Scheduling a Query Job Aid
User Role(s): *Agency Query Writer and DFS Query Writer*
Last Updated: *03/09/2023*

Overview
Florida PALM queries can be scheduled to run at a specific time and frequency, with the output available in Florida PALM. For example, if a query has been created to assist in monthly reporting, schedule a query to run in Florida PALM once a month at a specified time. After running a query, query outputs may be exported in variety of formats (xls, pdf, html, and rtf). Query Writers have the option to share their queries with other query users in Florida PALM or they may choose to share their exported query outputs outside of Florida PALM (e.g., via email if the output does not include confidential or sensitive information).

Before scheduling a query, you must know which query you want to use. Formatted reports and public queries, including navigational information in Florida PALM, can be found in the Reports Catalog on the Solution page of the Florida PALM website. View the *Running a Query* course in the *PALM TECH – Florida PALM Overviews* Learning Path in the People First Learning Management System to learn how to search for an existing query. If you are scheduling a custom query you created, you must know the name.

How to Schedule a Query
1. Navigate to the **Schedule Query** page.
   a. Path: NavBar > Menu > Reporting Tools > Query > Schedule Query
2. Click the **Add a New Value** tab.
   a. Tip: A **Run Control ID** may be reused but not deleted once it has been created.
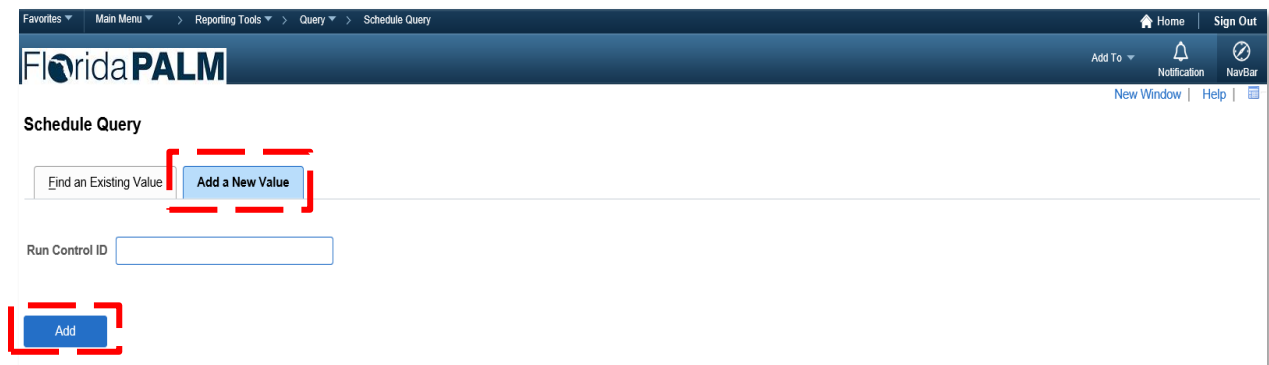3. Enter a **Run Control ID.**
4. Click the **Add** button.

Figure 1: The Add a New Value tab

5. In the **Query Name** field, enter the name of the query if it is known or search for a query using the **Search** button.
6. In the **Description** field, enter a description of the query.
7. Click the **Save** button.
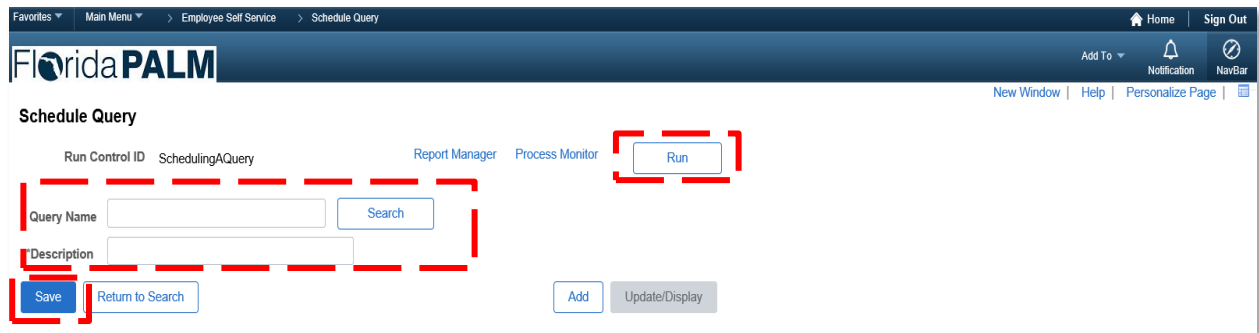8. Click the **Run** button.

