

# Infoview XIR3 Report Scheduling

User Guide

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# Infoview XIR3 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 Infoview and refresh the report manually.

### Pre-requisites to this tutorial:

- The report you wish to schedule must be published in Infoview and working correctly.
- You should be familiar with Infoview and know how to navigate and run reports. Please refer to the Infoview XIR3 How To Guide if you are not a current Infoview user.

# 1. SCHEDULING A REPORT

- 1.1. Open **Infoview** 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).

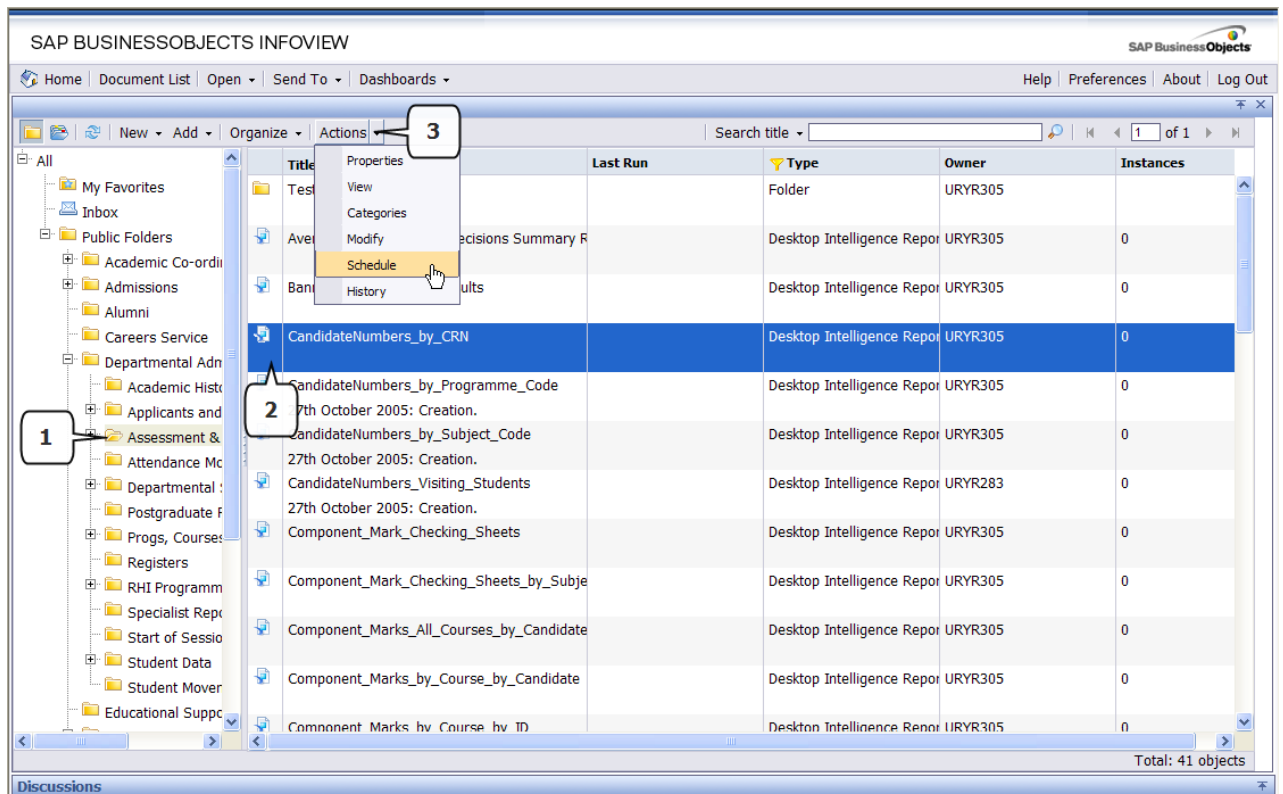


Figure 1

- 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).



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:

Object will run once only.

Start Date/Time:

End Date/Time:

**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:

Object will run every N hours and X minutes.

Hour(N) =  Minute(X) =

Start Date/Time:

End Date/Time:

**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.

Run object:

Object will run once every N days.

Days(N) =

Start Date/Time:

End Date/Time:

**Weekly:** Use the tickboxes to specify which particular days the report should run and the date range to control when it starts and ends.

