

## How to Schedule Reports

This job aid details the steps for scheduling a report to be sent to your email or Campus Solutions folder.

### Create a Run Control

1. Navigate to: **Main Menu > Reporting Tools>Query>Schedule Query**

2. Select **Add a New Value**

*To find an existing run control select the **Search** box to retrieve it.*

### 3. Name your Run Control ID

Best practices for naming a Run Control:

If report =

UCCS\_R\_GRAD\_DEGREE\_LIST name it

UCCS\_R\_GRAD\_DEGREE\_LIST or

department with report name:

“Math\_UCCS\_R\_GRAD\_DEGREE\_LIST

or

your name/initials with report name:

KAM\_UCCS\_R\_GRAD\_DEGREE\_LIST

Be consistent with your run control names to easily identify them to check and/or cancel in the future.

### 4. Select Add

### 5. Enter or Search Query Name

### 6. Select the Query you want

### 7. Fill in any prompts requested and Click OK

### 8. Enter a \*Description if it didn't autofill.

9. Select Save

Schedule Query

Run Control ID UCCS\_R\_GRAD\_DEGREE\_LIST Report Manager Process Monitor Run

Query Name UCCS\_R\_GRAD\_DEGREE\_LIST Search

\*Description grad list

Update Parameters

Prompt Name	Value
STRM	2188
ACAD_CAREER	UGRD
ACAD_PROG	UCCH
ACAD_PLAN	
EMPLID	
TOT_CUMULATIVE	
CUM_GPA	
	N
	N
INSTITUTION	UCB01

Save Add Update/Display

To Run the process

1. Select Run

Schedule Query

Run Control ID UCCS\_R\_GRAD\_DEGREE\_LIST Report Manager Process Monitor Run

Query Name UCCS\_R\_GRAD\_DEGREE\_LIST Search

\*Description UCCS\_R\_GRAD\_DEGREE\_LIST

Update Parameters

2. Select OK

Server Name Run Date 06/01/2018

Recurrence Run Time 9:38:48AM Reset to Current Date/Time

Time Zone

Process List

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

OK Cancel

Schedule Query

Run Control ID PrintSched\_KAM Report Manager Process Monitor Run

Query Name WRFS\_VLD\_INACTIVE\_TERM\_ACT Search

\*Description Term act with exp grad term

Update Parameters

Prompt Name	Value
STRM	2188

Save Add Update/Display

**To Create the Process Scheduler Request**

1. Navigate to: **Main Menu > Reporting Tools>Query>Schedule Query**. Find and **Run** the process you wish to schedule.

2. Set **Run Date**, **Run Time** and **Recurrence** (if using a recurrence, the run date can still be specified, but the run time will be grayed out/defaulted to the time configured with the recurrence).

3. Set the output **Type** (web or email) and **Format** (.xls, .txt, .pdf, etc.)

4. Set **Distribution**

If output **Type =Web**, use **Distribute To** section only. Specify IDs of users who should get access to output in Report Manager. Defaults to person running the process (you).

If output **Type=Email**  
Specify Email Subject line and Message Text (body)  
Enter recipient Email Addresses separated by semicolons.

5. Select **OK** to kick off the process.

Report will be sent to your email if Type chosen was "Email".

Report will display in screen below is Type chosen was "Web".

Server Name: [dropdown] Run Date: 06/01/2018 [calendar icon]  
 Recurrence: [dropdown] Run Time: 9:38:48AM [Reset to Current Date/Time]  
 Time Zone: [dropdown] [search icon]

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

OK Cancel

User ID: 1055279 Run Control ID: UCSS\_R\_GRAD\_DEGREE\_LIST

Server Name: [dropdown] Run Date: 06/01/2018 [calendar icon]  
 Recurrence: [dropdown] Run Time: 10:11:42AM [Reset to Current Date/Time]  
 Time Zone: [dropdown] [search icon]

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

OK Cancel

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

**Email Only**

Email Subject: Degree List Email With Log: [checkbox] Email Web Report: [checkbox]  
 Message Text: Today's degree list  
 Email Address List: [text area]

**Distribute To**

*ID Type	*Distribution ID
User	955823

OK Cancel

**To Cancel a report**

1. Navigate to: **Main Menu > PeopleTools>Process Scheduler>Process Monitor**

Complete the **User ID, Date Range** desired and **Run Status = Queued** fields to find your next scheduled report. Select **Refresh**.

2. Navigate to the report you want to cancel and click **Details**.

3. Select **Cancel Request**

4. Click **OK**

The process is now cancelled and will no longer run.

**Best Practices and Notes:**

- Cancel only your own requests/run controls.
- Cancel reports that are no longer needed.
- If your report is for a specific term, student population, or date, you will need to update the parameters for the new term/student population, or the data will be outdated.
- When to set up a report?  
**Once** - use future effective date (known date a report is needed, or if going on vacation, sending to multiple staff)  
**Recurring** – Specific day or week/time
- If a Campus Solutions upgrade occurs, all reports will be cancelled and will need to be rescheduled.
- What data is required to schedule a report?  
**Fields are required if \*asterisked** and optional if not. This affects the report display.

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**Support:**

For questions or assistance, please contact SIS Production Support:

- Email: [sishelp@berkeley.edu](mailto:sishelp@berkeley.edu)
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit: <http://sis.berkeley.edu/training>