SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

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.

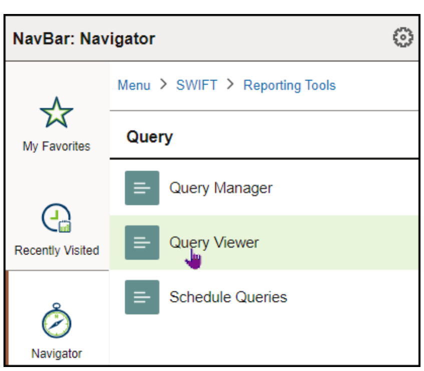
Setup a Scheduled Query for the First Time

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

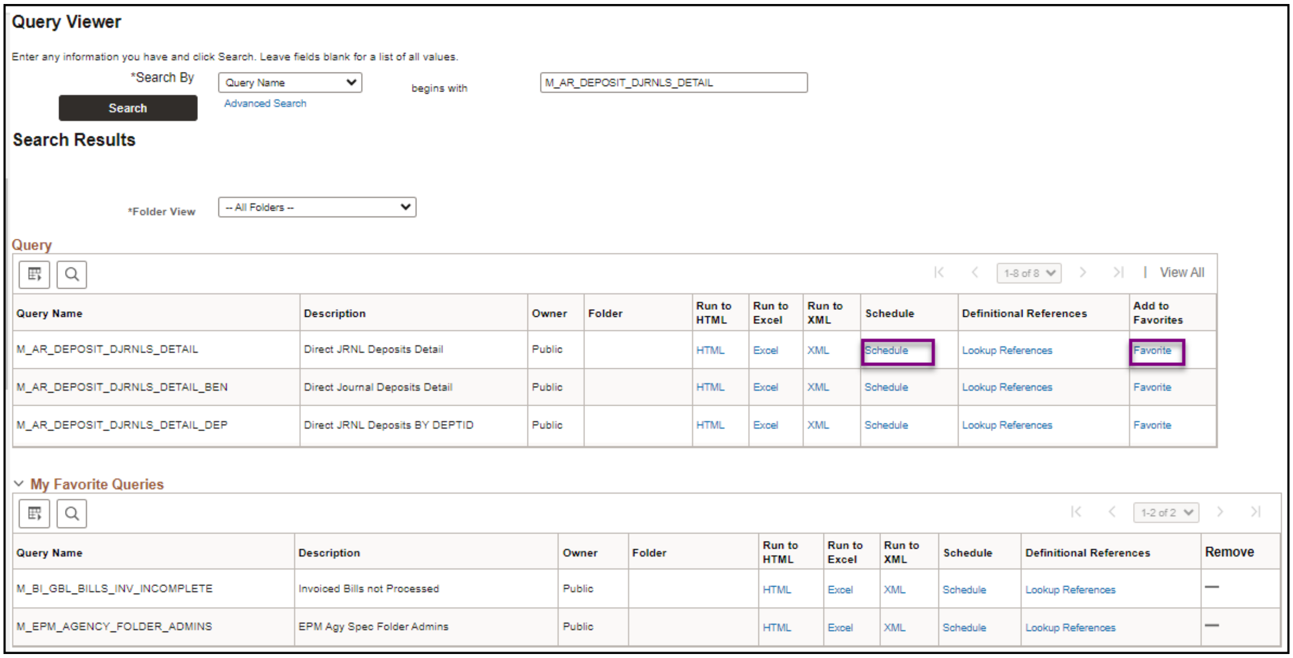
2. Select **Query Viewer**.



