Schedule a Query

Introduction

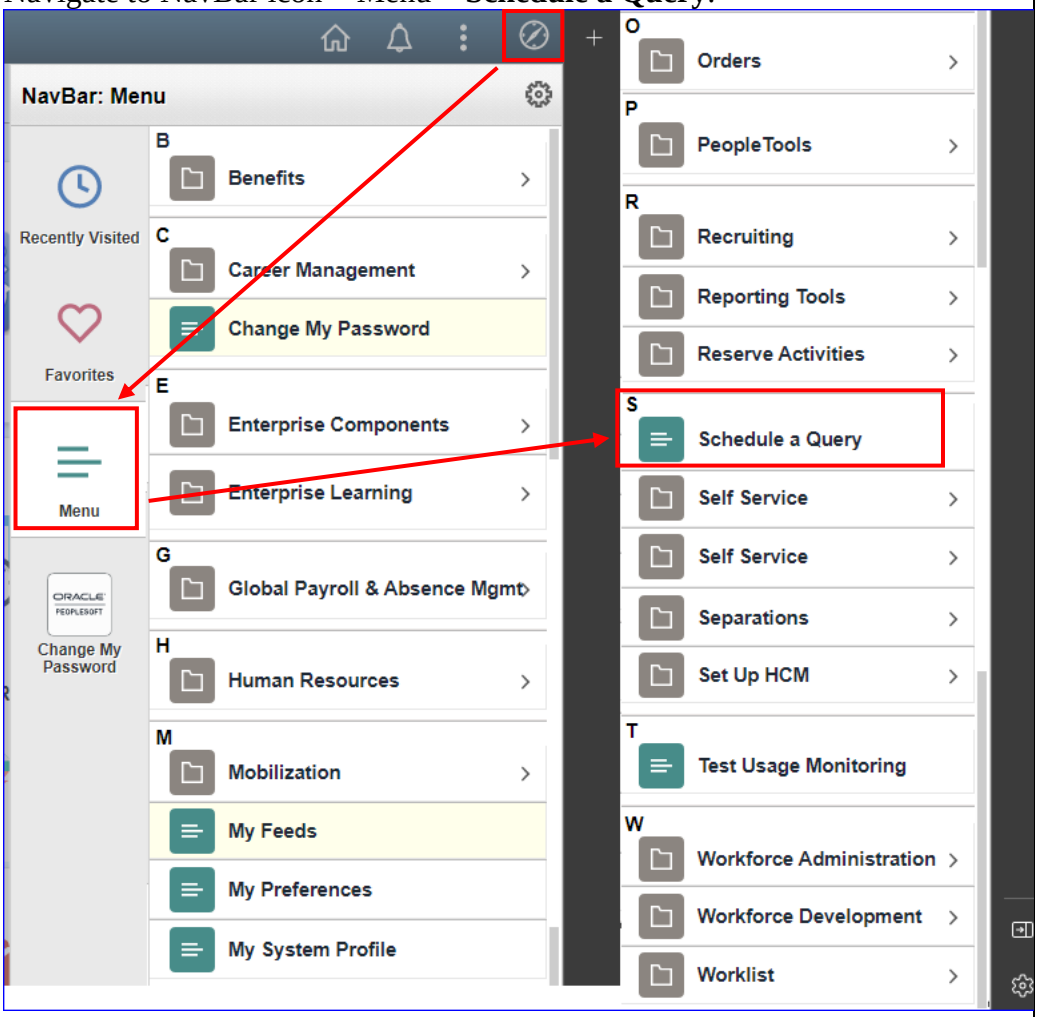
This guide provides the procedures for scheduling a query in Direct Access (DA).

Information

- Use this component to create a query to run a report that is commonly used and is NOT already a report option in a tile.
- This will increase performance and ensure long running queries do not timeout.

Procedures

See below.

Step	Action
1	Navigate to NavBar icon > Menu > **Schedule a Query**. 

