

QUICK REFERENCE GUIDE

February 20, 2024

Process Monitor Basics

This Quick Reference Guide (QRG) provides an overview of the Process Monitor in SWIFT. The process monitor is a tool provided to review your submitted and scheduled requests. There are various types of requests you can make. The types of requests available to you are dependent upon your security roles and permissions.

- **Process Requests:** A process is initiated to help transactions progress through SWIFT. Many processes run in regularly scheduled batches and require no user intervention.
- **Report Process Requests:** SWIFT contains predefined and preformatted reports.
- **Query Process Requests:** Queries allow you to request and retrieve information from SWIFT.

Understanding Requests

To make a request in SWIFT, you must first create a Run Control ID. A Run Control ID is a database record that remembers and provides values for a request you make in SWIFT. You use Run Control IDs to request scheduled queries, reports, processes, and process jobs. You can use a single Run Control ID to make a variety of requests. Alternatively, you can create multiple Run Control IDs to remember a various sets of values for a single request. Please be aware that Run Control IDs cannot be deleted, and we suggest you create Run Control IDs sparingly.

Creating a Run Control ID

Example: Create a Run Control ID from the Manager’s Financial Report dialog page.

Step 1: Navigate to the Manager’s Financial Report.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Commitment Control, KK Process, left-menu, Review Budget Activities, Manager’s Financial Report.
WorkCenter	Accounting, Commitment Control, GL/KK WorkCenter, left-menu, Reports/Processes, My Reports, Manager’s Financial Report.

Step 2: Select **Add a New Value** button.

1. The Manager’s Financial Report dialog page displays. Select the **Add a New Value** button.

Manager's Financial Report

Find an Existing Value + Add a New Value

▼ **Search Criteria**

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

Recent Choose from recent searches ✎ Saved Choose from saved searches ✎

Searches Searches

Search by: Run Control ID begins with

▼ Show more options

Case Sensitive

Search
Clear

2. Enter a few characters for your new Run Control ID. You can use a word, for example, "Default," enter your Business Unit ID, or some other entry that makes sense to you. Run Control IDs cannot include spaces.

Manager's Financial Report

Add a New Value Find an Existing Value

*Run Control ID

Add
←

3. Enter parameters for your request. If you want to save those parameters for the Run Control ID to use when you run this report again, select the **Save** button. Your "Default" Run Control ID will remember your entries. Then select the **Run** button.

Manager's Financial Report

Run Control ID Default
Report Manager
Process Monitor
Run

Report Parameters

*Budget Period:	<input type="text" value="2024"/>		
*Fund From:	<input type="text" value="0"/>	*Fund To:	<input type="text" value="Z"/>
*DeptID From:	<input type="text" value="G100"/>	*DeptID To:	<input type="text" value="G10Z"/>
*AppropID From:	<input type="text" value="G100"/>	*AppropID To:	<input type="text" value="G10Z"/>

* Break:

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display

Note: When you use a Run Control ID for a particular request, you will enter or update parameters. For more detailed information regarding MFR report parameters, refer to the [Run the Manager’s Financial Report \(MFR\) Quick Reference Guide](#).

Submitting a Request

Selecting **Run** button opens the Process Scheduler Request window. In this window, you select or verify the request you want to make. In addition, you can schedule, create recurring schedules, and choose a distribution, such as, emailing the results of the request to you. Whether scheduling in the future or on demand, you select the **OK** button to submit the request.

The screenshot shows the 'Process Scheduler Request' dialog box. At the top, it displays 'User ID 01152500' and 'Run Control ID Default'. Below this are input fields for 'Server Name', 'Recurrence', 'Run Date' (02/12/2024), and 'Run Time' (2:05:23PM). A 'Reset to Current Date/Time' button is also present. The 'Process List' table contains the following data:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Manager's Financial Report	M_KK002	Application Engine	Web	PDF	Distribution

At the bottom, there are 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button.

