

## 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.

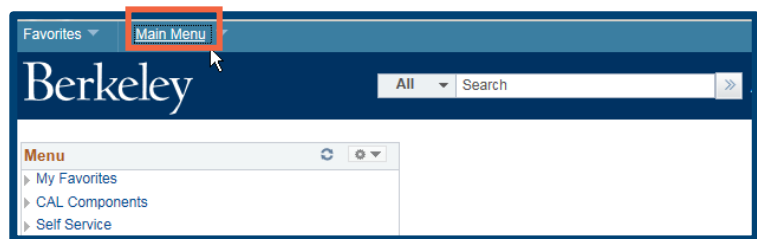
### Privacy Disclosure

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).

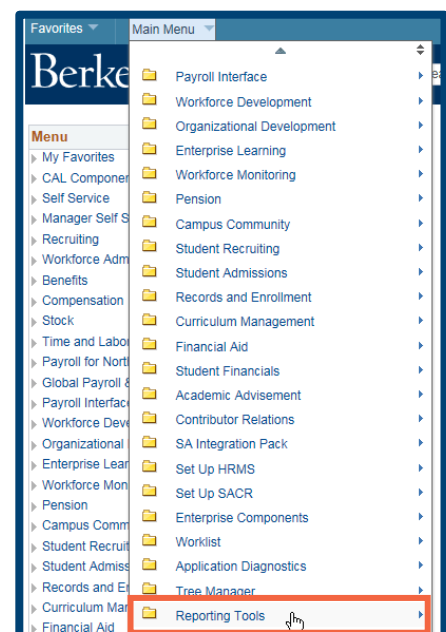
Private student information is considered Level 1 and includes, but is not limited to, academic records, information in personnel files, student conduct issues, SID, certain personal contact information, as well as other sensitive information encountered while on the job. Level 2 information, which if 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.

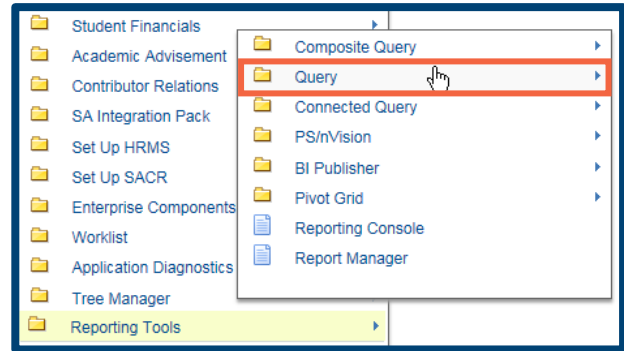


**NOTE:** Your menu may differ, based on your security access and functions.

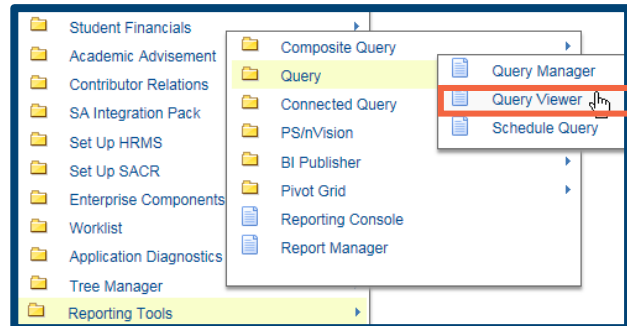
2. Click the **Reporting Tools** link.



- Click the **Query** link.



- Click **Query Viewer**, which opens a **Query Viewer** window.



## SEARCHING FOR A QUERY

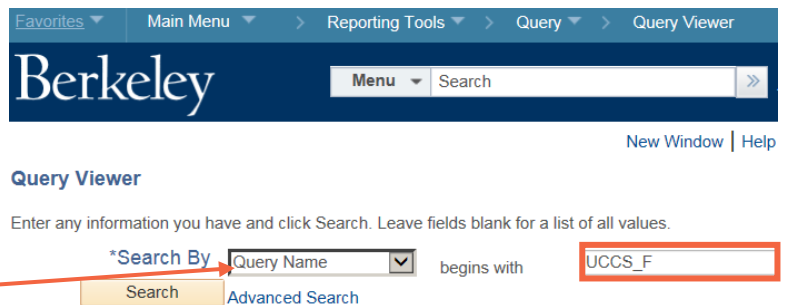
A list of Financial Aid reports can be found at <http://sisproject.berkeley.edu/reporting>

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

- 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 **"%"**



- 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”.

