

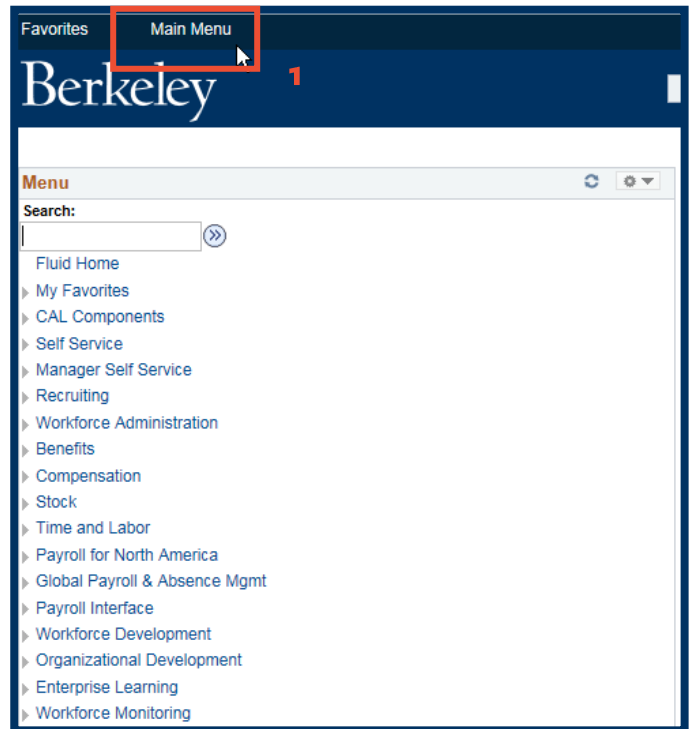
Scheduling a Query (Query Viewer)

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

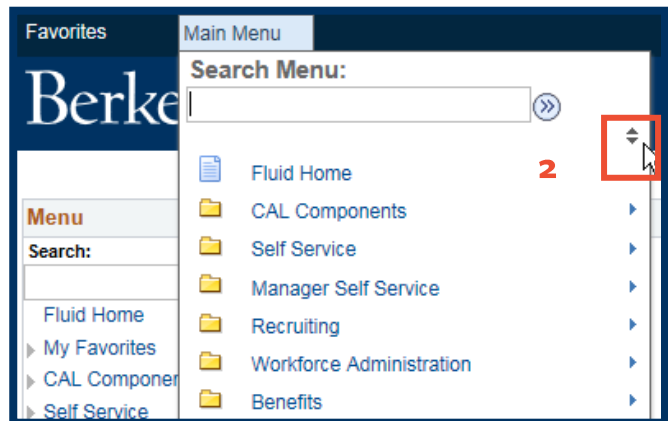
Once you have chosen a query to run, it will run in the current date and time, unless you tell Query Viewer otherwise. Running **Scheduler** gives you the ability to designate a run date and time, as well as a time zone, recipients, and output type and format.

