Automated Reports and Queries

Report and Query Scheduler

INSIDE THIS GUIDE:

This guide describes how to use the Report Scheduler and Query Scheduler features.

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Introduction

The Report Scheduler allows you to select and save the filters you use to run several commonly used reports and then set these reports to be run automatically by our Operations staff on each calendar day.

Have a report with several filters that you print quite a few times a month? Even if you don't automate your reports, the Save Settings feature will still be valuable, especially for reports with many different selection options.

Do you have repetitive Queries that you run each month? Would you like to automate the process? Use the new Query Scheduler to automate the running of selected Queries on the first of the month! The Query Scheduler will run the Queries you have set to run automatically, either by building database files or by printing reports, depending on the original Query output settings.

> *We want to emphasize this is not a "save it and forget it" feature. Set aside time each month to review your Queries and reports to ensure that they are archiving and printing correctly.*

Frequently Asked Questions

Following are some frequently asked questions about Report Scheduler and Query Scheduler.

Report Scheduler FAQ

The following section covers commonly asked questions about Report Scheduler.

When are automated reports run?

Scheduled reports are run every calendar day after beginning-of-day is run.

- Refer to page 12 for step-by-step directions on saving report settings.

How do I schedule a report to run more than one time in a month?

When you create your *scheduled* automation setting, you can select for it to run monthly, weekly, or daily.

- If you set it up with a setting of "Daily," it will run every day of the month, including Saturdays and Sundays. It will run regardless of whether your credit union is open on that day.

- If you set it up with a setting of "Weekly", a field will appear allowing you to enter the day of the week. If you just want your report to be run every Sunday, for example, this might do the trick. Otherwise, you can set up multiple automation settings that are identical, except that different days of the week are selected.

- If you set it up with a setting of "Monthly," a field will appear allowing you to select the date of the month. If you want a report to run on multiple days of the month, you will just need to set up multiple automation settings, one for each day you would like for it to be run.

What if I want my report to always run on the last day of the month?

To have your automated report run on the last day of the month, select a frequency of monthly and have the report run on the last day of the month, enter 31 in the day field. The program will know to adjust to the last day of each month.

__Important Note!__ This report is run after beginning of day, so data from the last day of the month will not be included in the report.

Can I schedule a report to print daily or weekly, or monthly?

Yes, you can select to have the *Frequency* of your scheduled report to run monthly, weekly, or daily.

Can I set up an automation report to run on current or end-of-month files?

Yes. When you create an automation setting, you will select whether to run the report using current or end-of-month files.

- ▪ NOTE: The NCUA Share Insurance report cannot be run on current files.

Can I schedule an end date for the scheduled report to run?

Yes, you can schedule an end date for the report scheduler to run. Enter a date in the *End date* field, and the report settings will no longer run after that date. (Leave this field blank or remove the date if no date is desired.)

- ▪ NOTE: The scheduled report will be purged 30 days after this date. The daily report will indicate this date for auditing purposes.

Which reports support Report Scheduler?

See page 10 for a list of reports that support this feature.

Should I review my automated report settings before the end of the month?

We want to stress that this is not a "save it and forget it" process.

Yes. It is important that you review your settings before the end of the month. You may decide to adjust them slightly or select to remove them from the automation process. Additionally, you should check to make sure that no one accidentally deleted your settings.

Should I check to see that my automated reports are archiving correctly? How do I do this?

We want to stress that this is not a "save it and forget it" process.

Yes. Set a monthly reminder to check that your reports are printing and archiving as expected.

After the automated reports processing is run, you will find the "Automated Run of Scheduled Reports – Audit Report" (PRUNAR) report in your DAILYxx OUTQ. Be sure to review this report as it lists the reports that were generated. An example of the PRUNAR report is on page 18.

What settings are saved by Report Scheduler?

All settings are saved by the Report Scheduler, except the process date and *Export to file*. Refer to the next few questions for more information on how the process date and date ranges are handled through automation.

Do I need to update the Process Date in my saved settings?

No, you do not need to update the process date in your saved settings. Report Scheduler will always run an automated report using data from the prior month.

Do I need to update date ranges in my saved settings? How are date ranges handled by the automation process?