Run object:

Object will run every week on the following days.

- Monday     Friday  
 Tuesday     Saturday  
 Wednesday     Sunday  
 Thursday

Start Date/Time:

End Date/Time:



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!

- 1.6. 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:

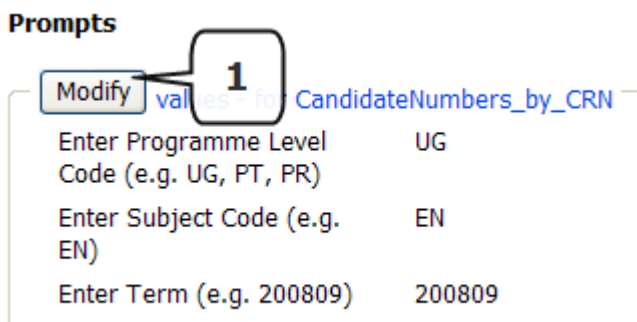
Object will run every week on the following days.

- Monday     Friday  
 Tuesday     Saturday  
 Wednesday     Sunday  
 Thursday

Start Date/Time:

End Date/Time:

- 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.

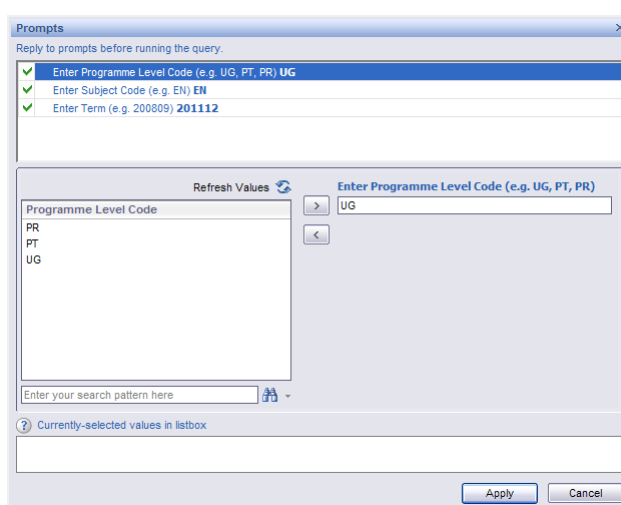
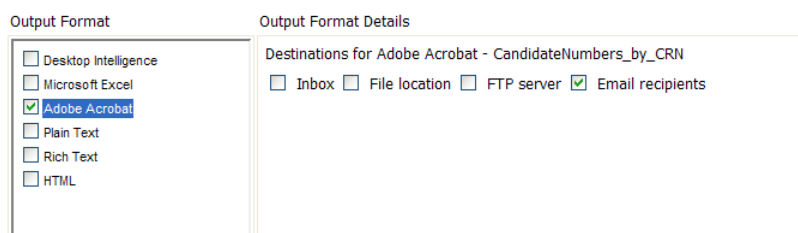


Figure 3

- 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.

**Formats and destination**

▼ **Output Format and Destination**



- 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).

#### ▼ Destinations Options and Settings

Destinations for the output format

Options and Settings

Email recipients **1**  Use the Job Server's defaults

From:

To:

Cc:

Subject:  **2**

**3**  Add attachment

Attachment:

Automatically generated

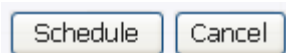
Specific name:

Add file extension

Message **2**

**4**  Cleanup instance after scheduling

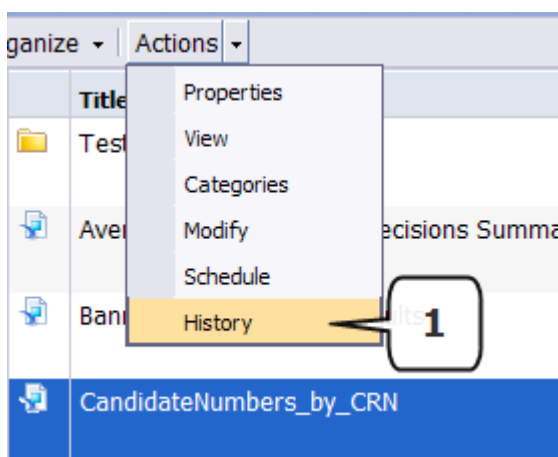
1.10. These are the only settings you need to schedule a report. The other options in the panel on the left are not needed. After specifying the e-mail recipient, click the Schedule button in the bottom right of the screen (or Cancel if you have changed your mind about scheduling the report).



