

# Scheduling Query of Type = Web and Format = XLS

## I. SCHEDULING THE QUERY FOR THE FIRST TIME

1. Navigate to Main Menu>Reporting Tools>Query>Schedule Queries. Page will default to the below screenshot.

Favorities  Main Menu  Favoriting Tools  Query  Schedule Queries
Schedule Query
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

2. Click the "Add a New Value" tab to create a new Run Control ID. Give it a meaningful name, something relevant to the process you are running (one idea for the Run control ID can be the name of the query you're trying to run) and click the "Add" button.

Note: Run Control ID does not allow spaces. If need to separate, you can use underscores as shown below.

Favorites  Main Menu HAWA	> Reporting Tools ▼ > Question	uery 🔻 > Schedule Queries					
Schedule Query							
Eind an Existing Value	Add a New Value						
*Run Control ID Run_Control_Name_Here							
Add							
Find an Existing Value   Add	a New Value						

3. The following page displays. Enter the name of the query to be scheduled and click the "Search" button.

Schedule Query	
Run Control ID Run_Control_Name_Here Report Manager Proc	cess Monitor Run
Query Name HIP_TL_LV_BAL_BY_EE Search	

4. On the next screen, click the link containing the query name to be scheduled. Note: If the query has no prompts, next step will jump to number 6.

Favorities * Main Menu * > Reporting Tools * > Quer HAWAII Information Portal		
Schedule Query	Scheduled Query Search Page	×
Run Control ID Run_Control_Name_Here Query Name HIP_TL_LV_BAL_BY_EE *Description Save	Cuery Type:       Queries       ▼         Query:       HIP_TL_LV_BAL_BY_EE       Search         Cuery       If I to f1 ▼       ▶ I View All         IFF       Q       If I to f1 ▼       ▶ I View All         HIP_TL_LV_BAL_BY_EE       Leave Balances at Month End       Public         Return       Public       Public	Help 

5. Note: In this case, this query has prompts, so go ahead and enter the prompt and click the "**OK**" button.

Favorites Wain Menu >> Reporting Tools >> Query >> Schedule Queries		
Schedule Query		
Run Control ID Run_Control_Name_Here	Report Manager Process Monitor Run	~
Query Name       HIP_TL_LV_BAL_BY_EE       Search         *Description	HIP_TL_LV_BAL_BY_EE <sup>•</sup> Date 10/31/2024 Q OK Cancel	Help

	The following screen	displays,	click the	"Run"	button
-					

The following scre	een displays, click the " <b>Run</b> " buttor	۱.		
avorites V Main Menu V HAWAII Information Portal	> Reporting Tools • > Query • > Schedule Queries			
Schedule Query Run Control ID	Run_Control_Name_Here	Report Manager	Process Monitor	Run
Query Name HIP_TL_ *Description Leave Ba Update Parameters	LV_BAL_BY_EE Se alances at Month End	arch		
Prompt Name	Value			
THE_DATE	2024-10-31		*	
Save			Add	Update/Display

- 7. At the next screen, select the below options and click the "**OK**" button. Server Name = **PSNT** 
  - Time Zone = **HST**

\*Type = Web \*Format = XLS

	Process Scheduler Request											
							He					
	User ID		Run Control II	Run_Control	_Name_Here							
	Server Name PSNT	~	Run Date 11/18/2024									
	Recurrence	~	Run Time 10:59:34AM Reset to Current Date/Time									
	Time Zone HST Q	Hawaijan Time										
Process	s List											
Select	Description	Process Name	Process Type	Туре	Format	Distribution						
	PSQUERY	PSQUERY	Application Engine	Web 🗸	XLS 🗸	Distribution						
OK	Cancel											

### 8. Click the "Process Monitor" link to see the status of the scheduled run.

Schedule Query				
Run Control ID	Run_Control_Name_Here	Report Manager	Process Monitor	Run