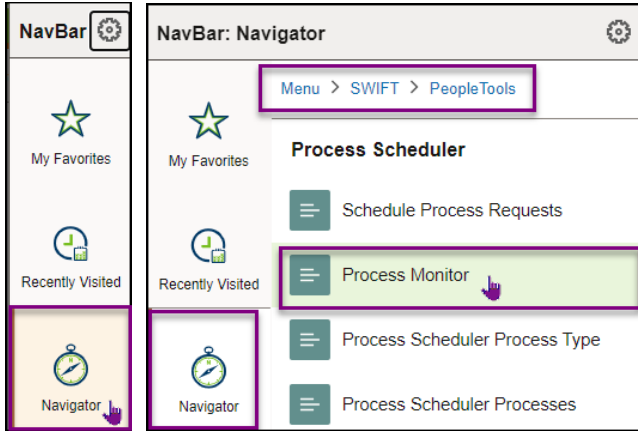
After selecting the **OK** button, a Process Instance number is assigned. You can select the **Process Monitor** hyperlink to view the status of running and scheduled processes.

The screenshot shows the 'Manager's Financial Report' dialog box. It displays 'Run Control ID Default', 'Report Manager', and 'Process Monitor' (with a red arrow pointing to it). A 'Run' button is also visible. Below the 'Process Monitor' link, a box contains the text 'Process Instance: 44856557'.

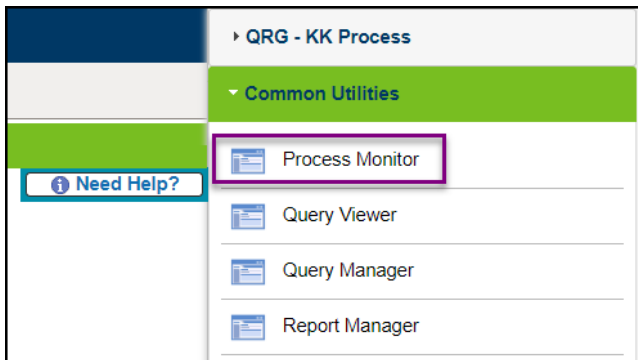
Finding the Process Monitor

If you have just made a request in SWFT, you can navigate directly to the Process monitor, using the hyperlink on the dialog page shown in the previous image. You can also find the process monitor by using the NavBar.

Navigation Option	Navigation Path
NavBar	Navigator, SWIFT, PeopleTools, Process Scheduler, Process Monitor.

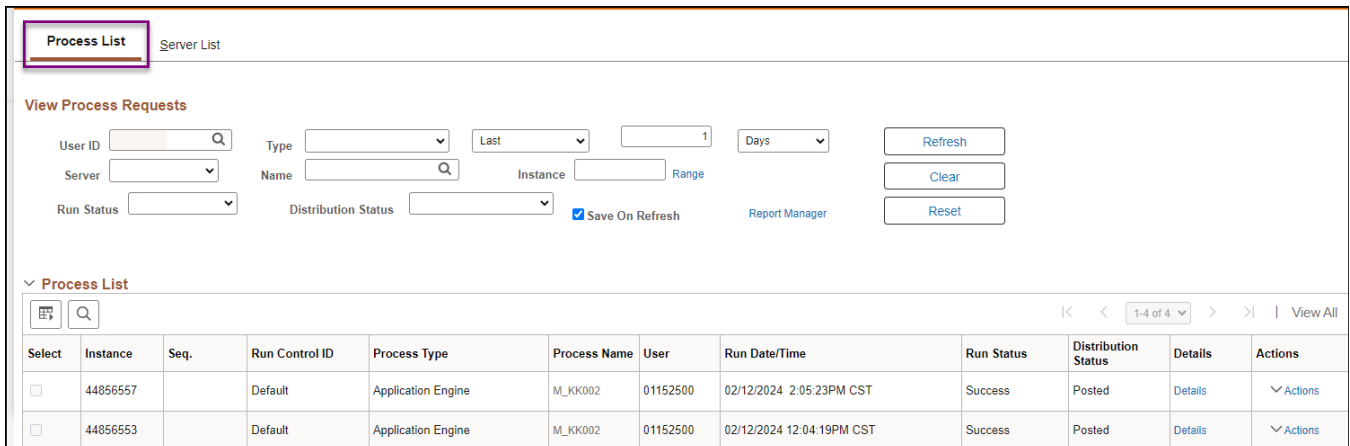


Another option for accessing the process monitor is whenever you see the **Need Help?** button. The **Need Help?** button appears when you are working in one of the modules, such as the Maintain and Process Bills tile of the Billing module. Expand the Common Utilities folder located below the QRG folder for that module, and then select the **Process Monitor** hyperlink.