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

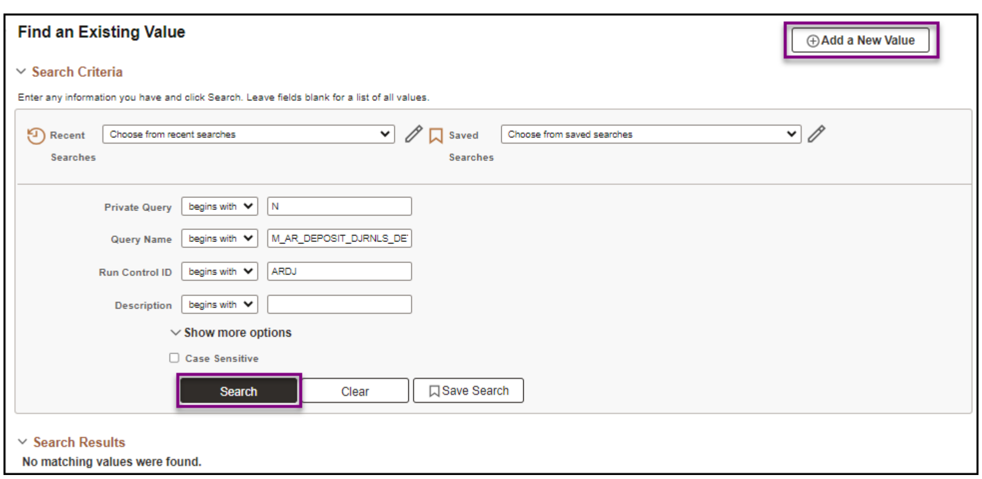
1. From the Query Viewer page, you may have a list of queries that you have added to your My Favorite Queries list, or you may need to search for a query.
2. Select the **Schedule** hyperlink associated to the query you want to schedule.

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

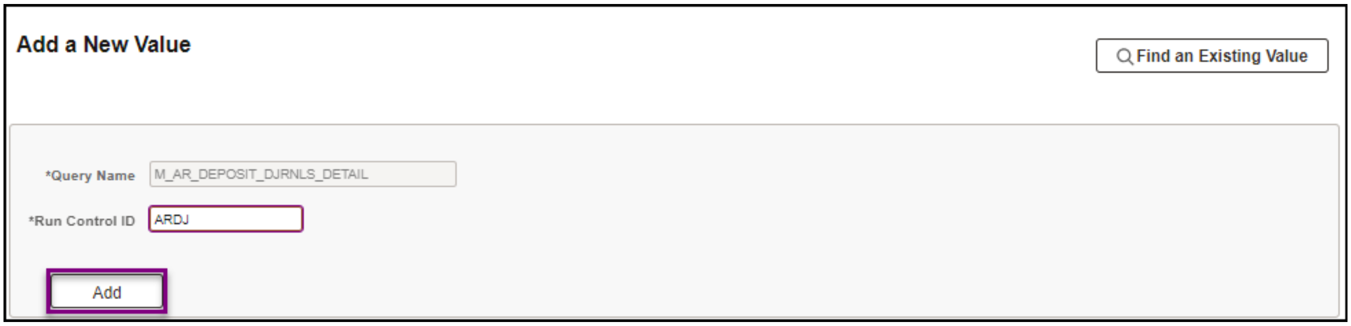


Step 4: Enter a Run Control ID.

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.



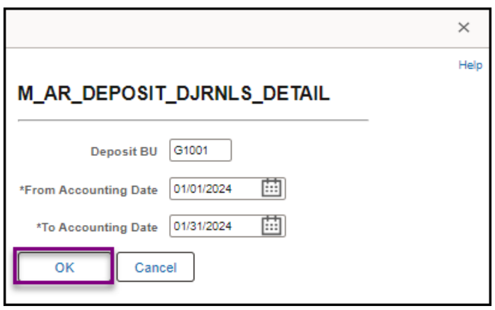
3. In the Run Control ID field, enter a word or combination of characters that are meaningful to you. Select the **Add** button.



Step 5: Enter the parameters for the query.

