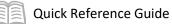
ADOA – General Accounting Office QUICK REFERENCE GUIDE: SCHEDULING REPORTS IN INFOADVANTAGE





Scheduling Reports in infoAdvantage

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Scheduling Reports in infoAdvantage

Overview

Reports in infoAdvantage have the option to be run on-demand (real-time) or can be scheduled to run on a pre-defined date or cadence. In order to minimize the stress to the infoAdvantage application caused by the buffering of larger reports, the GAO Reporting Team strongly recommends that users schedule their reports rather than running them on-demand. In addition to alleviating system stress, scheduled reports can also be set to be emailed to user(s) in Excel or PDF format saving users the process of having to log in to infoAdvantage to run an on-demand report.

Scheduling a Report

A report can be scheduled from a Statewide Reports folder or from the Department Folder for a user's agency. The only place a report cannot be scheduled is from another agency's Department Folder.

1. Either **right click** on the report or click the **3-dot** menu on the right of the grid and choose **Schedule**.

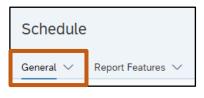
Selected Folder							
Pu	Public Folders / Department Folders / AAA Reports / On Demand Reports / Report Developers / 1 - DEV / CB / C + 👱 🚥 🏢						
Title	🚔 Favorites	Туре	Description	Last Updated			
Shortcut	to FIN-AZ-AP-N290 Dai	Shortcut		Sep 8, 2023 9:53 AM			
	View View Latest Instance Copy Opendoc Link Properties Schedule			View View Latest Instance Copy Opendoc Link Properties Schedule			
	Mobile Properties History Categories Mark As Favorite Details Organize >			Mobile Properties History Categories Mark As Favorite Details Organize			

2. The **Schedule** screen will then generate.

Complete the **General** tab of the **Schedule** screen for the desired report.

- 1. Ensure that the **General** tab is selected (this is the default).
- 2. In the Instance Title section:
 - a. In the **Title** field, users can update the default original report name if desired.

10/10/2023





Note: Updating the instance title of the report does NOT rename the report itself.

Instance Title	
Title*	
FIN-AZ-AP-N290 Daily Warrant Count	

- 3. In the **Destinations** section:
 - a. Click the **Add** button.

Destinations		
Delivery Destinations	Selected Delivery Destinations	
Add	Default Enterprise Location	\otimes

- b. Select the desired destination:
 - i. **Default Enterprise Location** 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.
 - ii. Email 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.

Select Destinations						
Select a destination	Defa	ult Enterprise Location ×	\sim			
Default Enterprise Lo	~	Default Enterprise Location				
		Email				

4. Click anywhere on the screen.

If using the **Default Enterprise Location** option:

1. Click **Confirm**.

\sim
ncel



If using the **Email** option:

- 1. In the **From:** field, enter the user's work email address that is scheduling the report.
- 2. In the **To:** field, enter the report recipient's email address. If there are more than one receipient, separate email address by a ";" and a space.
- 3. The **Subject:** and **Message:** fields are optional.
- 4. Click **Confirm**.

	Select Destinations	
Select a destination Email ×		~
Email	Email	
	Delivery Details	
	Use default settings	
	System Details	
	From:	
	test@azdoa.gov	Add Placeholder $~~ \lor$
	To:	
	test1@azdoa.gov; test2@azdoa.gov; test3@azdoa.gov Cc:	Email Address 🗸 🗸
		Add Placeholder 🗸
	Bcc:	
		Add Placeholder $~~ \lor$
	Reply To	
	Subject:	Add Placeholder $~~ \lor$
	Subject.	Add Placeholder 🗸 🗸
	Message:	
	$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	Add Placeholder $~~ \lor$
		Confirm Cancel

- 5. In the **Recurrence** section:
 - a. In the **Run Report:** field drop down menu, select the recurrence frequency which determines when the report will be run. Users can choose from the following options:
 - i. **Now** Runs the report immediately (default value).
 - ii. **Once** Runs the report one time for a future specified date and time.
 - iii. **Recurring** Runs the report at a recurring specified date and time.