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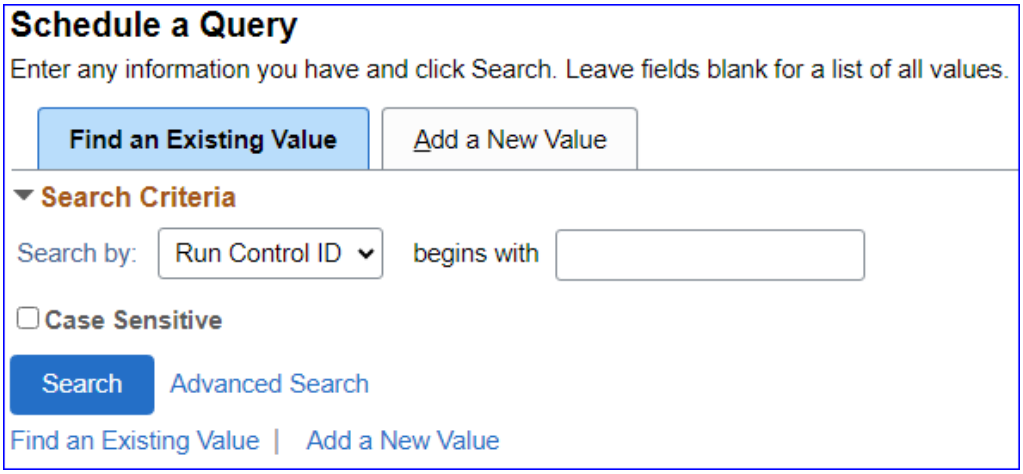
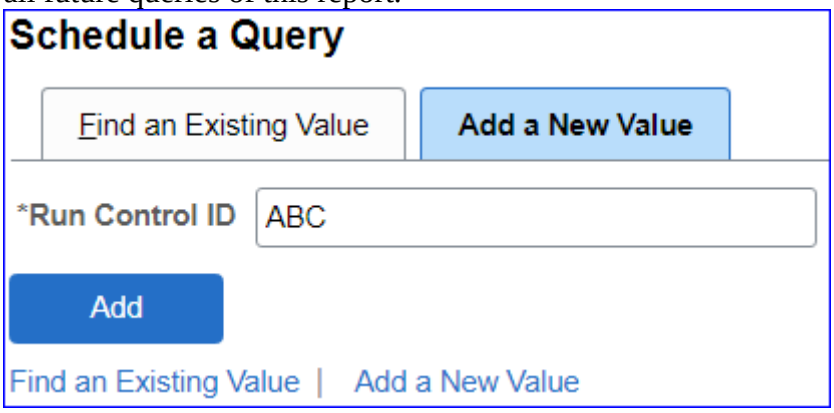
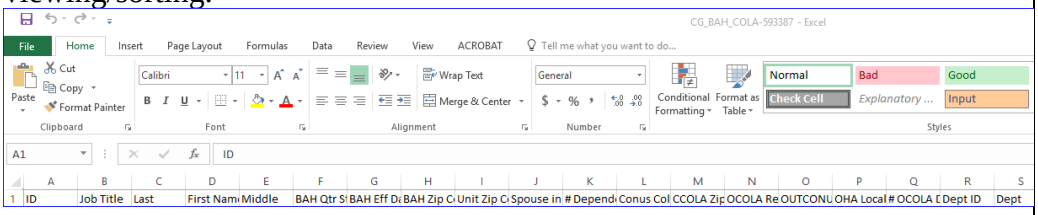
Schedule a Query, Continued

Procedures, continued

Step	Action
2	Select the **Add a New Value** tab. 
3	Name the query (**Run Control ID**) something you will remember and click **Add**. **NOTE:** Once you establish the name of the query, you can use that name for all future queries of this report. 
4	Click **Search** to see a list of all available queries for your user roles.
5	The list of available queries will display as hyperlinks with the Query report name. Scroll to the appropriate Query link or go to Step 6.
6	The search may be narrowed by entering search criteria in the **Query** field and clicking **Search**. Click the appropriate **Query** link.

7	Depending on which query is selected, additional information might be required before moving forward. In this example, the Set ID and the Deptid – SPO Deptid are required for the CG_BAH_COLA report. Click OK.
8	Click **Run**.
9	Select PSUNX from the **Server Name** drop-down and click **OK**.
10	The **Process Instance** will display. Click the **Process Monitor** link.
11	Click **Refresh** until the **Run Status** shows Success and the **Distribution Status** shows Posted. Click the **Actions drop-down** link. Click **View Log/Trace**. **NOTE:** Depending on the size of the query, this could take a long time. Feel free to continue working on other things, returning periodically to check the status.
12	Click the **Query** name (usually ends in .csv) link.
13	**Save** the report to a file/folder on your computer.
14	To open the report, double-click the **saved file**.
15	The Results of the query will display in an Excel spreadsheet format for viewing/sorting.