

How to Schedule a Report

This job aid is used by class schedulers and details the process for canceling a class section prior to or after enrollment.

Contents

[How to Schedule a Report](#)

[Create a Run Control](#)

[Best practices for naming a Run Control:](#)

[Run the process](#)

[Create the Process Scheduler Request](#)

[Cancel a report](#)

[Best Practices and Notes:](#)

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.*

Favorites > Main Menu > Reporting Tools > Query > Schedule Query

Berkeley

Schedule Query

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

Find an Existing Value **Add a New Value**

▼ Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Search Advanced Search

Find an Existing Value | Add a New Value

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

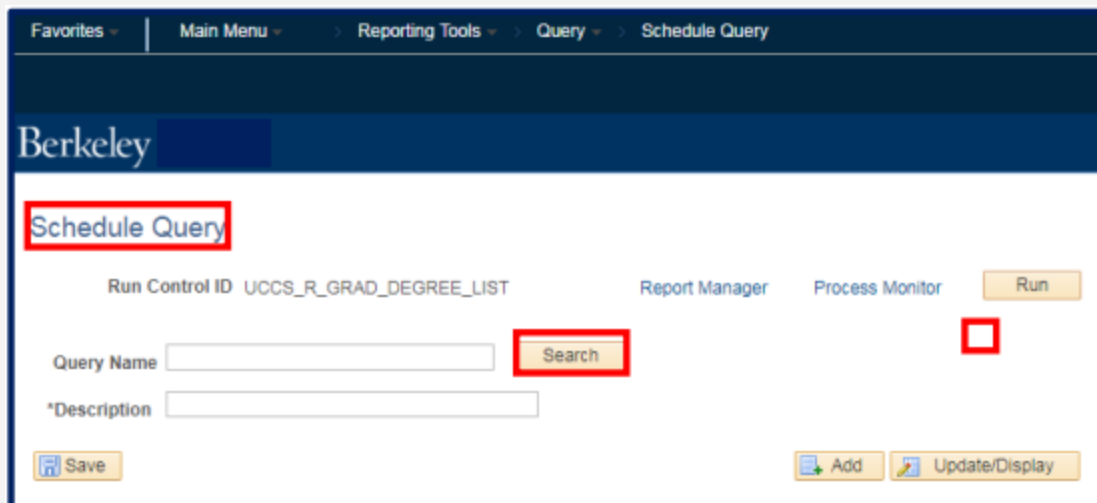
Be consistent with your run control names to easily identify them to check and/or cancel in the future.

4. Select **Add**



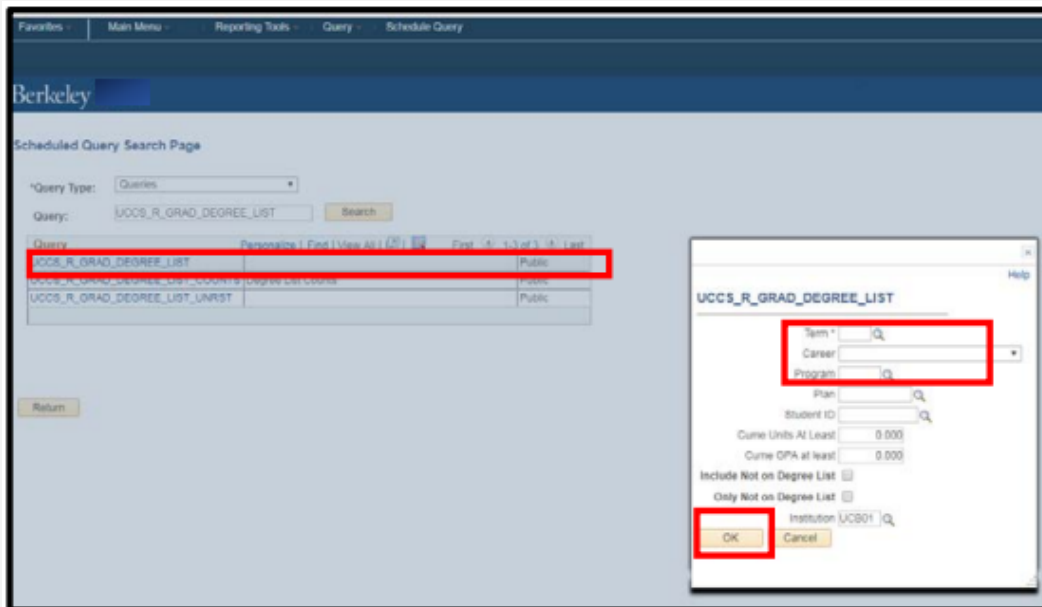
The screenshot shows a web form titled "Schedule Query". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a text input field labeled "Run Control ID", which is highlighted with a red border. Underneath the input field is a yellow button labeled "Add", also highlighted with a red border. At the bottom of the form, there are two links: "Find an Existing Value" and "Add a New Value".