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

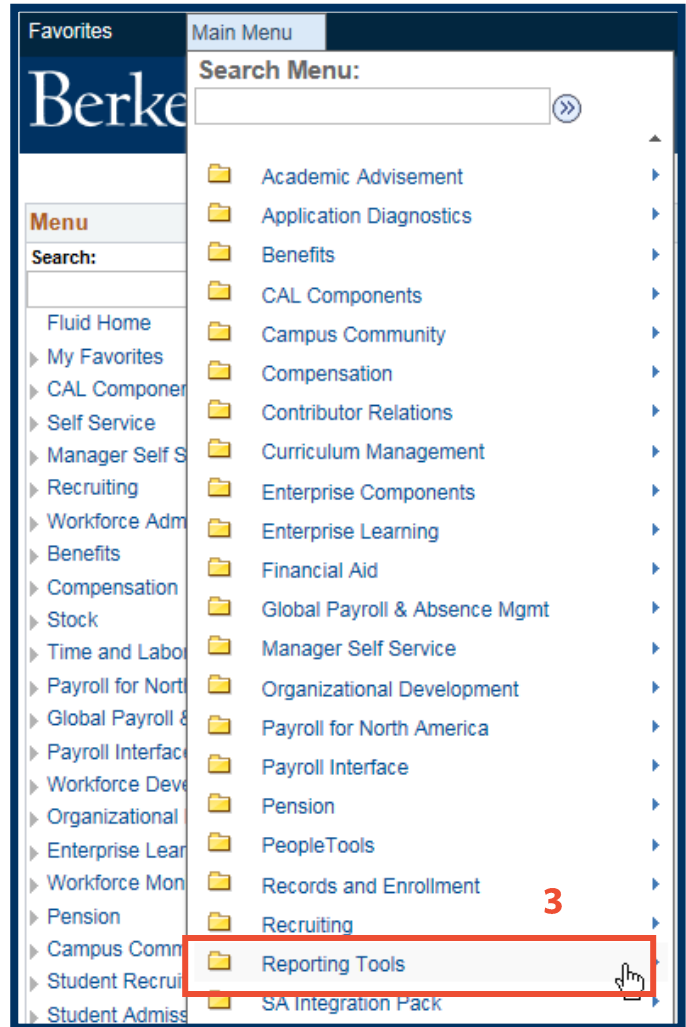
1. After you have logged in to Campus Solutions, using your CalNet ID and passphrase, click the **Main Menu** link at the top, right of the page.



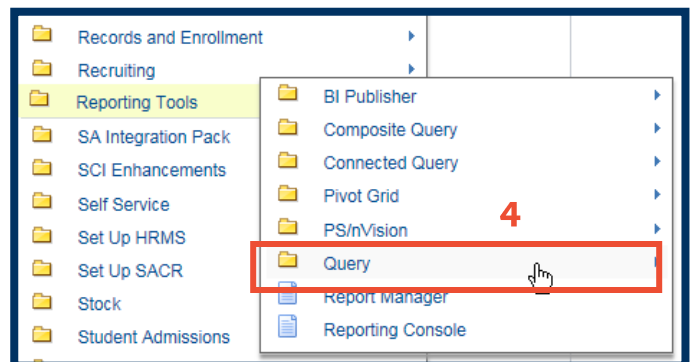
2. Click the **Menu Sort** button at the top of the **Main Menu**.



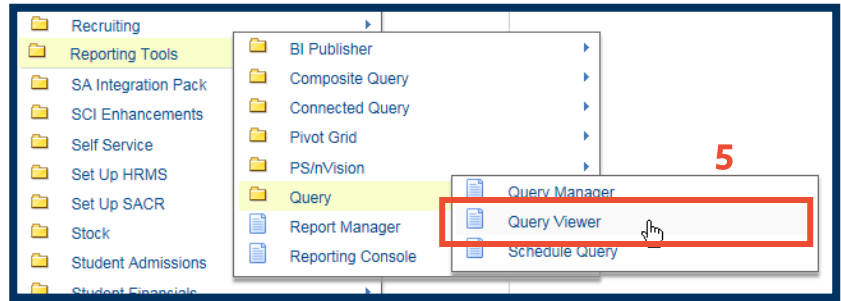
3. Click **Reporting Tools**.



