Home | Print | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

New Window | Help | Customize Page | http

Process Scheduler Request

User ID: 01135035 Run Control ID: C

Server Name: Run Date: 6/25/2012 Run Time: 1:01:17PM

Recurrence: Reset to Current Date/Time

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

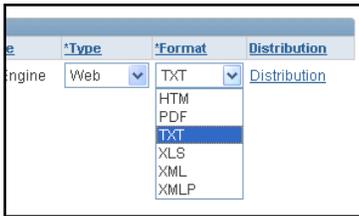
OK Cancel

The Process Scheduler Request page allows you to either run the query immediately, or schedule it to run at a future date and time. You can also set recurrence options so that the query runs repeatedly using the same parameters. Note: If you need to use different parameters, you will need to follow the steps in this Guide again to establish different criteria and set a different schedule for that query to run on.

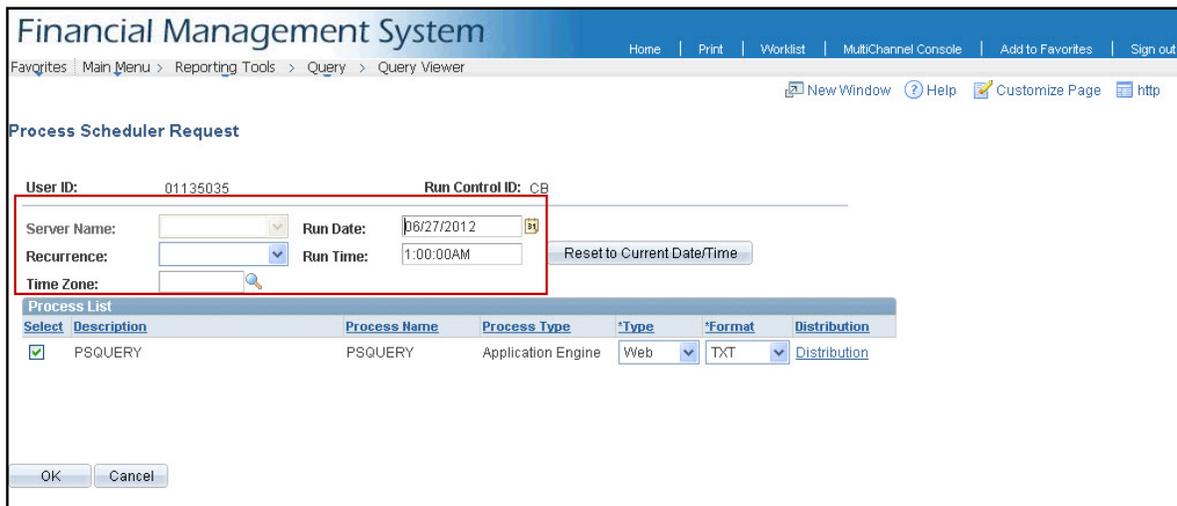
- By default, the Run Date and Run Time fields **(A)** show the current date and time. If you click OK without changing these fields, the query will run immediately.
- The Description and Process Name **(B)** will always read “PSQUERY.” This same page is used to schedule other processes and reports. In such cases, the Description and Process Name are specific to what is being run. In this case, though, “PSQUERY” stands generically for PeopleSoft Query.
- The Type and Format dropdown lists **(C)** indicate how the results of the query will be output. The defaults are “Web” and “TXT.” Using these settings, the report, in text format, will be delivered to the requester’s Report Manager. There are other options, however, for both fields:

*Type	*Format	Distribution
Web	TXT	Distribution
Email		
Feed		
File		
Web		
Window		

In most cases, the default “Web” is appropriate. This will deliver the query results to the Report Manager of the requester.



The only other options most users might choose are “XLS” to output the results in Microsoft Excel format, or “PDF” to output an Adobe Acrobat pdf file.



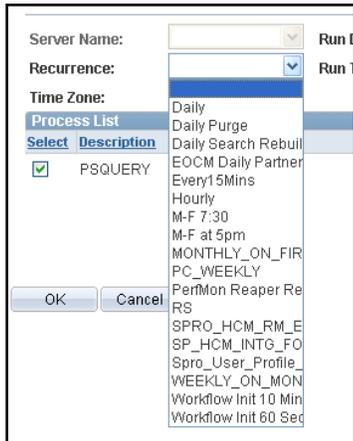
Here is the Process Scheduler page with the query set to run at a future date and time:

- The Run Date is changed to two days from today
- The Run Time is changed to 1:00 in the morning.
- The Time Zone will default based on the user’s ID settings. You only need to change this if you want it to run based on a different time zone.

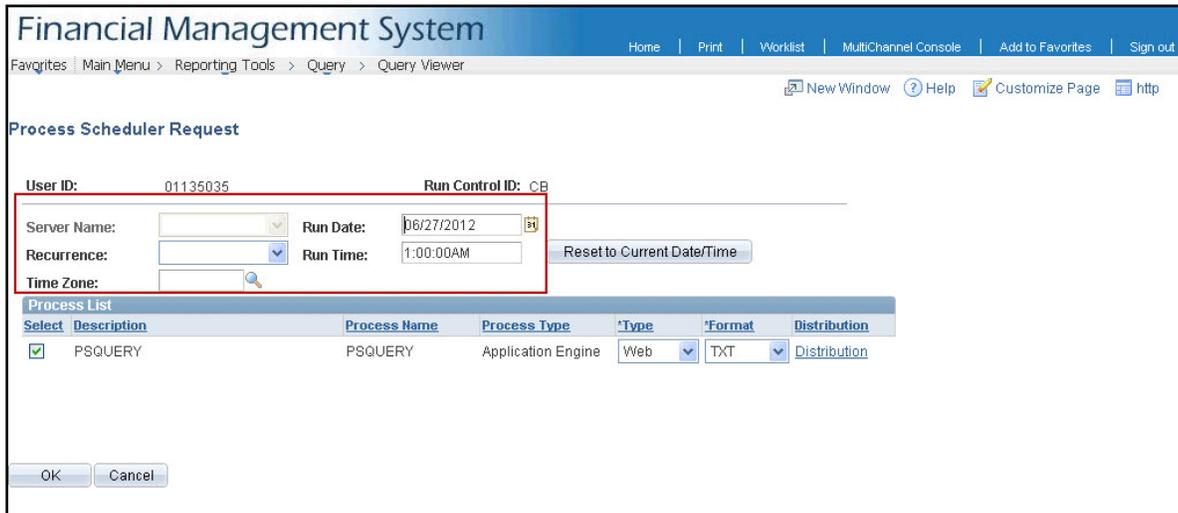
When the SWIFT system clock hits 1:00 AM on the 27th, this query will run automatically using the query parameters you established.

Note: If necessary, you can click the **Reset to Current Date/Time** button to restore the default settings.

This example does not have recurrence set, however you could choose to add that setting if desired. You can use the recurrence setting in combination with the date and time settings to establish the first instance of the recurring query. There are many Recurrence options:



For details on what each recurrence option means and when it runs, navigate in SWIFT to **PeopleTools, Process Scheduler, and Recurrences**.



When you are done setting the date and time for your scheduled query, click the **OK** button. The query will run when the system date and time matches the scheduled date and time. If you set recurrence, the query will run again based on that setting.

The query results will be available based on the output Type and Format settings you selected.