Recurrence	
Run Report:	
Now	\sim
Now	
Once	
Recurring	
Calendar	



iv. **Calendar** – Runs the report at a recurring basis based on Hard Close, Quarterly Depreciation, Soft Close, or Soft Close - 2 Business days after.

Recurrence Example – Once:

Recurrence	
Run Report:	
Once	\sim
Start Date:	
Sep 8, 2023, 1:01:55 PM	<u>5</u>
End Date:	
Sep 8, 2033, 1:01:55 PM	õ
Allow Retries	
OFF	

Recurrence Example – Calendar:

Recurrence								
Run Report:	Calendar:							
Calendar \lor	<		Se	ptember		202	3	>
Calendar Name:		Sun	Mon	Tue	Wed	Thu	Fri	Sat
Quarterly Depreciation 🗸	35						4	0
Start Date:							1	2
Sep 8, 2023, 1:01:55 PM	36	3	4	5	6	7	8	9
End Date:	37	10	11	12	13	14	15	16
Sep 8, 2033, 1:01:55 PM	38	17	18	19	20	21	22	23
Allow Retries	39	24	25	26	27	28	29	30
OFF								
			C	ctober		202	3	
		Sun	Mon	Tue	Wed	Thu	Fri	Sat
	40	1	2	3	4	5	6	7
	41	8	9	10	11	12	13	14
	42	15	16	17	18	19	20	21
	43	22	23	24	25	26	27	28
	44	29	30	31				
	Show Sele	ected Sch	neduled [Date(s)				

Note #1: All reports need to complete running by 8pm or else they will timeout and may show partial results.

Note #2: The Events, Scheduling Server Group and Notification sections have not been enabled for interactive users and should not be used.

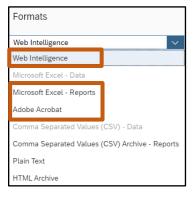
Complete the **Report Features** tab of the **Schedule** screen for the desired report.

- 1. Click the **Report Features** tab.
- 2. In the Formats section:
 - a. Select from the following available options:

Schedule	
General 🗸	Report Features 🗸



- i. **Web Intelligence** Report can be viewed within infoAdvantage only.
- ii. **Microsoft Excel Reports** Exports the report as an Excel spreadsheet.
- iii. Adobe Acrobat Exports the report as a PDF static document.



- 3. In the **Prompts** section:
 - a. Click the Edit Prompt Values button. The Prompts window will open.

Pr	ompts				
\sim	5	FIN-AZ-AP-N290 Daily Warrant Coun	nt		Edit Prompt Values
I	Enter Issu	e Date:		Constant val	ue 🗸

b. Enter the desired report prompts.

Note: For information on how to complete enter report prompts, see the "Report Running Steps" section of the AZ360 Manual: Interactive Reporting available at https://gao.az.gov/resources/training/gao-training-resources.

4. Click **Apply**.

Note: The Apply button will turn blue when all required fields have been selected. If Apply is not clicked after loading prompts, the report will fail.

囧					
Search	Q	C Enter Issue Date:		Ś	0
Enter Issue Date: (1) 9/1/2023 12:00:00 AM		Enter a date manually Selected value(s)	+	Q	0
		9/1/2023 12:00:00 AM			\otimes
				_	
			Appl	y Ca	ancel

Note: The Delivery Rules section has not been enabled for interactive users and should not be used.



- 5. Click the **Schedule** button in the bottom right of the screen.
- 6. 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.

Instance Title: FIN-AZ-AP-N290 Daily Warrant C	ount					
						[] ⊻ …
Title	Status	Instance Time	Created By	Туре	Parameters	
FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 7, 2023 1:46 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM	
□ ✓ FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 2, 2023 8:18 AM	150734	Web Intelligence	8/4/2023 12:00:00 AM	200
FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Aug 31, 2023 1:41 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM	000

Opening History

Seven days of instances of a scheduled report will be retained, which can be viewed at a later date using the History feature. Reports should be exported and saved outside of infoAdvantage. Any instances that are no longer required should be deleted from History.

