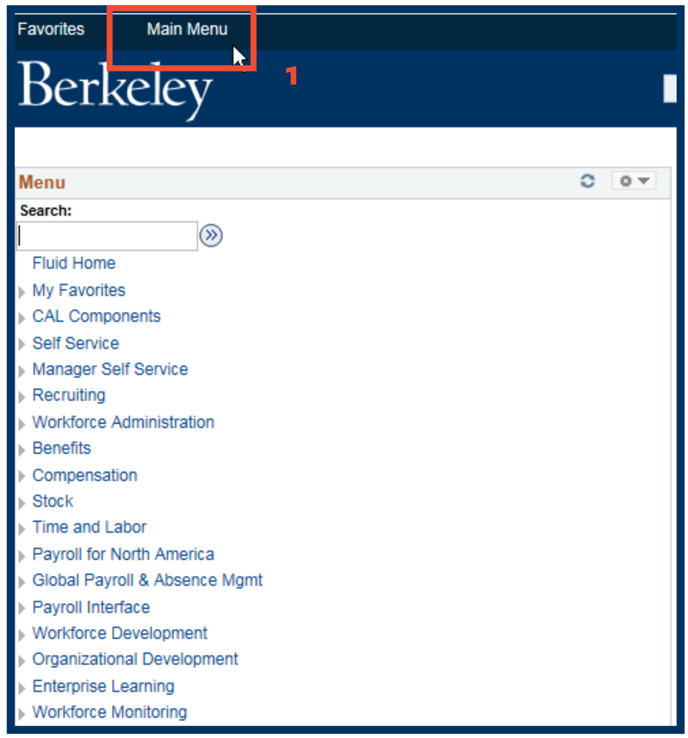
Scheduling a Query (Query Viewer)

PATH: Main Menu > Reporting Tools > Query > Query Viewer

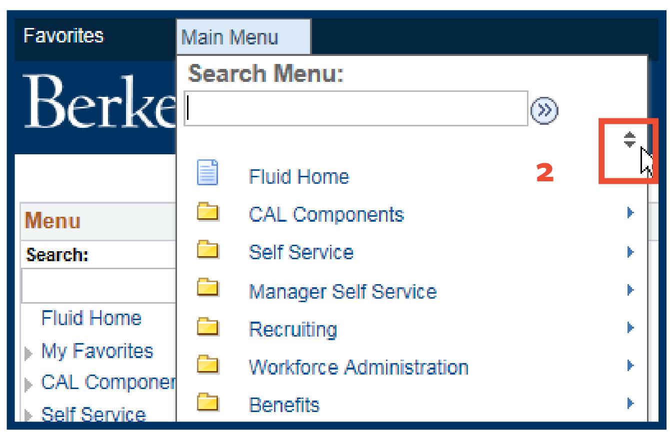
Once you have chosen a query to run, it will run in the current date and time, unless you tell Query Viewer otherwise. Running **Scheduler** gives you the ability to designate a run date and time, as well as a time zone, recipients, and output type and format.

NOTE: Advisors, if you are accessing Query Viewer from within the **Reporting Center**, ignore **Steps 1–5**, and go directly to **Step 6**.

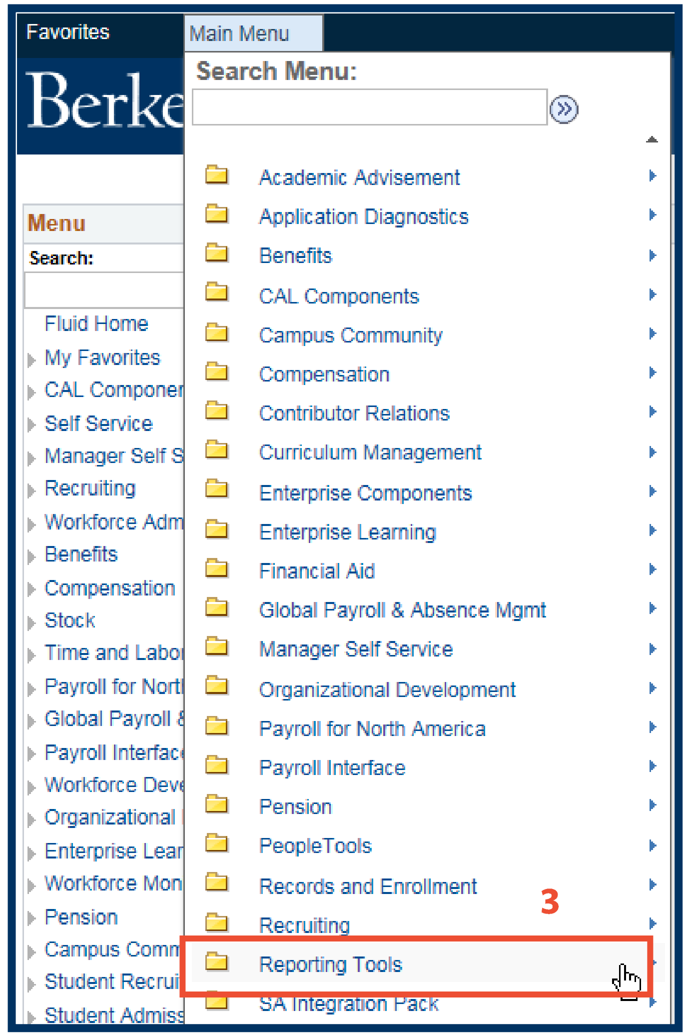
1. After you have logged in to Campus Solutions, using your CalNet ID and passphrase, click the **Main Menu** link at the top, right of the page.



