

# Oracle Financial Services Scheduler Services User Guide



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# 1

## Scheduler Services

Scheduler Services automates behind-the-scenes work that is necessary to sustain various enterprise applications and their operations. Using Scheduler Services, applications can control unattended background jobs program execution.

Scheduler Service operations:

- **Define Batch** - A Batch contains a group of background tasks that are executed together, on a specific date and time during which the resources are available for batch processing.
- **Define Task** - A batch job is a piece of a program meant to meet specific and business-critical functions. The program is a REST API used in a batch.
- **Schedule Batch** - Schedule batch jobs, to automate tasks that are processed on a regular basis but do not need to occur during the day or require human intervention. Jobs that happen on a regular basis are incorporated into batch schedules. You can also edit pre-conditions for batch group execution and pause scheduled executions.
- **Monitor Batch** - Track and access the real-time feedback on the status of the current encoding job and lists the jobs pending in the batch. You can also **Cancel** or **Restart** the service when required.
- **Scheduler Service Dashboard** - The Scheduler Service Dashboard gives the complete status of the Executed Runs, Successful Runs, Failed Runs, Ongoing Runs, Interrupted Runs, and the Upcoming Runs.

## Accessing Scheduler Services

Using the Scheduler Services, you can create and execute batches and schedules to run various tasks and also monitor them.

To access Scheduler Services :

- Log in to the Service Console and from the left Navigation pane in the Service console, click **Batch Administration > Scheduler**

You can view the Scheduler Service Dashboard. You can also access the following details from the Header panel:

- Click **Home** to return to your Cloud Service homepage.
- Click **Notifications**, to access all the notifications generated during batch/batch group execution. Click the Batch RunID to view the corresponding monitor batch page.
- Click **User Profile**, to access the user preferences and also to sign out from the Cloud services.
- Click **Tenant**, to view the tenant details.

## User Roles and Functions

You require specific user roles and functions, to use Scheduler Services, and to create and manage batches and tasks.

The user roles and user privileges for Scheduler Service are available in the [Users and User Privileges](#) Guide.

## Define Batch

You can use batch and batch groups to group a set of background tasks to be executed together.

A Batch contains a group of background tasks that are executed together, on a specific date and time during which the resources are available for batch processing.

Batch Groups consist of batches that need to be executed together. Batch groups help to process date and time-based background tasks based on a defined period when resources are available for batch processing.

To access the **Scheduler Service Summary (Define Batch)** page, from the left Navigation pane in the application console, click **Batch Administration > Scheduler > Define Batch**.

To access the list of existing batches and batch groups click **Batch** or **Batch Group** tab respectively. You can also view following details related to each batch/batch group.

- **Batch ID** - The unique alphanumeric code assigned to a specific batch/batch group.
- **Name** - The unique batch/batch group name.
- **Description** - The brief description of the batch/batch group.
- **Last Modified** - The last modified By user, date and time details.

To search for a specific batch/batch group, enter the keywords in the **Search** field and click **Search**. You can search based on **Name**, **Code**, and **Description**. You can also sort the batch/batch group list based on **Code**, **Name**, **Created Date**, and **Last Modified Date**.

Perform one of the following operations, to manage batch/batch group, from the **Scheduler Service (Define Batch)** page.

- [Create New Batch/Batch Group](#)
- [Edit a Batch/Batch Group](#)
- [Copy a Batch/Batch Group](#)
- [Delete a Batch/Batch Group](#)
- [Create/edit tasks](#)

## Creating a Batch/Batch Group

Create a batch/batch group, to execute a group of background tasks together, on a specific date and time, when the resources are available for batch processing.

To create a batch/batch group from the **Scheduler Service (Define Batch)**:

1. In the **Create Batch** page, enter the following **Batch Details**:
  - **Code** - Enter a unique alphanumeric code for the new batch/batch group. The code must start with alphabets, should not contain any spaces, and must not exceed 60 characters. Special characters are not allowed except **underscore ( \_ )**.
  - **Name** - Enter a unique name for the new batch/batch group. The name should start with alphabets, should not contain any spaces, and must not exceed 60 characters. Special characters are not allowed except **underscore ( \_ )**.