Date ranges (and single dates) in the selection criteria are saved in saved settings; however, for reports that use EOM files, when the automated report is run date ranges are replaced by the entire month range (for example 6/1 to 6/30) and single dates are replaced with a zero. The automated version of the report is simply run for the entire month. For scheduled reports that use current month files, some saved dates are ignored, while some reports require a date range to run (including but not limited to Teller Activity, Escrow Distribution, Decision Model, and Cross Sales). For those reports, the program uses the first day of the current month and then uses Proc Date as the second date.

If you retrieve the settings to run the report manually, simply update any dates or date ranges if needed prior to using Enter.

What do I enter in the Printer ID field?

When selecting your settings, enter a printer ID. This will be saved when you save your settings. Where you print will depend on whether you want a printed report (enter a Printer ID), to view the report (enter HOLDxx OUTQ), or to archive the report to CU*SPY (enter MONTHxx OUTQ). If you want to view *and* archive a report, you may save multiple settings, each with something different entered in the Printer ID field.

Can someone else edit or change my report settings?

No. An Employee ID is attached to saved settings. You cannot edit settings saved by another Employee ID, only to settings saved by your Employee ID.

Can I use someone else's saved report settings with a few adjustments?

Yes. You can retrieve someone else's settings, make your adjustments, and save the updated settings with a new report description and your Employee ID.

Who can delete saved report settings?

Anyone can delete anyone's saved settings. Obviously, you may want to delete your own settings. Additionally, your credit union may need to delete the settings of an employee who has left your credit union. **For this reason, anyone can delete saved settings of any Employee ID.** Because of this, it is a good idea to review your saved settings monthly.

Can I remove a report from the automated monthly report run but still save the settings to run manually?

Yes. Just edit your report settings to *Not automated* and *n/a* (not *Current* or *Previous*) through the Save Settings option. Or, if you are on the Report Scheduler screen (see page 16), highlight the report listing and select *Remove from automation*.

What if I want to archive a report and also print a copy?

If you want to both print and archive a report (manually or via the automatic archive process), create two identical settings for the report, one set to archive and one set to print to a physical printer.

Q: When using the Report Scheduler feature, how many saved report definitions can be stored within a specific tool?

The maximum number of saved report definitions that a credit union can save for any report is 999. These can be saved simply to be used for re-running the report later, or they can be scheduled to run automatically monthly.

Query Scheduler FAQ

The following section covers commonly asked questions about Query Scheduler.

When are automated Queries run?

Scheduled Queries are run every calendar day after beginning-of-day is run.

- Refer to page 12 for step-by-step directions on saving report settings.

Is the automation program for Queries warranted with SnapShot (FILExx) library?

No, this is not warranted. Queries that are built with tables out of the SnapShot library may not produce results as expected.

What is the maximum number of automated queries I can link together with the Automated Query feature? Can these be re-sequenced? Are there any cautions I should take when doing so?

You may string multiple queries together with the Automated Query feature. In this manner, you can cause the order queries are run, so that they can be run in the correct order. (One that relies on another is run after the first.) Up to 989 queries can be strung together. Additionally, there is a re-sequence feature available, should you need to reorder the queries.

> IMPORTANT CAUTION: Re-sequencing is not warranted for large Query sequences, for example ones at or over 90 queries.

How do I schedule a Query to run more than one time in a month?

When you create your automated Query, you can select for it to run monthly, weekly, or daily.

- If you set it up with a setting of "Daily," it will run every day of the month, including Saturdays and Sundays. It will run regardless of whether your credit union is open on that day.

- If you set it up with a setting of "Weekly", a field will appear allowing you to enter the day of the week. If you just want your report to be run every Sunday, for example, this might do the trick. Otherwise, you can set up multiple automation settings that are identical, except that different days of the week are selected.

- If you set it up with a setting of "Monthly," a field will appear allowing you to select the date of the month. If you want a report to run on multiple days of the month, you will just need to set up multiple automation settings, one for each day you would like for it to be run.

What if I want my Query to always run on the last day of the month?

To have your automated Query, select a frequency of monthly and have the report run on the last day of the month, enter 31 in the day field. The program will know to adjust to the last day of each month.

