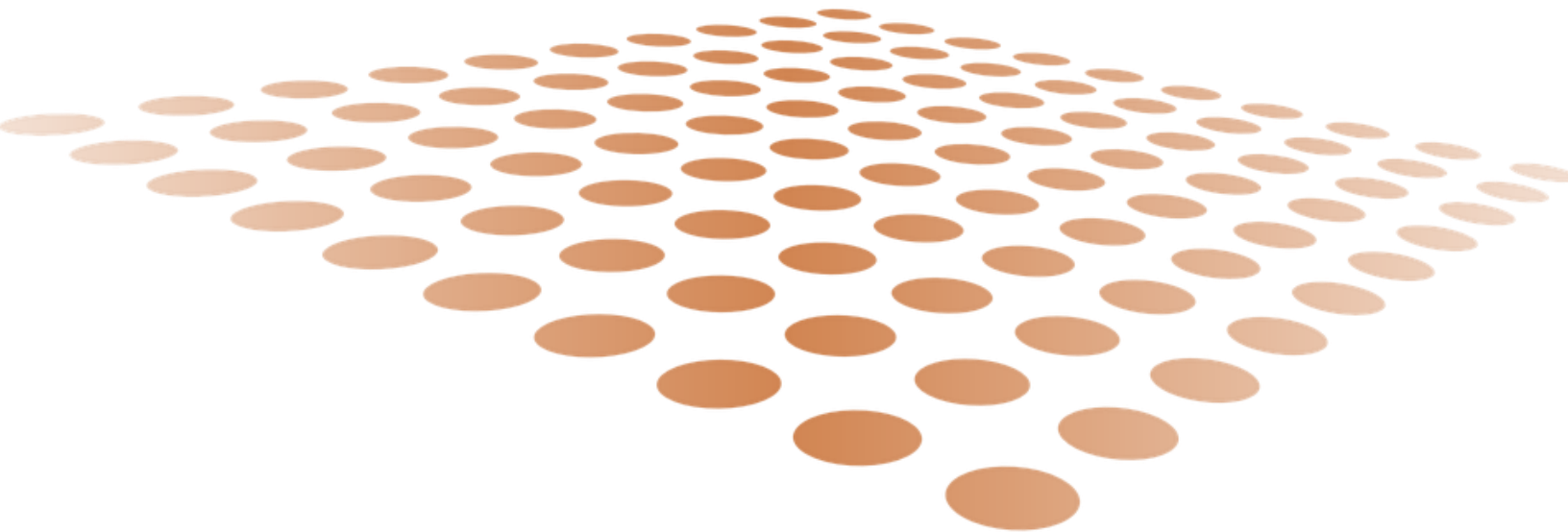


ADOA – General Accounting Office

# QUICK REFERENCE GUIDE: SCHEDULING REPORTS IN INFOADVANTAGE





# SCHEDULING REPORTS IN INFOADVANTAGE

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# SCHEDULING REPORTS IN INFOADVANTAGE

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## Overview

Some infoAdvantage reports may take a while to run online or may time out. Users have the option to schedule reports in infoAdvantage to run automatically without having to wait for the report to run on screen. Reports can be sent to other users via email in Excel or PDF formats.

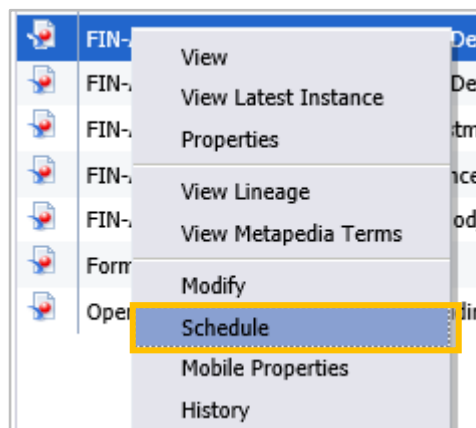
Reports cannot be scheduled from the Statewide Reports folder. Only reports in the Department On Demand Reports folder can be scheduled. A shortcut cannot be scheduled if it is linked to a Statewide Report. In order to schedule a Statewide report, the report must be copied and saved in the Department On Demand Reports folder.