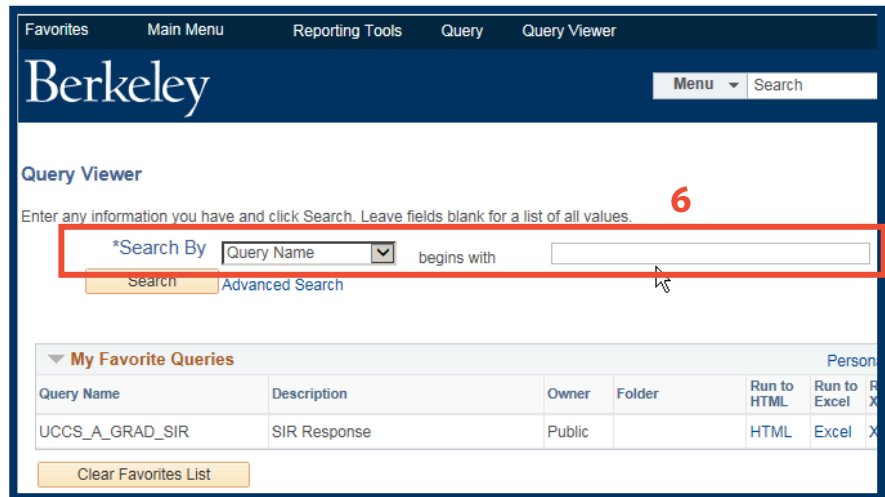
4. Click **Query**.



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** advanced search tool, which allows you to search different options with a range of parameters as well as **“begins with”**.



Query Viewer

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

Query Name

Description

Uses Record Name

Uses Field Name

Access Group Name

Folder Name

*Query Type =

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOY

[Basic Search](#)

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

Query Viewer

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

Query Name

8 **Description**

Uses Record Name

Uses Field Name

Access Group Name

Folder Name

*Query Type =

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOY

- 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.

Favorites Main Menu Reporting Tools Query Query Viewer

Berkeley

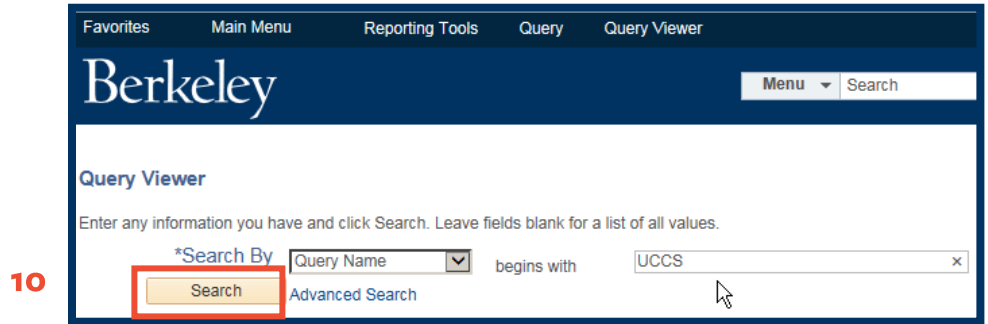
Query Viewer

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

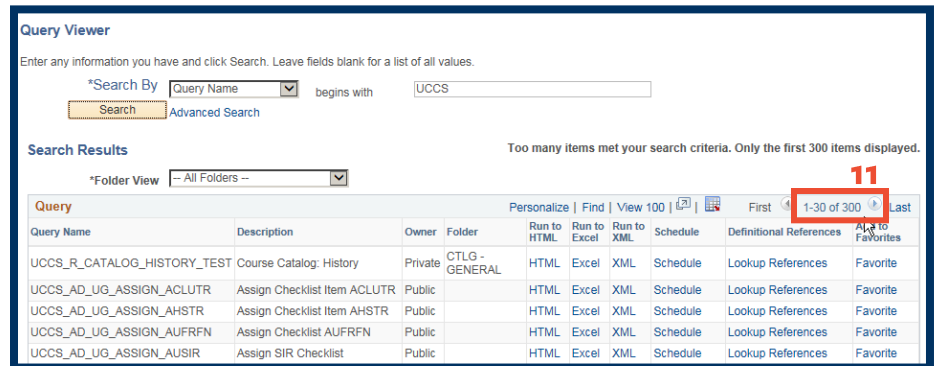
*Search By

[Advanced Search](#)