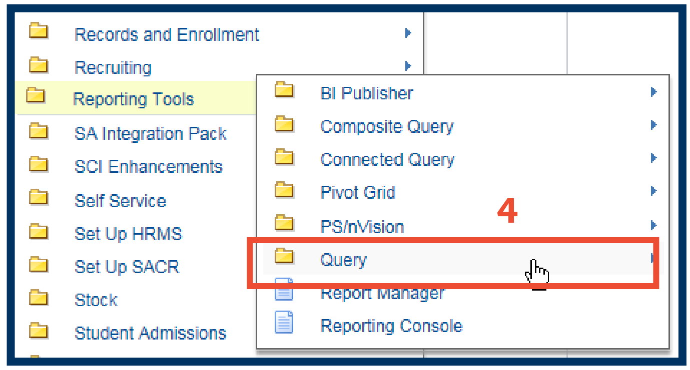
2. Click the **Menu Sort** button at the top of the **Main Menu**.



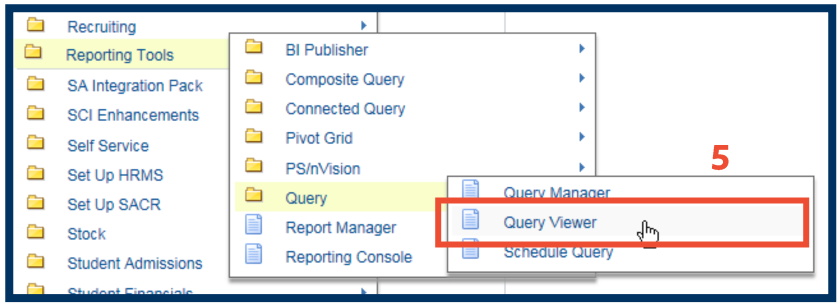
3. Click **Reporting Tools**.



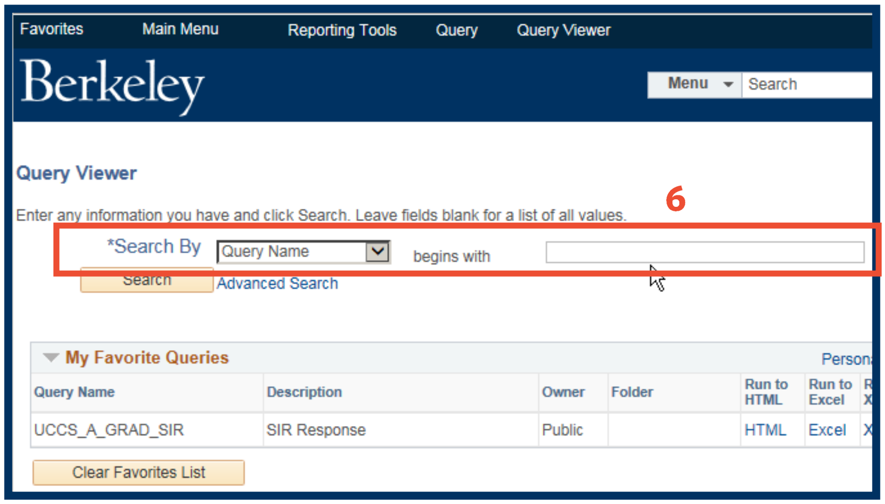
4. Click **Query**.



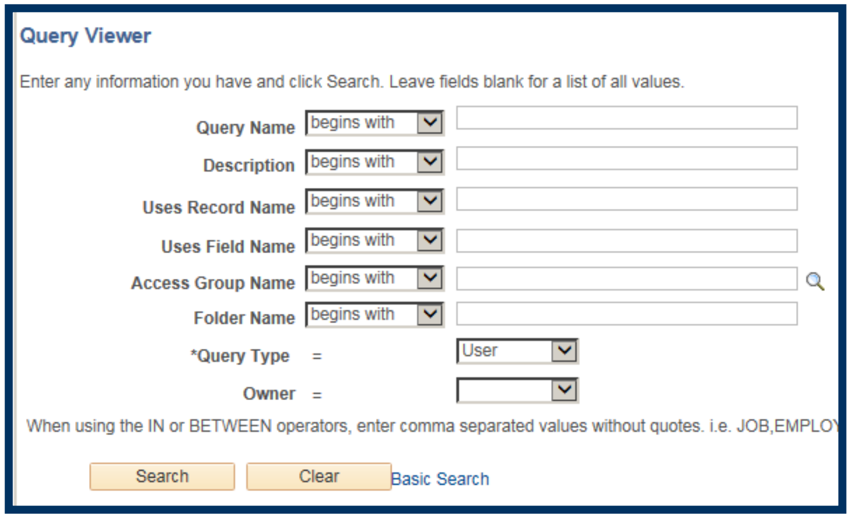
5. Click **Query Viewer**.