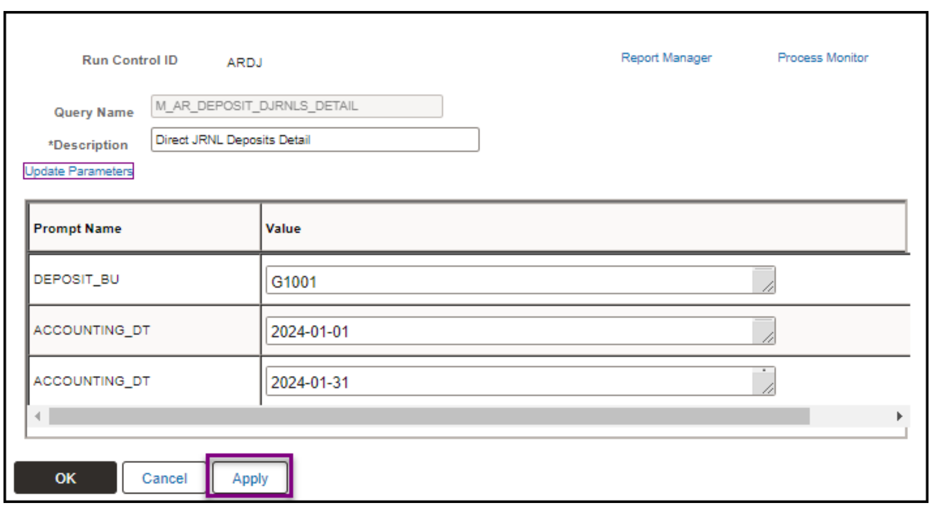
1. A dialog window or page displays. Enter information in the required fields. The required fields and overall layout of this page depends on the query you have chosen.
2. Select the **OK** button.

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



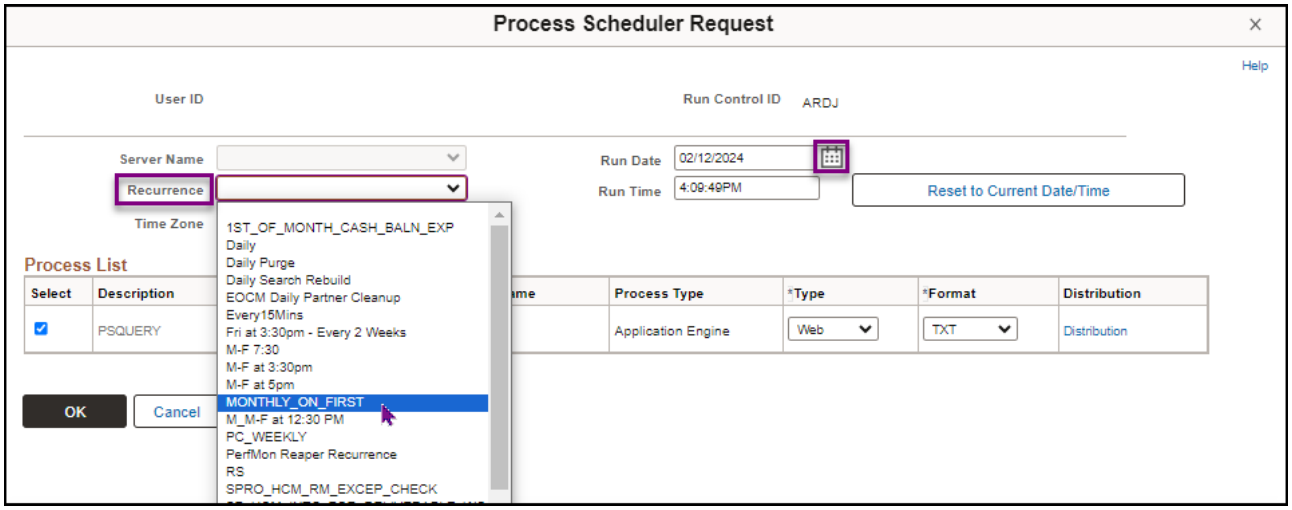
Step 6: Launch the Process Scheduler Request page.