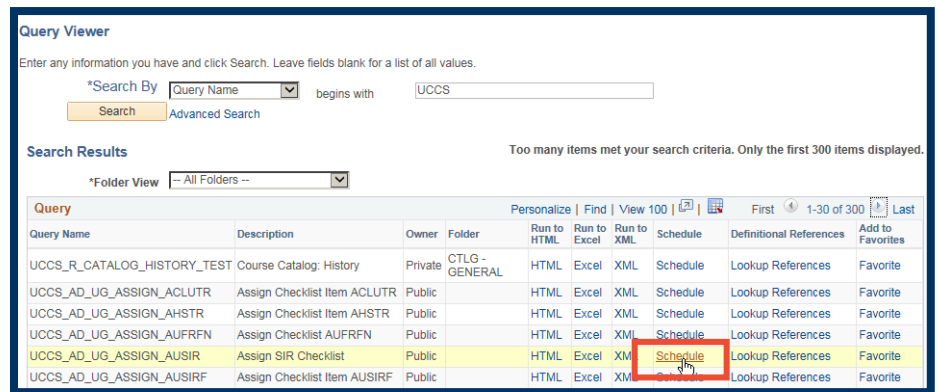
10. Click the **Search** button.



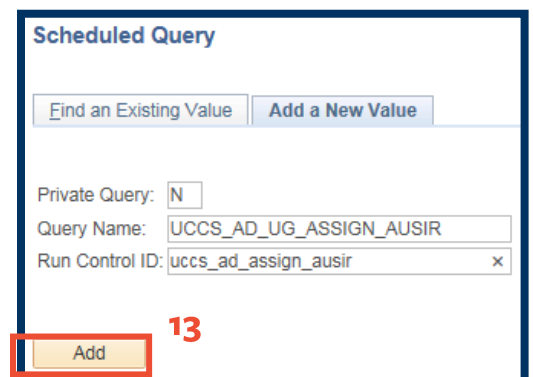
11. Note that we are viewing 30 out of 300 search results. To navigate to the next group of 30, click the **Show Next Rows** button (▶)



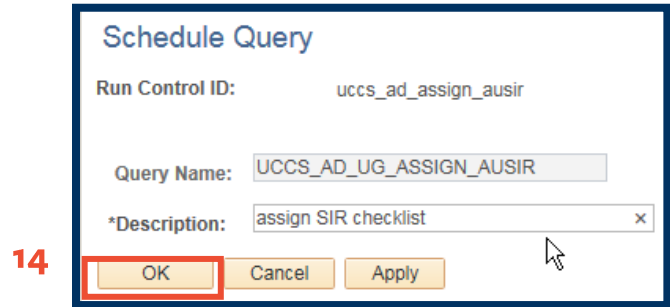
12. Once you have located your query, click its **Schedule** link.



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.

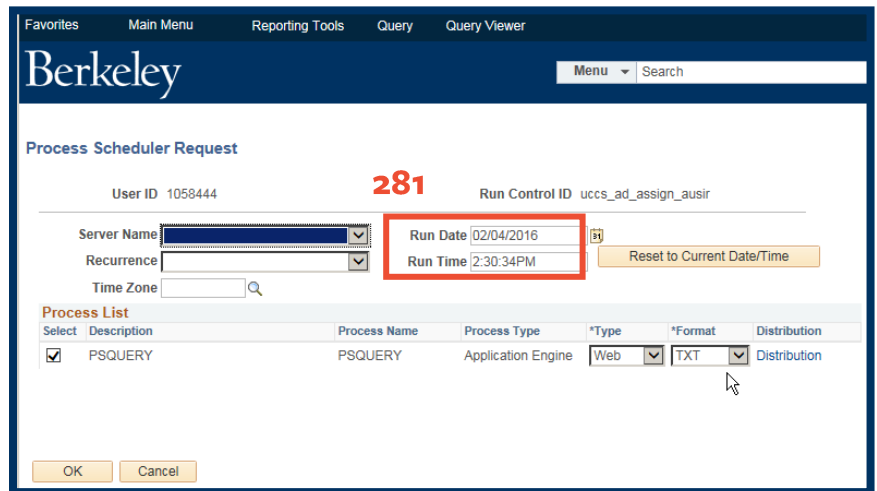


- Type a **Description** of the query, and click the **OK** button.