- **Description** - The description/details for the batch/batch group.  
The description should start with an alphabet and must not exceed 250 characters.
  - Select **Batch** to create a new batch or **Batch Group** to create a new batch group.
  - For new batch groups,select the **Batches** to be added to the batch group.
  - Select the **Service URL name** from the drop-down list, if it is available.  
To add a new service URL, enter a name to identify the new Service URL Name and enter the proper Service URL. You can give partial URL here and the complete URL in the Task Service URL.
  - Enter the complete **Cleanup URL** and enable the check box, to activate the cleanup URL, before you [initiate a batch/batch group restart](#).  
The complete Cleanup URL : `http://fccm-utility-service:8080//fccm-utility-service/cleanupExecutionWatcher`
  - Select one of the following options, to get an email notification, based on the selected batch execution status.  
Based on the selected option, an email is sent to the email ID of the logged in user, mentioned in the IAM console.
    - **Every Time** : An e-mail is triggered irrespective of the batch execution status.
    - **Never** : No e-mail will be triggered.
    - **On Error only** : (Default). An e-mail is triggered only when the batch execution has failed.
    - **On Interrupt only** : An e-mail is triggered if the batch execution is successfully interrupted.
2. For new batches, after entering the Batch Details, provide the following batch parameters.
- From the **Batch Parameters** pane, click **Add** to add a new batch parameter, in the following format.
- **Parameter Name** - A valid parameter name for the new Batch parameter.
  - **Parameter Value** - A valid parameter value required for Batch execution.

 **Note:**

Enclose the parameter Value for a Run time with \$ symbol. For example, `$paramName$`.

By default, **\$BATCHDATES**, **\$BATCHRUNIDS** and **\$RUNSKEY\$** are added as batch Parameters.

 **Note:**

**\$RUNSKEY\$** parameter is added only if you are creating a new batch or copying from an existing batch. It is not supported for existing batches.

To delete a batch parameter, click **Delete** next to that parameter details.

3. Click **Save**. The new batch/batch group is created and displayed in the **Scheduler Services (Define Batch)** page.

## Editing a Batch/Batch Group

Edit the batch/batch group details such as **Description** and also add new **Batch Parameters** to a batch, along with adding new **batches** to the batch group.

Seeded batches cannot be edited.

To modify a batch/batch group:

1. In the **Scheduler Services (Define Batch)** page, click **Edit** corresponding to the batch/batch group you want to modify.
2. Modify the required [details](#), in the **Edit Batch** page.
3. Click **Save** to save the edited batch/batch group.

The edited batch will be updated in the **Scheduler Services (Define Batch)** page.

## Copying a Batch/Batch Group

Copy a batch/batch group that you want to clone to create a new batch/batch group.

To copy a batch/batch group:

1. In the **Scheduler Services (Define Batch)** page, click **Copy** corresponding to the batch that you want to copy.
2. In the **Copy Batch** page, modify the required [Batch details](#) to create a new batch/batch group.
3. Click **Save** to add the copied batch to the **Scheduler Services (Define Batch)** page.

## Deleting a Batch/Batch Group

Delete a batch/batch group that is no longer required in the system from the Define Batch page.



### Note:

You cannot delete seeded batches.

To delete a batch/batch group:

1. From the **Scheduler Services (Define Batch)** page, click **Delete** corresponding to the batch/batch group you want to delete.
2. Click **OK** to confirm deletion.



### Note:

After confirmation, any active schedules associated with the batch will also be deleted.

## Define Tasks

The Define Tasks page lists tasks associated with a specific Batch Definition. You can create new tasks, and edit or delete existing tasks.

To access the **Define Task** page:

1. From the left menu, click **Batch Administration > Scheduler** and select **Define Task**.
2. Select Batch/Batch Group from the drop-down list and select the particular batch/batch group to access the list of tasks associated with it.