Using the Process Monitor

After selecting the Process Monitor, the Process List page displays. Use the Process List page to track the progress of your submitted requests and to manage your recurring requests.



Note: The Server List page is unlikely useful for most SWIFT users.

Monitor Requests

On the Process List page, there are two sections. At the top, is the View Process Requests For section. the system defaults to your user ID and 1 day's list of submitted requests. Generally, submitted requests remain on the Process List for up to two weeks, although there is some variability in retention. You may change certain parameters of the processes you can see. For example, you can change "Last" to "Date Range," or you can change "1" to another number. In the "Days" field, you can select "Hours," "Minutes," or "Year." While you can change some of the parameters, your roles and permissions limit what you can view. Use the **Refresh** button to save and update the page.

The screenshot shows the 'View Process Requests' form with the following fields highlighted by red boxes:

- User ID search field
- Type dropdown menu
- Filter dropdown menu (set to 'Last')
- Filter value input field (set to '1')
- Days dropdown menu
- Refresh button
- Server dropdown menu
- Name search field
- Instance input field
- Range label
- Run Status dropdown menu
- Distribution Status dropdown menu
- Save On Refresh checkbox (checked)
- Report Manager link
- Clear button
- Reset button

In the Process List section, you see a list of your submitted and any recurring requests. Notice the Instance number, Process Name, the Run Date/Time, the Run Status, and Distribution Status.

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	44856558		Default	PSJob	BJJOB03K	01152500	02/12/2024 2:35:49PM CST	Queued	N/A	Details	Actions
<input type="checkbox"/>	44856557		Default	Application Engine	M_KK002	01152500	02/12/2024 2:05:23PM CST	Success	Posted	Details	Actions
<input type="checkbox"/>	44856544		Default	PSJob	ARUPDATE	01152500	02/12/2024 10:24:22AM CST	Success	Posted	Details	Actions

When you see a Run Status with "Success" and a Distribution status of "Posted," the process is complete. You can locate the output using the **View Log/Trace** hyperlink, selecting **Report Manager**, or by checking your email (email for distribution would need to have been selected).

The screenshot shows the 'View Process Requests' form and the 'Process List' table. A red arrow points to the 'Report Manager' link in the form. Another red arrow points to the 'Actions' dropdown menu for the row with Run Status 'Success' and Distribution Status 'Posted'. The dropdown menu is open, showing the following options:

- Update Process >
- Details
- Parameters
- Message Log
- Batch Timings
- View Log/Trace

Run Statuses

Sometimes a process request may experience an error or an interruption. You can use the process monitor to view errors almost immediately. Some statuses will require you to problem solve and potentially rerun your request. Other statuses require no user intervention, for example, a Blocked status. A Blocked status means that SWIFT is temporarily preventing the job from running and holding it until another job instance finishes. Blocked process instances are rare, and only affect a small handful of jobs that are limited to a specific number of concurrent instances. This means that a lot of requests have been submitted by users around the state. If you see this status, there is nothing you need to do. Eventually, the process will run.

Select	Instance	Seq.	Process Type	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	38131483		Application Engine	02/16/2022 6:30:00AM CST	Blocked	N/A	Details

A status of Warning indicates a potential error in a transaction. This type of status may require problem solving. For example, a budget check warning, may require a correction in the ChartFields of a transaction. Refer to SWIFT's [Training and Support Resources](#) for the transaction type to help with potential errors. Feel free to reach out to the [SWIFT Help Desk](#) for additional support.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	40207869		PSJob	BUJOB03K	TRN11	05/02/2023 9:41:57AM CDT	Warning	Posted	Details

Note: Refer to the Appendix for descriptions of the various process statuses of the Process Monitor.