To access History on a report:

1. Either **right click** on the report or click the **3-dot** menu on the right of the grid and choose **History**.

	Selected Folder								
	Public Folders / Department Folders / AAA Reports / On Demand Reports / Report Developers / 1 - DEV / CB /								
v	Title 🚊	Favorites	<u> </u>	Туре	Description	Last Updated			
	C Shortcut to FIN-AZ-AP-N290 Daily Warrant			Shortcut		Sep 8, 2023 9:53 AM	000		
		View					View		
		View Latest Instance					View Latest Instance		
		Copy Opendoc Link					Copy Opendoc Link		
		Properties					Properties		
		Schedule					Schedule		
		Mobile Properties					Mobile Properties		
		History					History		
		Categories					Categories		
		Mark As Favorite					Mark As Favorite		
		Details					Details		
		Organize >					Organize >		

2. Click on any of the reports with a Status of **Success** to view the report.

Instance Title: FIN-AZ-AP-N290 Daily Warrant C	count					
						[] ± …
Title	Status	Instance Time	Created By	Туре	Parameters	
🔲 🖌 FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 7, 2023 1:46 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM	***
□ ✓ FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 2, 2023 8:18 AM	150734	Web Intelligence	8/4/2023 12:00:00 AM	000
FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Aug 31, 2023 1:41 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM	

View Latest Instance

To view the most recently completed scheduled report:



1. Either **right click** on the report or click the **3-dot** menu on the right of the grid and choose **View Lastest Instance**.

		Selected Fo	der	
Public Folders / Depart	C + 🛓 🚥 🛄			
Title	.≞ Favorites	. Птуре	Description	Last Updated
Shortcut to FIN-AZ-AP-N290	Daily Warrant View	Shortcut		Sep 8, 2023 9:53 AM
	View Latest Instance Copy Opendoc Link			View Latest Instance
	Properties			Copy Opendoc Lini Properties
	Mobile Properties			Schedule Mobile Properties
	History Categories			History
	Mark As Favorite Details			Categories Mark As Favorite
	Organize	>		Details Organize

2. The report will open with the last scheduled instance.

Deleting Instances

Users have the ability to delete their own instance(s) of a scheduled report. To delete an instance of a scheduled report:

1. Either **right click** on the report or click the **3-dot** menu on the right of the grid and choose **Delete**.

6	CGI infoAdvantage	History \sim							Q	R • (2 8
Instance	e Title: FIN-AZ-AP-N290 Daily Warrant Count										
										(3 ± …
Title	9	Status	Instanc	e Time 🛛 🖉	≞ Cre	reated By	Туре	Parameters			
v 🕑	FIN-AZ-AP-N290 Daily Warrant Count	Pending	Sen 8	2023 3:28 PM	_R	D_TEST_PROD	Microsoft Excel	9/18/2023 12:00:00 AM			
□ ✓	FIN-AZ-AP-N290 Daily Warrant Count	Juccess		023 1:46 PM	150	60734	Web Intelligence	8/4/2023 12:00:00 AM			Run Now
□ ✓	FIN-AZ-AP-N290 Daily Warrant Count	Success	Reschedule	023 8:18 AM	150	0734	Web Intelligence	8/4/2023 12:00:00 AM			Reschedule
🗆 😳	FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Pause	2023 1:41 PM	150	0734	Web Intelligence	8/4/2023 12:00:00 AM			Pause
			Details								Details
			Delete								Delete

- 2. On the **Delete** pop up message, click **OK**.
- 3. Deleting the report will removed it from the report History screen.