You can view the following details related to each task:

- **Task ID** - The unique identifier for the task.
- **Name** - The name of the task..
- **Parent Task** - The parent task associated with the task.
- **Component** - The seeded/custom component associated with the task.
- **Created Date** - The task creation date.
- **Last Modified** - The last modification date.

To search for a specific task, enter the keywords in the **Search** field and click **Search**. You can search based on the **Task Name**, **Code** and **Description**. You can also sort the Task list based on **Code**, **Name**, **Precedence**, **Component**, **Created Date**, and **Last Modified Date**.

Using the **Preview** option, you can view the complete task execution sequence for a specific batch/batch group.

Perform the following operations to manage a Task, from the **Scheduler Service (Define Task)** page.

- [Add a task](#)
- [Modify a task](#)
- [Define a task precedence](#)
- [Delete a task](#)

## Adding a Task

Add new tasks to a selected Batch Definition.

To add new task:

1. In the **Scheduler Service (Define Task)**, select the Batch for which you want to add a new task from the drop-down list.
2. Click **Add** to access the **Add Task** page.
3. Enter the following details:
  - **Task Code** - Enter a unique alphanumeric code for the new task. The code must begin with letters, should not include spaces, and has a maximum limit of 60 characters. Special characters except **underscore** ( `_` ) are not allowed.
  - **Task Name** - Enter a unique name for the new task. The name should start with letters, not contain spaces, and have a maximum limit of 60 characters. Special characters except **underscore** ( `_` ) are not allowed.



- **Task Description** - The description/details for the task. The description should begin with a letter and not exceed 250 characters. Avoid using phrases like "Select From" or "Delete From" in the description.
- **Task Type** - Select the task type from the drop-down list.
- **Component** - Select the custom or the seeded component associated with the task.

 **Note:**

Refer to the respective component guide for information related to the component specific parameters.

- **Batch Service URL** - Select the required Batch Service URL from the drop-down list. Batch Service URL is not required, if you provide the complete Task Service URL.
  - **Task Service URL** - Enter task service URL if it is different from Batch Service url.
4. By default, all Batch Level Parameters are added and enabled as task parameters in the **Task Parameters** pane.

 **Note:**

You can edit the parameters only for custom components.

- a. Enter the Parameter name in the **Param Name** field.
- b. Enter the Parameter value in the **Param Value** field.

To delete a parameter, click on **Delete** next to the respective parameter.

5. Click **Save** to add the new task to task summary in the **Define Task** page.

 **Note:**

Sync task will remain active if execution time is more than 15 minutes at target service and till acknowledge status is generated from target API after the execution.

## Modifying a Task

Modify details such as Task Description and Task Type in existing tasks.

You can also add a new task parameter and enable or disable existing task parameters.

To modify a task:

1. From the **Define Task** page, select the Batch to modify the task details from the drop-down list.
2. Click **Edit** corresponding to the Task you want to modify.
3. Modify the required Task Details, in the **Edit Task** page.
4. Click **Save** to update the changes.

The modified task is added to the **Define Task** page.

## Define Task Precedence

Task Precedence indicates the execution-flow of a batch. Task Precedence Value helps to determine the order in which the specific tasks of a batch are executed.

For example, consider a Batch consisting of four tasks. The first three tasks lack define precedence and hence will be executed simultaneously during batch execution. However, Task 4 has a precedence value as Task 1, indicating that Task 4 is executed only after the successful completion of Task 1.

You can set Task Precedence between Tasks or define to run a Task after a set of other tasks. While, multiple tasks can be executed simultaneously, cyclical execution is not permitted. Tasks without defined precedence execute immediately upon Batch Execution.



### Note:

The **Task Precedence** option is disabled if a batch has only one associated task.

To define task precedence:

1. Click **Add or Remove Precedence** corresponding to the task requiring precedence, to access the **Precedence Mapping** list.
  - a. Select a batch to execute before the current task, from the **Available Tasks** pane and click **Move Selected**.  
To move all the batches, click **Move All**.
  - b. To remove a batch from the task precedence sequence, select the task from the **Selected Tasks** pane and click **Remove**.  
To remove all the selected batches, click **Remove All**.
2. Click **Save** to update Task Precedence in the batches.
3. Click **Preview** to view the precedence information.