Scheduling a report will create an instance of the report. These instances are the report results after prompt input.

## Begin Scheduling

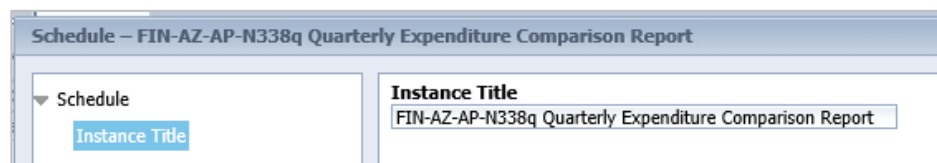
Right Click on the report and then choose **Schedule**

This will open a new window with the following options:



## Instance Title

**Instance Title (Report Name/Title)**

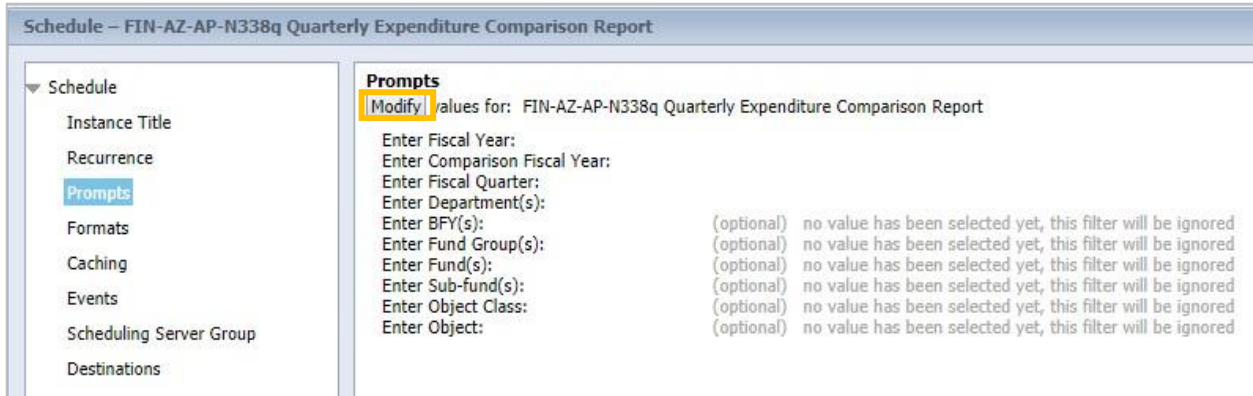


Defaults to the original report name. Instance report name/title can be changed. The instance title does NOT rename the report itself.



