Berkeley | Student Information Systems

SIS Job Aid #1019

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

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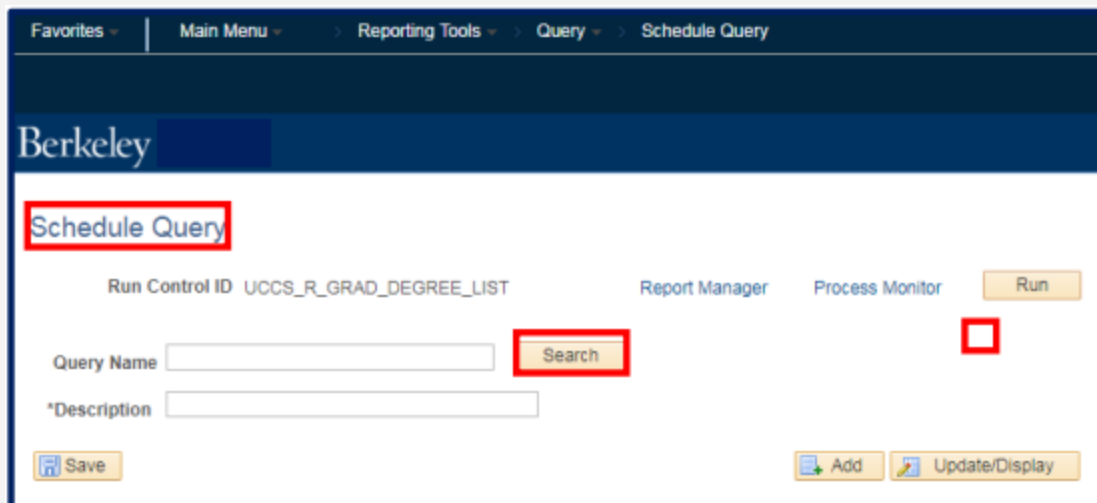
Be consistent with your run control names to easily identify them to check and/or cancel in the future.
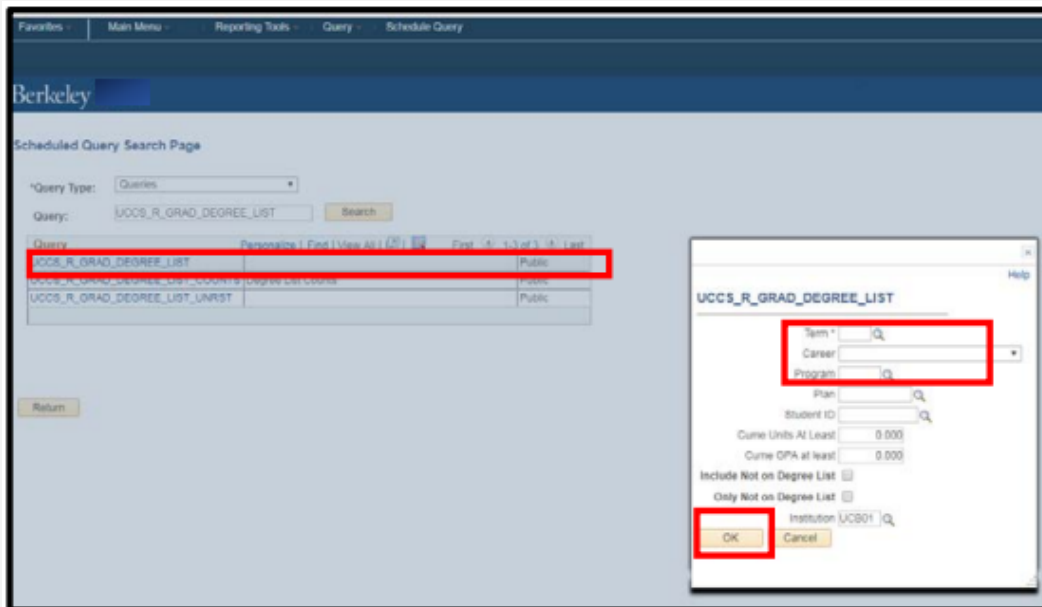
4. Select **Add**