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

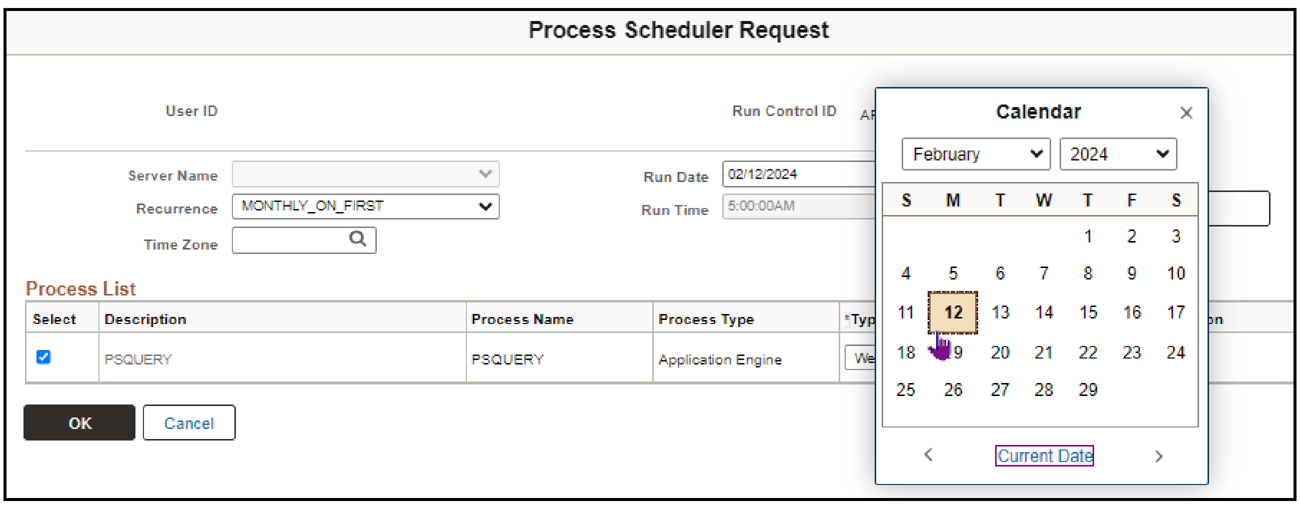


Step 7: Schedule your query by entering parameters from the Process Scheduler Request page.

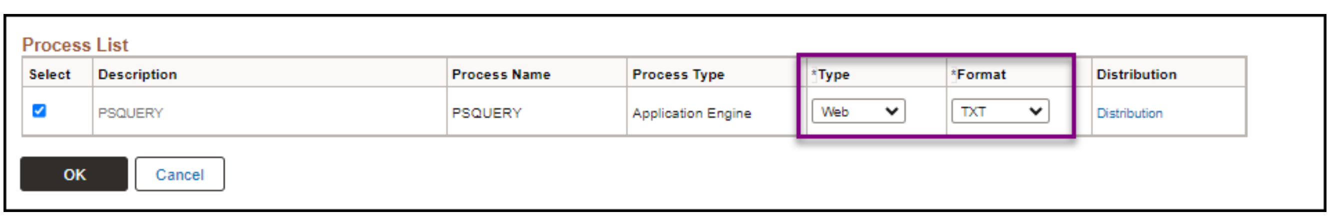
1. The Process Scheduler Request dialog page displays. If you want to schedule a recurrence, select the drop-down in the Recurrence field and choose an option.
2. To schedule a Run date in the future, choose the **Run Date** calendar icon.



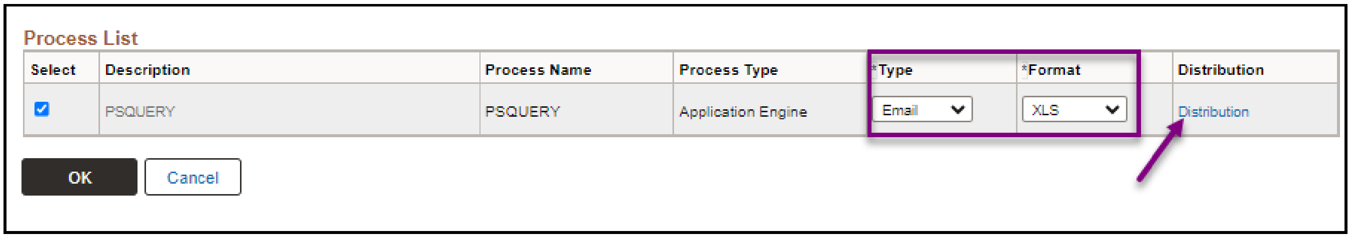
3. Select a date.