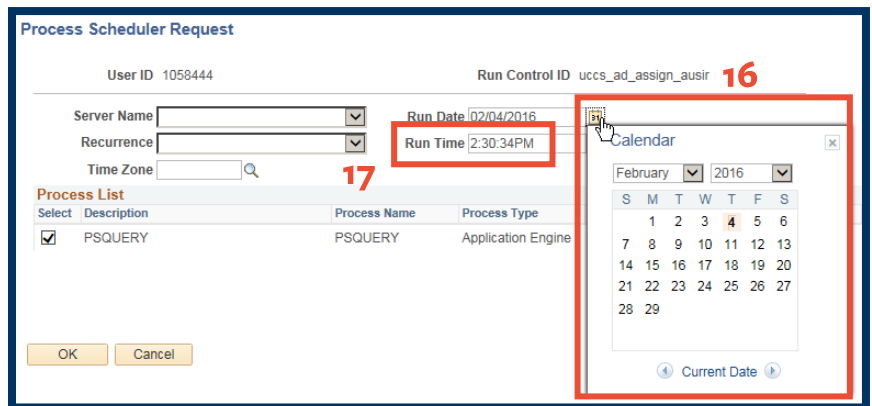
- The **Process Scheduler Request** window opens.

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**”



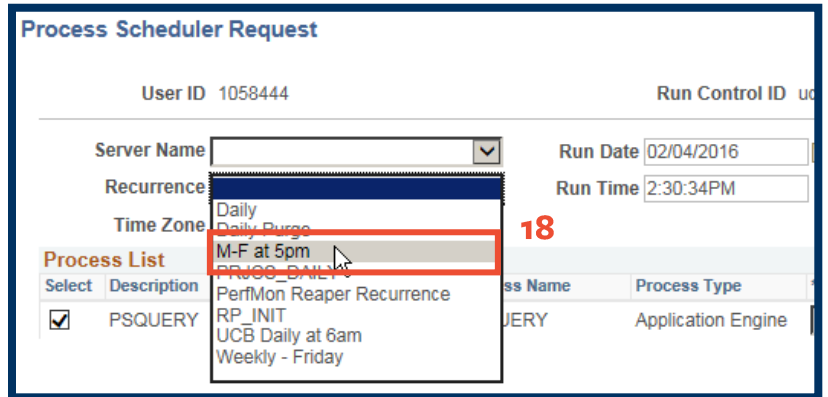
- To change the date, either type the new value in the **Run Date** text box, or select a date from the **calendar** to the text box's right.

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

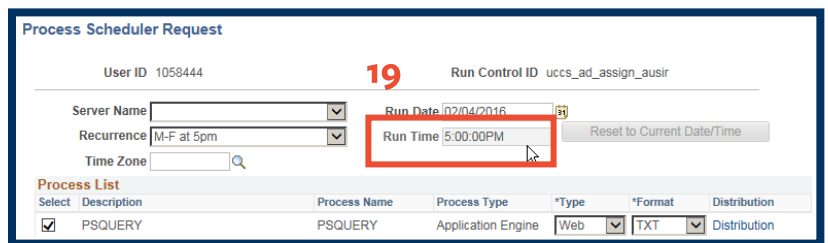


- To change the **Run Time**, type a different time in the **Run Time** text box. Times can be entered in AM/PM (12-hour time) or in 24-hour time.

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.