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

**Query Viewer**

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

\*Search By: Query Name (dropdown) begins with: [text box]

[Search] [Advanced Search]

**Search Criteria:**

- Query Name: begins with UCCS\_F
- Description: begins with [text box]
- Uses Record Name: begins with [text box]
- Uses Field Name: contains ISIR
- Access Group Name: begins with [text box]
- Folder Name: begins with [text box]
- \*Query Type: = User
- Owner: = [text box]

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

[Search] [Clear] [Basic Search]

**Search Results**

\*Folder View: All Folders

Query	Personalize	Find	View	100	First	1-30 of 104	Last		
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UCCS_FA_QBU_SSN_UPDATE_MCP	Selects S/M Rules 30, 40	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCCS_F_CALISIR_CORR_EMPL	CallSIR Corr record by EMPL ID	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCCS_F_CALISIR_L1_LOWNEED	CAL ISIR AutoLoad - 1st Level	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCCS_F_CALISIR_L2_EFC_CHG_OK	CAL ISIR AutoLoad - 2nd Level	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

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.

- Enter **UCCS\_F\_LW\_TRAIN** and click **Search**.

- 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

**Query Viewer**

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

\*Search By: Query Name (dropdown) begins with: UCCS\_F\_LW\_TRAIN

[Search] [Advanced Search]

**Search Results**

\*Folder View: All Folders

Query	Personalize	Find	View	All	First	1 of 1	Last		
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UCCS_F_LW_TRAINING_SAMPLE	sample query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

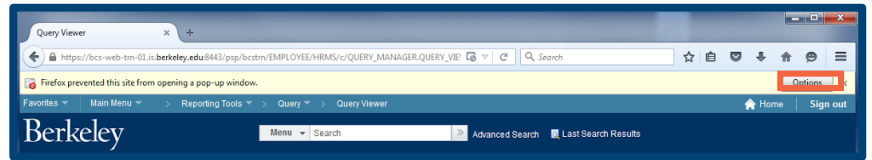
select Excel.

## 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.

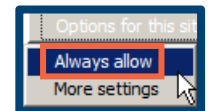


Internet Explorer



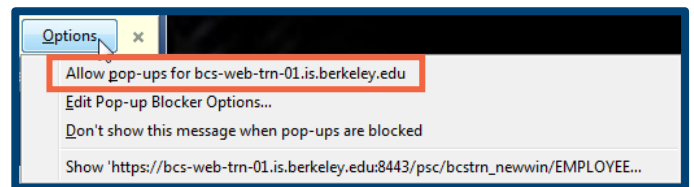
Firefox

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



Internet Explorer

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

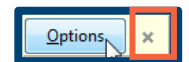


Firefox

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



Internet Explorer



Firefox

## Modifying Parameters

- 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**.

- Click the **View Results** button.
- 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.

- 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.

### UCCS\_F\_LW\_TRAINING\_SAMPLE - sample query

Aid Yr:

First Name:

**View Results**

ID	Institution	Aid Yr	Trans Nbr	Verif Track Flg	SAR C Flag Chng	In Family	In College
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### UCCS\_F\_LW\_TRAINING\_SAMPLE - sample query

Aid Yr:

First Name:

**View Results**

ID	Institution	Aid Yr	Trans Nbr	Verif Track Flg	SAR C Flag Chng	In Family	In College
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### UCCS\_F\_LW\_TRAINING\_SAMPLE - sample query

Aid Yr:

First Name:

**View Results**

ID	Institution	Aid Yr	Trans Nbr	Verif Track Flg	SAR C Flag Chng	In Family	In College
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Do you want to open or save UCCS\_F\_LW\_TRAINING\_SAMPLE\_476....xls (10.5 KB) from bcs-web-trn-01.is.berkeley.edu?