Can I schedule a Query to run daily, weekly, or monthly?

Yes. Daily, weekly, and monthly scheduling is supported.

Can I schedule an end date for the Query to run?

Yes. You can schedule an end date for the Query to run. Enter a date in the *End date* field, and the Query will no longer run after that date. Leave this field blank or remove the date if no end date is desired.

▪ NOTE: The scheduled query will be purged 30 days after this date. The daily report will indicate that date for auditing purposes.

Should I check to see that my automated Queries are running correctly?

> *We want to stress that this is not a "save it and forget it" process.*

Yes. Set a monthly reminder to check that your Queries are running as expected.

Once the automated Queries are run, the "Automated Run of Scheduled Queries – Audit Report" (PRUNAQ) will appear in your DAILYxx OUTQ. Be sure to review this report. An example of the PRUNAQ report is on page 23.

What if my Query includes end-of-month files?

When creating the Queries for the Query Scheduler, it is very important that you use only **current month files**. When you set up the automation process, CBX allows you to indicate whether you would like the Scheduler to automatically substitute the proper file name to pull from the most recent month-end.

> *IMPORTANT NOTE: It is your responsibility to confirm that an end-of-month file exists, should you wish to substitute it though the automation scheduler feature.*

Query Scheduler will not work properly if end-of-month file names are used in the original Query saved in your QUERYxx library. You may need to set up separate Queries to be used only by the Query Scheduler.

What other tips are there for creating Queries for use with Query Scheduler?

As mentioned above, Queries used in Query Scheduler cannot contain end-of-month files. Additionally, if you are using output option *Database file* be sure to set the *Data in file* option to *Replace File* or for Queries that build on each other, use *Add to Member*. Make sure the Authority of your Queries is set to "*ALL." Be sure to always run the Query first to generate a database file before using it in the Query Scheduler. Finally, if you update the Query that the scheduled Query is based on, return to the scheduled Query, and update it to include the new files.

How do I print a report generated from a Query to a physical printer or an OUTQ?

When selecting your Query output, use output option *Printer* and enter a printer ID. Where you print will depend on whether you want a printed report (enter a Printer ID), to view the report (enter HOLDxx OUTQ), or to archive the report to CU*SPY (enter MONTHxx OUTQ). If you want to view *and* archive a report, you may have multiple Queries, each with a different output option for the report.

Can I schedule a series of Queries that are dependent on each other with the Query scheduler?

Yes. The Query scheduler runs the Queries in the order they appear on the screen. To run Queries that build on each other, simply enter them sequentially.

▪ For information on re-sequencing the Queries, refer to page 22.

If I alter a Query, do I need to also update it in the Query Scheduler?

If a Query is updated, it automatically refreshes in the Query Scheduler.   If a file has been added and you need to use the month-end file, you will need edit the query on the Query Scheduler screen and designate this selection for the new file.

What happens if a Query is deleted from QUERYxx? What happens in the Query Scheduler?

If a Query is deleted from QUERYxx, this will be indicated on the screen by "**NOT FOUND**."

If you remove the Query from automation, is it removed from QUERYxx?

No. Removing a Query from automation does not delete the Query from QUERYxx.

Reports Supporting Report Scheduler

The following list includes reports that currently support the report scheduler feature.

