

## Reporting Tools —Running Query Viewer

**Query Viewer** is the *Campus Solutions* tool for running established queries and generating reports. (**Query Manager** is the developer’s tool used to build queries and is *not* the subject of this guide.) The following steps demonstrate how to run **Query Viewer** for the purpose of generating a report. Note that reports can be output to HTML browser windows, *Excel* spreadsheets, and CSV- or XML-formatted documents, and that you can save queries as **Favorites** for easy future access.

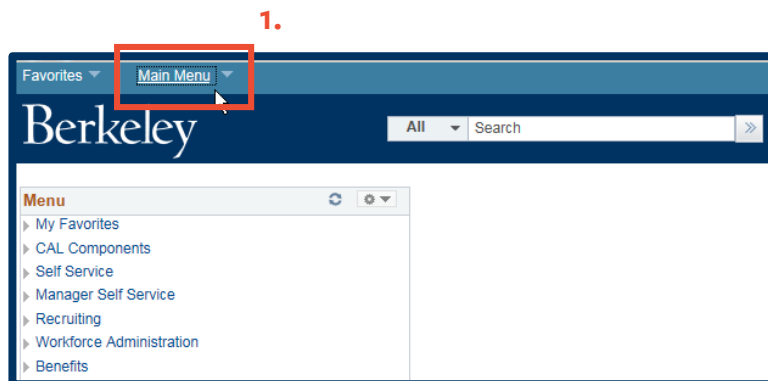
### Privacy Disclosure

Disclosure of information from student records is governed by the Federal Family Educational Rights and Privacy Act (FERPA) and in part by the State of California Education Code. UCB maintains a campus policy governing disclosure of information from student records. This policy provides reasonable interpretations of those laws and protects the student’s right of privacy as guaranteed by the State of California’s constitution. For more information, the entire policy can be found at: <http://registrar.berkeley.edu/ferpa.html>

You must not release any private student information to any person or organization without the student’s written consent, and must only handle all UCB information for authorized work-related purposes, according to the Minimum Security Standards for Electronic Information (MSSEI).

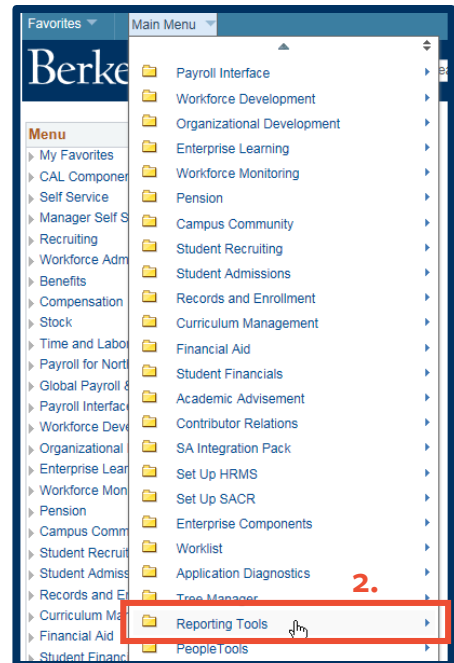
Private student information is considered Level 1 and includes, but is not limited to, academic records, information in personnel files, student conduct issues, SID, certain personal contact information, as well as other sensitive information encountered while on the job. Level 2 information, which if exposed to unauthorized persons, causes extreme impact. It includes but is not limited to Social Security Numbers, Credit Card Numbers and medical information.