5. Enter or Search Query Name

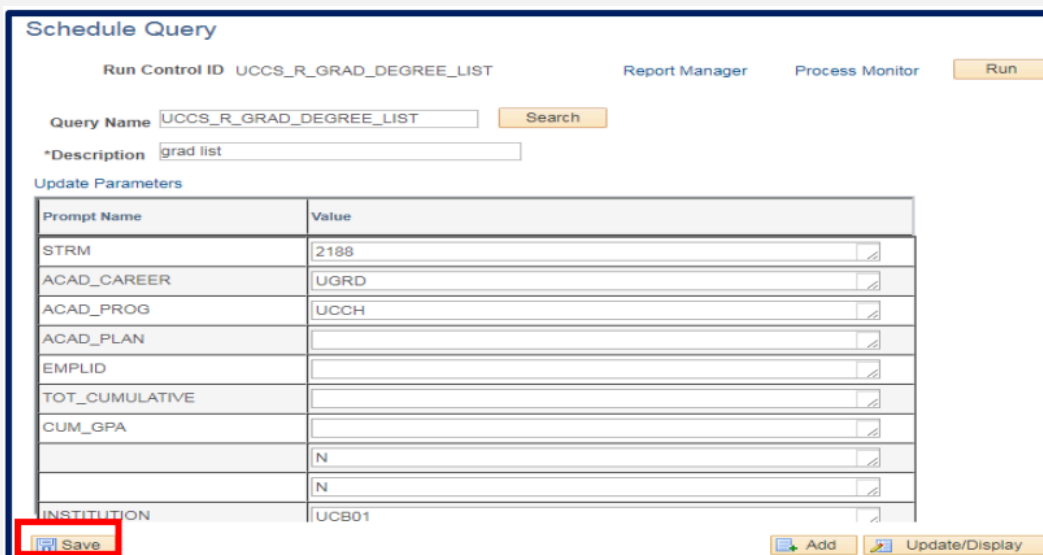


The screenshot shows the Berkeley Student Information Systems interface. The breadcrumb trail at the top reads: "Favorites > Main Menu > Reporting Tools > Query > Schedule Query". The "Berkeley" logo is visible in the top left. The main content area is titled "Schedule Query" and is highlighted with a red box. Below the title, the "Run Control ID" is set to "UCCS_R_GRAD_DEGREE_LIST". There are buttons for "Report Manager", "Process Monitor", and "Run". Below these is a "Query Name" input field with a "Search" button next to it, which is highlighted with a red box. There is also a "Description" input field. At the bottom, there are buttons for "Save", "Add", and "Update/Display".