5. **Enter** or **Search Query Name**

6. Select the **Query** you want

7. Fill in any **prompts** requested and Select **OK**
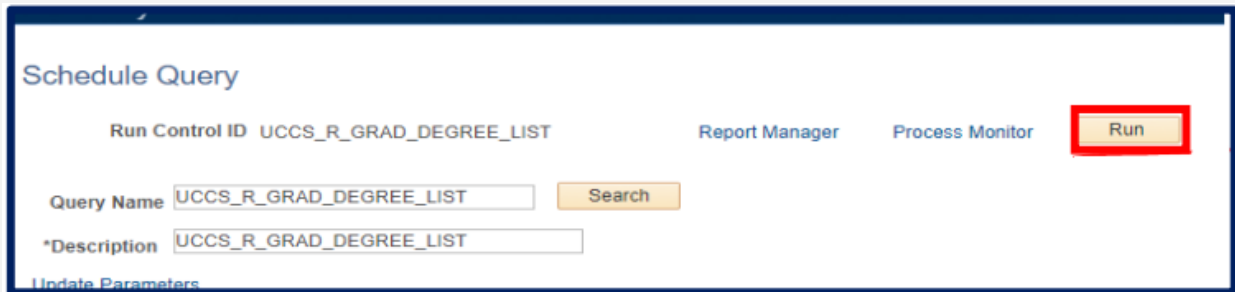
8. Enter a ***Description** if it didn't autofill.