1. After logging into *Campus Solutions*, using your CalNet ID and passphrase, click the **Main Menu** link.

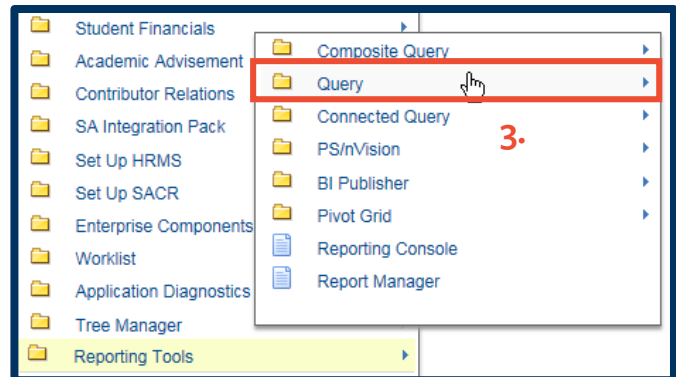


**NOTE:** Your menu view may be different from the example here, based on your security access and functions.

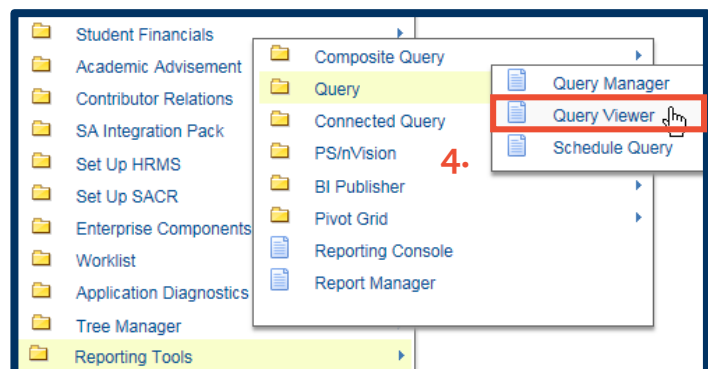
- 2. Click the **Reporting Tools** link.



- 3. Click the **Query** link.

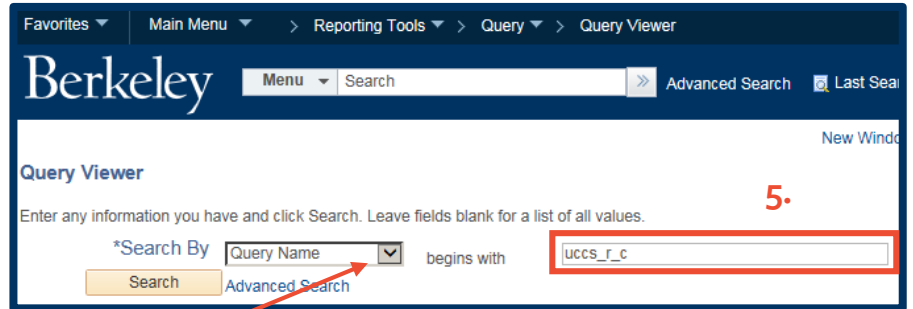


- 4. Click **Query Viewer**, which will open the **Query Viewer** dialog window.



Within the **Query Viewer** dialog window, there are two kinds of searches you can perform: **Basic Search** and **Advanced Search**.

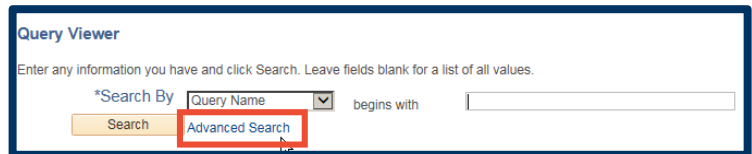
- For a **Basic Search** (with the default value of **Query Name**), type “**UCCS\_R\_C**” in the “**begins with**” text box, indicating you are searching for a query whose name begins with “**UCCS\_R\_C**”.



**NOTE:** You can also search by **Access Group Name, Description, Folder Name, Owner, Type, Uses Field Name,** and **Uses Record Name.**

The **Advanced Search** window offers you a broader range of search criteria:

- For the **Advanced Search**, click the **Advanced Search** link at the bottom of the Query Viewer dialog window.



**NOTE:** The default parameter within the drop-down menu is “**begins with**”. Observe that in this example, the **Query Name** parameter is “**contains**” followed by the value, “**CONCISE**”, indicating you are looking for a query that has the text string, “**CONCISE**”, within its name.

- Once you have configured your search criteria, click the **Search** button.