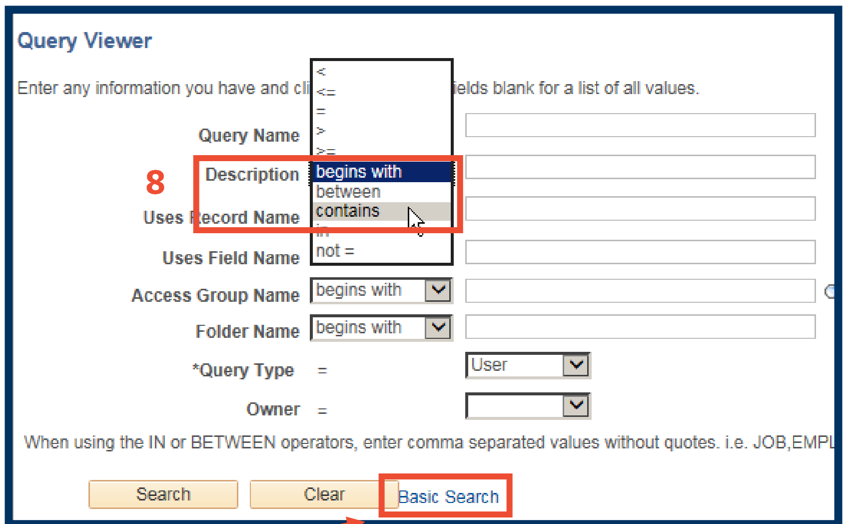
6. Search for a query. (Observe the **Search by Query Name** "**begins with**" option. Type the beginning of a query name in the text box to the right of "**begins with**".



7. Or you could click on the **Advanced Search** link to launch **Query Viewer's** avanced search tool, which allows you to search different options with a range of parameters as well as "**begins with**".

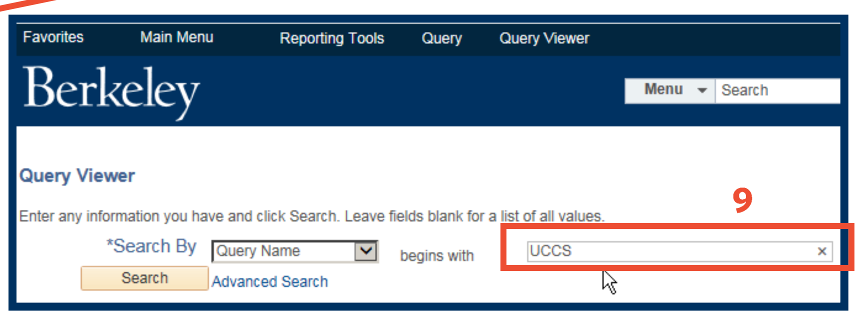


8. Here we can search for a description that “**contains**” a text string.



9. Returning to **Basic Search** (by clicking on the **Basic Search** link), we will search for a **Query Name** that “**begins with**” “**uccs**”.

   NOTE: Searches are NOT case sensitive.



