

Instructions: How to Schedule a Report in NYBEAS

To schedule a report in NYBEAS, you must navigate to the Schedule Query page and either search or enter the Run Control ID for the report you wish to schedule and run.

Navigation – Main Menu > Reporting Tools > Query > Schedule Query

If you are running the report for the first time, begin with Step 1 below. If you are not running the report for the first time, on the Find an Existing Value tab, click on Search and then select the Run Control ID you previously created. You may skip to Step 3.

Step 1: Add the Report Run Control ID

Schedule Query

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search by: Run Control ID ▾ begins with

☐ Case Sensitive

Search [Advanced Search](#)

No matching values were found.

[Find an Existing Value](#)

Quick Tip: If this is your second or later time running a NYBEAS report, just hit the "Search" button, and select the Run Control ID you previously created, and skip to Step 3 of the instructions.

Click "Add a New Value"

The first time you schedule a report in NYBEAS, you need to name the process you are running to generate the report. The name for your process is referred to as the Run Control ID. Each Report in NYBEAS will have a Unique Run Control ID. The appendix to these instructions lists the available reports and the Run Control ID associated with them.

After you click "Add a New Value" enter the Run Control ID and press the "Add" button.

Schedule Query

Find an Existing Value **Add a New Value**

Run Control ID: AGYENROLLMENT

Add

[Find an Existing Value](#) | [Add a New Value](#)

The Run Control ID is unique to each NYBEAS report.

Add a Run Control ID to define the name of the process NYBEAS will use to run your desired report. You will only need to add the Run Control ID once.

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Step 2: Search for the Report to be Associated with Your Run Control ID **Schedule Query**

Run Control ID: AGYENROLLMENT

[Report Manager](#)

[Process Monitor](#)

[Run](#)

Query Name:

Search

*Description:

Press the "Search" button to find the report associated with the Run Control ID you just added.

[Update Parameters](#)

Prompt Name	Value

Once you press the Search button, you will select the report associated with the Run Control ID you established. For this example, we will use BEA_AGENCY_HI_ENROLLMENT.

Scheduled Query Search Page

*Query Type:

Queries

Query:

BEA

Search

QUICK HINT: To only show NYBEAS benefits queries, type "BEA" then hit Search.

[Click Here to access the report](#)

Query	Customize Find View 100	First 1-12 of 129 Last
BEA_AGENCY_HI_ENROLLMENT	Health Insurance Enrollment	Public

NOTE: As more reports become available, users will be able to schedule these reports too. Please note, the information you see on this page may not be representative of your system access.

SPECIAL NOTE FOR ARS USERS: HBAs who have access to the Accident Reporting System (ARS) will be able to view a greater number of reports. ARS queries may be scheduled using this page, or directly in ARS. To isolate NYBEAS benefits reports, type "BEA" in the field **Query** and hit search.

After you've selected the report associated with your Run Control ID (in this case the Run Control ID: AGYENROLLMENT defines BEA_AGENCY_HI_ENROLLMENT), you will be brought to another page. For reports that list agency specific information, you will be brought to the following page.

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Step 3: Schedule the Report

Once you enter your agency code information, you will see the following page.

Schedule Query

Run Control ID: AGYENROLLMENT

[Report Manager](#)

[Process Monitor](#)

Run

Query Name: BEA_AGENCY_HI_ENROLLMENT

Search

*Description: Health Insurance Enrollment

[Update Parameters](#)

Prompt Name	Value
DEPTID	08000

Press the Run button.

Step 4: Process Scheduler Request Page

Process Scheduler Request

User ID: TXC13

Run Control ID:AGYENROLLMENT

Server Name: PSUNX

Run Date: 08/24/2015

BT

Recurrence:

Run Time: 4:54:24PM

Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Scheduled Query Program	PSQUERY	Application Engine	Web	XLS	Distribution

Press OK once you've set your file format.

OK

Cancel

Once you schedule your report, you will receive a Process Instance number.

Schedule Query

Run Control ID: AGYENROLLMENT

[Report Manager](#)

[Process Monitor](#)

Run

Query Name: BEA_AGENCY_HI_ENROLLMENT

Search

*Description: Health Insurance Enrollment

[Update Parameters](#)

Prompt Name	Value
DEPTID	08000

Process Instance:649565

You will now receive a Process Instance number. This lets you know your report was successfully scheduled.