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.



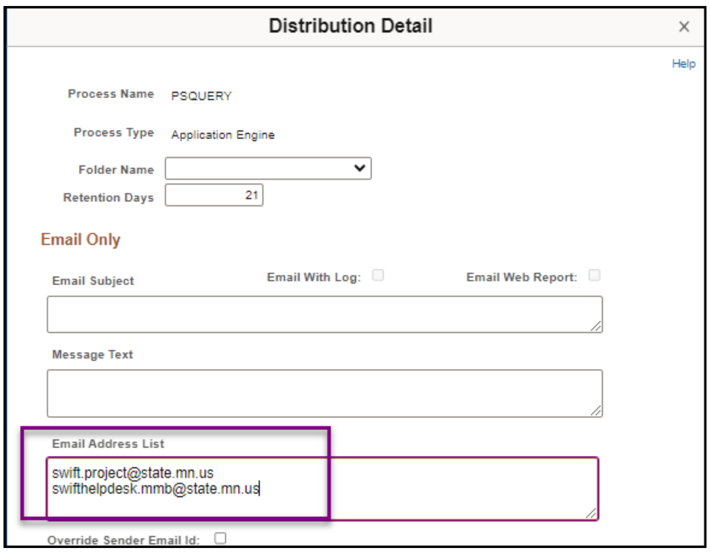
5. You can choose to receive an email with an Excel document attached. To do so, select "Email" for *Type and XLS for *Format.
6. You can add other users to receive the query results as well by selecting **Distribution** hyperlink.



Step 8. Enter user information.

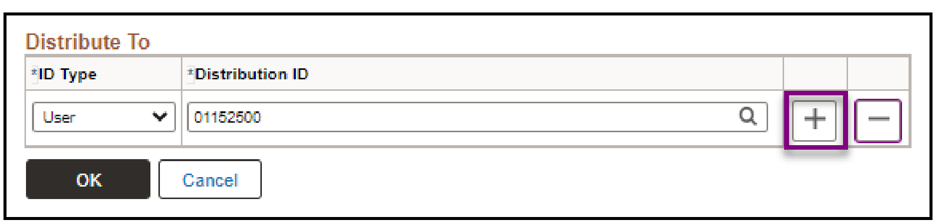
There are two ways to add users.

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

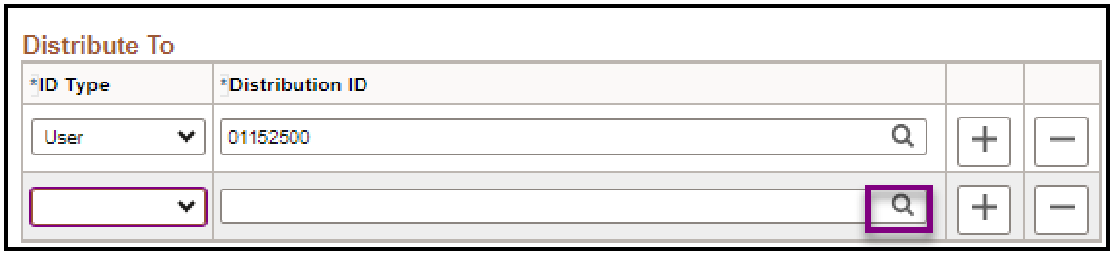


Note: You may get a warning message that there is a syntax error in the email address. However, entering emails as shown above should work. Ensure you have the proper email format.

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

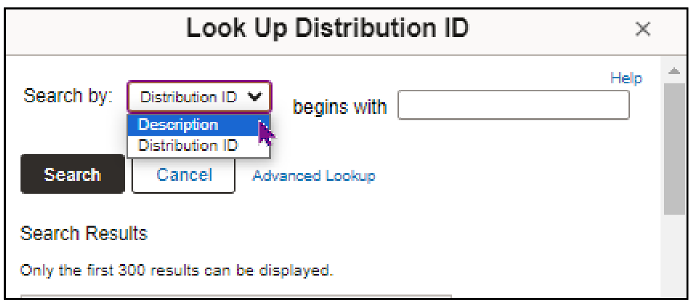


b. A new line is added. Select “User” in the *ID Type. Use the lookup glass to find the appropriate user.