10. Click the **Search** button.

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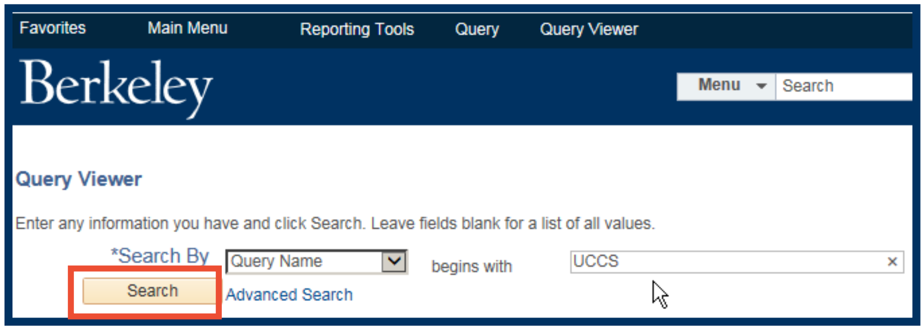
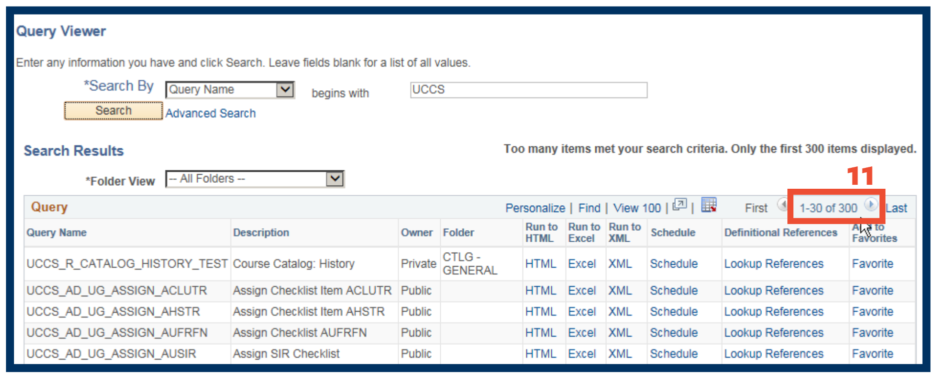
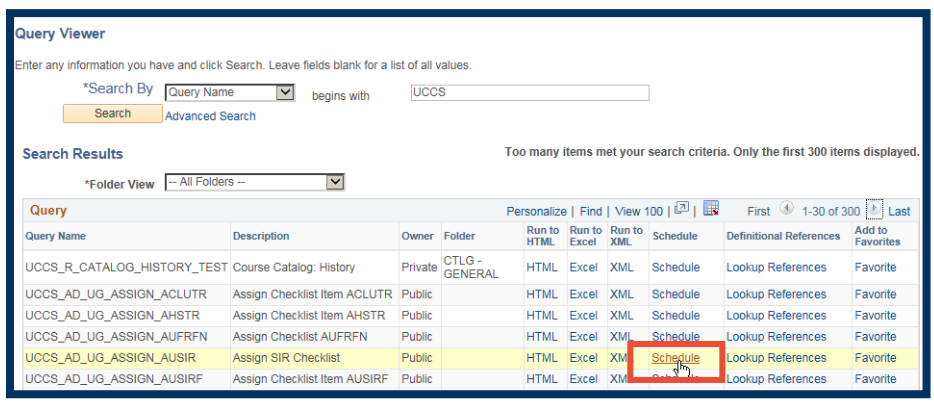


11. Note that we are viewing 30 out of 300 search results. To navigate to the next group of 30, click the **Show Next Rows** button ( )



12. Once you have located your query, click its **Schedule** link.



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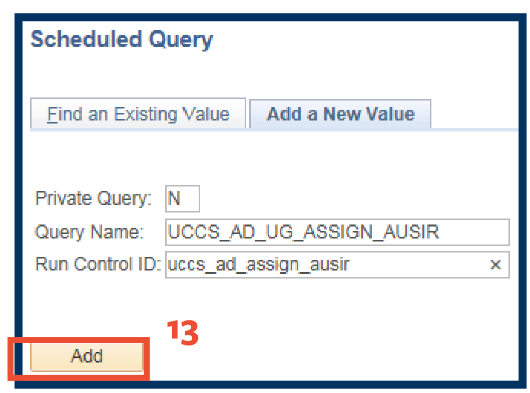
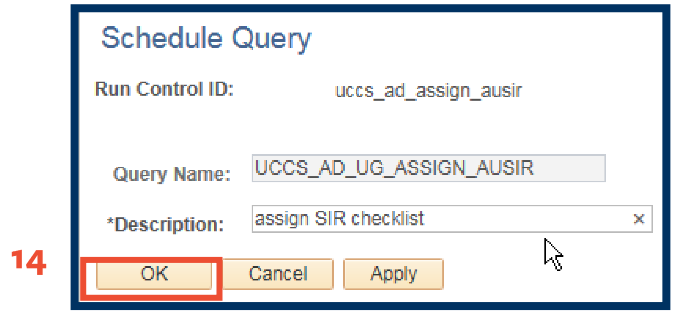
13. The **Scheduled Query** window appears in which you can search for an existing run control ID, or add a new run control ID. We will add a new run control ID. Once you entered it, click the Add button.

