



# Scheduling Reports

Before you schedule any reports it is **vital** that you copy the reports and save them to **My Folder**. If you don't, the reports will be scheduled with your parameters for the entire School, not just yourself!

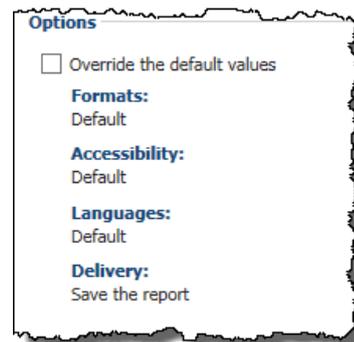
Scheduling reports is very useful if you would like to run the same report/s on a regular basis or have a report delivered to a colleague whilst you are away. However, if it is a report that has date parameters, then the updated parameters have to be completed each time before the scheduled report runs.

1. To schedule the report, click on the **schedule** icon and the **Schedule Listing** screen will display.



2. Complete the **Frequency** fields as to how the report is to be scheduled.
3. Choose the output format for the report by clicking in the **Override the default values** box under the **Options** section.

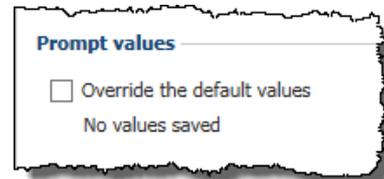
The **Option** selections are not visible until the **Override** box is checked.



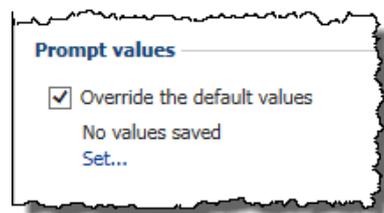
You have the option to:

- Set the format output
- Default the delivery method whether it be save, print or email. Email is the recommended option. Remember to use the full email address if sending to a colleague.

4. Set the report parameters by ticking **Override the default values** in the **Prompt values** section.



Click on **Set**.



5. The usual parameters screen will display accordingly to the report you are scheduling. This needs to be completed. Remember to set up parameters before you schedule the report.



**Top Tip! Schedule to run reports after 9.30am as the overnight build should have completed!**

Click **Finish** to display the schedule screen.

NB: These parameters can be changed at any time by selecting the scheduled report, clicking on the



Schedule icon, and choosing the relevant option.



## Saving parameters

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If you wish to save the parameters and the report contains no date parameters, then untick the Override the default values box

## Changing parameters

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If you wish to alter the parameters the next time you run the report, or it contains date ranges, then leave the tick in the Override the default values box under the Prompt values section.

## Removing a schedule

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Navigate to **My Folders**, and click on **More ...** for the report schedule you wish to remove. There will be an option to click called **Remove the Schedule**. A message will pop up asking you if you are sure you want to remove the schedule. Click **OK**.

## Viewing a schedule if delivery option *Save the report selected*

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From the **Home Page** navigate to **My Area**, and click on **My Activities and Schedules**. Click on **Schedules**. A list of your schedules will display