Overview/Description
This job aid describes the steps necessary to schedule a query and retrieve the report results from the process monitor.

Best Practice
When running a query that may return a large query set, use the schedule query feature to request the query run at a later time. This will help reduce application performance issues and ensure daily processes are not impacted.

Instructions
1. Search for the Query

Navigation
NavBar > Navigator > Reporting Tools > Query > Query Manager

   a. Enter the Search By criteria.
   b. Click the query’s Schedule link.
2. Schedule the Query

a. Click **Add a New Value**.

b. Enter a new **Run control ID** (this should contain no spaces) and click **Add**.

```
Scheduled Query
```

```
Private Query Name
Query Name 980_EMPLOYEE_DATA
Run Control ID XXX_This_is_a_test

Add
```

c. Enter any required parameters if necessary.

d. Enter/update **Description**.

e. Click **OK**.

```
Schedule Query
```

```
Run Control ID XXX_This_is_a_test

OK Cancel Apply
```
3. Process Scheduler Request (This may take a minute or two to display.)

3.1. Schedule a **one-time** request

a. Leave the **Server Name** field blank.

b. Run Date defaults to the current date.

c. Enter the **Run Time**.

d. In the **Process List**, select “XLS” for the output **Format**.

e. To ensure PII, PHI, sensitive, confidential, etc. information is kept secure, select “Web" as the output **Type**. Do not select “Email.”

f. Click **OK**.

3.2. Schedule a **recurring** request

**Important**

You have the option to schedule your query as a recurring request using predefined occurrences in the **Recurrence** field. Below are things to consider when selecting one of these options:

- The **Run Date** defaults to the date the occurrence was defined. You will need to select a new run date.

- The **Run Time** defaults to the time the occurrence was defined. Once the occurrence is selected, this field is greyed out and cannot be modified.

**Recommended Recurrence Options**

- BOR Monday
- BOR Wednesday
- BOR Friday
- M-F at 5 pm
- BOR Tuesday
- BOR Thursday
- Daily
- BOR Monthly
a. Leave the **Server Name** field blank.

b. Select an appropriate **Recurrence**.

c. **Run Date** defaults to the defined date, select the correct date.

d. **Run Time** defaults to the defined time and cannot be modified.

e. In the **Process List**, select “XLS” for the output **Format**.

f. To ensure PII, PHI, sensitive, confidential, etc. information is kept secure, select “Web" as the output **Type**. Do not select “Email."

g. Click **OK**.

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### 4. View Request from the Process Monitor

**Navigation**

- Schedule Query > Process Monitor
- NavBar > Navigator > People Tools > Process Scheduler > Process Monitor

a. Locate your query in the **Process List**. If your query is scheduled to run in the future, the **Run Status** will show “Queued."

b. Click the **Details** link.
5. Retrieving Your Query Results

Use either the **Process Monitor** or **Report Manager** to retrieve your query results.

5.1. Process Monitor

**Navigation**

- Schedule Query > Process Monitor
- NavBar > Navigator > People Tools > Process Scheduler > Process Monitor

a. Locate your query in the **Process List**.
b. Verify the **Run Status** is “Success”
c. Click the **Details** link.

d. Click the **View Log/Trace** link.
e. Locate your query (should have an “.xlsx” extension) and select its name in the **File List**. A new tab/window will open with the results.

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### 5.2. Report Manager > List Tab

**Navigation**

Navbar > Navigator > Reporting Tools > Report Manager

a. Adjust your search settings if needed and click **Refresh**. Note that your query will not appear in Report Manager until it has actually run (no “queued” status in Report Manager).

b. Click the **Report Name** link on the **List** tab.
c. Locate your query (should have an “.xlsx” extension) and select its name in the **File List**. A new tab/window will open with the results.

![](image1)

5.3. Report Manager > Administration Tab

a. From the Administration tab, click the **Details** link.
b. Locate your query and select its name in the file list. A new tab/window will open with the results.