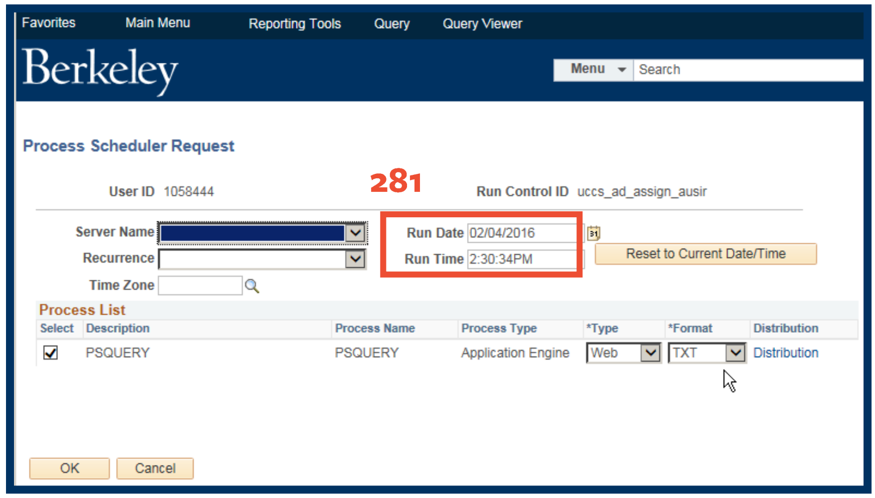


14. Type a **Description** of the query, and click the **OK** button.



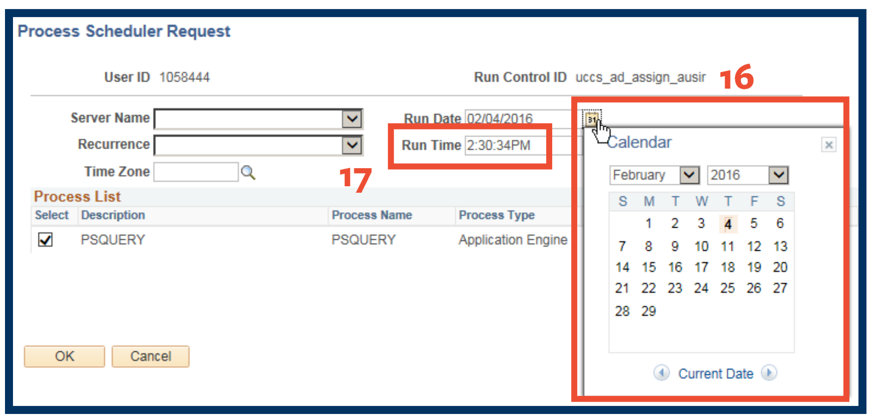
15. The **Process Scheduler Request** window opens.

    By default, the **Run Date** and **Run Time** will be set to the current date and time, and **Recurrence** and **Time Zone** will have no values present. **Type** and **Format** are typically set to "**Web**" and "**TXT**"



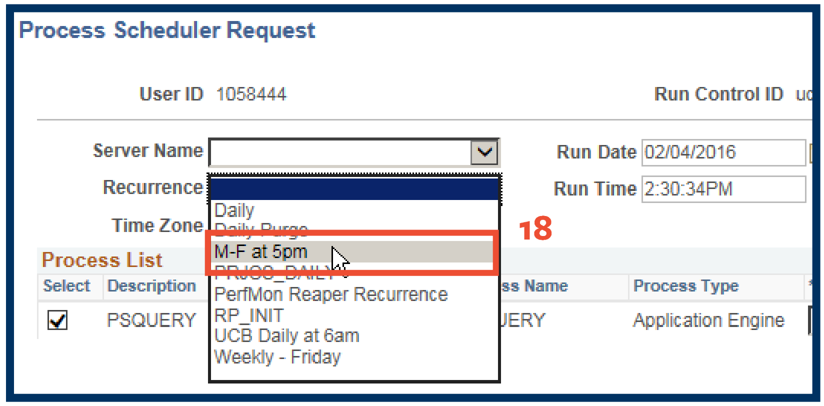
16. To change the date, either type the new value in the **Run Date** text box, or select a date from the **calendar** to the text box's right.

    Dates are in the format: **DD/MM/YYYY**

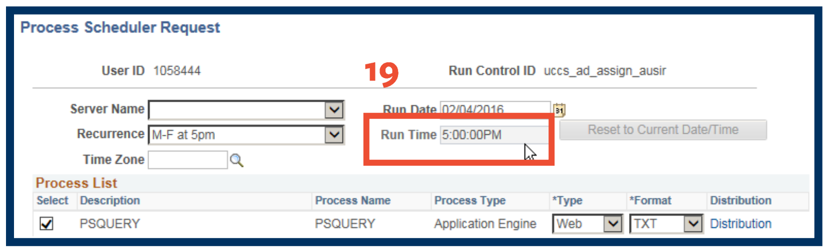


17. To change the **Run Time**, type a different time in the **Run Time** text box. Times can be entered in AM/PM (12-hour time) or in 24-hour time.

18. By default, **Recurrence** is set to **None**, but you can apply a recurrence by clicking on the **Recurrence** drop-list arrow and making a selection.



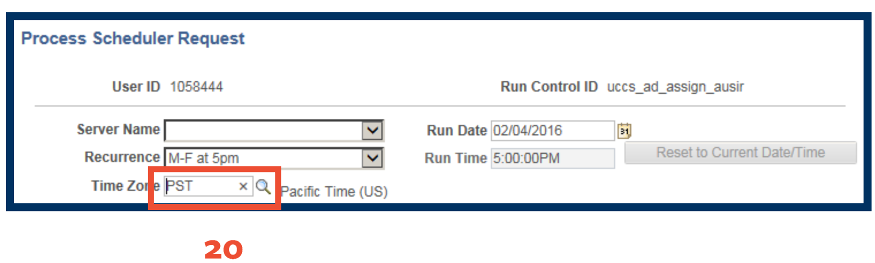
19. Each **Recurrence** has a preset **Run Date** and **Run Time**. For example, to the right we see that a **M-F at 5pm** run takes place at **5:00 PM**. Observe that for this run, this time is grayed out and therefore cannot be changed, although the date can be altered.