**Query Viewer**

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

Query Name: contains [CONCISE] x

Description: begins with

Uses Record Name: begins with

Uses Field Name: begins with

Access Group Name: begins with

Folder Name: begins with

\*Query Type = User

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

**7.** Search Clear Basic Search

**Search Results**

\*Folder View -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML
UCCS_R_1048_CC_CONCISE	CC: Concise	Public	CATALOG/SCHEDULE	HTML	Excel	XML
UCCS_R_1059_SC_CONCISE	SC: Concise	Public	CATALOG/SCHEDULE	HTML	Excel	XML

When you click the downward-pointing arrow to the right, you can see the available parameters for the Advanced Search fields.

- <
- <=
- =
- >
- >=
- begins with
- between
- contains**
- in
- not =

Returning our focus to the **Basic Search window**, and our search criteria of “**Query Name begins with UCCS\_R\_C**”, we click the **Search** button to advance to the **Search Results** window.

- Click the **Search** button.

Favorites Main Menu Reporting Tools Query Query Viewer

Berkeley Menu Search Advanced Search Last Search

**Query Viewer**

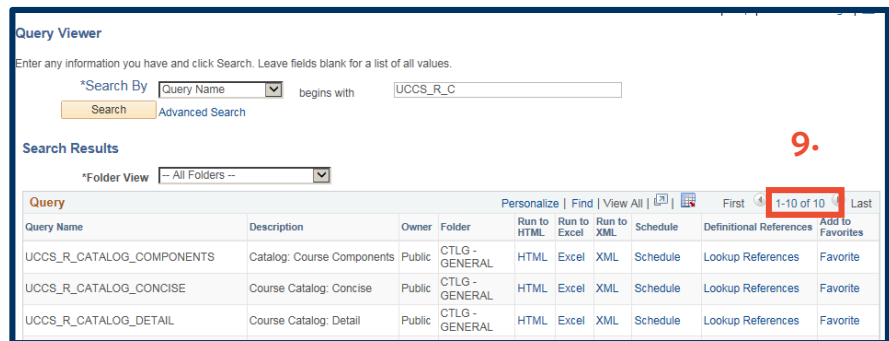
Enter any information you have and click Search. Leave fields blank for a list of all values.

**8.** \*Search By Query Name begins with uccs\_r\_c

Search Advanced Search

- The Search Results show all queries whose names begin with “UCCS\_R\_C”.

Observe that there are five queries that meet the search criteria.



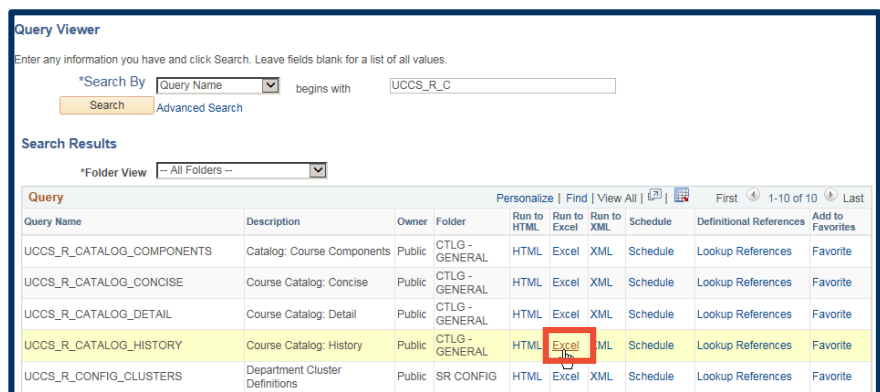
**NOTE:** Many queries in *Campus Solutions* begin with “UCCS”, so search results limited to “UCCS” would take a while to load.

To shorten the load time, include additional information. For example, each functional area has an abbreviation used in query names that is self-identifying. Include them in your search string, and the load time will be briefer:

- A — Admissions (“UCCS\_A\_”)
- C — Campus Community (“UCCS\_C\_”)
- F — Financial Aid (“UCCS\_F\_”)
- S — Student Financials (“UCCS\_S\_”)
- R — Student Records (“UCCS\_R\_”)
- V — Advising (“UCCS\_V\_”)

You can also use wildcard characters in your search such as “FA%” for all queries beginning with “FA”.