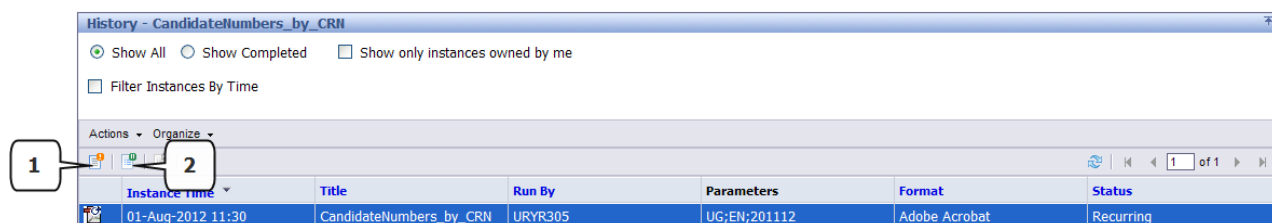
## 2. CHANGING AN EXISTING SCHEDULE

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).



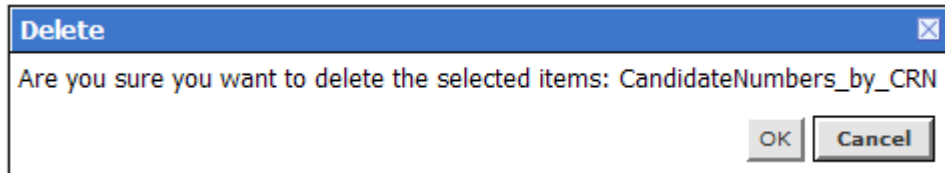
- 2.2. The schedule history of that report is displayed, showing each instance. The details of the instance are shown – if you have multiple instances of the same report, you can click on the column headers to filter the list. If you want to see full details of an instance, including the e-mail address 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.

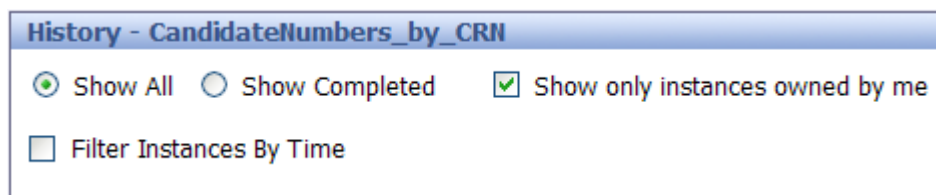
- 2.4. If you want to delete a schedule completely, select the instance and then click the 'Organize' drop-down. Click 'Delete' and you will be prompted to confirm that you definitely wish to delete:





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](mailto:BannerSupport@rhul.ac.uk) for advice.

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

		Continuing	New	Repeat in attendance	Resit/not in attendance	Thesis Submitted	Undeclared	Visiting-Incoming	Sum:
Awaiting Sign Up	Home/EU	131	28	6	6		1	2	174
Awaiting Sign Up	Overseas	23	15	3	1			1	43
Deferred Entry	Home/EU		73						73
Signed Up	Islands & I.O.M.	13	9						22
Signed Up	Home/EU	4486	2805	181	15	1		99	7587
Signed Up	Overseas	824	1138	52	14	2		103	2133
Sum:		5939	4659	257	40	4	120	210	11229

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.

Royal Holloway University of London  
**CONFIDENTIAL**

These registers are checked regularly for consistency; do not sign on behalf of anyone else. Initials or printed names do not count as a record of attendance. Original signatures must be used.

Weekly Sign-In Sheet by Course (Name Only)

PS 1030 Self and Society  
CRN: 60361

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Term: 201011                      Part of Term: UG Autumn Term  
DATE: \_\_\_\_\_                      CONVENOR: \_\_\_\_\_

Last Name	First Name	Signature

Figure 2

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

Interrupted Students with expired Interruption Dates									
Current ID	From Date	To Date	Title	Current First Name	Current Last Name	Student Status Code	Programme Code	Programme Name	Department
1	01/Aug/2010	06/Dec/2010	Miss	Roberta	Westwood College	IS	1397	BSc Social Work	Health & Social Care

Figure 3