

End users have the ability to schedule reports to run at specific times. End users can also receive an email with a URL to access the report. Please note that there are limitations to scheduling and receiving email notices. Please review each section thoroughly in order to ascertain how the functionality may affect you.

Scheduling your Report

After selecting the report to run and entering the parameters, click on the Schedule button to schedule the report to run at a specific time. The Schedule button is located in the block titled 'At these Times'. The Schedule form provides you with several scheduling options. The default schedule is 'As Soon as Possible'.

The screenshot shows a 'Schedule' dialog box with the following elements:

- Buttons: 'Apply a Saved Schedule...', 'Help', 'OK', 'Cancel'
- Input fields: Two empty text boxes for scheduling parameters.
- Section: 'Run the Job...' containing radio buttons for:
 - As Soon as Possible
 - Once
 - Periodically
 - On Specific Days
 - Advanced
- Checkbox: 'Save this schedule'

- **As Soon as Possible (default):** This option submits your request as soon as possible.
- **Once:** This option submits your request once at the time and date you specify.
- **Periodically:** This option submits your request repeatedly at the interval you specify.
- **On Specific Days:** This option submits your request repeatedly on specific days of the week or month.
- **Apply a Saved Schedule:** This option allows you to re-use a previously defined and saved schedule. You may modify the saved schedule for this one submission or save the modified schedule with a new name for future use.
- **Advanced:** This option is not available at this time.

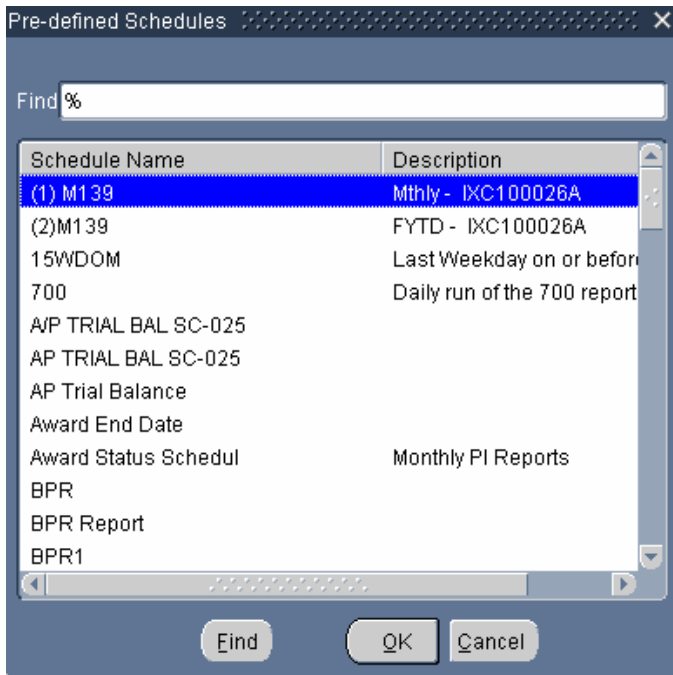
To schedule a request to run **Periodically**, you must determine how often you want to run the request and if you want it to run for a specific timeframe or indefinitely.

1. **Start At:** Use the List of Values (LOV) calendar to choose a date and time.
2. **End At (optional):** If you require this report for a specific time only, use the LOV calendar to choose an end date and time. If you want the report to run indefinitely at the specified time, then leave this option blank.
3. **Re-run every:** Use this option to choose the frequency of submission. The report can be run Monthly, Weekly, Daily, by the Hour, or by the Minute.
4. **Apply the Interval:** Use this option to determine when to start the clock for the next run. For most reports, the default of From the Start of the prior run is sufficient.
5. **Increment date parameters each run (optional):** Use this option to have the value for that parameter be adjusted to match the resubmission interval. For example, if the value for the parameter is 25-JUL-2007 07:00:00 and your interval is monthly, the parameter is adjusted to 25-AUG-2007 07:00:00 for the next submission.
6. **Save this schedule (optional):** This option allows you to save the schedule. You will be prompted for a Schedule Name and Description. Note that a detailed Schedule Name and Description is recommended since all end users can view saved schedules.

To schedule a request to run **On Specific Days**, you must determine which dates or days of the week you want to run the request and if you want it to run for a specific timeframe or indefinitely.

1. **Start At:** Use the List of Values (LOV) calendar to choose a date and time.
2. **End At (optional):** If you require this report for a specific time only, use the LOV calendar to choose an end date and time. If you want the report to run indefinitely at the specified time, then leave this option blank.
3. **Dates of Every Month (optional):** Use this option pick specific dates on which the report should be run. Note that the Last Day is available instead of choosing a specific date.
4. **Days of Every Week (optional):** Use this option pick specific days on which the report should be run.
5. **Increment date parameters each run (optional):** Use this option to have the value for that parameter be adjusted to match the resubmission interval. For example, if the value for the parameter is 25-JUL-2007 07:00:00 and your interval is monthly, the parameter is adjusted to 25-AUG-2007 07:00:00 for the next submission.
6. **Save this schedule (optional):** This option allows you to save the schedule. You will be prompted for a Schedule Name and Description. Note that a detailed Schedule Name and Description is recommended since all end users can view saved schedules.

To schedule a request using **Apply a Saved Schedule**, you can utilize one of your previously saved schedules or a schedule created by another end user.



Once you select a saved schedule, you can alter the existing settings and save the new schedule with a new Schedule Name and Description.

Once you have scheduled your report(s), you may see those requests when you View your Requests or if you have just submitted a new request. The reports will appear with a Phase of Pending and a Status of Scheduled.