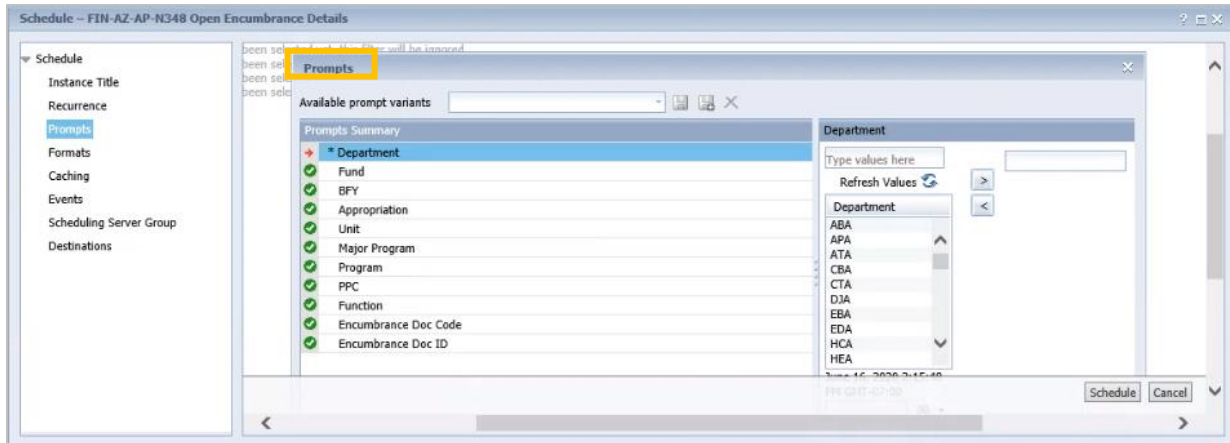
## Prompts

These are the filters that may be required (optional prompts indicated) before running the report. Enter the prompts by clicking on Prompts in the left menu and then clicking the **Modify** button. Prompts often take a few moments to appear, please be patient. The normal prompt input window will come up and the prompt responses may be chosen from there. Ensure all required prompts are completed. When there are no prompts in a report, the **Modify** button will stay grayed out and will not allow a user to select it.



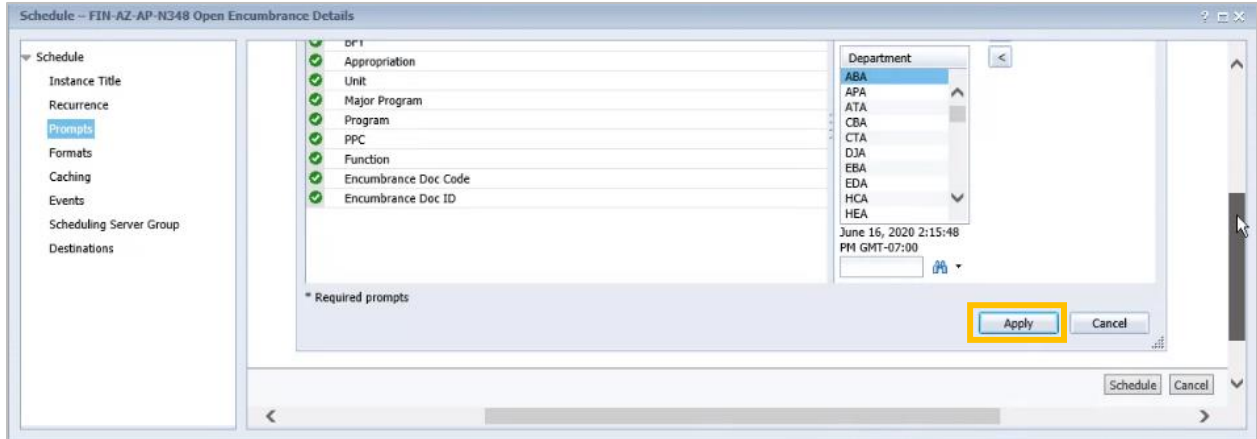
Prompt	Status
Enter Fiscal Year:	
Enter Comparison Fiscal Year:	
Enter Fiscal Quarter:	
Enter Department(s):	
Enter BFY(s):	(optional) no value has been selected yet, this filter will be ignored
Enter Fund Group(s):	(optional) no value has been selected yet, this filter will be ignored
Enter Fund(s):	(optional) no value has been selected yet, this filter will be ignored
Enter Sub-fund(s):	(optional) no value has been selected yet, this filter will be ignored
Enter Object Class:	(optional) no value has been selected yet, this filter will be ignored
Enter Object:	(optional) no value has been selected yet, this filter will be ignored

**Note:** Patience needed during this step, prompt list and options may take a minute to load.



After entering prompts, select **Apply** in the bottom right section (may need to scroll down) of the Prompts window and ensure you see all the prompt inputs on the screen before moving to next step.

**Note:** Completing this information enables the use of InfoAdvantage Report FIN-AZ-AM-N627 Assets Purchased with Federal Dollars. Refer to QRG Assets Purchased with Federal Dollars for more information.