Reports Supporting the Automation Feature
Tool #108 Accrued Dividend Summary Rpt - CDs
Tool #190 CD Maturity Analysis Report
Tool #191 CD Selective Trial Balance Report
Tool #213 Closed Account Report
Tool #218 Closed Membership Report
Tool #280 Contingent Liability Analysis Report
Tool #321 Cross Sales Analysis Report
Tool #381 General Transaction Register
Tool #407 Investment Maturity Report
Tool #408 Investment Trial Balance Report
Tool #412 IRA Contributions & Fair Market Value
Tool #461 Loan Delinquency Analysis Report
Tool #466 Loan Interest Analysis Report
Tool #471 Loan Purpose Code Analysis Report
Tool #474 Loan Security Code Analysis Report
Tool #487 Mbr Trial Balance Listing – Select Info
Tool #493 Member Account Adjustments Report
Tool #502 Member Name & Address Listing
Tool #545 NCUA Share Insurance Report   ▪ NOTE: Automated settings for this report cannot be run on current month files.
Tool #548 New Account Report
Tool #550 New Membership Report
Tool #554 New/Refinanced Loan History Report
Tool #556 Non-Transactional Overrides Report
Tool #578 Particip. Loan Delinquency Analysis Rpt.
Tool #590 PLI Trial Balance
Tool #633 Print BSA/SAR Activity Report   ▪ NOTE: It is important to select the correct date range settings for this report automation. See the booklet **Bank Secrecy Act Monitoring Tools** on the Reference Page for more details.
Tool #636 Print Check Disbursement Register
Tool #637 Print Collection Delinquency Report
Tool #642 Print Escrow Disbursement Listing
Tool #644 Print File Maintenance Report
Tool #650 Print GL Trial Balance (monthly)
Tool #687 Print Subsidiary Trial Balance Detail
Tool #679 Print Risk Score Analysis Report
Tool #771 Rural Development Part. Loan Detail Report

Tool #788 Selective Loan Information Report
Tool #843 Teller Activity Analysis Report
Tool #848 Teller Activity Report
Tool #868 Transaction Override Report
Tool #1990 Print BSA/SAR Structuring Report
Tool #1028 FUEL Decision Performance Report
Tool #1150 Indirect Loan Reserves Report

Using Report Scheduler

Refer to the FAQ section for Report Scheduler for tips about Report Scheduler. See page 3.

Reviewing Printed and Archived Reports

We want to stress that this is not a "save it and forget it" process. Set a monthly reminder to check that your reports are printing and archiving as expected.

Saving Report Settings

We want to stress that this is not a "save it and forget it" process. It is important to review your settings prior to the end of the month. You may decide to adjust them slightly or select to remove them from the automation process. Additionally, you should check to make sure that no one accidentally deleted your settings.

- NOTE: You can also save settings from the *Automated Reports Scheduler* screen. See page 16.

1. Navigate to the report selection screen and select your filters and printer ID on the selection screen of a report that supports Report Scheduler.

- See page 5 for information about how the Process date and date ranges (and single dates) are handled by saved settings.

- See page 10 for a listing of reports that currently support this feature.

2. To save your report settings, use **Save Settings** on reports that support automated scheduling).

This screen shot shows the different selections you can make on this screen.

The new report settings placeholder will appear at the top of the screen.

3. Select *Add/Edit* to save the new settings.

4. Enter the description for your settings.

    - We recommend adding your name or other identifier to your saved settings; it will be important later to differentiate, for example, the CEO's favorite settings from those used by someone on the accounting team.

    - NOTE: Do not use the Description "CUA Monthly Archive." This name is reserved for reports that were previously run by Operation staff.

5. If you are going to schedule the report, select whether to run the report on current or previous month files.

6. Then select the frequency.

- Select *N/A* if you do not want to have the report settings use the report scheduler feature.

- Select *Daily*, *Weekly*, or *Monthly* if you want this report to be included in the Report Scheduler feature. When report automation is run this report will be printed or archived depending on your saved settings.
  - If you select Daily, the scheduled report will run seven days a week, regardless of whether your credit union has beginning of day processing.

  - If you select Weekly, you must select the day of the week. The report scheduler is run on that day, seven days a week, regardless of whether your credit union is open.

  - If you select Monthly, you must also select the day of the month (0-31) when the automation setting will be run. For the last day of the month enter 31.

- You can run a report manually at any time regardless of whether it is saved for report automation.

7. If desired, specify an *End date* when the automated report will no longer be run. Leave this field blank or remove the date if no end date is desired.
   - NOTE: The settings will be deleted 30 days after this date. The Daily report will note this date. See the daily reports on page 10.

8. Use Enter to save your settings. You will exit the screen and your saved settings will move to the bottom of the listing.
   - NOTE: If you already have several saved settings, you may need to scroll down to view this setting.

If you want to both print and archive a report (manually or via the automatic archive process), create two identical settings for the report, one set to archive and one set to print to a physical printer.