<ol><li>Click the "Refresh" button to see the status of the schedul</li></ol>	d run.
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Proces	ss List	Server List								
View Process Request For User ID Q Type V Last V 1 Days V Refresh										
Serv	er	~	Name	Q Instan	ce From	Instance To		Clear		
Run S	tatus	~	Distribution Status		Ƴ <mark>⊻</mark> Sa	ve On Refresh Report Mana	ıger F	Reset		
▼ Process List I → View All										
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
	806585		Application Engine	PSQUERY		11/18/2024 10:59:34AM HST	Processing	N/A	Details	▼Actions

10. Once the "Run Status = Success" and "Distribution Status = Posted", Click on the "Report Manager" link or direct menu path: Reporting Tools>Report Manager

Proces	ss List	Server List									
View Process Request For User ID Q Type V Last V 1 Days V Refresh											
Serve	er	~	Name	Q Instan	ce From	Instance To		Clear			
Run St	tatus	~	Distribution Status		🖌 🔽 Sa	ve On Refresh Report Mana	ager	Reset			
▼ Process List    Image: Contract of the second											
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions	
	806585		Application Engine	PSQUERY		11/18/2024 10:59:34AM HST	Success	Posted	Details	▼Actions	

# 11. Under the "Administration" tab, click the link under "Description" to view the file.

List	Explorer	Administrati	on Archives					
View Pepe	rte Eor							
User ID		Туре	Las	t 🗸	1	Days 🗸		Refresh
Status		► Folder	✓ Instance	to				
Report List				<b>I4</b>	1-1 of 1 👻		View All	
Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details	
	764715	806585	Leave Balances at Month End	11/18/2024 11:04:20AM	Microsoft Excel Files (*.xls)	Posted	Details	
Select Al	[	Deselect All			1			1
Delete		Click the delete	e button to delete the selected report(s)					
Go back to Pr	ocess Monitor							
Save								
List   Exploi	er   Adminis	stration   Arch	ves					

## **RE-RUNNING QUERY THROUH THE QUERY SCHEDULER**

<u>NOTE</u>: The next time you like to run the same query through the schedule process, you can reuse the same **Run** Control ID you created above, to run the query again.

1. Navigate to Main Menu>Reporting Tools>Query>Schedule Queries and click the "Search" button. All the available Run Control IDs created by you "the user" will appear. Select the one associated with the specific process you are running by clicking the hyperlink under the "Run Control ID".

Favorites  Main Menu HAWA	> Reporting Tools * > Query	r 🕶 > Schedule Queries 🛛 🧕
Schedule Query Enter any information you	have and click Search. Leave fie	elds blank for a list of all values
Find an Existing Val	ue Add a New Value	
Search Criteria Run Control	ID v begins with	
Case Sensitive		
Search Advanced S	earch	
Search Results		
View All	[4]	1-1 of 1 🗸 🕨 🕨
Run Control ID	Description	Query Name
Run_Control_Name_Here	Leave Balances at Month End	HIP_TL_LV_BAL_BY_EE

 Next screen will default same as step 6 above, when you run the process for the first time. <u>Note:</u> The Run Control saves the parameters from last run, so you will need to update the value(s), in the case that prompts exist. In this case you need to update the value for the "THE\_DATE" prompt by clicking the hyperlink labeled "Update Parameters".

Favorites - Main Menu	u 🖝 > Reporting Tools 👻 > Query 🐨 > Schedule Queries tion rtal	
Schedule Query Run Control	IID Run_Control_Name_Here Report Manager Process Monitor Run	
Query Name HIF *Description Lea Update Parameters	IP_TL_LV_BAL_BY_EE     Search       eave Balances at Month End     Image: Search	
Prompt Name	Value	
THE_DATE	2024-10-31	
Save	Add Update/Disp	lay



If you choose to update the parameters by clicking the "**Update Parameters**" link, the following screen will display. Select the appropriate value and click the "**OK**" button.