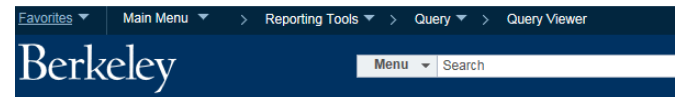
**Open** **Save** **Cancel**

UCCS\_F\_LW\_TRAINING\_SAMPLE\_47607713.xls [Read-Only] [Compatibility Mode] - Excel

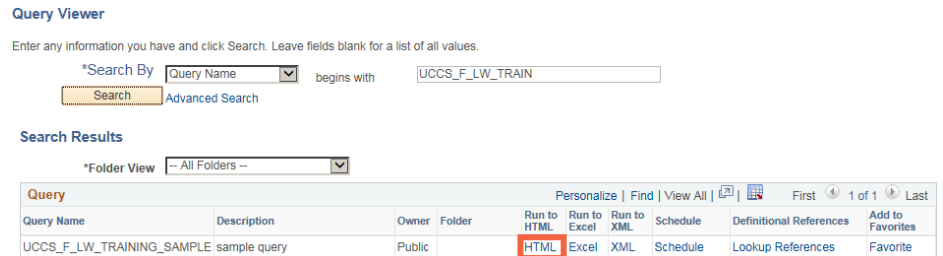
ID	Institution	Aid Yr	Trans Nbr	Verif Track Flg	SAR C Flag Chng	In Family	In College
30010000	UCB01	2017	5				
26000000	UCB01	2017	1			01	1
26000000	UCB01	2017	1			01	1
30010000	UCB01	2017	2				
30010000	UCB01	2017	1			01	1
13000000	UCB01	2017	1			01	1
30010000	UCB01	2017	2			01	1
30010000	UCB01	2017	2			01	1
30010000	UCB01	2017	1				
30010000	UCB01	2017	1			01	1
25000000	UCB01	2017	1			01	1

## Exporting a Query to HTML

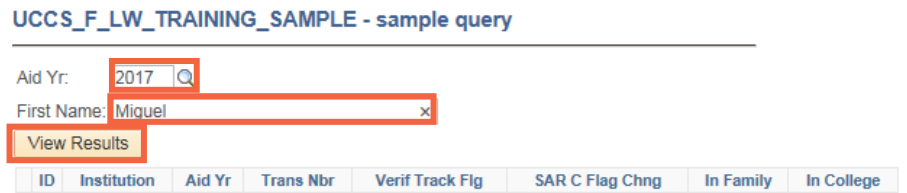
17. From the **Query Viewer** window, search for a query.