## Deleting a Task

Remove any tasks that are no longer required in the system, from a Batch Definition.

To delete a task:

1. From the **Define Task** page, select the Batch from the drop-down list.
2. Click **Delete** corresponding to the Task you want to delete.
3. Click **OK** in the confirmation dialog to confirm deletion.

## Managing Batch/Batch Group Executions

**Schedule Batch** enables users to manage batch/batch group executions.

To access **Schedule Batch** page, from the left menu, click **Operations and Processes** and then select **Schedule Batch**.

All the batch/batch group schedules are listed. You can sort this list based on code, name, Task Precedence, Components, and dates, to access a specific schedule.

From the **Schedule Batch** page, you can perform the following operations related to the execution and scheduling of batches/batch groups

- [Execute batch/batch groups instantaneously](#)
- [Edit dynamic parameters](#)
- [Automate batch/batch group executions using the various scheduling options](#)
- [Re-run a batch/batch group execution](#)
- [Re-start a batch/batch group execution](#)

## Execute Batch/Batch Group

Use the Execute Batch to run a batch/batch group instantaneously.

To execute a Batch/Batch Group:

1. In the **Schedule Batch** page, select **Batch** or **Batch Group** to execute from the drop-down list.
2. Select the **Batch /Batch Group** for execution.
3. Click **Execute** to access the **Execution Schedule** page.
4. Click **Exclude Tasks** to add/remove tasks from the execution list.
5. Click **Hold Tasks** to pause/release tasks during execution.
6. Click **Edit Dynamic Parameters** to [modify the dynamic parameters](#).
7. Click **Execute**.

The Batch is executed, and the associated unique Run ID is displayed in the format `<BATCH_CODE>_<MIS_DATE>_<ITERATION-COUNT>`.

You can always click preview to view the PMF process sequence used to execute the selected batch/batchgroup.

## Adding Pre-Conditions For Batch Group Execution

Pre-conditions help to execute batches associated with a batch group, on specific days, based on the set frequency and selected days.

You can set pre-conditions for a batch group, to execute specific batches on selected days based on the set frequency interval. This enables to wisely use the available resources for execution.

To set pre-conditions for batch group execution:

1. Click **Schedule** from the Header panel.
2. In the **Schedule Batch** page, select **Batch Group** and the **Batch Group Name**.
3. Click **Pre-Conditions** to set the pre-conditions for task execution.
4. Select the **Batch** to set the pre-condition.
5. Set the execution frequency to Weekly, Monthly, or specific interval and set one of the following conditions:
  - **Weekly** - Select the weekdays to execute the batch. You can select multiple days.
  - **Monthly** - Select the days of the month to execute the batch. You can select multiple days.
  - **Interval** - Select the recurrence frequency to execute the batch.

6. Click **Add** to add another pre-condition.
7. After adding all the required pre-conditions, Click **Save**.

The pre-conditions are saved and the batch group will be executed based on the set pre-conditions.

 **Note:**

The batch group is always get executed based on the pre-condition and any schedule associated with the batch group will not be considered for processing.

## Edit Dynamic Parameters

Modify the dynamic parameters set for a batch/batch group.

You can modify the batch parameters, batch header parameters, task parameters, and the task header parameters associated with a batch/batch group.

To edit the dynamic parameters from the **Schedule Batch** page:

1. Select **Batch/Batch group** and then select the specific batch/batch group.
2. Click **Edit Parameters** to access the **Edit Dynamic Params** page.  
You can also edit the dynamic parameters while configuring the scheduling options.
3. Click the batch/batch group name to access all the parameters.
4. Set the **\$BatchDate\$** to set the batch execution date: :
  - Set the batch date to SYSDATE (system date). The batch execution date is set to SYSDATE by default.
  - Toggle and select **MISDATE** to select a particular batch execution date.
5. Enter **\$BATCHRUNID\$** to set the batch run ID in the format:  
<BATCH\_CODE>\_<MIS\_DATE>\_<ITERATION-COUNT>.
6. Edit the batch header parameters and the task parameters.
7. Click **Save** to update the batch/batch group parameter values.
8. After updating the changes, execute the batch/batch group or configure the scheduling settings.

