QUICK REFERENCE GUIDE: SCHEDULING REPORTS IN INFOADVANTAGE
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SCHEDULING REPORTS IN INFOADVANTAGE

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.

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.

Recurrence
The recurrence frequency determines when the report will be run. It can be run once or it can schedule to run in the future, or even to run on a recurring basis. Default to Now to run the report immediately.
Example scheduling a report for a specific time:

Example of scheduling a report for a specific calendar structure. Reports can be scheduled to run on a recurring basis based on **Hard Close, Quarterly Depreciation, or Soft Close**.

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

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: *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**.
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**. Instances of the scheduled report will be retained for **Seven** days. 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.
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**.

*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.
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**Scheduling Reports in infoAdvantage**