Figure 2: The Schedule Query page when adding a new value

9. In the **Recurrence** dropdown, select the desired frequency.
10. Enter the desired time zone in the **Time Zone** field.
11. Enter the date when you would first like this query to run in the **Run Date** field.
12. The **Run Time** defaults based on the Recurrence selected in step 10.
13. Click the **Format** dropdown and select your desired format for the query output. Common output options include:
    a. XLS (Excel)
    b. PDF
    c. HTML
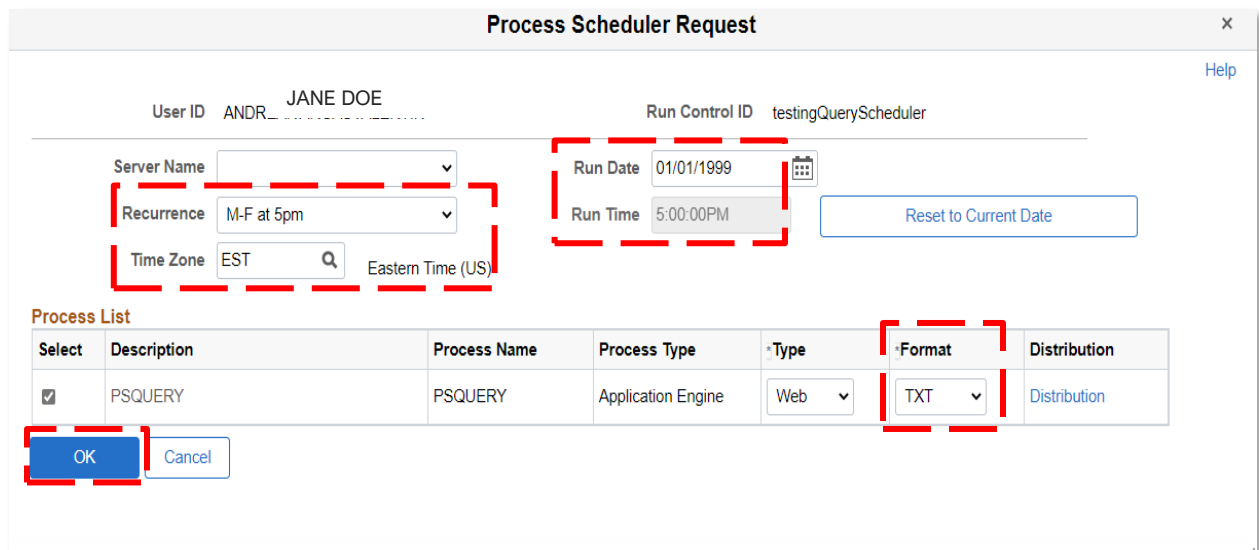   d. TXT (RTF)
14. Click the **OK** button.

Figure 3: The Process Scheduler Request page

15. To view the output of a scheduled query, navigate to the **Report Manager** page.
    a. Path: NavBar > Menu > Reporting Tools > Report Manager
    b. Tip: The **Report Manager** page automatically loads with the scheduled queries that were run in the last 24 hours. Use the **View Reports For** section to search for other developed queries.