- Next, you will select the output format you in which you want to view your report. Your choices are HTML, *Excel*, or XML. Click on any one of these links to open a view of the report.



For our first example, we will choose *Excel* as the format

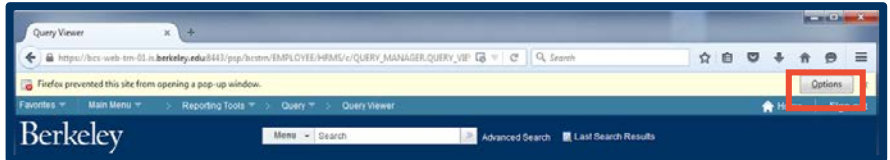
## Pop-Up Blocker

11. Depending on browser security configurations, you may next see a pop-up blocker message, regardless of the output format. If so, click *Internet Explorer's Options for this site* button or *Firefox's Options* button.



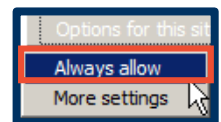
Internet Explorer

11.



Firefox

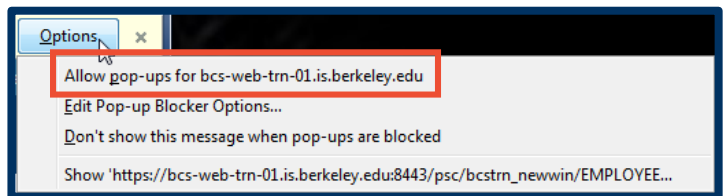
12. Under **Options for this site**, click **“Always allow”**.



12.

Internet Explorer

Under **Options**, click **“Allow pop-ups for”** (name of *Campus Solutions* link at *berkeley.edu*)



Firefox

13. Following that, click the **Close** icon, to close the message box.



Internet Explorer

13.

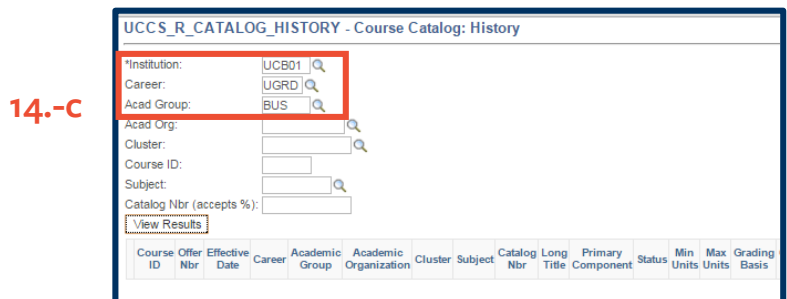
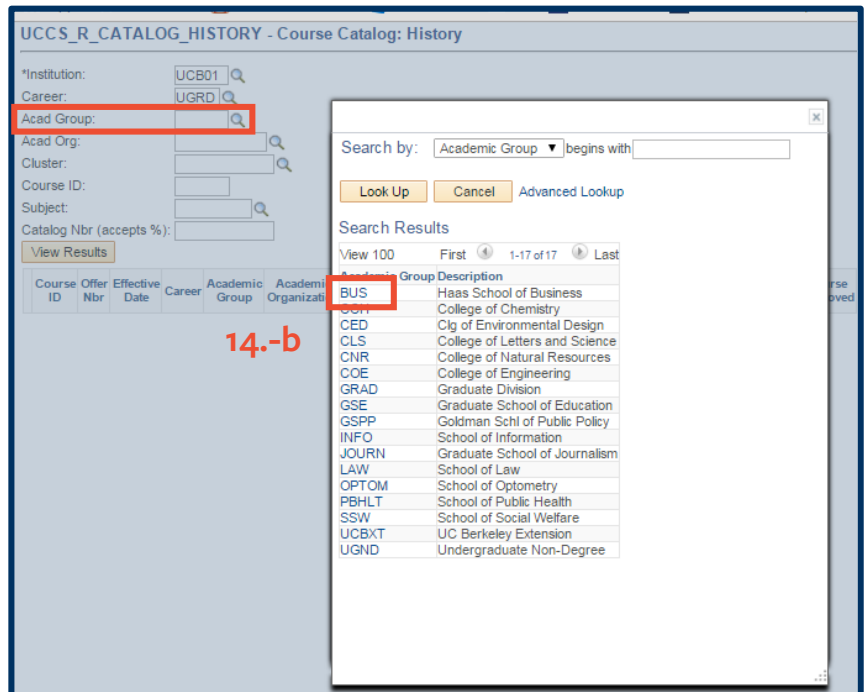
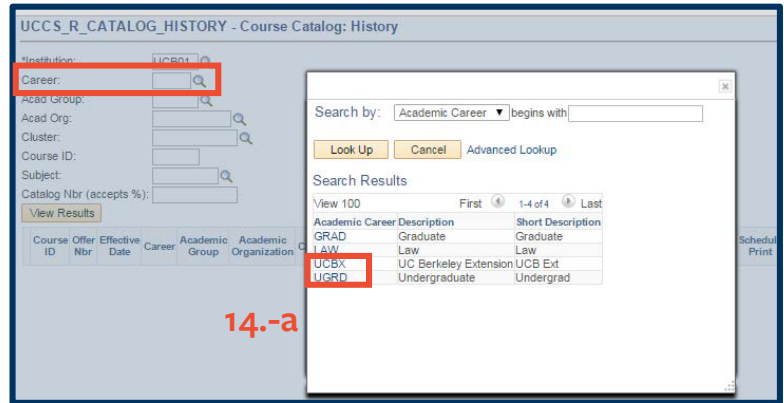