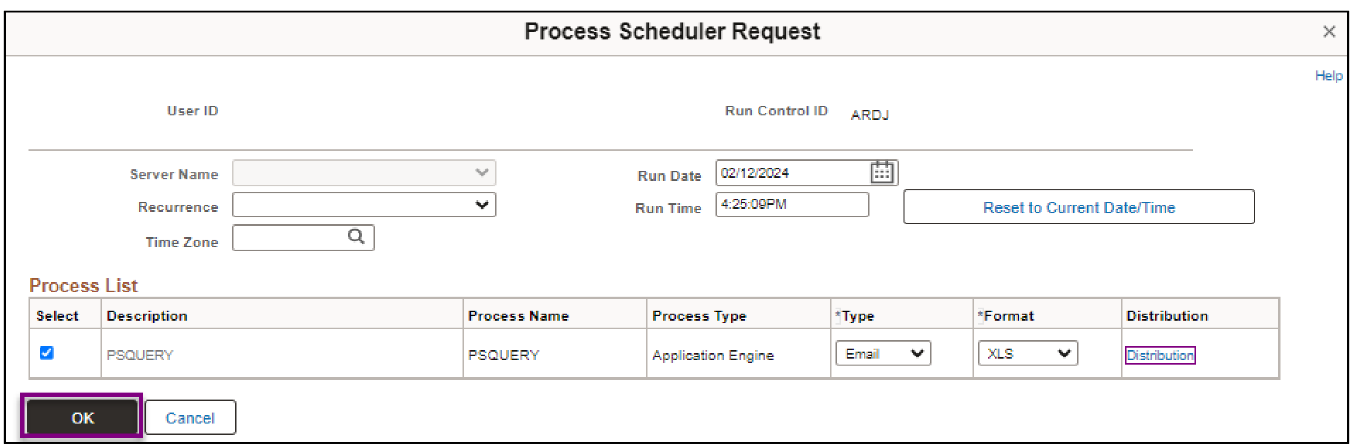


Note: The User ID must be set up in SWIFT with an up-to-date email address.

c. Use the Basic or Advance search



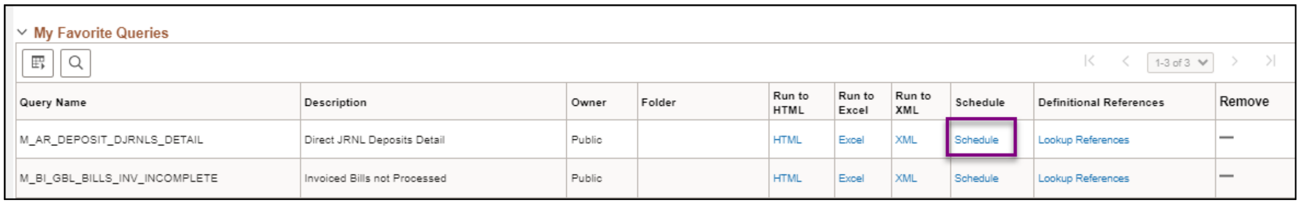
Step 9. After selecting all options, select the **OK** button.