	×
	Help
HIP_TL_LV_BAL_BY_EE	
*Date Q OK Cancel	-
	.::

#### 4. Click the "Run" button.

Favorites - Main Menu - Main - Main Menu - Main - Main Menu - Main -	r > Re	eporting Tools 🔻 🔉 Query 🔫 🗧	Sched	ule Queries 🧕			
Schedule Query Run Control II	D Run_	_Control_Name_Here			Report Manager	Process Monitor	Run
Query Name HIP. *Description Lea Update Parameters	_TL_LV_BA	N_BY_EE		Search			
Prompt Name		Value					
THE_DATE		2024-09-30				*	
Save Return to	Search	Previous in List	Next in	List		Add	Update/Display

5. The "**Process Scheduler Request**" page should have the parameters already saved, but you can update as needed. Click the "**OK**" button.

		Process	Scheduler Request	1			;
							Hel
	User ID		Run Control I	Run_Control_	Name_Here		
	Server Name PSNT	~	Run Date 11/22/2024				
	Recurrence	~	Run Time 10:14:52AM		Reset to Current I	Date/Time	
	Time Zone HST Q						
Process	List	awallan Time					
Select	Description	Process Name	Process Type	туре	Format	Distribution	
	PSQUERY	PSQUERY	Application Engine	Web 🗸	XLS 🗸	Distribution	
ОК	Cancel						



Report Manager	Process Monitor	Run

7. Click the "Refresh" button to see the status of the scheduled run.

Proces	ss List	Server List									
View Pro	cess Requ	est For									
User Serv	ID	م •	Type	۲ ال م ام	ast stance From	Instance To	Days •		Diear		
Run S	tatus	~	Distribution Stat	tus	Ť.	Save On Refresh	Report Manage	er F	teset		
Proces	ss List										
I C	ર								● 1-1 of	1 👻 🕨	View All
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	F	Run Status	Distribution Status	Details	Actions
	806585		Application Engine	PSQUER	(	11/18/2024 10:59:34AM	HST F	Processing	N/A	Details	▼Actions

8. Once the "Run Status = Success" and "Distribution Status = Posted", Click on the "Report Manager" link or direct menu path: Reporting Tools>Report Manager

Proces	ss List	Server List									
View Pro	cess Requ	est For									
User		Q	Туре	<ul> <li>✓ Last</li> </ul>	~	1	Days ~	R	efresh		
Serv	er	~	Name	Q Instar	nce From	Instance To			Clear		
Run S	tatus	~	Distribution Status		<b>~</b> Sa	ive On Refresh	Report Manag	aer F	Reset		
<ul> <li>Proces</li> </ul>	ss List										
<b>■</b> C	٤								4 4 1-1 of 1	•	View All
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time		Run Status	Distribution Status	Details	Actions
	806585		Application Engine	PSQUERY		11/18/2024 10:59:34AM	HST	Success	Posted	Details	▼Actions

9. Under the "Administration" tab, click the link under "Description" to view the file. This should prompt you for the location where to download the file on your computer.

List	Explorer	Administrati	on Archives							
View Repor	ts For									
User ID		Туре		~	Last	<b>~</b>	1	Days 🗸		Refresh
		~		✓ Instand	ce	to				
Status		Folder			L					
Report List										
■ Q							1-1 of 1 ¥		View All	
Select	Report ID	Prcs Instance	Description		F	Request )ate/Time	Format	Status	Details	
	7647 <b>1</b> 5	806585	Leave Balances at I	Month End	1 1	1/18/2024 1:04:20AM	Microsoft Excel Files (*.xls)	Posted	Details	
Select All		Deselect All								-
Delete		Click the delete	e button to delete the	selected repo	ort(s)					
30 back to Pro	cess Monito	r								
Save										
.ist   Explore	er   Adminis	stration   Arch	ves							