Manually Printing a Report with Saved Settings

You can retrieve your settings to run a report manually at any time of the month. While on the report selection screen, use **Retrieve Settings**.

Select *Select* to select from a list next to you saved settings.

Report name	LCDDV - Certificate of Deposit Accrued Dividend Repc	
Action	ID	De
N/A	001	Jans settings for this report
Select	002	Wills settings for this report
View		
N/A	003	Running on the 15th
N/A	004	weekly run on Monday
N/A	005	Previous month

Press Enter to run the report.

- NOTE: You can also retrieve settings from the *Automated Reports Scheduler* screen. See page 16.

Updating Report Settings

If you want to update existing saved settings that you created earlier (under your Employee ID), first retrieve the report settings you wish to alter and update the selections as desired. When you save the settings using *Save Settings* (F24), use *Add/Edit* next to the same description of the settings you retrieved. This allows you to update settings but keep the same description. Use Enter to save the settings.

You can only adjust the saved settings created by your Employee ID. If you want to use someone else's settings and make adjustments, retrieve the saved settings using *Retrieve Settings* (F23), make the changes, and save the settings with a new description.

- NOTE: You can also retrieve settings from the Automated Reports Scheduler screen. See page 16.

Deleting Report Settings

To delete settings, move to the Save Settings screen. Use *Delete* next to the saved setting you want to delete.

Action	ID	Description	Period
N/A	NEW		N/A
Delete	001	Jans settings for this report	Current

A confirmation screen will appear. Use Enter to delete the setting.

Warning: You can delete any saved settings, even those created by another Employee ID.
Obviously, you may want to delete your own settings. Additionally, your credit union may need to delete the settings of an employee who has left your credit union.

- NOTE: You can also delete settings from the Automated Reports Scheduler screen. See following section.

Review Setting Details

While on the report selection screen, use **Retrieve Settings**. Then select *View* next the saved setting and use Enter to see a view-only version of information about the report settings such as who created it, the last time the report was saved, and the last time it was run with these settings using the automated processing.

Using the Report Automation Screen

You can view reports that support the automated feature, view your saved filters, and save new filters directly from the Report Automation listing screen (shown below). This listing is accessed via **Tool #759 *Report Automation - Standard Reports*.**

- Because this gives access to all your saved report settings, you may wish to restrict access to this screen.

Report	Description	Saved Report Settings	To Be Run	Data To Use
LTBLN	Loan Information Report	058 New Mortgage Loans	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTBLN	Loan Information Report	059 call report real estate loans matur 5yr	NOT AUTOMATED	
LTBLN	Loan Information Report	060 Call Report Variable VISA 5yr maturity	NOT AUTOMATED	
LTBLN	Loan Information Report	061 Call Report In cat 39 detail	NOT AUTOMATED	
LTBLN	Loan Information Report	062 call report other r est new loans	NOT AUTOMATED	
LTBLN	Loan Information Report	063 call report used auto new loans	NOT AUTOMATED	
LTBLN	Loan Information Report	064 INDIRECT lOANS EXCLUD BUS CODES	NOT AUTOMATED	
LTBLN	Loan Information Report	065 New Mortgage Report	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTBLN	Loan Information Report	066 VISA GOLD VARIABLE MO END REVISED	NOT AUTOMATED	
LTBLN	Loan Information Report	067 CALL REPORT REAL EST MATURING 5 YR	NOT AUTOMATED	
LTBLN	Loan Information Report	068 call report indirect delinquency	NOT AUTOMATED	
LTEACT	Teller Activity Analysis	001 ECU school branch	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTKPER	Cross Sales Analysis Report	**NONE SAVED**		
LTLACT	Teller Activity Report	001 Call Center Transaction Report	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTRANA	Non-Transactional Override Rep	**NONE SAVED**		
LTRANO	Override Transaction Register	001 mary	WEEKLY	CURRENT
LTRREG1	Account Adjustment Transaction	001 CUA MONTHLY ARCHIVE	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTRREG2	Transaction Register	001 SRS 9H ACCT ADJ	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTRREG2	Transaction Register	002 SRS 9E ACCT ADJ	MONTHLY ON THE 1ST	PREVIOUS EOM DATA
LTRREG2	Transaction Register	003 SRS 9F ACCT ADJ	MONTHLY ON THE 1ST	PREVIOUS EOM DATA

●Add new report settings   ●Remove report from automation   ●Delete report settings   ●Retrieve report settings

From this screen, select a report setting or a report and one of the following settings:

- *Add New Settings*: Select this to update or create new settings for a report.