\Lambda Delete						
This will delete the instance. Do yo	ou want to p	proceed?				
	ОК	Cancel				

1	000 infoAdvantage	History \sim					Q	K 0 🔇	8
Insta	nce Title: FIN-AZ-AP-N290 Daily Warrant Count								
								C	<u>↓</u>
	Title	Status	Instance Time	Created By	Туре	Parameters			
2	✓ FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 7, 2023 1:46 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM			
	✓ FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 2, 2023 8:18 AM	150734	Web Intelligence	8/4/2023 12:00:00 AM			
	S FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Aug 31, 2023 1:41 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM			

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 After User Departure below for more details.

Updating Recurring Instances

Recurring scheduled instances may need to be adjusted to update prompts or change email addresses. To update a recurring instance:

1. Either **right click** on the recurreing report or click the **3-dot** menu on the right of the grid and choose **Reschedule**.

Co infoAdvantage	History ~					Q A	• • • 🔒
nstance Title: FIN-AZ-AP-N290 Daily Warrant C	Count					000	
Title	Status	Instance Time	Created By	Туре	Parameters	Run Now	€ ∓ …
V FIN-AZ-AP-N290 Daily Warrant Count V FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 7, 2023 1:46 PM Sep 2, 2023 8:18 AM	150734 150734	Web Intelligence Web Intelligence	8/4/2023 12:00:00 AM 8/4/2023 12:00:00 AM	Reschedule	
FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Aug 31, 2023 1:41 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM		
		Reschedule				Pause	Run Now Reschedule
		Pause Details				Details	Pause Details

Rescheduling Instances After User Departure

When a user leaves an agency, the user account is removed from infoAdvantage. All of the user's 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.

To reschedule a report:

- 1. **Right click** on the report and select **History** to view the departed user's instances.
- 2. Select an instance with a Status of Success or Recurring. With the instance highlighted, **right click** on the report and select **Reschedule**. In this scenario, user _RE_TEST_PROD has left an agency and their recurring report needs to be rescheduled.

Instance Title: FIN-AZ-AP-N290 Daily Warrant Count																											
Title			Status	Instance Time	Created By	Туре	Parameters																				
V 🕞 FIN	N-AZ-AP-N290 Daily Warrant Count		Recurring	Sep 8, 2023 3:57 PM	_RD_TEST_PROD	Microsoft Excel	11/1/2022 12:00:00 AM																				
🗆 🖌 FIN	N-AZ-AP-N290 Daily Warrant Count			Sep 7, 2023 1:46 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM																				
🗆 🖌 FIN	N-AZ-AP-N290 Daily Warrant Count	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule	Reschedule							Success	Sep 2, 2023 8:18 AM	150734	Web Intelligence	8/4/2023 12:00:00 AM
E 🕞 FIN	N-AZ-AP-N290 Dally Warrant Count	Pause Details Delete	Recurring	Aug 31, 2023 1:41 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM																				



3. On the Schedule screen, General tab, Replace section select Replace existing schedule.

Replace	
Replace:	
Replace existing schedule	
Create new schedule from existing schedule	

- 4. On the **Select Destinations** screen, select the desired destination:
 - a. **Default Enterprise Location** If selected no further action required.
 - b. **Email** If selected, update the **From:** and **To:** fields by removing the departed user's information and entering the new sender and receipient information.
- 5. Complete the steps from the "Schedule a Report" section to specify report recurrance and Report Features tab details.
- 6. Click Schedule.
- 7. Once complete the former user's EIN in the Created by column will be replaced with the active agency user's EIN.

Instance Title: FIN-AZ-AP-N290 Daily Warrant Count					
Title	Status	Instance Time 🚔	Created By	Туре	Parameters
C FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Sep 8, 2023 3:57 PM	150734	Microsoft Excel	11/1/2022 12:00:00 AM
□ ✓ FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 7, 2023 1:46 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM
□ ✓ FIN-AZ-AP-N290 Daily Warrant Count	Success	Sep 2, 2023 8:18 AM	150734	Web Intelligence	8/4/2023 12:00:00 AM
📋 🕞 FIN-AZ-AP-N290 Daily Warrant Count	Recurring	Aug 31, 2023 1:41 PM	150734	Web Intelligence	8/4/2023 12:00:00 AM