6. Select the **Query** you want
7. Fill in any **prompts** requested and Select **OK**

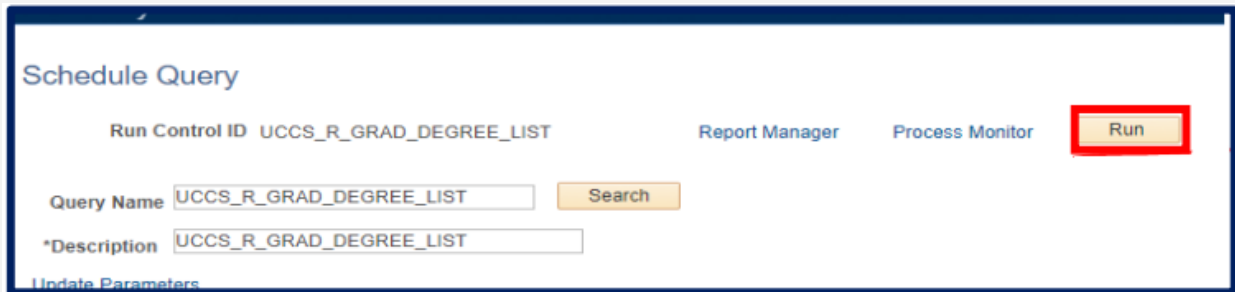


8. Enter a ***Description** if it didn't autofill.
9. Select **Save**



Run the process

1. Select **Run**



Schedule Query

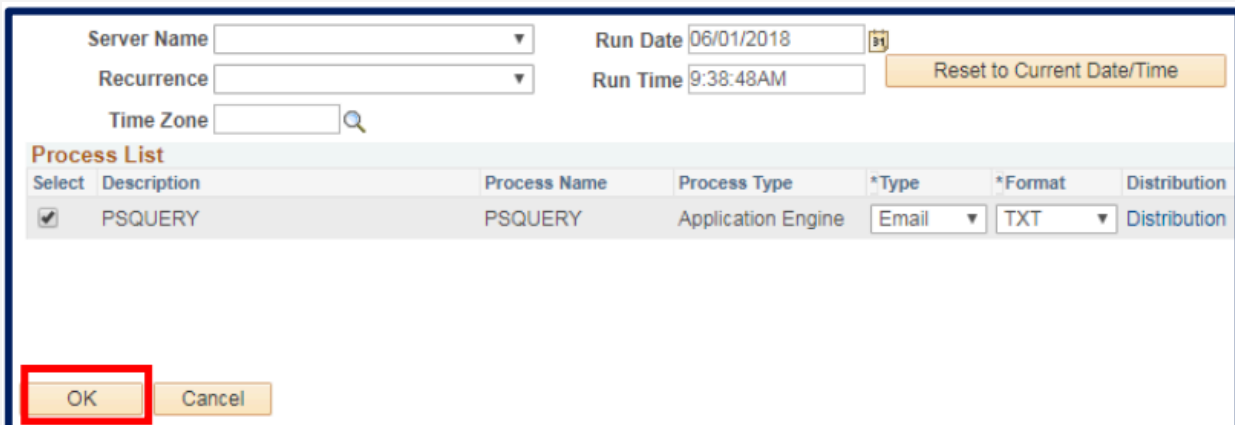
Run Control ID: UCCS_R_GRAD_DEGREE_LIST Report Manager Process Monitor **Run**

Query Name: Search

*Description:

[Update Parameters](#)

2. Select **OK**



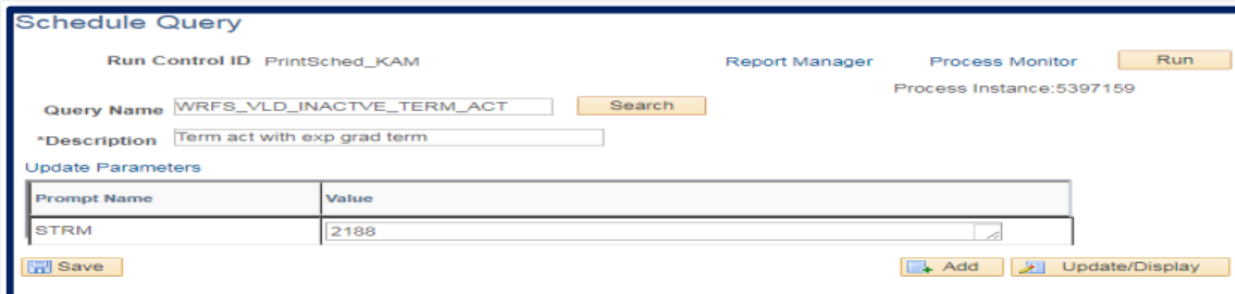
Server Name: Run Date:

Recurrence: Run 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



Schedule Query

Run Control ID: PrintSched_KAM Report Manager Process Monitor **Run**

Query Name: Search

*Description:

[Update Parameters](#)

Prompt Name	Value
STRM	<input type="text" value="2188"/>

Process Instance: 5397159

Create the Process Scheduler Request

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

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

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.)

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

4. Set **Distribution**

- a. 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).

- b. 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.

- a. Report will be sent to your email if Type chosen was "Email".
- b. Report will display in screen below is Type chosen was "Web".

Distribution Detail

Process Name PSQUERY
Process Type Application Engine
Folder Name
Retention Days 30

Email Only

Email Subject Degree List Email With Log: Email Web Report:
Message Text Today's degree list
Email Address List

