



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.

The screenshot shows the 'Schedule Query' page in the Hawaii Information Portal. The breadcrumb navigation is 'Main Menu > Reporting Tools > Query > Schedule Queries'. The page title is 'Schedule Query'. Below the title, there is a search criteria section with a dropdown menu set to 'Run Control ID' and a 'begins with' text box. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search' button is also present.

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.

The screenshot shows the 'Schedule Query' page with the 'Add a New Value' tab selected. The 'Run Control ID' field is filled with the text 'Run_Control_Name_Here'. The 'Add' button is highlighted with a red box.



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

Navigation: Favorites > Main Menu > Reporting Tools > Query > Schedule Queries

HAWAII Information Portal

Schedule Query

Run Control ID Run_Control_Name_Here Report Manager Process Monitor Run

Query Name

*Description

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.

Navigation: Favorites > Main Menu > Reporting Tools > Query > Schedule Queries

HAWAII Information Portal

Schedule Query

Run Control ID Run_Control_Name_Here

Query Name

*Description

Scheduled Query Search Page

Query Type:

Query:

Query

<input type="button" value="Q"/>	<input type="button" value="Q"/>	1-1 of 1	<input type="button" value="View All"/>
<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>
<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>

<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>
<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>
<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>	<input type="button" value="Q"/>

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

Navigation: Favorites > Main Menu > Reporting Tools > Query > Schedule Queries

HAWAII Information Portal

Schedule Query

Run Control ID Run_Control_Name_Here Report Manager Process Monitor Run

Query Name

*Description

HIP_TL_LV_BAL_BY_EE

*Date



6. The following screen displays, click the “Run” button.

[Favorites](#) > [Main Menu](#) > [Reporting Tools](#) > [Query](#) > [Schedule Queries](#)

HAWAII Information Portal

Schedule Query

Run Control ID Run_Control_Name_Here Report Manager Process Monitor **Run**

Query Name: Search

*Description:

[Update Parameters](#)

Prompt Name	Value
THE_DATE	<input type="text" value="2024-10-31"/>

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

User ID Run Control ID Run_Control_Name_Here

Server Name: Run Date:

Recurrence: Run Time:

Time Zone: Hawaiian Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	<input type="text" value="Web"/>	<input type="text" value="XLS"/>	Distribution

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



9. Click the “Refresh” button to see the status of the scheduled run.

Process List | Server List

View Process Request For

User ID Type Last 1 Days [Refresh](#)

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

▼ **Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	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**

Process List | Server List

View Process Request For

User ID Type Last 1 Days [Refresh](#)

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

▼ **Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	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 | **Administration** | Archives

View Reports For

User ID Type Last 1 Days [Refresh](#)

Status Folder Instance to

Report List

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	764715	806585	Leave Balances at Month End	11/18/2024 11:04:20AM	Microsoft Excel Files (*.xls)	Posted	Details

Select All Deselect All

[Delete](#) Click the delete button to delete the selected report(s)

[Go back to Process Monitor](#)

[Save](#)

List | Explorer | Administration | Archives



RE-RUNNING QUERY THROUGH THE QUERY SCHEDULER

NOTE: 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**”.

Search Results

Run Control ID	Description	Query Name
Run_Control_Name_Here	Leave Balances at Month End	HIP_TL_LV_BAL_BY_EE

2. Next screen will default same as **step 6** above, when you run the process for the first time. **Note:** 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**”.

Update Parameters

Prompt Name	Value
THE_DATE	2024-10-31



- 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.

HIP_TL_LV_BAL_BY_EE

*Date

- Click the **“Run”** button.

Schedule Query

Run Control ID Run_Control_Name_Here Report Manager Process Monitor

Query Name

*Description

Update Parameters

Prompt Name	Value
THE_DATE	<input type="text" value="2024-09-30"/>

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

Process Scheduler Request

User ID Run Control ID Run_Control_Name_Here

Server Name Run Date

Recurrence Run Time

Time Zone Hawaiian Time

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	<input type="text" value="Web"/>	<input type="text" value="XLS"/>	Distribution



6. 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](#)

7. Click the **“Refresh”** button to see the status of the scheduled run.

Process List [Server List](#)

View Process Request For

User ID Type Last 1 Days **Refresh**

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	806585		Application Engine	PSQUERY		11/18/2024 10:59:34AM HST	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**

Process List [Server List](#)

View Process Request For

User ID Type Last 1 Days [Refresh](#)

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh **Report Manager** [Reset](#)

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	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 **Administration** Archives

View Reports For

User ID Type Last 1 Days [Refresh](#)

Status Folder Instance to

Report List

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	764715	806585	Leave Balances at Month End	11/18/2024 11:04:20AM	Microsoft Excel Files (*.xls)	Posted	Details

Select All Deselect All

[Delete](#) Click the delete button to delete the selected report(s)

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[Save](#)

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