

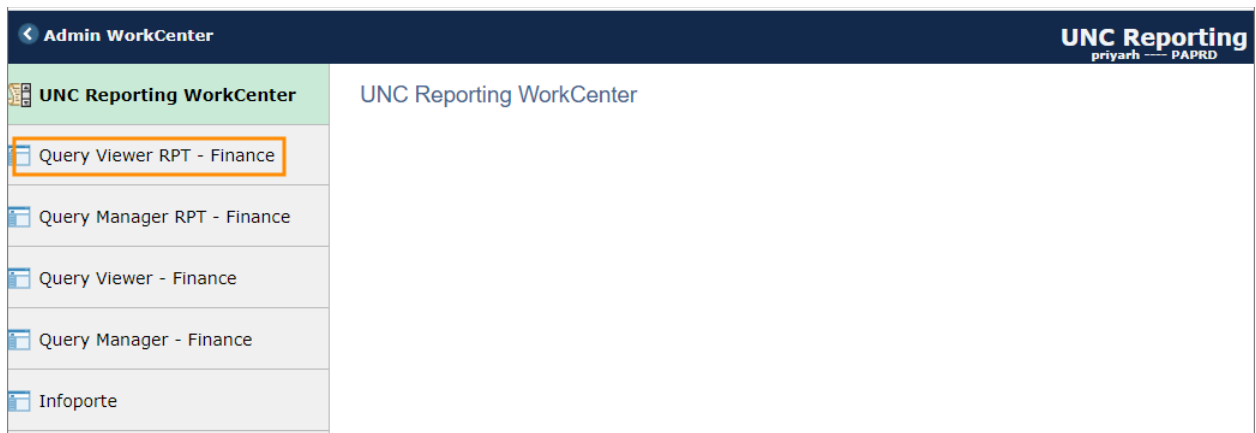
Scheduling Queries in RPT

The following instructions show you how to schedule queries in the RPT reporting environment. Scheduling queries allows you to automatically run queries after hours on a recurring basis and then view the results whenever you are ready without having to wait for the query to run.

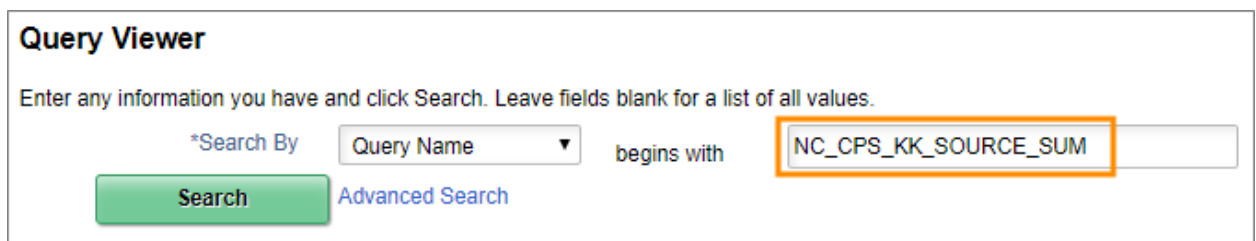
1. On the Admin WorkCenter home page in ConnectCarolina, click the **Reporting** tile.



2. From the menu on the left, click the **Query Viewer RPT – Finance** link.



3. Enter the name of the query and click the **Search** button.



4. Click the **Schedule** link.

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule
NC_CPS_KK_SOURCE_SUM	KK Source summary data	Public		HTML	Excel	XML	Schedule

5. Enter a **Run Control ID** and then click the **Add** button.

Note: For the Run Control ID, you can enter any name you'd like that helps you remember what the query is for.

Scheduled Query

Private Query

Query Name

Run Control ID

6. Enter the criteria for the query and then click the **OK** button.

Note: Enter a % sign for any criteria where you want to see all values.

[Help](#)

NC_CPS_KK_SOURCE_SUM

Unit

Bud Per

Year

Period

Dept%

Source%

7. Enter a **Description** for your query and then click the **OK** button.

Schedule Query

Run Control ID DEPT_BALANCES

Query Name NC_CPS_KK_SOURCE_SUM

*Description **KK Source summary data**

[Update Parameters](#)

Prompt Name	Value
BUSINESS_UNIT	UNCCH
BUDGET_PERIOD	2020
FISCAL_YEAR	2020
ACCOUNTING_PERIOD	10
DEPTID	318300
CLASS_FLD	%

OK Cancel Apply

8. In the **Recurrence** box, choose the time you want your query to run and in the **Format** box, choose **XLS**.

Process Scheduler Request

User ID minterc Run Control ID DEPT_BALANCES

Server Name [dropdown] Run Date 02/09/2018 [calendar icon]

Recurrence M-F at 4am [dropdown] Run Time 3:51:41AM [button: Reset to Current D...]

Time Zone [dropdown]

Process List

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web [dropdown]	XLS [dropdown]

OK Cancel

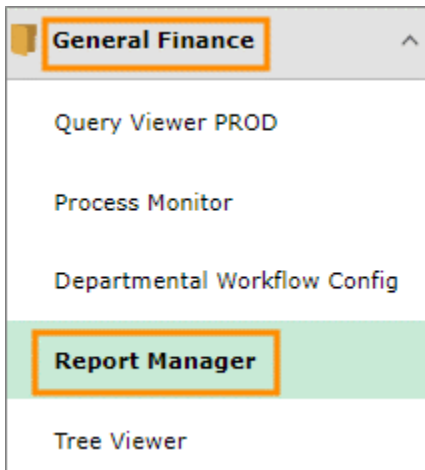
9. Click the **OK** button.
Result: Your query is now scheduled to run at the time you chose.

Seeing the Query Results

1. After the time your query was scheduled to run, click the **Finance WorkCenter** tile on the Admin WorkCenter home page.



2. Click **General Finance** and then click the **Report Manager** link.



3. Click the link for your report.

Reports						
Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance	
1	KK Source summary data	KK SOURCE SUMMARY DATA	General	04/14/20 11:58AM	8830228	10449253
2	KK Source summary data	KK SOURCE SUMMARY DATA	General	04/14/20 10:08AM	8830166	10449191

4. Click the link with **xlsx** on the end.

File List		
Name	File Size (bytes)	Datetime Created
AE_PSQUERY_10449253.stdout	289	04/14/2020 11:58:40.814363AM EDT
NC_CPS_KK_SOURCE_SUM-10449253.xlsx	16,386	04/14/2020 11:58:40.814363AM EDT

5. Choose a name and place to save your spreadsheet and then click the **Save** button.
6. Navigate to where you saved your report and open it to see the results.

Source	Source Descr	Unit	Ledger Grp	Fund Grp	Budget Period	FY	Per	Budget
12001	AA-Appropriation/Central Rcts	UNCCH	FAST	STATE	2020	2019	10	180905.00
12001	AA-Appropriation/Central Rcts	UNCCH	FAST	STATE	2020	2020	10	10157241.24
12535	Replacmt Lab Equipmt	UNCCH	FAST_REV	STATE	2020	2020	10	12493.00
12535	Replacmt Lab Equipmt	UNCCH	FAST	STATE	2020	2020	10	12493.00
12563	Summer School Receipts	UNCCH	FAST	STATE	2020	2020	10	179842.71
14101	Facilities & Admin	UNCCH	FAST	F&A	2020	2019	10	0.00
14101	Facilities & Admin	UNCCH	FAST	F&A	2020	2020	10	4189252.68
14103	NC Suspense	UNCCH	FAST	F&A	2020	2020	10	26.75
14104	F&A JV import suspense	UNCCH	FAST	F&A	2020	2020	10	0.00