Manage Recurring Requests

Recurring requests are schedule by you on the Process Scheduler Request page. There are various recurrence schedules available to you, in the drop-down of the Recurrence field, for example, "Monthly on the First."

The screenshot shows a dropdown menu for the 'Recurrence' field. The menu is open, displaying a list of recurrence options. The 'MONTHLY_ON_FIRST' option is highlighted in blue. The background shows a 'Process List' table with a selected row for 'PS/AR Receivable U'.

Select	Description
<input checked="" type="checkbox"/>	PS/AR Receivable U

Recurring requests are identified by the **Recurrence** icon that looks like a green arrow circle. Initially, the first recurrence runs right away. The next scheduled recurrence will stay in a Queued status until the run date and time.

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	44856578		Default	Application Engine	M_KK002		03/01/2024 5:00:00AM CST	Queued	N/A	Details	Actions
<input type="checkbox"/>	44856577		Default	Application Engine	M_KK002		12/01/2018 5:00:00AM CST	Success	Posted	Details	Actions

You can manage the recurrence by selecting the **Recurrence** icon. A new dialog window, the Recurring Process/Job page displays. From this page you can select various actions, such as “Hold,” Stop,” and “Restart.”

- Select the **Hold** button to suspend initiating and recurring.
- Select the **Stop** button to halt the current request from recurring a new request.
- Select the **Restart** button to resume activity for the last request based on the last action selected.

Recurring Process/Job X

[Help](#)

Process Name: M_KK002 Process Type: Application Engine

Recurrence Name: MONTHLY_ON_FIRST

Hold To suspend initiating and recurring the current queued request.

Stop To halt the current request from recurring a new request

Restart To resume activity for the last request based on the last action selected

You can choose to **Restart** the occurrence at any time.

Recurring Process/Job X

[Help](#)

Process Name: M_KK002 Process Type: Application Engine

Recurrence Name: MONTHLY_ON_FIRST

Hold To suspend initiating and recurring the current queued request.

Stop To halt the current request from recurring a new request

Restart To resume activity for the last request based on the last action selected

Request List

Instance	Run Status	Run Date/Time	Request Date/Time	Completed Date/Time
44856578	Hold	03/01/2024 5:00:00AM CST	02/12/2024 3:00:42PM CST	
44856577	Success	12/01/2018 5:00:00AM CST	02/12/2024 3:00:01PM CST	02/12/2024 3:00:43PM CST

Return

Appendix – Process Monitor Statuses

Run Status	Description
Blocked	The running of this process has been blocked, which indicates that this process is waiting. A blocked status requires no action by you. The process will run in time.
Cancel	Indicates that a user has requested to cancel the scheduling of a process request.
Cancelled	Indicates that the server agent has successfully canceled the request after it has started.
Error	Indicates that the program associated with the process request encountered an error while processing transactions. In this case, the user should trouble-shoot the error. Once error is corrected, may need to rerun the process.
Hold	Indicates that a user has requested that the scheduling of a process request be put on hold.
Initiated	Indicates that a PeopleSoft Process Scheduler Server has acknowledged the new request. At this time, PeopleSoft Process Scheduler validates the parameters that are associated with this request and submits the command line to start the process.
No Success	Indicates that the program encountered an error (interruption) within the transaction. No Success is different from Error. A user will need to run the process again.
Pending	Status assigned to an item of a new PSJob request. This indicates that this item is waiting for a previous item in the job before PeopleSoft Process Scheduler releases this item. When the previous item has completed successfully, PeopleSoft Process Scheduler changes the status of the item to Queued.
Processing	Indicates that PeopleSoft Process Scheduler has successfully initiated the program. A status of Processing indicates that the program is running.
Queued	Status assigned to a new process request. The process request remains Queued until a PeopleSoft Process Scheduler Server picks up the new request.
Restart	Indicates that a process, which encountered an error, is attempting to restart.
Success	Indicates that the program has successfully completed.
Warning	A warning status is not an Error. A warning may continue or stop the process request.

Note: Adapted from ORACLE® PeopleSoft PeopleTools 8.60: Process Scheduler.