It is important to note that if you accidentally schedule a report or if you no longer need the scheduled report, you can cancel the request with the Cancel Request button. **Canceling a request cannot be undone.** Please note that processes (not reports) should never be cancelled. If you are not certain about whether or not it is safe to cancel a request, please contact the Help Desk at 202-994-5530, option 2, option 4.

The screenshot shows the 'Requests' application window. At the top, there are three buttons: 'Refresh Data', 'Find Requests', and 'Submit a New Request...'. Below these is a table with columns: Request ID, Name, Parent, Phase, Status, and Parameters. The first row is highlighted in blue and has 'Pending' and 'Scheduled' in green. A 'Decision' dialog box is open over the table, asking 'Cancelling a request cannot be undone. Continue?' with 'Yes' and 'No' buttons.

Request ID	Name	Parent	Phase	Status	Parameters
3286162	Award-Project Performar		Pending	Scheduled	, 31-Jan-2007, 31-Jan-2007, AWARI
3286161	Award-Project Performar		Completed	Normal	, 31-Jan-2007, 31-Jan-2007, AWARI,
3286160	Award-Project Performar		Completed	Cancelled	, 31-Jan-2007, 31-Jan-2007, AWARI
3286159	Award-Project Performar		Completed	Cancelled	, 31-Jan-2007, 31-Jan-2007, AWARI
3286157	Award-Project Performar		Completed	Normal	, 31-Jan-2007, 31-Jan-2007, AWARI
3286156	Award-Project Perf				, 31-Jan-2007, 31-Jan-2007, AWARI
3286155	Award-Project Perf				, 31-Jan-2007, 31-Jan-2007, AWARI
3286154	Award-Project Perf				, 31-Jan-2007, 31-Jan-2007, AWARI
3286153	Award-Project Perf				, 31-Jan-2007, 31-Jan-2007, AWARI
3286152	Award-Project Perf				, 31-Jan-2007, 31-Jan-2007, AWARI

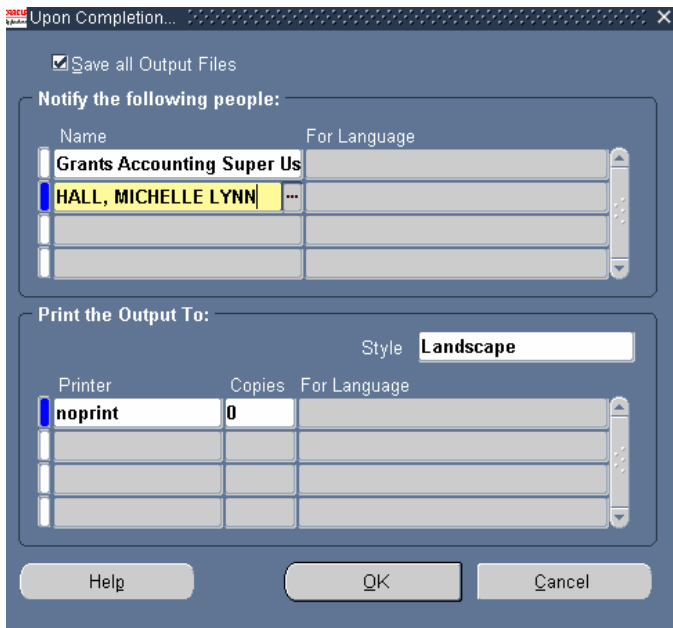
Buttons at the bottom: Hold Request, View Details..., View Output, Cancel Request, Diagnostics, View Log...

Emailing your Report

After selecting the report to run and entering the parameters, click on the Options button to send a URL to specified recipients for report retrieval. The Options button is located in the block titled 'Upon Completion'. The Upon Completion form provides you the option to 'Notify the following people'.

The 'Upon Completion...' dialog box has a 'Save all Output Files' checkbox checked. It contains two main sections: 'Notify the following people:' and 'Print the Output To:'. The first section has a table with 'Name' and 'For Language' columns. The second section has a 'Style' dropdown set to 'Landscape' and another table with 'Printer', 'Copies', and 'For Language' columns. The 'Printer' field is set to 'noprint' and 'Copies' is set to '0'. Buttons for 'Help', 'OK', and 'Cancel' are at the bottom.

In the Name field, you can utilize the LOV to notify an individual or to a responsibility. Notification means that an email will be sent to the recipient(s). Special care and consideration should be given if the option to notify a responsibility is selected.



The email includes a URL which will provide a single access to the report for security reasons. This is also iterated in the email.

```
From: Workflow Mailer [mailto:ofsmgr@gwu.edu]
Sent: Wednesday, January 10, 2007 12:04 PM
To: mhall@gwu.edu
Subject: Request 1234567 (Award-Project Performance Report - Detail [GM-139]
Unsecured) has completed with status Normal
```

Request number 1234567 (Award-Project Performance Report - Detail [GM-139] Unsecured) completed at 12:02:48 on 10-JAN-07 with a status of Normal. This request was submitted by MHALL1. After clicking on the link below we suggest that you save this report as PDF file for future use. For security reasons, the link becomes inactive after the first access. The report may be viewed at the following URL : <http://URL will be located here.>

If you attempt to access a report after the first access, you will receive the following message: “Authentication failed.”

Please note the following regarding URLs:

- **Reports CANNOT be accessed without being on the GWU network.**
- **Each URL becomes invalid after the first access for security reasons.**
- **URLs are valid for 45 days from the completion date of the request.**

DO NOT USE THE ‘Print the Output To:’ OPTION!