Firefox

## Modifying Parameters

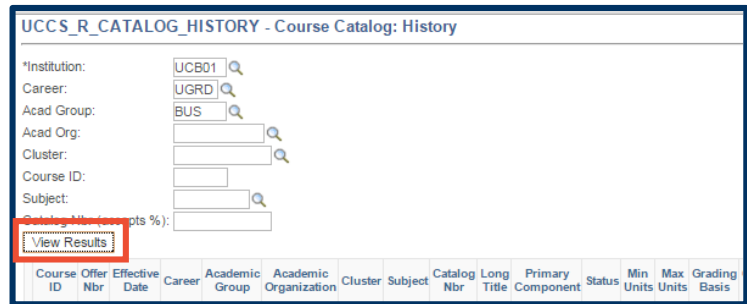
- If the query you are running requires you to modify parameters, the query configuration window opens, prompting you to further define the parameters of the query.

For example, you could designate **Career** (14-a) and **Academic Group** (14-b) as parameters, as shown to the right. The more criteria you define, the narrower the search results and the more quickly results are returned to you.



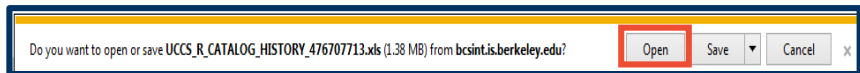
- After defining the parameters, click the **View Results** button.

15.



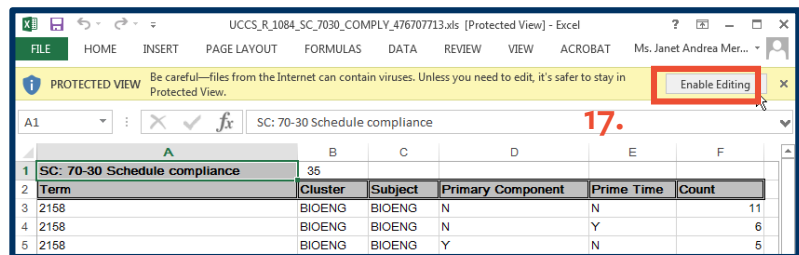
- Click the **Open** button in the pop-up bar that appears at the bottom of your browser.

16.



- Since the output format is *Excel*, click on the **Enable Editing** button within *Excel*.

17.