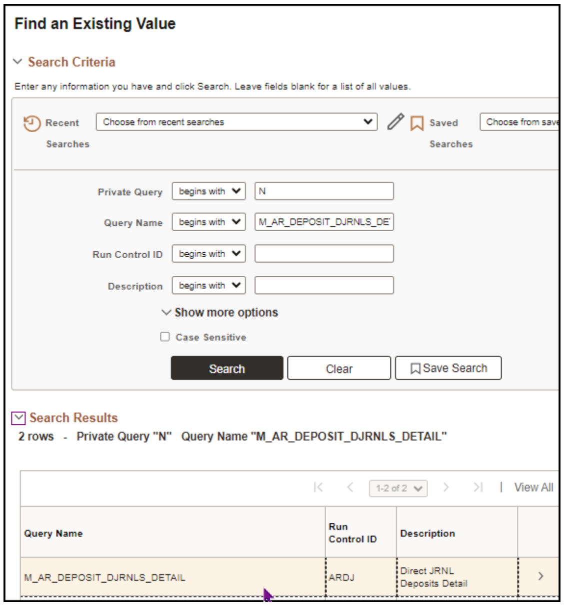
Update Your Scheduled Query

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

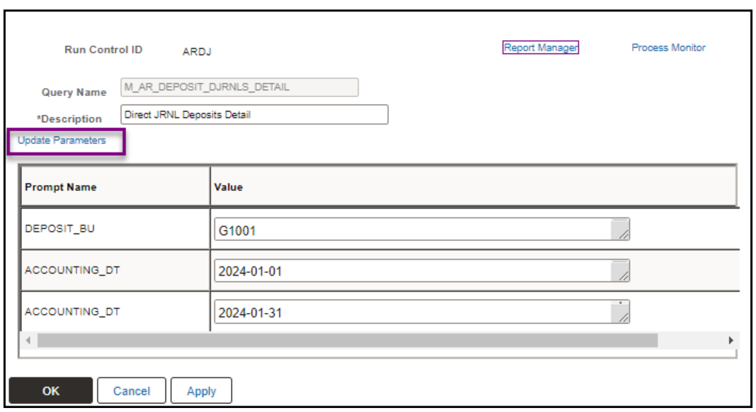
1. If you have marked it as a favorite, it should show on the Query Viewer page in the My Favorite Queries section.
2. Select the **Schedule** hyperlink for the Query.



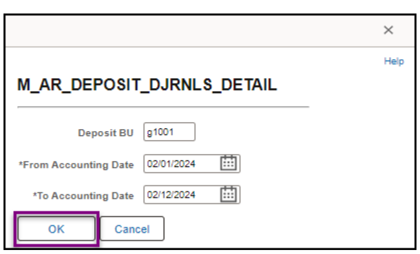
Step 2. Choose the Run Control ID associated to query that you want to update.



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



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



Hold, Stop, or Restart a Scheduled Recurring Query

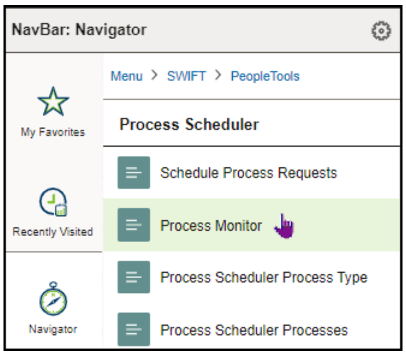
Once you have scheduled a recurring query, you can stop or hold (pause) the query, for example, when on a much-needed vacation. You also can restart the recurring schedule.

Step 1: Navigate to the Process Monitor.

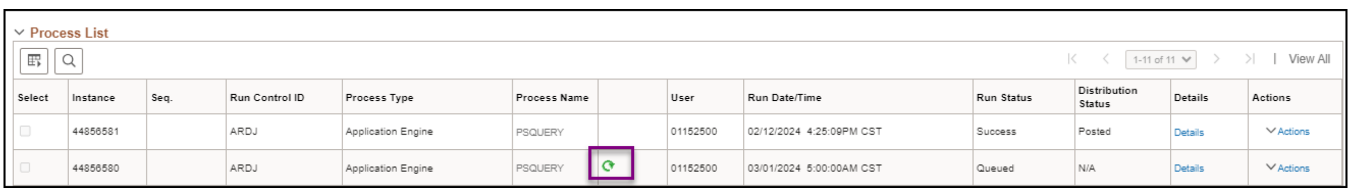
1. Select the **NavBar** icon. It looks like a compass and is in the upper-right hand corner of SWIFT.

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.



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.