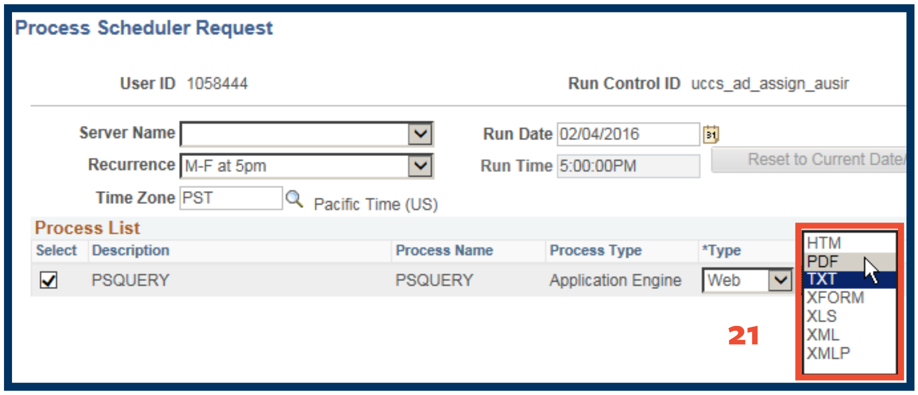
(A system administrator will set up the selections within the **Recurrence** menu and their associated run dates and times.)

20. Make sure you set the **Time Zone** to **PST** (Pacific Standard Time).

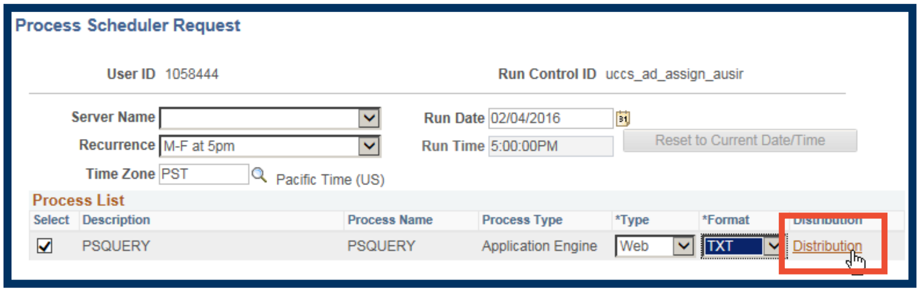
(Click the **Look up** icon—a magnifying glass—to view a table of time zones.)