## Scheduling and Automating Batch/Batch Group Execution

Automate batch/batch group execution.

Using the various scheduling options, you can automate batch/batch group execution to run based on the specified scheduling parameters.

To automate batch/batch execution:

1. Click **Schedule** from the Header panel.
2. In the **Schedule Batch** page, select from the following options:
  - **Once** - Run only once.
  - **Daily** - Run daily.
  - **Weekly** - Run weekly on selected days and time.

- **Monthly** - Run monthly on selected days and time.
  - **Quarter** -Run every quarter on selected days and time.
  - **Cron Expression** - A Cron Expression is a string comprising of six or seven fields separated by white space. Fields can contain any of the allowed values, along with various combinations of the allowed special characters for that field.  
To execute a batch/batch group using a Cron expression, enter the Cron Expression for your schedule. For more information about the Cron Expression, click **Information** next to the Cron Expression field.
3. Enter the following generic information and the parameters:
    - **Batch/Batch Group** - Batch/batch group for execution.
    - **Batch/Batch Group Name** - The specific batch/batch group to be executed.
    - **Schedule Name** - The unique schedule name.
  4. Provide the following scheduling parameters based on the selected schedule option.  
For Cron Expression based scheduling, enter the required Cron expression.

**Table 1-1 Scheduling Options**

Details	Once	Daily	Weekly	Monthly	Quarter
<b>Start Date</b> to begin execution.	Yes	Yes	Yes	Yes	Yes
<b>End Date</b> to stop the execution	No	Yes	Yes	Yes	Yes
<b>Run Time</b> to execute the batch/ batch group	Yes	Yes	Yes	Yes	Yes
<b>Days of the week</b> you want to execute the batch/batch group. You can select multiple days.			Yes	Yes	Yes
<b>Months of the Year</b> you want to execute the batch/batch group. You can select multiple months.				Yes	Yes
<b>Day of the Month</b> to execute batch/batch group				Yes	Yes
<b>First Months of the Year</b> to calculate the year beginning and each quarter beginning.					Yes
<b>Select Quarters</b> to execute batch/batch group You can select multiple quarters.					Yes
<b>Days of Quarter</b> - Select the days to execute the batch/batch group. You can select first day, mid day, last day, First N days, or last N days					Yes
<b>No. of Days</b> - If you select first N days or last N days, select the number of days to execute the batch/batch group at the beginning or end of the selected quarter					Yes

5. **Exclude Tasks** to add/remove tasks from the execution list.
6. **Hold Tasks** to pause/release tasks during execution.

7. Click **Edit Dynamic Parameters** to modify the dynamic parameters.
8. Click **Schedule** to add the new schedule for execution.  
You can [set pre-conditions](#) to process batch groups. When a batch group has an associated pre-condition, the execution schedule will not be considered for processing.
9. To manage schedules associated with a specific batch:
  - a. In the **Select Batch** page, select **Batch** and select the **Batch Name** to view the associated schedules.
  - b. Click **View Schedule** to access the list of all the schedules associated with the batch.  
You can perform the following tasks:
    - Click **Edit** to modify the schedule.
    - Click **Pause** and enter the **Start Date** and **End Date** to pause the schedule from execution. Click **Add** to apply the pause.  
To remove the pause, click **Delete** next to the specific pause.

## Re-run Batch/Batch Group

Re-running a batch/batch group facilitates you to run the batch/batch group irrespective of the previous execution state.

When you re-run a batch/batch group that has been previously executed, a new Run ID is generated, and the batch/batch group is executed as if it were a new run.

To re-run a batch::

1. Click **Schedule Batch** from the Header panel.
2. In the **Schedule Batch** page, select the **Re-run** tab.
3. Select **Batch/Batch Group**.
4. Select the **Batch or Batch group Name** you want to re-run.
5. Select the **Batch Run ID**.
6. Click **Re-run**.