- *Remove from automation*: Select this to change the report run option from "monthly" to "not automated." The report settings will not be deleted.

- *Delete Settings*: Select this to completely delete the report settings.

- *Retrieve settings*: Select this to review settings, update settings, or to run the report with these settings.

Reviewing Your Automated Reports

After the scheduled reports are run, you can refer to your DAILYxx OUTQ for the "Automated Run of Scheduled Reports – Audit Report" (PRUNAR) – shown below for a list of reports run by the Report Scheduler.

They are listed by report name and the Description used to define the saved settings.

- In the example below, the reports designated as "CUA MONTHLY ARCHIVE" were created by Operations staff for the credit union.
- Two of the reports had an *end date* when the report should no longer be run. The notation *Scheduled report has reached the end date* indicates that the report will no longer be run. The report settings will be purged thirty days later. This is helpful for auditing purposes.

```
4/20/21  11:23.21              ABC CREDIT UNION                                    PRUNAR       PAGE
   RUN ON   4/20/21            AUTOMATED RUN OF SCHEDULED REPORTS -- AUDIT REPORT              USER
                                                 LAST RUN
REPORT NAME  DESCRIPTION                          DATE    INFORMATION
LCLAC        004 FANNIE PAID OFF LOANS          3/20/2021
LCLAC        005 FREDDIE PAID OFF LOANS         3/20/2021
                                                         Scheduled report has reached the end date
LCLAC        006 CUA MONTHLY ARCHIVE
LDQAN        003 Monthly Report                 3/20/2021
                                                         Scheduled report has reached the end date
LDQAN        004 Weekly Report                  3/20/2021
LDQAN        005 Delq Loans Report              3/20/2021
LDQAN        006 Daily Report                   3/20/2021
LFMLOG       005 test                           4/20/2021
LTEACT       002 Teller Activity Analysis       3/20/2021
                                                 ***END OF REPORT***
```

- As these reports are run daily, they are also archived daily to the Miscellaneous category in CU*SPY.
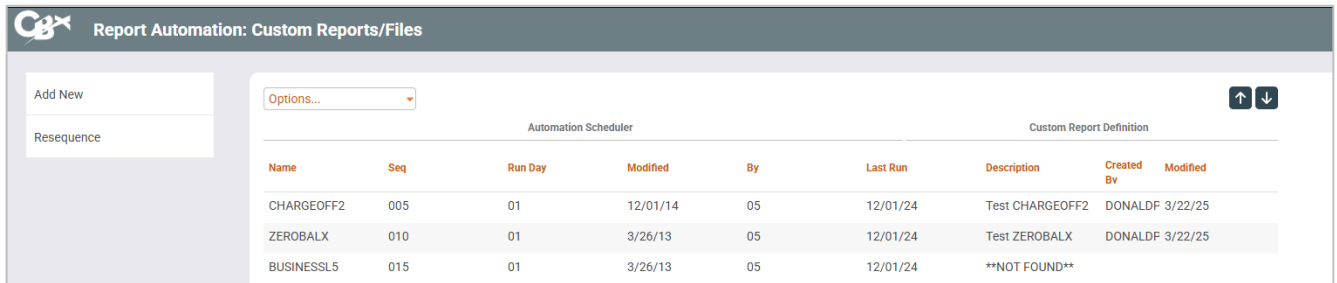
Using Query Scheduler

Refer to the FAQ section for Query Scheduler for tips on setting up your Queries for Query Scheduler. See page 7.