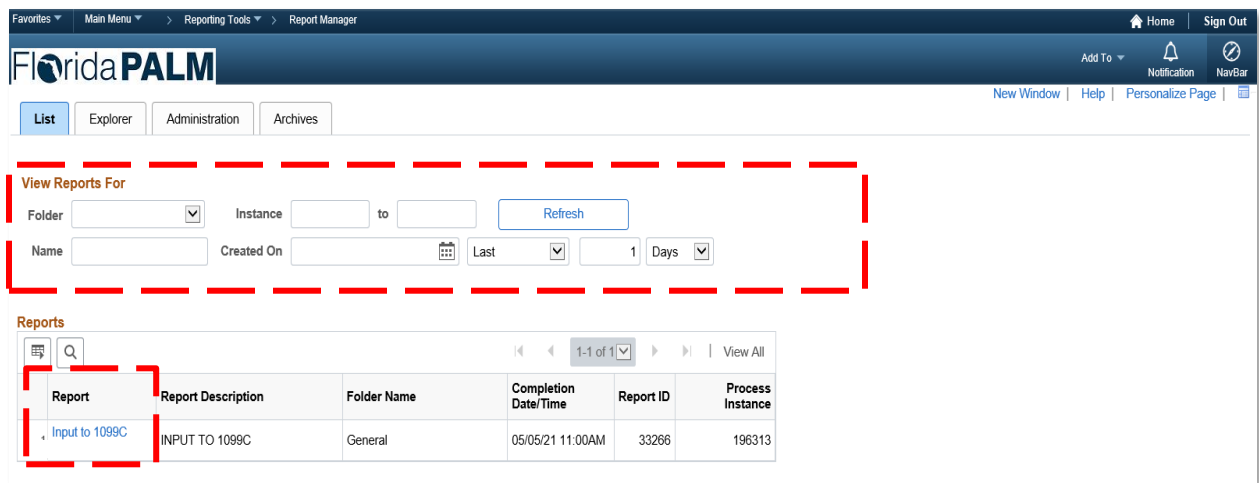16. Click the desired report link from the **Report** column.

Figure 4: The Report Manager page

17. In the **File List** section, click the desired format to download.
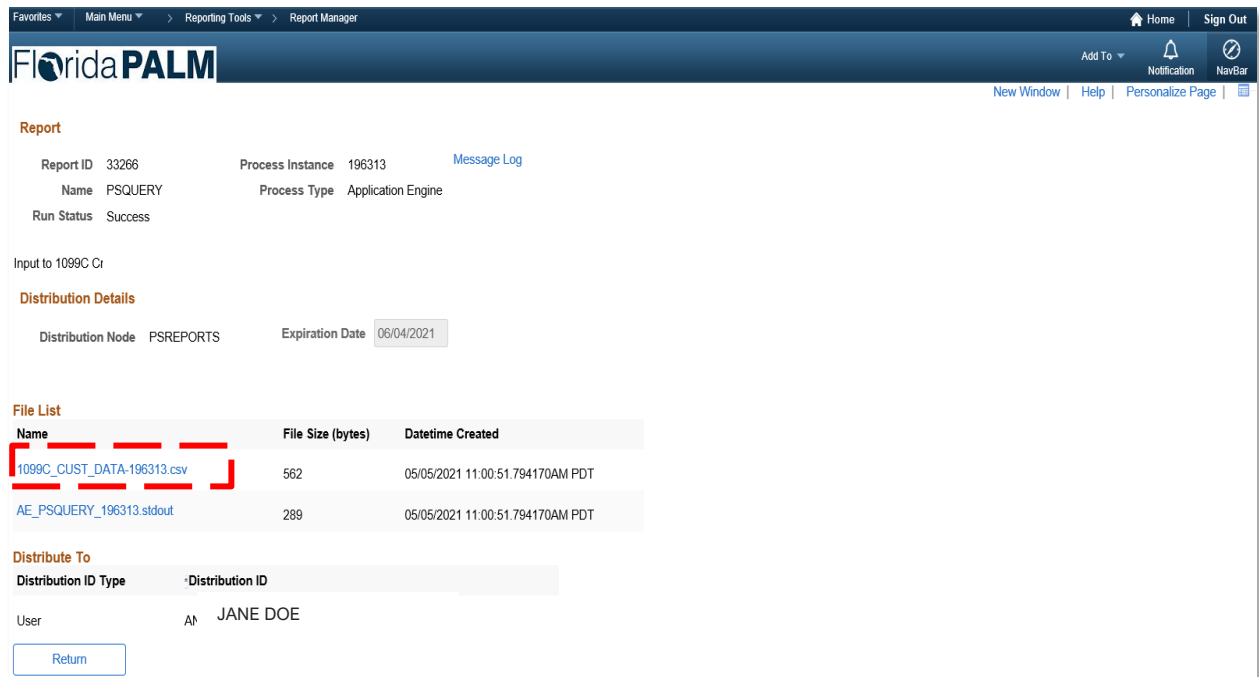   a. Tip: Select the "**.csv**" file to download an Excel version.

Figure 5: The Report page for a scheduled query

Still have questions?
Please contact the **Florida PALM Solution Center.**