*Note: If you do not click Apply after loading prompts then report will fail.*

## Formats

Select the desired output format. Available options are **Web Intelligence**, **Microsoft Excel**, and **Adobe Acrobat (PDF)**.

## Caching

This is not available to interactive users.

## Events

This has not been configured for interactive users. Please do not use this option.

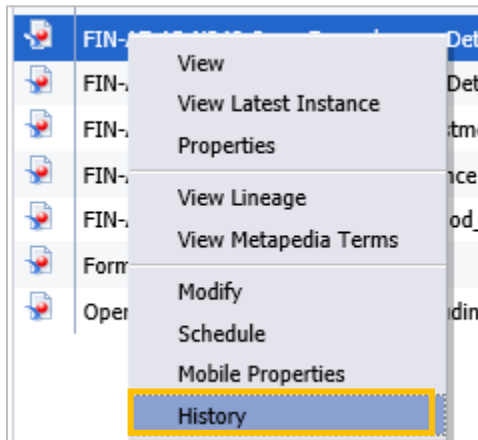
## Scheduling Server Group

This is not available to interactive users.

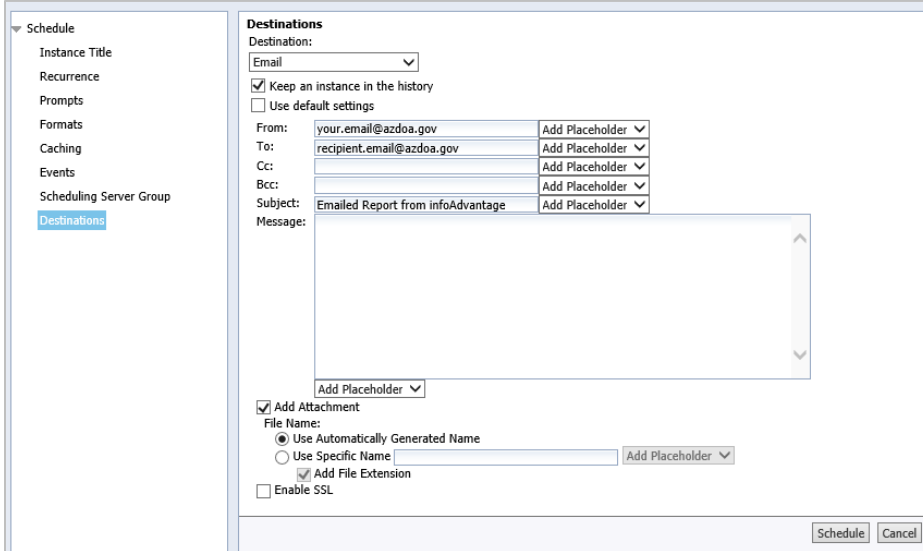
## Destinations

Select the desired destination. Available options are **Default Enterprise Location** and **Email**. All other scheduling destinations are currently not available to interactive users.

The destination by default is set to **Default Enterprise Location**. Scheduled instances run with the **Default Enterprise Location** can only be viewed by right clicking the report and choosing **History**.

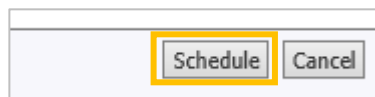


Setting the destination to **Email** allows users to send reports to their Email inbox for further analysis. Scheduled instances run with the **Email** destination should be formatted in **Microsoft Excel** or **Adobe Acrobat** for viewing outside of infoAdvantage. Enter your email address in the **From** section and the recipient's email address in the **To** section. **Subject** and **Message** are optional.



## Submit

Finish scheduling the report by clicking **Schedule** in the bottom right-hand corner.



