

## QUICK REFERENCE GUIDE

February 20, 2024

### Schedule Queries

Queries are part of the reporting tools available to SWIFT users. Queries allow you to request and retrieve information from SWIFT. There are hundreds of queries available to you. Many queries came standard from Oracle. Many queries were written by SWIFT Module Support due to common need and user request. Available queries are based on your roles and permissions. This guide assumes the user has located and identified the query they want to run. Refer to the [Overview of SWIFT Reporting](#) user guide for general information about locating and running queries.

This Guide has three parts. In the first part, we demonstrate how to setup a scheduled query for the first time. In the second part, we demonstrate how to update the parameters of a scheduled query. Third, we demonstrate how to hold, stop, or restart a scheduled recurring query.

Through the Process Scheduler Request page, you can schedule a query to run at a specific time, instead of on demand. You can also schedule queries to run on a recurring basis, for example, daily, weekly, or monthly at a set date and time.

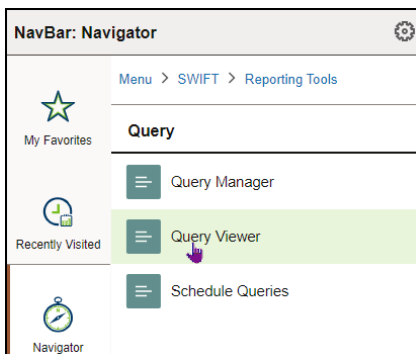
### Setup a Scheduled Query for the First Time

Step 1: Navigate to the Query Viewer.

1. Select the **NavBar** icon. It looks like a compass and is in the upper right corner of SWIFT.

Navigation Option	Navigation Path
NavBar	Navigator, SWIFT, Reporting Tools, Query, Query Viewer

2. Select **Query Viewer**.



Step 2: Search or view the list of available queries from the Query Viewer.

1. From the Query Viewer page, you may have a list of queries that you have added to your My Favorite Queries list, or you may need to search for a query.
2. Select the **Schedule** hyperlink associated to the query you want to schedule.

**Note:** Consider selecting the **Favorite** hyperlink before scheduling. This will allow you easy access to update the query as needed.

### Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

#### Search Results

\*Folder View

#### Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
M_AR_DEPOSIT_DJRNL_DETAIL	Direct JRNL Deposits Detail	Public		HTML	Excel	XML	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_AR_DEPOSIT_DJRNL_DETAIL_BEN	Direct Journal Deposits Detail	Public		HTML	Excel	XML	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_AR_DEPOSIT_DJRNL_DETAIL_DEP	Direct JRNL Deposits BY DEPTID	Public		HTML	Excel	XML	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

#### My Favorite Queries

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
M_BI_GBL_BILLS_INV_INCOMPLETE	Invoiced Bills not Processed	Public		HTML	Excel	XML	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<input type="button" value="--"/>
M_EPM_AGENCY_FOLDER_ADMINS	EPM Agy Spec Folder Admins	Public		HTML	Excel	XML	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<input type="button" value="--"/>

Step 4: Enter a Run Control ID.

1. The first time you schedule a query, you must create a specific Run Control ID for that query. If you already have a Run Control ID associated to that query or are unsure if you do, select the **Search** button from the Find an Existing Value page.
2. If you do not have a Run Control ID, select the **Add a New Value** button.

### Find an Existing Value

#### Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent  Saved

Private Query

Query Name

Run Control ID

Description

Show more options

Case Sensitive

#### Search Results

No matching values were found.

3. In the Run Control ID field, enter a word or combination of characters that are meaningful to you. Select the **Add** button.

Step 5: Enter the parameters for the query.

1. A dialog window or page displays. Enter information in the required fields. The required fields and overall layout of this page depends on the query you have chosen.
2. Select the **OK** button.

**Note:** In some instances, “%” wild card is an acceptable entry.

Step 6: Launch the Process Scheduler Request page.

1. The Schedule Query page displays. Select the **Apply** button.

Prompt Name	Value
DEPOSIT_BU	G1001
ACCOUNTING_DT	2024-01-01
ACCOUNTING_DT	2024-01-31

Step 7: Schedule your query by entering parameters from the Process Scheduler Request page.

1. The Process Scheduler Request dialog page displays. If you want to schedule a recurrence, select the drop-down in the Recurrence field and choose an option.
2. To schedule a Run date in the future, choose the **Run Date** calendar icon.

**Process Scheduler Request**

User ID: \_\_\_\_\_ Run Control ID: ARDJ

Server Name: \_\_\_\_\_ Run Date: 02/12/2024 [Calendar Icon]

Recurrence: [Dropdown] Run Time: 4:09:49PM [Reset to Current Date/Time]

Time Zone: 1ST\_OF\_MONTH\_CASH\_BALN\_EXP

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

OK Cancel

3. Select a date.

**Process Scheduler Request**

User ID: \_\_\_\_\_ Run Control ID: ARDJ

Server Name: \_\_\_\_\_ Run Date: 02/12/2024

Recurrence: MONTHLY\_ON\_FIRST Run Time: 5:00:00AM

Time Zone: [Search]

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

OK Cancel

4. The \*Type and \*Format fields are used to determine how you want to receive the output for your query. The defaults are Web and Text. This means the output will be CSV (text) file and can be found in your report manager.

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

OK Cancel

5. You can choose to receive an email with an Excel document attached. To do so, select "Email" for \*Type and XLS for \*Format.
6. You can add other users to receive the query results as well by selecting **Distribution** hyperlink.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Email	XLS	<a href="#">Distribution</a>

OK Cancel

### Step 8. Enter user information.

There are two ways to add users.