Adding a Query to the Query Scheduler
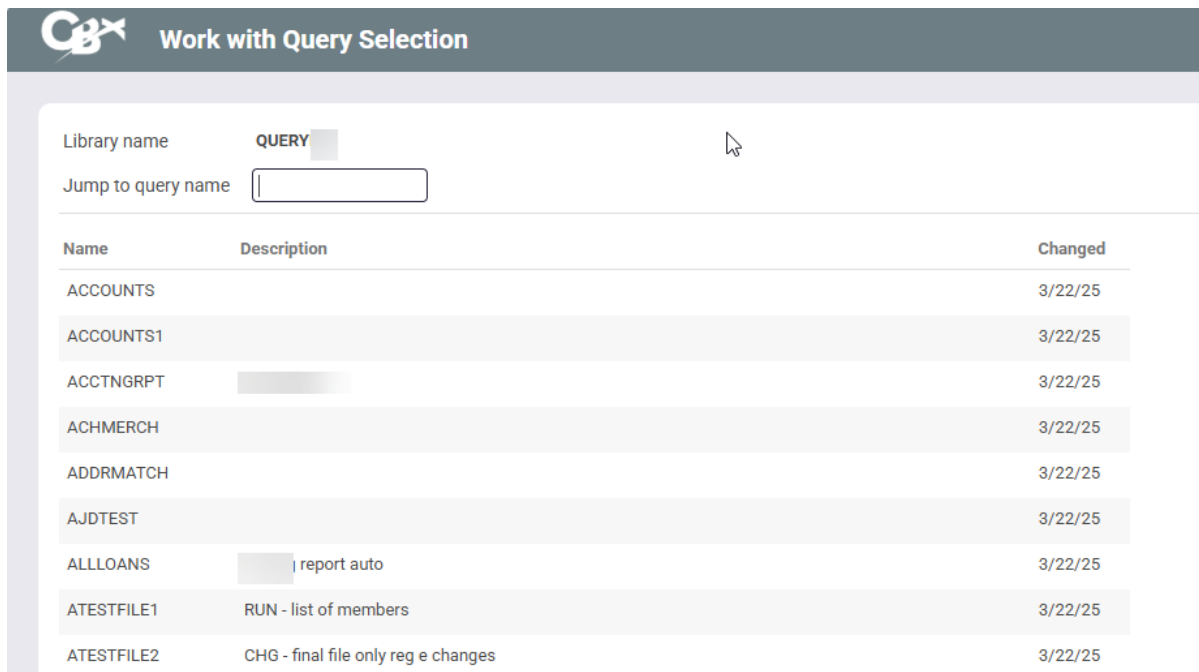
It is very easy to add a Query to the Query scheduler. This process is done directly from the Report Automation: Custom Reports Files screen.

1. Use **Tool #758** *Report Automation - Custom Rpts/Files*.

2. You will view a listing of the Queries that are currently included in the Query scheduler.

3. Use **Add New** to add a new Query.

4. Use the lookup next to *Custom report definition name (in QUERYxx)*. This will show you a listing of the Queries currently in QUERYxx.

   ▪ This step is recommended. The Query name will be brought into the screen, and the files will be populated.

5. Select the Query from the list and use Select to return to the previous screen.

6. The files of the Query will be populated.

7. Enter an end date if one is desired. The Query will no longer be run on that date. The daily report will indicate that you have gotten to this date. Or leave it blank or remove the date if no end date is desired.

8. Then select the frequency.
   - If you select Daily, the scheduled Query will run seven days a week, regardless of whether your credit union has beginning of day processing.

   - If you select Weekly, you must select the day of the week. The Query scheduler is run on that day, seven days a week, regardless of whether your credit union is open.

   - If you select Monthly, you must also select the day of the month (0-31) when the automation setting will be run. For the last day of the month enter 31.

9. Select whether to use end of month files.

10. Use **Add/Update** to add the Query to the Query Scheduler.

The new Query is added to the scheduler.

Updating a Scheduled Query if the Query is Updated

If an automated Query is added to the Scheduler feature and you make a change to the Query definition on which it is based during the month, you must also update the Automated Query. Otherwise, the automated Query will not run at month-end.

The detail screen shows the files in the original Query (that the scheduled Query is based on) to the right of the files included in the automated Query. If the lists don't match, use **Add/Update** on the *Change* screen to update the automated Query to match.