9. Select **Save**
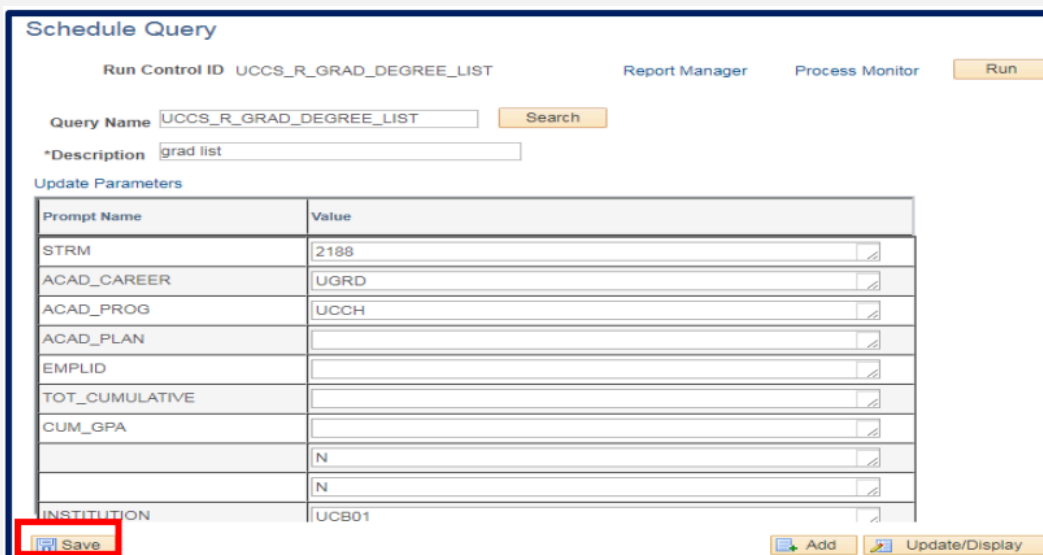
Run the process

1. Select **Run**

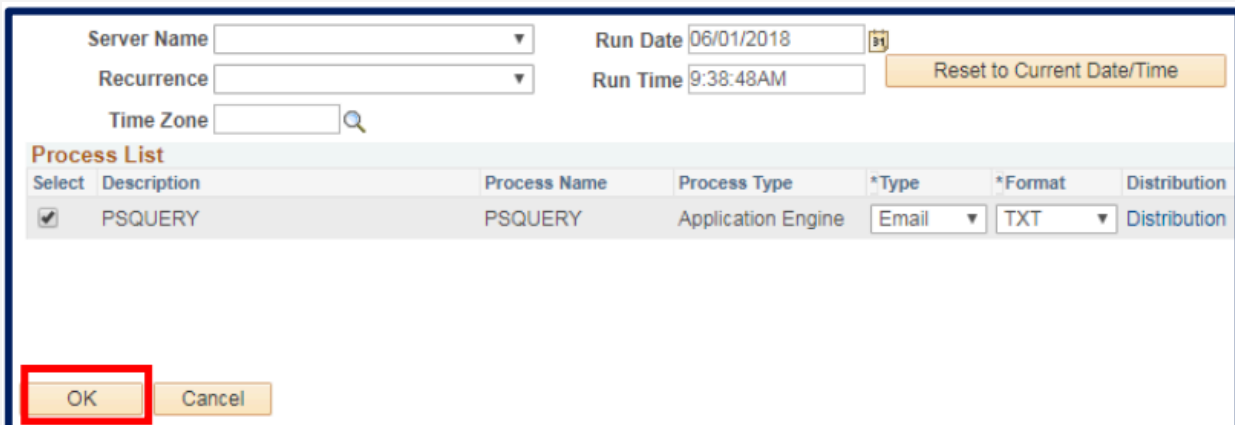2. Select **OK**

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**

    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".

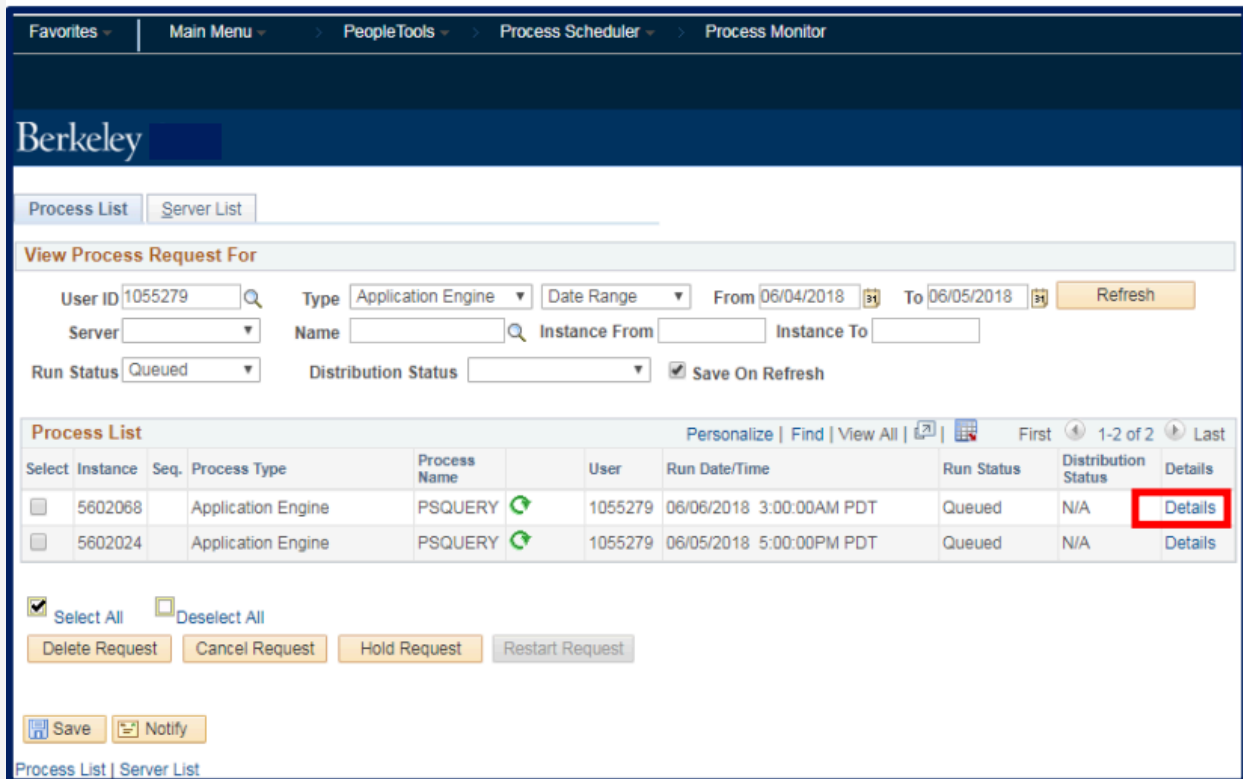   b. Report will display in screen below is Type chosen was "Web".

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 canceled and will no longer run.

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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.