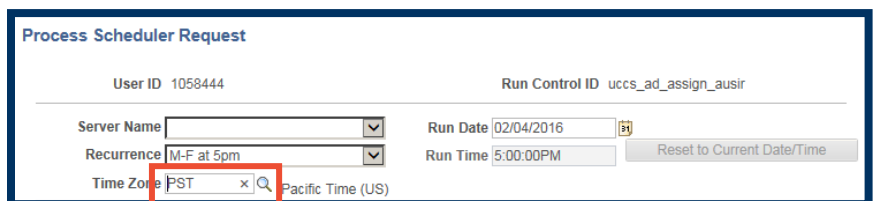
19. Each **Recurrence** has a preset **Run Date** and **Run Time**. For example, to the right we see that a **M-F at 5pm** run takes place at **5:00 PM**. Observe that for this run, this time is grayed out and therefore cannot be changed, although the date can be altered.



(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**.

The screenshot shows the 'Process Scheduler Request' form. At the top, it displays 'User ID 1058444' and 'Run Control ID uccs_ad_assign_ausir'. Below this are fields for 'Server Name', 'Run Date' (02/04/2016), 'Recurrence' (M-F at 5pm), 'Run Time' (5:00:00PM), and 'Time Zone' (PST). A 'Process List' table is shown below with one row: 'PSQUERY' (Application Engine, Web). A dropdown menu for '*Format' is open, showing options: HTM, PDF, TXT, XFORM, XLS, XML, and XMLP. The 'PDF' option is highlighted. A red box highlights the dropdown menu, and the number '21' is in the bottom right corner.

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

The screenshot shows the same 'Process Scheduler Request' form as above. In this view, the '*Format' dropdown is set to 'TXT'. A red box highlights the 'Distribution' link in the bottom right corner of the table area. The number '22' is in the bottom right corner.

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.

Distribution Detail

Process Name PSQUERY
Process Type Application Engine
Folder Name [dropdown]
Retention Days 30

Email Only [checkbox]
Email Subject [text] Email With Log: [checkbox] Email Web Report: [checkbox]

Message Text [text area] **24**

Email Address List [text area]

Distribute To

*ID Type	*Distribution ID
User [dropdown]	1058444 [text] 25

OK Cancel

- 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.

Distribution Detail

Process Name PSQUERY
 Process Type Application Engine
 Folder Name [dropdown]
 Retention Days 30

Email Only

Email Subject [text] Email With Log: Email Web Report:

Message Text [text area]

Email Address List [text area]

Distribute To

*ID Type	*Distribution ID
User [dropdown]	1058444 [text]

OK Cancel

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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.

Process Scheduler Request

User ID 1058444 Run Control ID uccs_ad_assign_ausir

Server Name [dropdown] Run Date 02/04/2016 [calendar]
 Recurrence M-F at 5pm [dropdown] Run Time 5:00:00PM [text] [Reset to Current Date/Time]
 Time Zone PST [dropdown] Pacific Time (US)

Process List

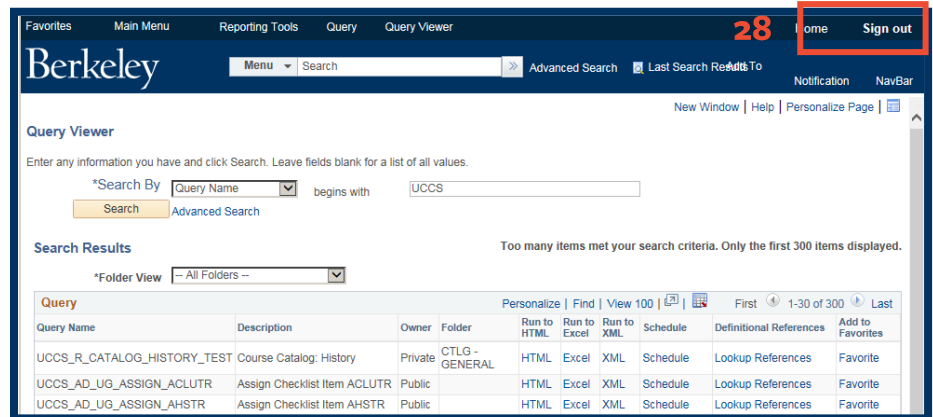
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web [dropdown]	TXT [dropdown]	[dropdown]

OK Cancel

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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