Re-Sequencing Queries that Build on Each Other

- NOTE: You may string multiple queries together with the Automated Query feature. In this manner, you can cause the order queries are run, so that they can be run in the correct order. (One that relies on another is run after the first.) Up to 989 queries can be strung together. Additionally, there is a re-sequence feature available, should you need to reorder the queries.

The Query scheduler runs the Queries in the order they appear on the screen. To run Queries that build on each other, simply enter them sequentially.

To re-sequence Queries, follow this process:

1. If you add the Queries out of order sequentially, select the Query and *Edit*.

2. Enter a new number in the *Sequence #* field.

3. Then use **Add/Update**.

4. You can then use **Resequence** to change the numbering to be by increments of ten. (This will be refreshed when you exit and re-enter the screen.)

Removing a Query from Automation

To remove a Query from the Query scheduler, simply select the Query and then *Remove from Automation*. This will not delete the Query from QUERYxx, it will simply remove it from automated processing.
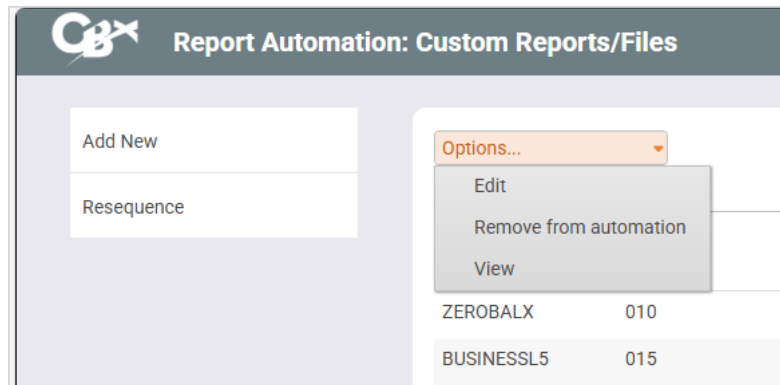
Query is Deleted From QUERYxx

If a Query is removed from QUERYxx, the Query Scheduler will indicate that the Description of the Query is "**Not FOUND**." (See below.)

CHARGEOFF2	005	01	12/01/14	05	12/01/24	Test CHARGEOFF2	DONALDF 1/04/20
ZEROBALX	010	01	3/26/13	05	12/01/24	Test ZEROBALX	DONALDF 1/04/20
BUSINESSL5	015	01	3/26/13	05	12/01/24	**NOT FOUND**	
BUSINESSL6	020	01	3/26/13	05	12/01/24	**NOT FOUND**	

Reviewing Your Automated Queries

After the scheduled Queries are run, you can refer to your DAILYxx OUTQ for the "Automated Run of Scheduled Queries – Audit Report" (PRUNAQ) – shown below for a list of Queries run by the Query Scheduler.

The Queries are listed by Query name and indicate whether the Query generated a report without a printer undefined.

- The reports with a printer ID of *PRINT are considered exceptions and are archived to the HOLDxx OUTQ. This is indicated in the Exceptions column. From here they can either be printed or archived.
- One of the queries had an *end date* when the Query should no longer be generated. The notation *Scheduled query has reached the end date* indicates that the Query will no longer be run. The Query settings will be purged thirty days later. This is helpful for auditing purposes.

Items that are not Exceptions built database files or output to a specific printer ID.

```
 4/20/21   8:53.22                        ABC CREDIT UNION                              PRUNAQ        PAGE
    RUN ON    4/20/21                      AUTOMATED RUN OF SCHEDULED QUERIES -- AUDIT REPORT          USER  ███████
                              LAST RUN
 QUERY NAME FREQUENCY SEQUENCE  DATE    EXCEPTIONS
 AUTOLOANS     D       030    4/19/2021
                                            Scheduled query has reached end date
 ACCTNGRPT     M       040    4/19/2021
 BDAYTODAY     D       050    4/19/2021
 CREDIT        W       060    4/19/2021
 ALLLOANS      D       070    4/19/2021
 PAIDOFF       M       080    4/19/2021
 MGTMONTHLY    W       090    4/19/2021
 WEEKLYRPT     D       100    4/19/2021
                                       ***END OF REPORT***
```

Each day the PRUNAQ report (shown above) is archived to CU*SPY in the Miscellaneous category.