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Step 5: Check on Your Report Status

Schedule Query

Run Control ID: AGYENROLLMENT

[Report Manager](#) [Process Monitor](#)

[Run](#)

Process Instance: 649565

Query Name: BEA_AGENCY_HI_ENROLLMENT

[Search](#)

*Description: Health Insurance Enrollment

[Update Parameters](#)

Prompt Name	Value
DEPTID	08000

From here you can check on your scheduled report's status by clicking the Process Monitor Link.

By clicking the Process Monitor link, you can observe your scheduled report. When it first starts the Run Status will say "Queued". You may click the "Refresh" button to update this page and see if your scheduled report's status changed. When your scheduled report is running, the run status will say "Processing". When it is completed, the Run Status will update to say "Success" or "Error".

Additionally, once your report is scheduled, you may do other work in NYBEAS and check on its status later to see when the process finished. For large reports that involve a great deal of information, this is recommended.

[Process List](#) [Server List](#)

View Process Request For

User ID: TXC13 [Type:](#) Last: 1 Days [Refresh](#)

Server: Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	649566		Application Engine	PSQUERY TXC13		08/24/2015 5:00:19PM EDT	Success	Posted	Details

Status of your scheduled report

Once your report's Run Status says, "Success" and the Distribution Status says, "Posted" you may now open the report.

Step 6: View Your Report

To view the report you scheduled or to view an archived report result navigate to the Report Manager Page.

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Navigation – Main Menu > Reporting Tools > Report Manager

On Administration tab on this page you will see the list of reports available and their corresponding request date and time (the run date). Select the report you just ran to open the file.

Select the report you want to open.

View Reports For

User ID: TXC13 Type: [v] Last: 1 Days [v] Refresh

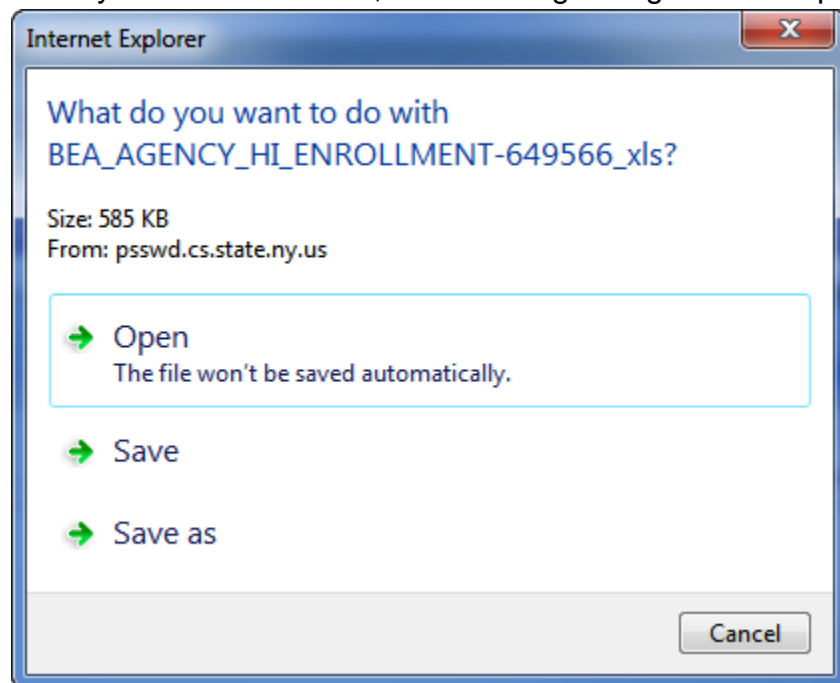
Status: [v] Folder: [v] Instance: [] to: []

Report List

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	17235	649566	Health Insurance Enrollment	08/24/2015 5:00:22PM	Microsoft Excel Files (*.xls)	Posted	Details
<input type="checkbox"/>	17234	649565	Health Insurance Enrollment	08/24/2015 4:56:26PM	Microsoft Excel Files (*.xls)	Posted	Details

The Report Manager stores previously ran reports too, for up to thirty (30) days.

Once you click on the link, the following dialog box¹ will open.



¹ The type of dialog box that appears could differ on where it appears and how it looks depending on the type and version of the browser you are using; also the time it takes for this dialog box to appear could vary depending on the population of the department you ran the report for.