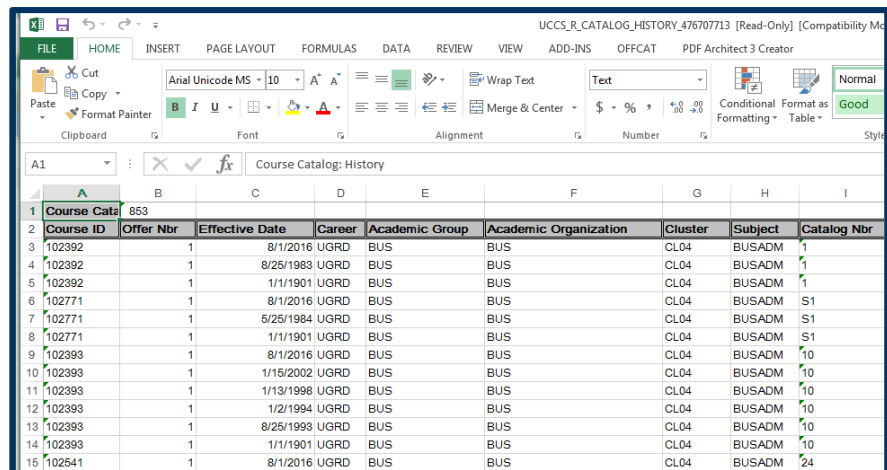


**NOTE:** If you select the HTML or XML output options you may have to deal with the pop-up blocker message, but *not* with **Enable Editing**.

- The report appears in the form of an editable *Excel* spreadsheet.

18.

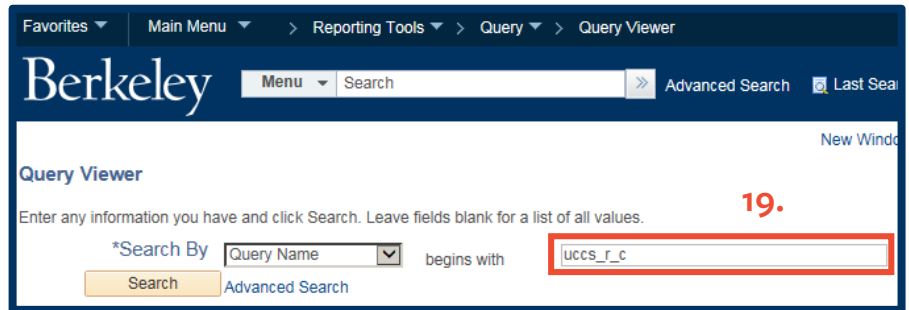
You can save, print, format, or simply view the output from within *Excel*. When you are done, close *Excel*. The **Query Viewer Search Results** window will still be open in your browser.



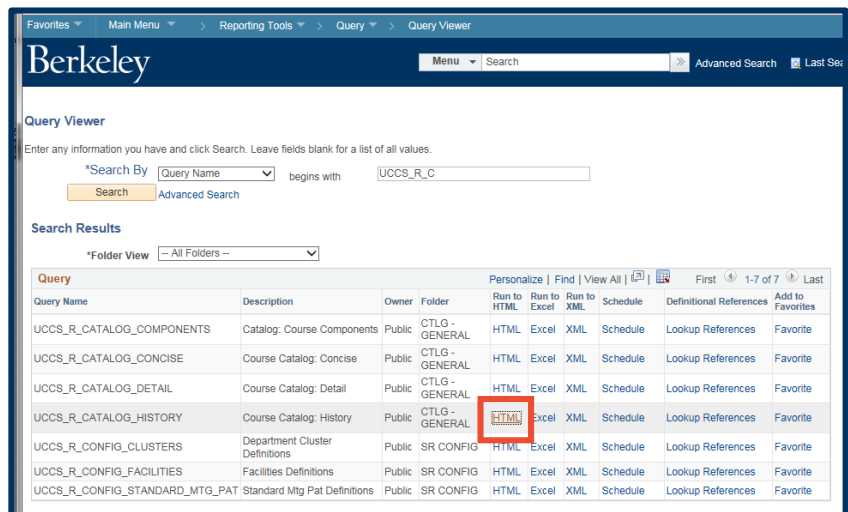


## Exporting a Query to HTML

- From the **Query Viewer** window, do your initial search for a query.

