Infowview XI R3 Report Scheduling

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Refer to this tutorial to learn how to schedule reports to run at specified times and email the output to specified people. By scheduling a report, you can have it run automatically without needing to login to Infowview and refresh the report manually.

Pre-requisites to this tutorial:

- The report you wish to schedule must be published in Infowview and working correctly.
- You should be familiar with Infowview and know how to navigate and run reports.
  Please refer to the Infowview XI R3 How To Guide if you are not a current Infowview user.
1. SCHEDULING A REPORT

1.1. Open **Infowiew** and log in using your own username and password.

1.2. Open the Document List and navigate to the folder containing the report you want to schedule (Figure 1, Box 1). Click on the report to schedule (Figure 1, Box 2).

1.3. With the report selected, click on the Actions button (Figure 1, Box 3) and select the Schedule option. The screen will refresh to show the Schedule panel (Figure 2).
1.4. The display in the main panel is dependent on the option selected in the panel on the left. An ‘Instance’ of a report is the scheduled output of it at the specified time. **Instance Title** refers to the title you can give to it, if you want to change it from the original report title. Please note this will not change the actual title of the report, just your specific instance of it.

1.5. **Click Recurrence.** You will be presented with a drop-down list to schedule the report to run in a number of different ways.

   **Once:** Use this if you only want the report to run a single time, on a date and time in the future. This may be useful if you want to capture the data at a specific time when you are not able to refresh the report yourself (e.g. if you want the data as it was at 1am).

   ![Run object: Once](Run object: Once)

   **Object will run once only.**

   Start Date/Time: 10:55 18/7/2012

   End Date/Time: 16:56 24/3/2019

   **Hourly:** This option allows you to specify the report to run repeatedly throughout the specified date range, at whatever hour/minute intervals you need. This is useful for taking snapshots of data that is rapidly changing.

   ![Run object: Hourly](Run object: Hourly)

   **Object will run every N hours and X minutes.**

   Hour(N) = 1  Minute(X) = 0

   Start Date/Time: 10:55 18/7/2012

   End Date/Time: 16:56 24/3/2019

   **Daily:** Selecting this allows you to specify a report to run once per day but it does not have to be every single day between the specified date range – to run it every other day for example, enter 2 in the Days(N) field.
Weekly: Use the tickboxes to specify which particular days the report should run and the date range to control when it starts and ends.

1.6. Other Recurrence options are available, but the above are the most common. Here's an example of scheduling a report to run twice a week on a Monday and Wednesday at 10am, starting on 23/09/2010 and ending on 02/10/2012:

```
Recurrence
Run object: Weekly

Object will run every week on the following days.
- [ ] Monday  - [ ] Friday
- [ ] Tuesday  - [ ] Saturday
- [ ] Wednesday - [ ] Sunday
- [ ] Thursday

Start Date/Time: 10:55 18/7/2012
End Date/Time: 16:56 24/3/2019
```

Please note - the ‘End Date/Time’ year will be set as default to several years in the future – make sure you change this **before** you schedule the report!

1.7. Click on **Prompts** in the panel on the left. The prompts for the report are displayed – to enter your own parameters, click the Modify button (Box 1)
The Prompts window will appear (Figure 3) – this is the same as the List of Values method for refreshing a report ad hoc. Fill in each prompt with your chosen parameters and then click the Apply button.

1.8. Click **Formats and Destinations** from the panel on the left. First, you select the **Output Format and Destination** section – generally you should only select Microsoft Excel or Adobe Acrobat formats. If the output is going to be used for a further process, i.e. the basis for a mail merge, or needs to be edited, choose the Excel format. If it is only going to be used to view or print, choose Acrobat. You then click the ‘Email recipients’ tickbox, as scheduled reports will be e-mailed as attachments.

1.9. Next, click the **Destinations Options and Settings** menu. To have the report e-mailed, you first untick the box labelled ‘Use the Job Server’s defaults’ (Box 1) which will expand the screen to allow you to enter further details. Put your own e-mail
address in the From field, the user you want to send the report to in the To field (which can be yourself if you want to schedule a report to go to you), and enter a Subject for the e-mail. You can automatically populate the Subject bar with the report title by clicking the Subject button (Box 2) and selecting 'Title'. You can also add the Date and Time the report was refreshed here, by selecting from the drop-down.

Click the ‘Add attachment’ tickbox (Box 3) and either leave the file name as ‘Automatically generated’ or enter a ‘Specific name’ for it (again using the drop-down to select the title, which you can add to if you want). If you use a specific name, also tick ‘Add file extension’. If you want to include some text in the main body of the e-mail, click into the ‘Message’ window and enter it. Finally, tick the ‘Cleanup instance after scheduling’ button (Box 4).

1.10. These are the only settings you need to schedule a report. The other options in the panel on the left are not needed. After specifying the e-mail recipient, click the Schedule button in the bottom right of the screen (or Cancel if you have changed your mind about scheduling the report).
2. CHANGING AN EXISTING SCHEDULE

You can change any aspect (e.g. Recurrence, Prompts, Destination, File Format etc.) of a scheduled report at any time.

2.1. Click on the report you scheduled from the Document List in Infoview. Click on the ‘Actions’ drop-down, and select ‘History’ (Box 1).

2.2. The schedule history of that report is displayed, showing each instance. The details of the instance are shown – if you have multiple instances of the same report, you can click on the column headers to filter the list. If you want to see full details of an instance, including the e-mail address of the recipient(s), click the ‘Instance details’ button (Box 1). You can also temporarily stop an instance from running, without deleting it completely, by clicking the ‘Pause’ button (Box 2). If an instance is paused, it will not send an output again until it is resumed (the button to the right of Pause).

2.3. To Reschedule the report using different parameters, or different recipients or file formats, select the instance and click on the ‘Actions’ drop-down and choose Reschedule. This will take you back to the main Schedule menu where you can edit the existing instance. This only applies for a schedule that is still ‘active’ – i.e. is currently running. If a schedule has already finished you will not be able to edit it, you should set up a new schedule.

2.4. If you want to delete a schedule completely, select the instance and then click the ‘Organize’ drop-down. Click ‘Delete’ and you will be prompted to confirm that you definitely wish to delete:
Click OK and the schedule of that report will be deleted.

**PLEASE NOTE:** Making changes/deleting an instance does not affect the original report, it is only your scheduled instance you are making changes to. However, if other users have scheduled a report you may see their instances in the History – please ensure you only make changes to instances YOU own. You can filter the History to show only your instances by clicking the ‘Show only instances owned by me’ tickbox at the top of the page.
APPENDIX A. SCHEDULING EXAMPLES

The following are examples of the kind of situations where you might like to use scheduling. If you have a particular scheduling requirement and you are not sure how to configure it, please ask BannerSupport@rhul.ac.uk for advice.

1. To have a regular report of the status of students (Figure 1).

2. Registers and Sign-In Sheets (Figure A2) – can be used in conjunction with the Banner Attendance Tracking module, as part of the data collection prior to entry.

3. Students who have missed a deadline or have invalid date data (Figure B3)