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

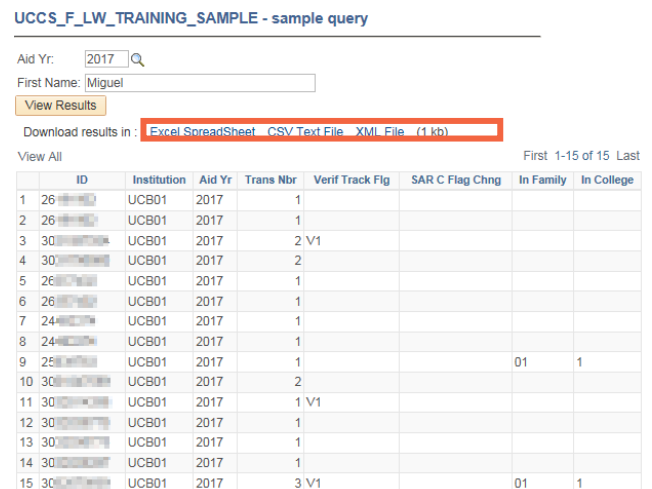


19. If your report has prompts, fill in the appropriate values to configure the parameters.

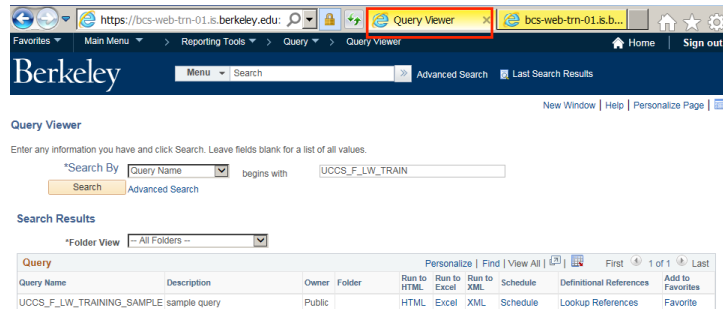
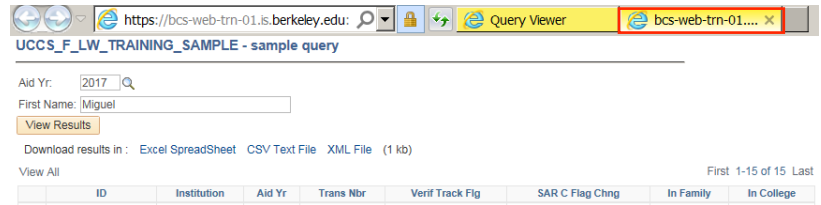


20. Click the **View Results** button.

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**.



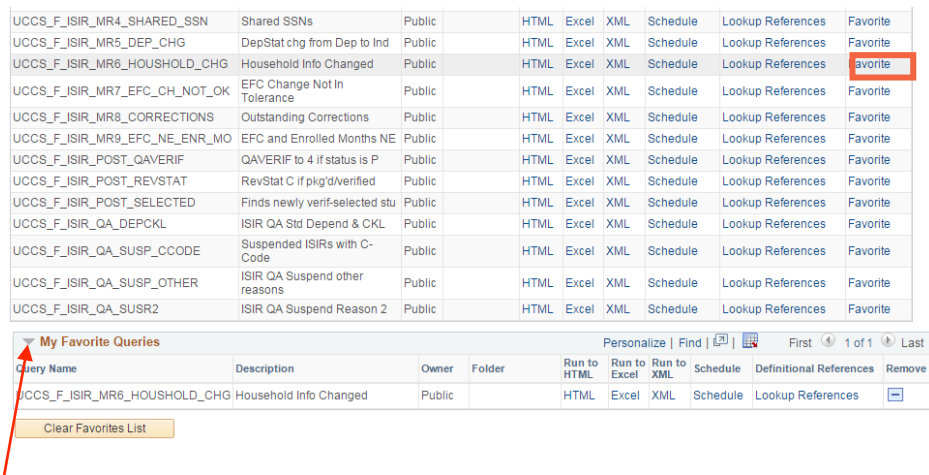
22. Observe that the **Query Viewer** is still open in its own browser tab, and the **HTML** output is in a separate browser tab. This enables you to close the results tab and return to run a different query.



## Making a Query a Favorite

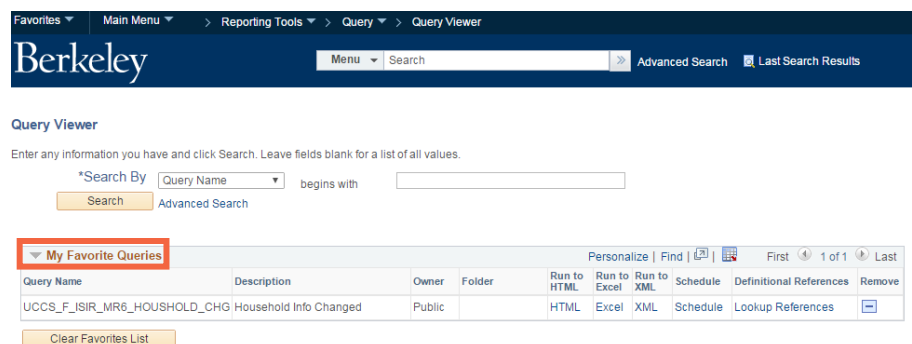
23. You can mark a query a **Favorite**, so you don't have to search for it.

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.