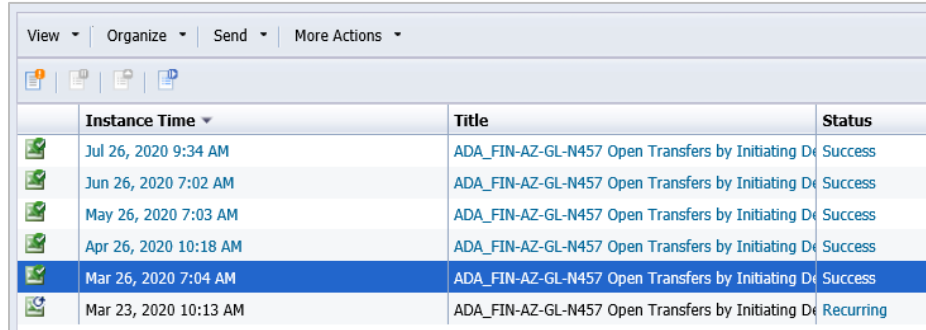
The **History** dialog box will open, the instance will show as **Pending** or **Recurring** status depending on how the report was scheduled. When the report is processing it will be in a **Running** status; when the report is complete, the status will change to **Success**.

## Opening History

The **History** dialog box can be re-opened by right clicking on the report and then selecting **History**. Five instances of the scheduled report will be retained, which can be viewed at a later date. Reports should be exported and saved outside of infoAdvantage and instances deleted from **History** if no longer needed.

Click on any of the report **Titles** to view that scheduled report.

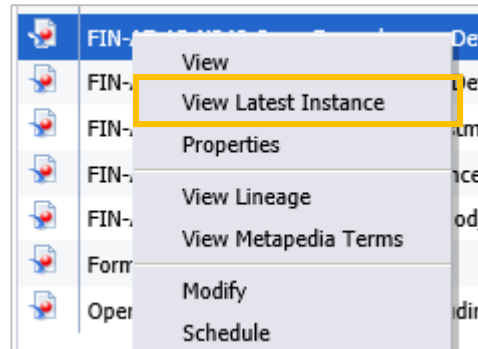
*Note: Individual report instance limits can be increased to more than 5 by sending a request and reason to [AFIS.Reports@azdoa.gov](mailto:AFIS.Reports@azdoa.gov)*



Instance Time	Title	Status
Jul 26, 2020 9:34 AM	ADA_FIN-AZ-GL-N457 Open Transfers by Initiating De	Success
Jun 26, 2020 7:02 AM	ADA_FIN-AZ-GL-N457 Open Transfers by Initiating De	Success
May 26, 2020 7:03 AM	ADA_FIN-AZ-GL-N457 Open Transfers by Initiating De	Success
Apr 26, 2020 10:18 AM	ADA_FIN-AZ-GL-N457 Open Transfers by Initiating De	Success
Mar 26, 2020 7:04 AM	ADA_FIN-AZ-GL-N457 Open Transfers by Initiating De	Success
Mar 23, 2020 10:13 AM	ADA_FIN-AZ-GL-N457 Open Transfers by Initiating De	Recurring

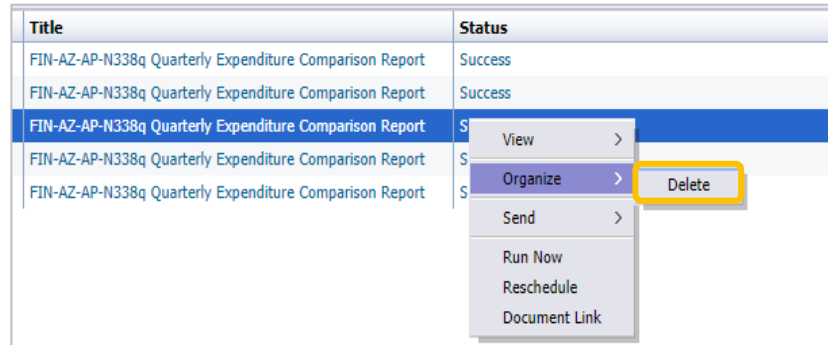
## View Latest Instance

To view the most recently completed scheduled report, right click on the report and then select **View Latest Instance**. The report will open with the last scheduled instance.