1. You can enter their email address in the Email Address List box.

**Distribution Detail**

Process Name: PSQUERY

Process Type: Application Engine

Folder Name:

Retention Days:

**Email Only**

Email Subject:     Email With Log:     Email Web Report:

Message Text:

Email Address List:

Override Sender Email Id:

**Note:** You may get a warning message that there is a syntax error in the email address. However, entering emails as shown above should work. Ensure you have the proper email format.

2. The second option to add an individual is to add their User ID to the Distribution To section of the Distribution Details page.
  - a. Select the **Plus** icon

**Distribute To**

*ID Type	*Distribution ID		
User	01152500	<input type="text"/>	<input type="text"/>

OK Cancel

- b. A new line is added. Select "User" in the \*ID Type. Use the lookup glass to find the appropriate user.

The screenshot shows a table titled "Distribute To" with two columns: "\*ID Type" and "\*Distribution ID". The first row has "User" in the first column and "01152500" in the second, with a search icon to the right. A second row is highlighted with a red box, showing an empty dropdown for "\*ID Type" and an empty search field for "\*Distribution ID" with a search icon to its right. To the right of the table are two columns of buttons: "+" and "-" for each row.

**Note:** The User ID must be set up in SWIFT with an up-to-date email address.

- c. Use the Basic or Advance search

The screenshot shows a dialog box titled "Look Up Distribution ID". It has a "Search by:" dropdown menu with "Distribution ID" selected. Below it, there is a "begins with" text input field. There are "Search", "Cancel", and "Advanced Lookup" buttons. A "Search Results" section at the bottom states "Only the first 300 results can be displayed."

Step 9. After selecting all options, select the **OK** button.

The screenshot shows a dialog box titled "Process Scheduler Request". It contains fields for "User ID", "Run Control ID", "ARDJ", "Server Name", "Recurrence", "Time Zone", "Run Date" (02/12/2024), and "Run Time" (4:25:09PM). There is a "Reset to Current Date/Time" button. Below these fields is a "Process List" table:

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

At the bottom of the dialog are "OK" and "Cancel" buttons.

## Update Your Scheduled Query

Step 1. If you need to update the parameters (values) for a scheduled query, navigate to the Query Viewer.

1. If you have marked it as a favorite, it should show on the Query Viewer page in the My Favorite Queries section.
2. Select the **Schedule** hyperlink for the Query.

My Favorite Queries

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
M_AR_DEPOSIT_DJRNL_DETAIL	Direct JRNL Deposits Detail	Public		HTML	Excel	XML	Schedule	Lookup References	—
M_BI_GBL_BILLS_INV_INCOMPLETE	Invoiced Bills not Processed	Public		HTML	Excel	XML	Schedule	Lookup References	—

Step 2. Choose the Run Control ID associated to query that you want to update.

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches

Saved Searches: Choose from saved searches

Private Query: begins with N

Query Name: begins with M\_AR\_DEPOSIT\_DJRNL\_DE

Run Control ID: begins with

Description: begins with

Show more options

Case Sensitive

Search Clear Save Search

Search Results

2 rows - Private Query "N" Query Name "M\_AR\_DEPOSIT\_DJRNL\_DETAIL"

Query Name	Run Control ID	Description
M_AR_DEPOSIT_DJRNL_DETAIL	ARDJ	Direct JRNL Deposits Detail

Step 3. Select the **Update the Parameters** hyperlink.

Run Control ID: ARDJ

Report Manager Process Monitor

Query Name: M\_AR\_DEPOSIT\_DJRNL\_DETAIL

Description: Direct JRNL Deposits Detail

Update Parameters

Prompt Name	Value
DEPOSIT_BU	G1001
ACCOUNTING_DT	2024-01-01
ACCOUNTING_DT	2024-01-31

OK Cancel Apply

Step 4. On the dialog page, update the parameter values as desired. Select the **OK** button.

M\_AR\_DEPOSIT\_DJRNL\_DETAIL

Deposit BU: g1001

\*From Accounting Date: 02/01/2024

\*To Accounting Date: 02/12/2024

OK Cancel

## Hold, Stop, or Restart a Scheduled Recurring Query

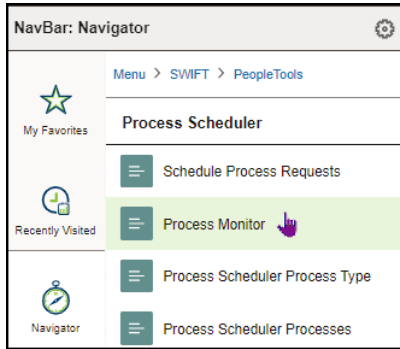
Once you have scheduled a recurring query, you can stop or hold (pause) the query, for example, when on a much-needed vacation. You also can restart the recurring schedule.

Step 1: Navigate to the Process Monitor.

1. Select the **NavBar** icon. It looks like a compass and is in the upper-right hand corner of SWIFT.

Navigation Option	Navigation Path
NavBar	Navigator, SWIFT, PeopleTools, Process Scheduler, Process Monitor

2. Select **Process Monitor**.



Step 2. Select the Recurrence icon in the Process List section.

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	44859581		ARDJ	Application Engine	PSQUERY	01152500	02/12/2024 4:25:09PM CST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	44859580		ARDJ	Application Engine	PSQUERY	01152500	03/01/2024 5:00:00AM CST	Queued	N/A	<a href="#">Details</a>	<a href="#">Actions</a>

**Note:** You may need to expand the length of time for which the Process Monitor shows requests.

Step 3. Choose Hold, Stop, or Restart buttons, depending on your need. Active buttons depend on the status of the request.

