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**.

5. 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**.

![Image of Query Viewer window with Basic Search example](image)

6. 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.
7. Once you have configured your search criteria, click the **Search** button.

8. Click the **Search** button.

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.
9. 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”.

10. Next, you will select the output format 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.

12. Under Options for this site, click “Always allow”. Under Options, click “Allow pop-ups for” (name of Campus Solutions link at berkeley.edu)

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

14. 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.
15. After defining the parameters, click the View Results button.

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

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

**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.

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

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

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

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

21. Configure parameters, as needed.
22. Click the View Results button.

23. Observe that from the HTML report, you can output the report’s contents to Excel spreadsheet, CSV Text File, or XML File.
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.

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.
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
- Submit a ticket: [https://shared-services-help.berkeley.edu/new_ticket/it](https://shared-services-help.berkeley.edu/new_ticket/it)