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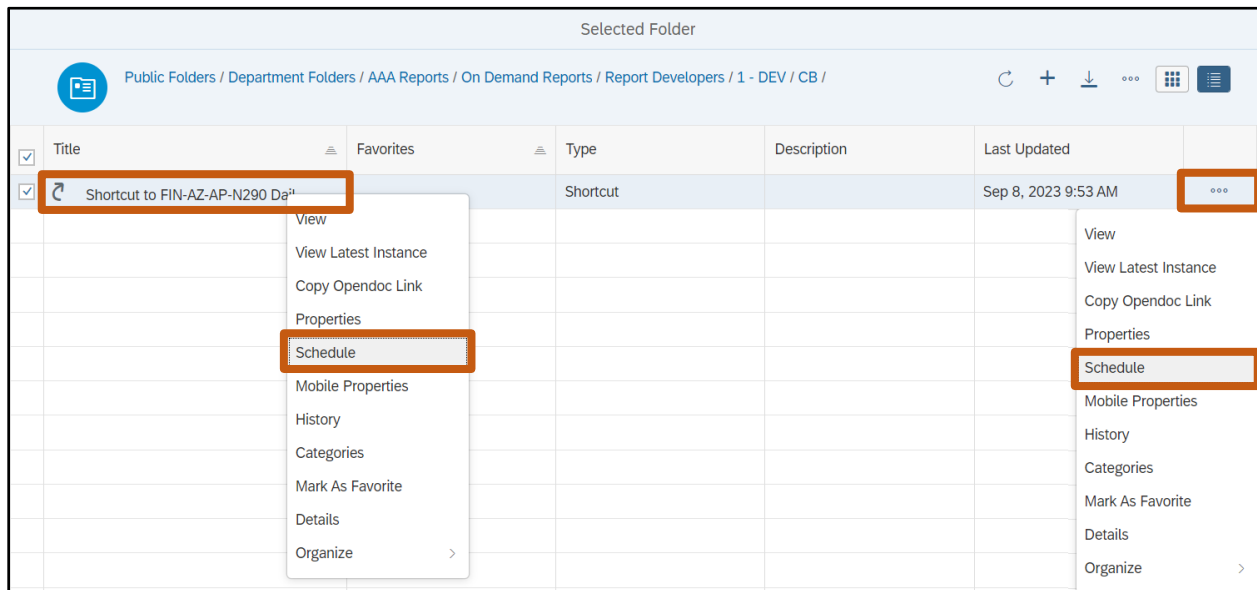
2. The **Schedule** screen will then generate.

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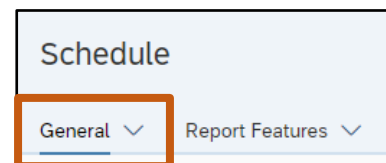
Note: Updating the instance title of the report does NOT rename the report itself.

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 ⊗

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 | Default Enterprise Location ✕ | ⌄

Default Enterprise L(| ☑ Default Enterprise Location

| ☐ Email

4. Click anywhere on the screen.

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

1. Click **Confirm**.

Select Destinations

Select a destination | Default Enterprise Location ✕ | ⌄
Default Enterprise Location | Default Enterprise Location

Confirm | Cancel

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**.

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.

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 Example – Calendar:


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.
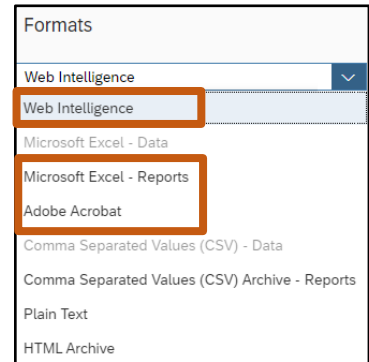

1. Click the **Report Features** tab.

2. In the **Formats** section:
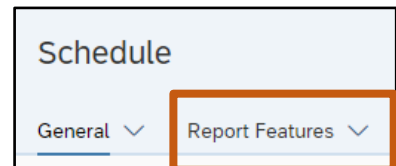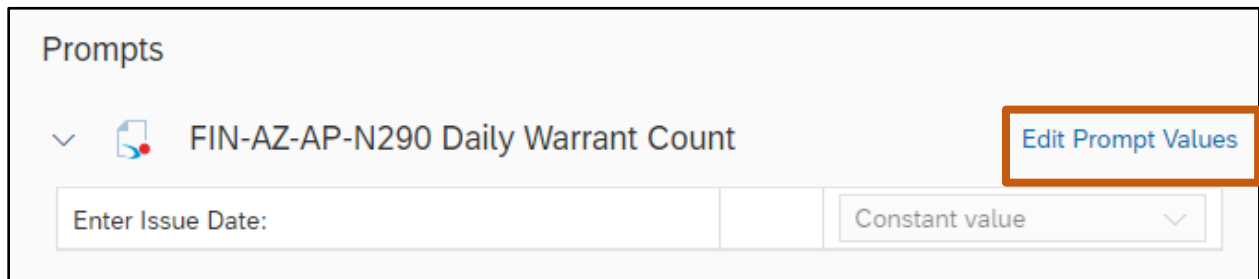
   a. Select from the following available options:

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.

