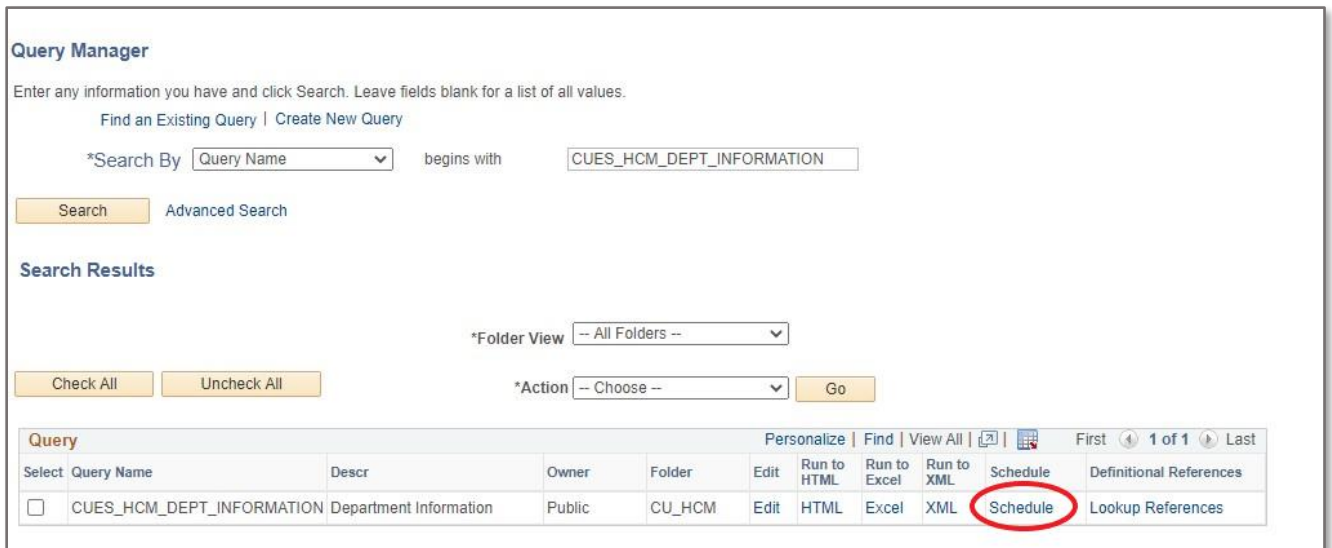# Human Capital Management (HCM): Step-by-Step Guide

Scheduling Queries to Run in the Background

This guide describes how to schedule a query using Query Manager. When you schedule a query, you are setting it up to run in the background via the Process Scheduler, rather than running it directly through Query Manager. Scheduling can be necessary for a query that takes a long time to run, or when the results contain more data than Query Manager can return. Scheduling ensures a long-running query will complete without HCM timing out and that the full results will be included in the returned file.

Scheduling a Query

To schedule a query:

1. Locate your query in **Query Manager**. (Query Manager can be accessed from the CU HCM WorkCenter page's Resources tab.)

2. Click the **Schedule** link for the query.

The Scheduled Query page appears. Your options vary depending on whether you have run this query before:

- If this is the first time you have scheduled this particular query, the system prompts you to create a new Run Control ID from the Add a New Value tab:

It is recommended that you use an easy-to-remember Run Control ID, such as your last name, and that a unique ID be created for each query.

- If you previously scheduled this query, HCM displays previously used Run Control IDs for you to choose from on the Find an Existing Value tab:

3. If you are creating a new Run Control ID, enter prompt values (where applicable), as you would any time you run a query, and click **OK**:

CUES_HCM_DEPT_INFORMATION

Dept ID (Optional) [　　] 🔍
Node (Optional) [S0001] 🔍
Company (Optional) [　] 🔍
Tax Location (Optional) [　　] 🔍
Location (Optional) [　　] 🔍
Off-Campus ONLY ☐

[OK]   [Cancel]

The Schedule Query page appears with a summary of the query to be run.