21. You may want to set the format to **PDF**.



22. You can also set up distributing the report to someone else by clicking the **Distribution** link.



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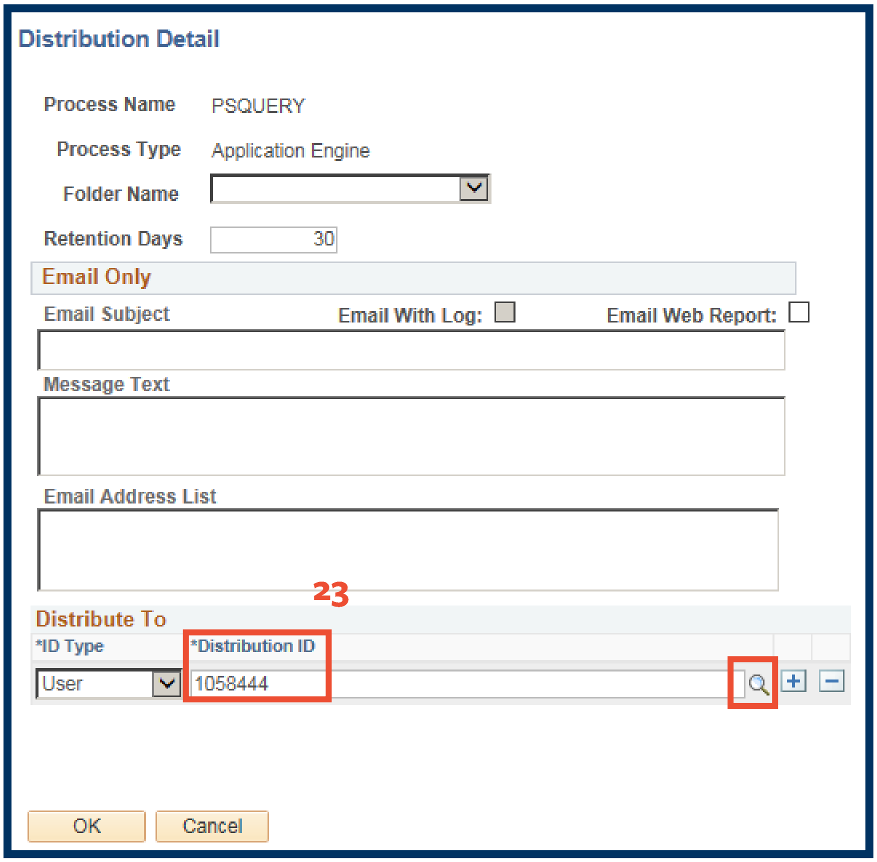
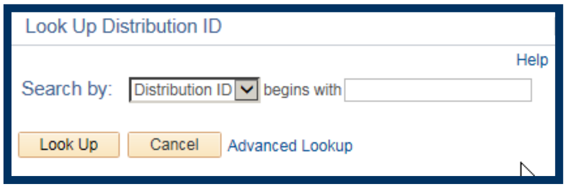
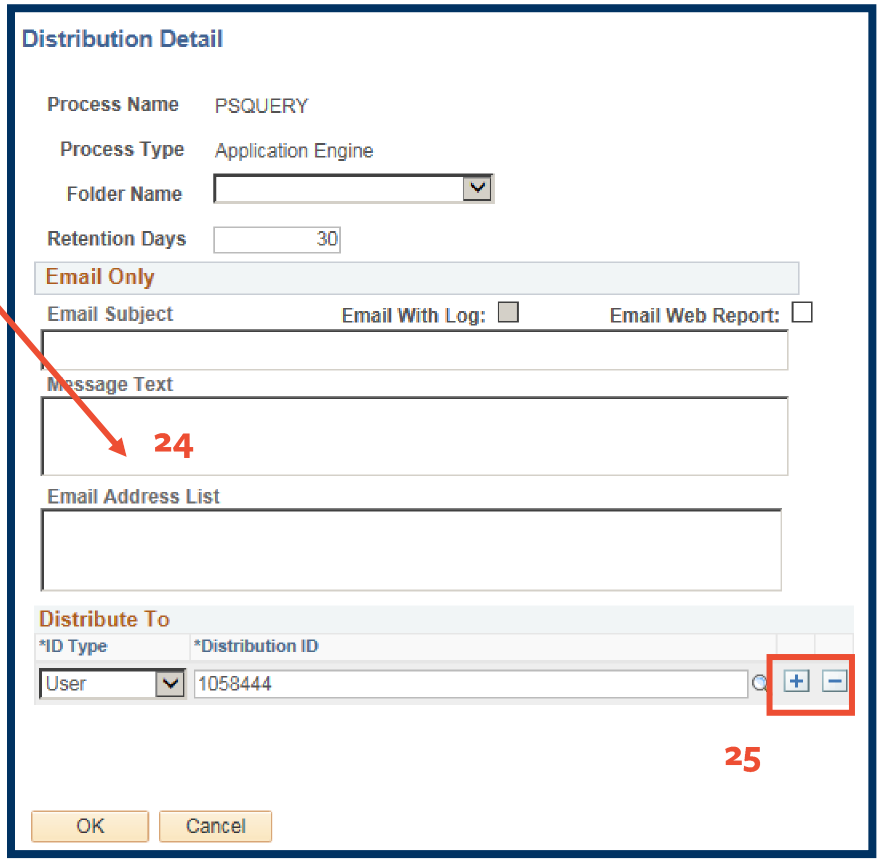
23. In the **Distribution Detail** window, if you know the **User's** ID, enter it in the **Distribution ID** text box. If you do not know it, click on the **Look Up** icon to search for the User name and UID.



*Type the last name of the **User**, then click the **Look Up** button. The user's name will appear in the **Search Results** listed below the **Look Up** button. Click on the appropriate user name.*



24. The query can be distributed with an attached message.



25. Click the **+** or **–** signs to add or remove a recipient.

26. When done setting up **Distribution**, click the **OK** button, to return to the **Process Scheduler Request** window.