## Deleting Instances

To delete an instance of a scheduled report, from the **History** dialog box right click on the instance and select **Organize** and then **Delete**.



Title	Status
FIN-AZ-AP-N338q Quarterly Expenditure Comparison Report	Success
FIN-AZ-AP-N338q Quarterly Expenditure Comparison Report	Success
FIN-AZ-AP-N338q Quarterly Expenditure Comparison Report	S
FIN-AZ-AP-N338q Quarterly Expenditure Comparison Report	S
FIN-AZ-AP-N338q Quarterly Expenditure Comparison Report	S

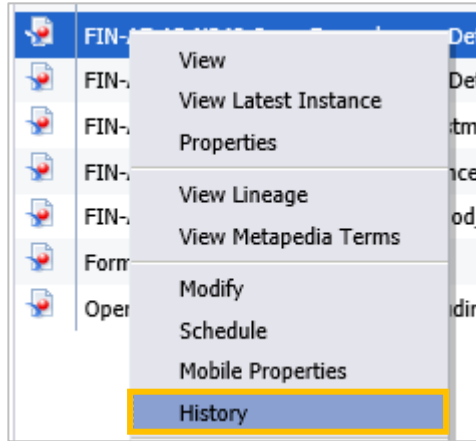
*Note: When a user is removed from infoAdvantage, any recurring reports that the user had scheduled will no longer run and will*



*need to be rescheduled by another user. See Rescheduling Instances below.*

## Updating Recurring Instances

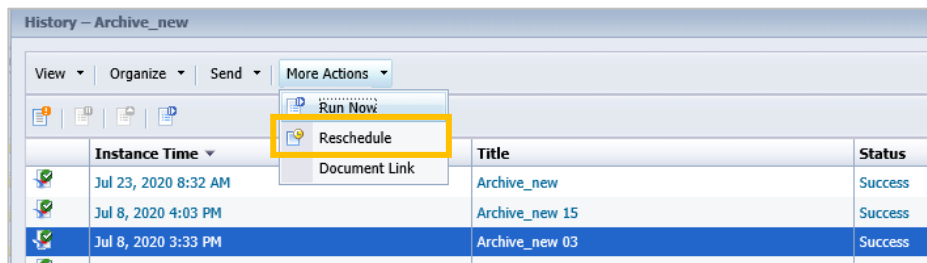
Reoccurring scheduled instances may need to be adjusted to update prompts or change email addresses. Right click on the report and then select **History** to view the recurring instance.



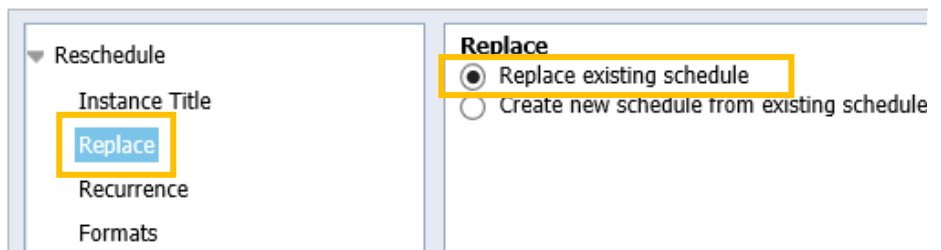
## Rescheduling Instances After User Departure

When a user leaves an agency, the user account is removed from infoAdvantage, all of the users scheduled reports will fail with error “Object failed to run due to insufficient security privileges”. When a user is leaving an agency, it is best to have an active agency user reschedule any reports to ensure all reports generate successfully.

Right click on the report and select **History** to view the departed user’s instances. Select an instance with a *Success Or Recurring Status*. With the instance highlighted select the **More Actions** menu at the top of the navigation bar and select **Reschedule**.



Schedule the report by following the direction under **Begin Scheduling Instance Title**. When using an instance with the *Recurring Status*, select the *Replace existing*





*Schedule* from the **Replace** tab.