Alternatively, if you selected a previously used Run Control ID, you will be taken directly to this same page:

Schedule Query

Run Control ID sbs_example   Report Manager   Process Monitor

Query Name [CUES_HCM_DEPT_INFORMATION]

*Description [Department Information]

Update Parameters

Prompt Name	Value
DEPTID	
TREE_NODE	S0001
COMPANY	
TAX_LOCATION_CD	
LOCATION	
BIND6	N

[OK]   [Cancel]   [Apply]

4. Make sure the **Description** field is filled in. This field is automatically filled in if the query already has a description saved. The description entered in this field will appear on the Run Control search page if and when you schedule this query again. Also, a Run Control ID saves the values entered in the prompt fields, so you can have multiple Run Control IDs for the same query that select different information based on those prompted values. You can then differentiate these multiple IDs by entering distinct descriptions.

5. Enter or confirm the prompt values displayed on the page.

6. If this is the first time using a Run Control ID, click **Apply** (rather than OK). The selections made are saved for future use. The Process Scheduler Request window appears:

7. Make your output selections, and click **OK**.

For example, the format of the results file can be changed to XLS for better Excel compatibility.

Note: Do not change the Type and Distribution selections from their default values. This ensures that sensitive university information is protected from unauthorized access. For more information about Data Classification, or to review the Use Guidelines for Employee Data, visit https://www.cu.edu/security/data-classification.

Accessing Report Manager

If you clicked Apply from the Schedule Query page, you will remain on the Schedule Query page where you can access Report Manager using the link on the page:

If instead you clicked OK, and then clicked OK from the Process Scheduler Request window, you will return to the Query Manager search page, and will need to navigate to the Report Manager (**NavBar**> **Navigator**> **Reporting Tools**> **Report Manager**).

The Report Manager shows your report request history. You will see a separate line item for each requested process. Your scheduled query will look similar to the following.
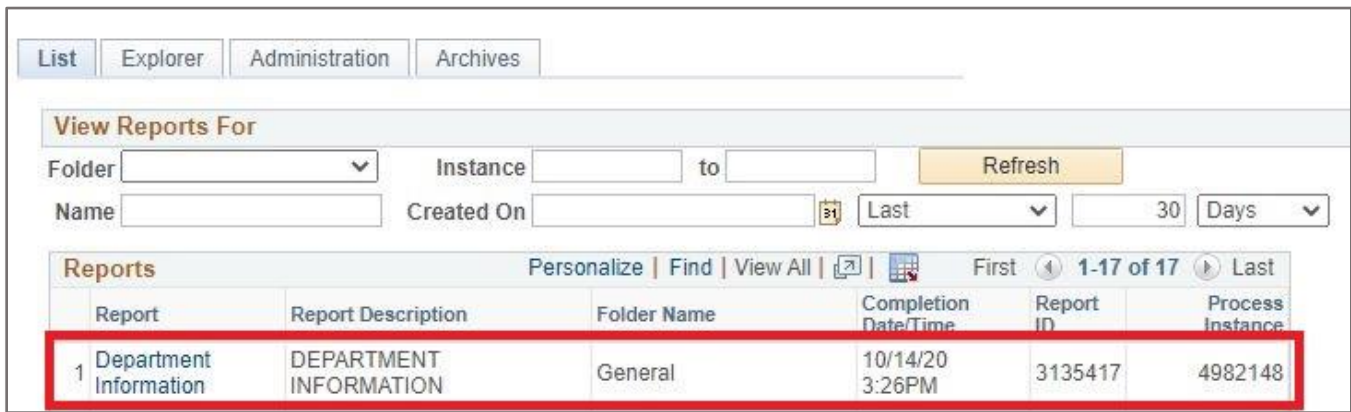
Note: When you first go to Report Manager, your query may not be listed. This is because it is still running. Check back after a reasonable amount of time based on the complexity of the query you are running and the anticipated volume of output.

Retrieving Results from a Scheduled Query

1. Once your query has successfully completed and is listed in Report Manager, click on the query name:

The Report Details window appears.

2. Click the file that contains the query name and a download will start automatically.

For assistance with scheduling a query, contact hcmdata@cu.edu.