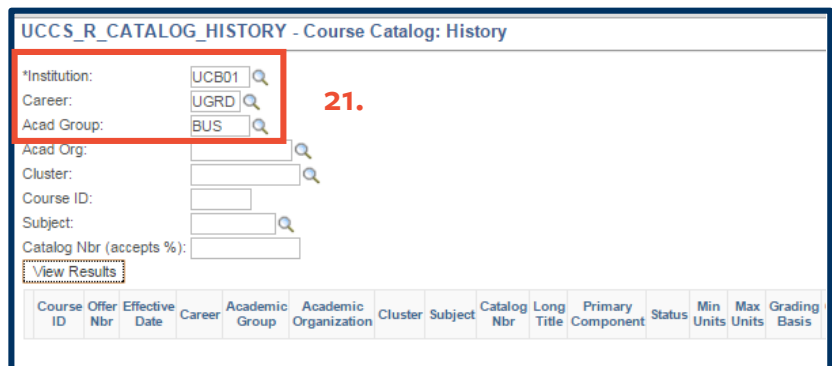


- From the **Search Results** window, locate the desired query, and click on the **HTML** link.



20.

- Configure parameters, as needed.



22. Click the **View Results** button.

22.

UCCS\_R\_CATALOG\_HISTORY - Course Catalog: History

\*Institution:

Career:

Acad Group:

Acad Org:

Cluster:

Course ID:

Subject:

Catalog Nbr (accepts %):

**View Results**

Course ID	Offer Nbr	Effective Date	Career	Academic Group	Academic Organization	Cluster	Subject	Catalog Nbr	Long Title	Primary Component	Status	Min Units	Max Units	Grading Basis
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23. Observe that from the **HTML** report, you can output the report's contents to **Excel spreadsheet, CSV Text File, or XML File**.

23.

UCCS\_R\_CATALOG\_HISTORY - Course Catalog: History

\*Institution:

Career:

Acad Group:

Acad Org:

Cluster:

Course ID:

Subject:

Catalog Nbr (accepts %):

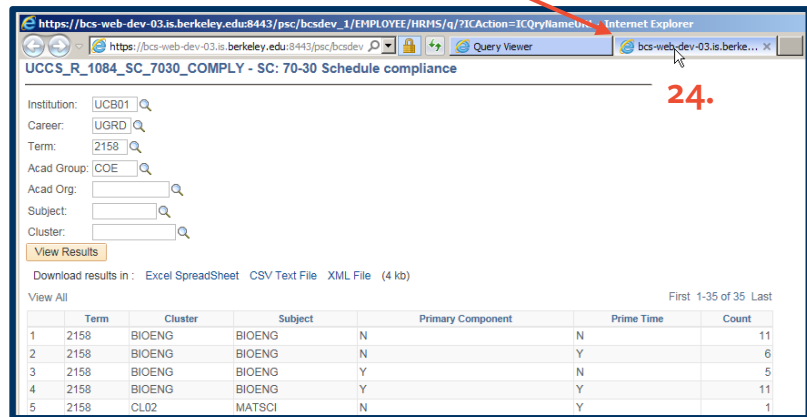
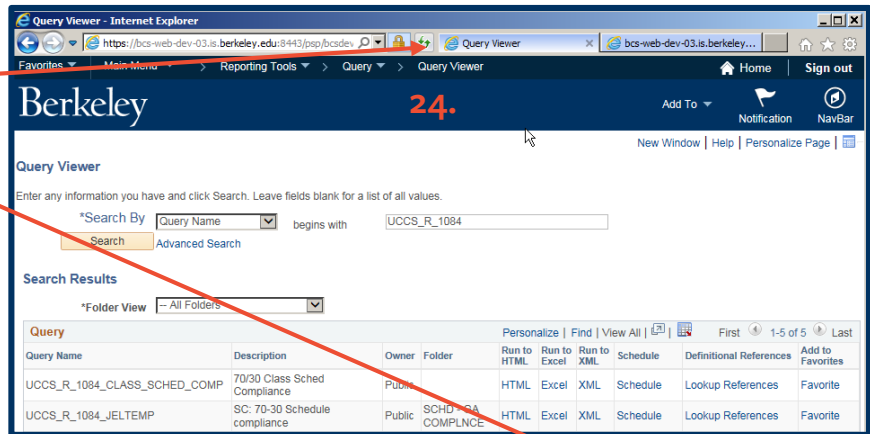
**View Results**

