**Reporting Tools—Running Query Viewer**

*Query Viewer* is the *Campus Solutions* tool for running established queries and generating reports. (*Query Manager* is the tool used to build queries. See the *Query Manager* job aid for more information). Reports can be output to HTML, Excel, and CSV- or XML-formatted documents. Queries can be saved 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 policy can be found at: http://registrar.berkeley.edu/ferpa.html

Do not release any private student information to any person or organization without the student's written consent, and use UCB information only for 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, and credit card Numbers.

1. After logging into *Campus Solutions*, click the *Main Menu* link.

   ![Main Menu](image)

   **NOTE:** Your menu may differ, based on your security access and functions.

2. Click the *Reporting Tools* link.

   ![Reporting Tools](image)
3. Click the Query link.

4. Click Query Viewer, which opens a Query Viewer window.

SEARCHING FOR A QUERY

A list of Financial Aid reports can be found at http://sisproject.berkeley.edu/reporting.

There are two kinds of searches you can perform in Query Viewer: Basic Search or Advanced Search.

5. For a Basic Search (with default of Query Name), you could type “UCCS_F” in the begins with text box. All Financial Aid queries begin with “UCCS_F”.

**NOTE:** You can also Search By: Access Group Name, Description, Folder Name, Owner, Type, Uses Field Name, & Uses Record Name.

**NOTE:** Many queries begin with UCCS_F. Include additional information for faster searches. You can also use wildcard characters such as “%”.
6. To search a broader range of criteria, click the **Advanced Search** link.

You can use a combination of fields and search parameters. In this example, we will look for a query whose name begins with “UCCS_F” and that uses the Field Name of “ISIR”.

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

In this example, we will run a query to pull all students with a particular first name. Click **Basic Search**, to return to the simple search page and use the search criteria of **Query Name begins with “UCCS_F_LW_TRAINING_SAMPLE”** to see the available choices.

8. Enter **UCCS_F_LW_TRAIN** and click **Search**.

9. In this example, there is only one result, but often there may be several queries.

Select an output format (HTML, Excel, or XML).

For this example, we will
select Excel.
Pop-Up Blocker

10. Depending on browser security configurations, you may see a pop-up blocker message. If so, click Internet Explorer’s **Options for this site** button or Firefox’s **Options** button.

11. IE: Under **Options for this site**, click “**Always allow**”.

Firefox: Under **Options**, click “**Allow pop-ups for**” (Campus Solutions link: is.berkeley.edu)

12. Click the **Close** icon, to close the message box.
Modifying Parameters

13. Some reports may need more information before they can be run. If the query is set to allow prompts, the configuration window opens, asking you to define the parameters of the query.

For this example, we will enter an Aid Year and First Name.

14. Click the View Results button.

15. If you have chosen to see the results in Excel, you may see another pop-up message. Click the Open button in the pop-up bar.

16. The report appears in an Excel spreadsheet. You may need to click “Enable Editing” to edit. 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

17. From the Query Viewer window, search for a query.

18. From the Search Results, locate the desired query, and click on the HTML link. A second browser window will open.

19. If your report has prompts, fill in the appropriate values to configure the parameters.

20. Click the View Results button.

21. The results will display below. From the HTML report, you can output the report’s contents to Excel spreadsheet, CSV Text File, or XML File.
22. Observe that the **Query Viewer** is still open in its own browser tab, and the **HTML** output is in a separate browser tab. This enables you to close the results tab and return to run a different query.

### Making a Query a Favorite

23. You can mark a query a **Favorite**, so you don’t have to search for it.

From the initial **Query Viewer** search and in the **Search Results**, find the query and click on **Favorite**.

Once you have a **Favorite**, **My Favorite Queries** will appear at the bottom of the **Search Results**.

24. When you return to **Query Viewer**, **My Favorite Queries** will appear beneath the **Search** section and will display any queries designated as **Favorite**.

If you are done running queries, use the menu to navigate to a new page or click **Sign Out**. When you are finished, make sure to exit the browser as well. Do not leave open browser windows unattended.