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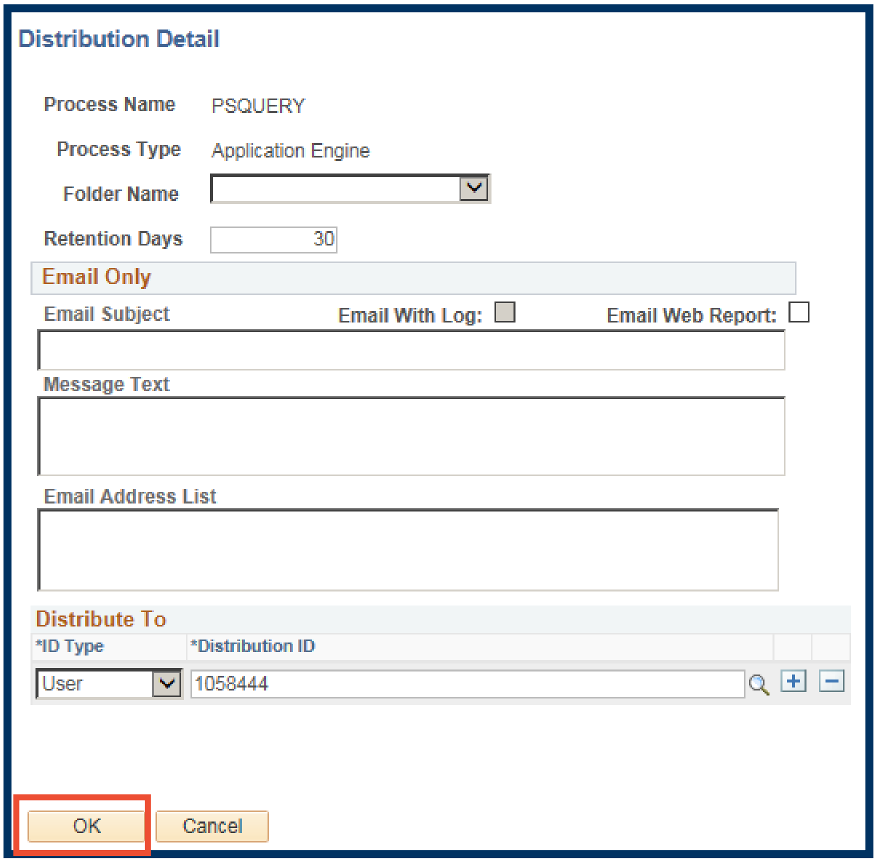

27. Having set the **Run Time, Run Date**, **Time Zone**, and **Distribution**, and so forth, click the **OK** once more to return to the **Query Manager** window.

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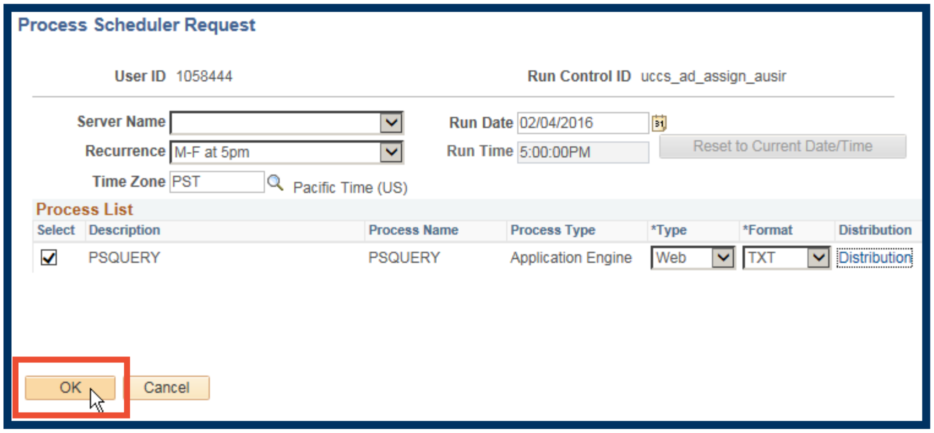
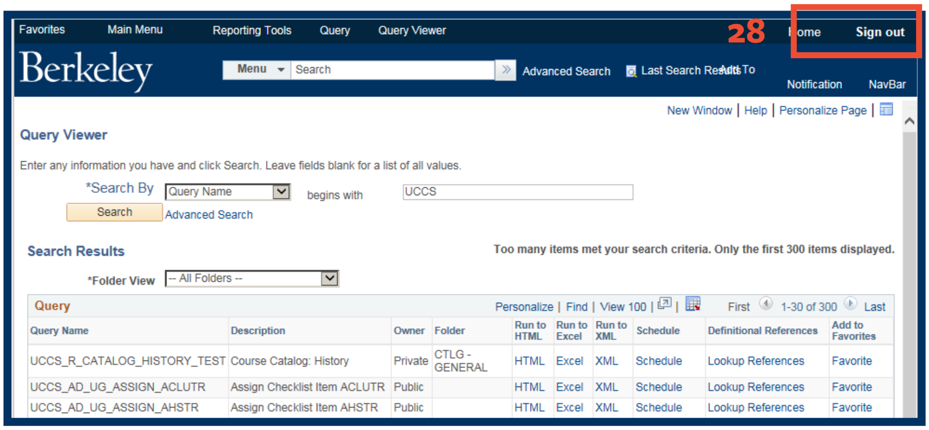


28. Back in the **Query Manager** window, click the **Home** link in the **Navigation Bar** across the top of the window, to continue working elsewhere in *Campus Solutions*, or click the **Sign out** link to end your *Campus Solutions* session.

   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 window unattended.



Support:

For questions or assistance, please contact the SIS Project:

- Call **510-664-9000** (press **option 6**)
- Email: sishelp@berkeley.edu
- Submit a ticket: **https://shared-services-help.berkeley.edu/new_ticket/it**