Distribute To

*ID Type User *Distribution ID 955823

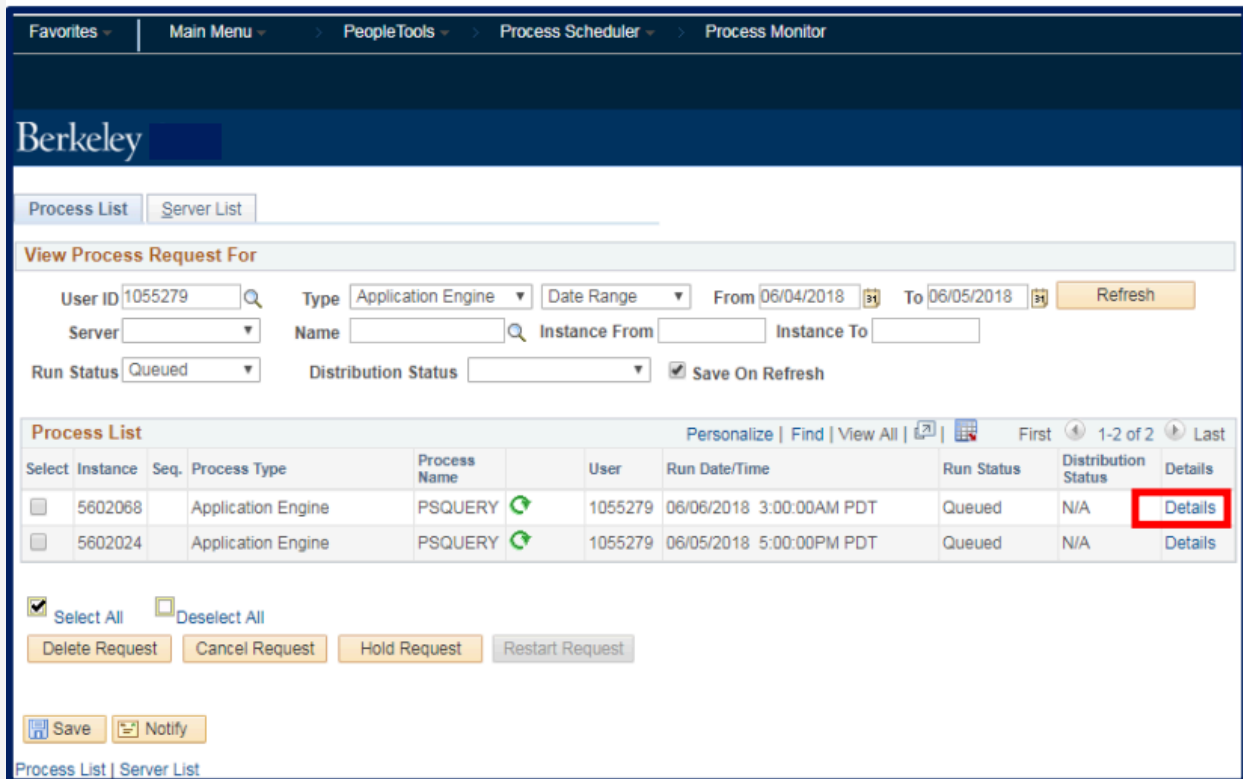
OK Cancel

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**.



The screenshot shows the Berkeley Process Monitor interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > PeopleTools > Process Scheduler > Process Monitor. Below this is the Berkeley logo and a search bar. The main section is titled "View Process Request For" and contains several input fields: User ID (1055279), Type (Application Engine), Date Range (From 06/04/2018 To 06/05/2018), Server, Name, Instance From, Instance To, Run Status (Queued), and Distribution Status. A "Refresh" button is located to the right of the Date Range fields. Below the search fields is a "Process List" table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains two rows of data. The first row has Instance 5602068, Process Type Application Engine, Process Name PSQUERY, User 1055279, Run Date/Time 06/06/2018 3:00:00AM PDT, Run Status Queued, and Distribution Status N/A. The second row has Instance 5602024, Process Type Application Engine, Process Name PSQUERY, User 1055279, Run Date/Time 06/05/2018 5:00:00PM PDT, Run Status Queued, and Distribution Status N/A. The "Details" link in the second row is highlighted with a red box. Below the table are buttons for "Select All", "Deselect All", "Delete Request", "Cancel Request", "Hold Request", and "Restart Request". At the bottom, there are "Save" and "Notify" buttons.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5602068		Application Engine	PSQUERY	1055279	06/06/2018 3:00:00AM PDT	Queued	N/A	Details
<input type="checkbox"/>	5602024		Application Engine	PSQUERY	1055279	06/05/2018 5:00:00PM PDT	Queued	N/A	Details

3. Select **Cancel Request**
4. Click **OK**

Process Detail

Process

Instance 5397159 Type Application Engine
 Name PSQUERY Description PSQUERY
 Run Status Success Distribution Status Posted

Run **Update Process**

Run Control ID PrintSched_KAM Hold Request
 Location Server Queue Request
 Server PSUNX1 **Cancel Request**
 Recurrence Delete Request
 Re-send Content Restart Request

Date/Time **Actions**

Request Created On 05/16/2018 2:51:37PM PDT Parameters Transfer
 Run Anytime After 05/16/2018 2:48:36PM PDT Message Log View Locks
 Began Process At 05/16/2018 2:52:01PM PDT Batch Timings
 Ended Process At 05/16/2018 2:53:31PM PDT View Log/Trace

The process is now canceled and will no longer run.

Process List Personalize | Find | View All | | First 1-18 of 18 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5601654		Application Engine	PSQUERY	1055279	06/01/2018 7:00:00PM PDT	<input checked="" type="button" value="Cancel"/>	N/A	Details
<input type="checkbox"/>	5601653		Application Engine	PSQUERY	1055279	06/01/2018 10:42:56AM PDT	Success	Posted	Details

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.