## Re-start Batch/Batch Group

Re-start a batch/batch group that has not executed successfully or has been explicitly interrupted, canceled, or put on hold during the execution process.

Restarting a batch/batch group enables you to continue execution directly from the point of interruption or failure, allowing you to complete executing the remaining tasks.



### Note:

Before restarting a batch/batch group, ensure to provide the [complete cleanup URL](#) and also to enable invoking the cleanup URL before restarting the execution.

To re-start a batch/batch group:

1. Click **Schedule Batch** from the Header panel.
2. From the **Schedule Batch** page, select the **Re-start** tab.

3. Select **Batch/Batch Group**.
4. Select the **Batch or Batch group** you want to schedule daily from the drop-down list.
5. Select the **Batch Run ID**.
6. Click **Re-start**.

## Monitor Batch/Batch Group

Using Monitor Batch/Batch Group, you can view the status of executed batches/batch groups, along with the tasks details.

Monitoring enables users to track and identify issues at regular intervals, ensuring smoother batch execution. Both a visual representation and a tabular view of the status of each task in the batch are available.

To monitor a batch/batch group:

1. Click **Monitor Batch** from the Header panel.
2. Select the **Batch/Batch Group** and the **Batch/Batch Group Name** to monitor the execution.
3. **Set Refresh Frequency Time Interval and duration** in seconds.

By default, the refresh interval is set to **5 seconds** and duration is set to **5 minutes**. This indicates that the monitor progress will be refreshed every 5 seconds for the next 5 minutes.

The refresh interval ranges between 5 to 60 seconds and the duration ranges between 5 to 180 seconds.

4. Select the **MISDATE** to view the list of Batch Run IDs executed on a specific date.
5. Select the **Batch Run ID** you want to monitor.
6. Click **Start Monitor** to view the results in **Visualization** and **List View** tabs.

The **Visualization** tab displays execution status graphically, while the **List View** tab provides the details in a tabular form, including:

- **Status:** Task execution status - **Not-Started**, **On-going**, **Aborted**, **Successful**, **Failed**, **Interrupted**, **Excluded** and **Undefined**.

### Note:

When the task execution status is **Aborted**, the batch execution will still be **On-going**. The task status will be set to **Ongoing**, when it is triggered again.

- **Start Time:** Task execution start time.
  - **End Time:** Task execution end time.
  - **Task Details:** Mouse-over the task to display its status and details.
7. At any point, select **Stop Monitor**, to stop monitoring.  
You can download the task execution summary in PDF or Excel, with or without the task logs, from the **Monitor Task** page.
  8. (Optional). To rerun, restart, or interrupt execution, click **Actions** and select the required option.

You can also reset the search criteria using **Actions**.

9. (Optional). Click **View Execution Parameters** adjacent to a batch/batch group, to access the list of tasks and task parameters such as **Runskey ID**, **Misdate**, associated with that batch/batch group.

## Scheduler Service Dashboard

View the task executions based on the execution status in the Scheduler Service Dashboard.

To access the **Scheduler Service Dashboard** page, from the left Navigation pane in the Service console, click **Batch Administration > Scheduler**.

You can access the following details related to batch/batch group execution from the Dashboard:

- The batches/batch groups are categorized based on their execution status - **Executed Runs**, **Successful Runs**, **Failed Runs**, **Ongoing Runs**, **Interrupted Runs**, and **Upcoming Runs** tabs. Click the respective tab to view the details of the batches/batch groups based on their execution status. For example, click **Ongoing Runs** to view the details of the batches that are currently running.
- The run time, schedule name and the MISDATE associated with each batch/batch group.
- The batch execution summary for all the batches executed in the last 7, 30 and 120 days. The summary is displayed in the form of a color-coded bar graph with legend for the various execution statuses.
- To view the list of all task executions associated with a specific batch/batch group, select the required execution status tab, select Batch/Batch Group and select the required batch/batch group.
- To view the task executions within a specific date range, select the required execution status tab, select Batch/Batch Group and select the required batch/batch group. Specify both the start and end dates.