Download results in: **Excel Spreadsheet** CSV Text File XML File (2026 kb)

View All

Course ID	Offer Nbr	Effective Date	Career	Academic Group	Academic Organization	Cluster	Subject	Catalog Nbr	Long Title	Primary Component	Status	Min Units	Max Units	Grading Basis	Contact Hours	Course Approved	Schedule Print	Catalog Print
1	102392	1 08/01/2016	UGRD	BUS	BUS	CL04	BUSADM	1	Introduction to Accounting	LEC	Inactive	3.00	3.00	Stand Opt	999.99	Pending	Y	Y
2	102392	1 08/25/1993	UGRD	BUS	BUS	CL04	BUSADM	1	Introduction to Accounting	LEC	Active	3.00	3.00	Stand Opt	999.99	Approved	Y	Y
3	102392	1 01/01/1901	UGRD	BUS	BUS	CL04	BUSADM	1	Introduction to Accounting	LEC	Active	3.00	3.00	Stand Opt	999.99	Pending	Y	Y
4	102771	1 08/01/2016	UGRD	BUS	BUS	CL04	BUSADM	S1	Introduction to Accounting	LEC	Inactive	3.00	3.00	Stand Opt	999.99	Pending	Y	Y

24. Observe that the **Query Viewer** search window is in its own browser tab, and the **HTML** output is in a separate browser tab. This enables you to close the HTML view and return to perform a different query search.



## Making a Query a Favorite

25. You can make a query a **Favorite**, so you don't have to search for it every time you run **Query Viewer**.

To make a query a Favorite, from the initial **Query Viewer** window, search for the query, and in the **Search Results** window, click on its **Favorite** link.

The screenshot shows the 'Search Results' window. At the top, there's a 'Folder View' dropdown set to 'All Folders'. Below is a table of search results. The table has columns: Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Run to XML, Schedule, Definitional References, and Add to Favorites. The query 'UCCS\_R\_1083\_SC\_GA\_CLASSES' is highlighted with a red box, and its 'Add to Favorites' link is also highlighted. Below the main table is a section titled 'My Favorite Queries' which contains the same query. A red arrow points from the 'Favorite' link in the main table to the 'My Favorite Queries' section.

25.

**NOTE:** Once you have made a query a **Favorite**, **My Favorites** will appear at the bottom of your **Search Results** window.

26. When you return to **Query Viewer** at a later time, **My Favorites** will appear beneath the **Search By** section of **Query Viewer** and will display any queries you have designated to be a **Favorite**.

26.

The screenshot shows the 'Query Viewer' window. At the top, there's a navigation bar with 'Main Menu', 'Reporting Tools', 'Query', and 'Query Viewer'. Below is a search bar with 'Query Name' selected. Below the search bar is a section titled 'My Favorite Queries' which contains the query 'UCCS\_R\_1083\_SC\_GA\_CLASSES'. A red box highlights this section.

27. From the right-hand side of the **Navigation Bar** that appears across the top of the window, click the **Home** link to return to *Campus Solutions'* home page, or click **Sign out** to end your *Campus Solutions* session.

**NOTE:** To completely exit *Campus Solutions*, exit your browser, as well, at the end of a browser work session. Do not leave your open browser unattended.

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### Support:

For questions or assistance, please contact Campus Shared Services IT.:

- Call **510-664-9000** (press **option 1**, then **option 2** to reach SIS support)
- Email: [itcsshelp@berkeley.edu](mailto:itcsshelp@berkeley.edu)
- Submit a ticket: [https://shared-services-help.berkeley.edu/new\\_ticket/it](https://shared-services-help.berkeley.edu/new_ticket/it)