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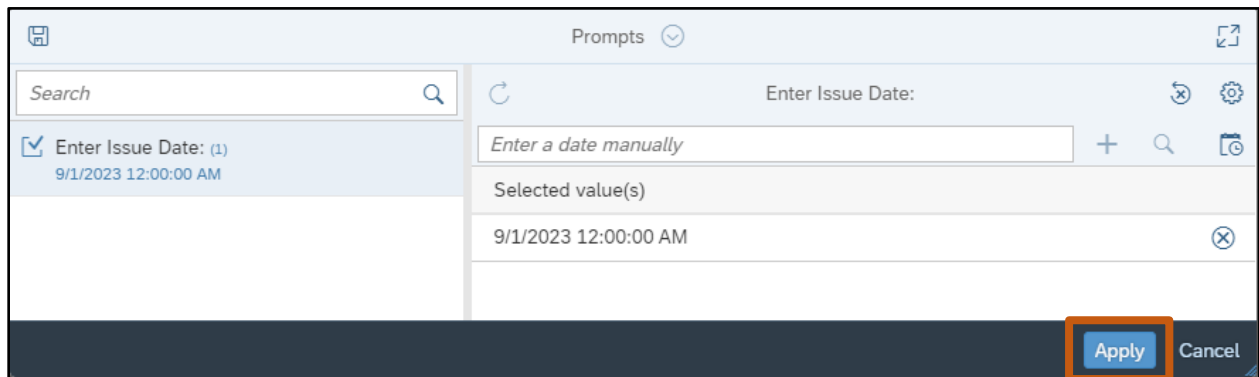
Note: The Delivery Rules section has not been enabled for interactive users and should not be used.

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.

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**.

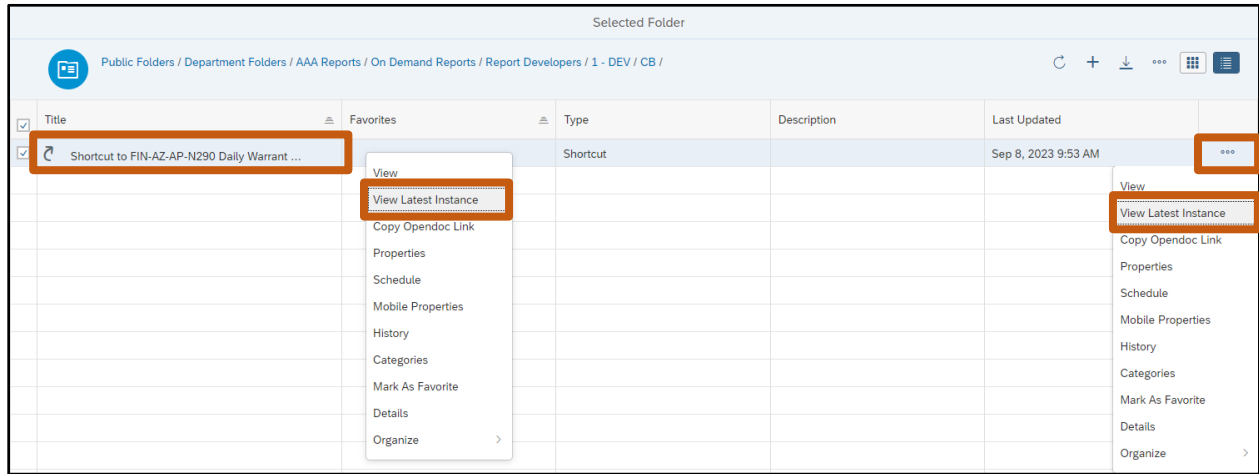2. Click on any of the reports with a Status of **Success** to view the report.

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**.
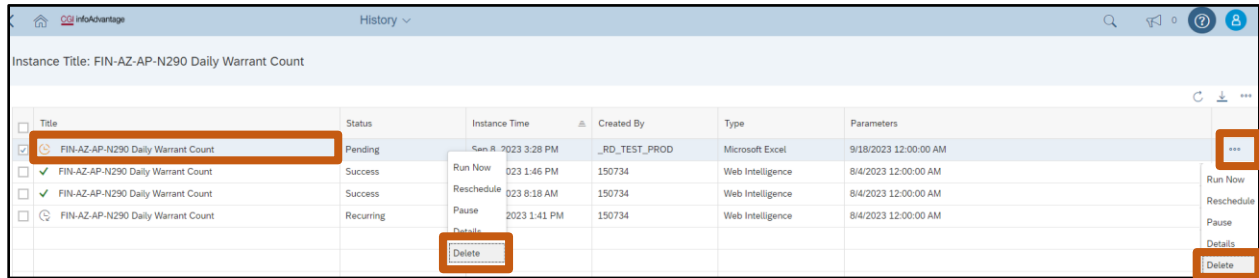

2. The report will open with the last scheduled instance.
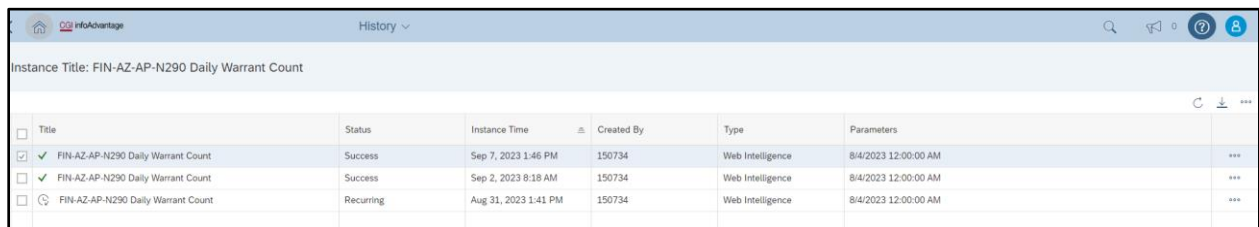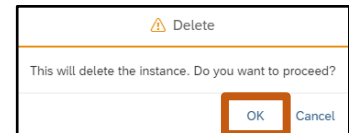
Deleting Instances

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**.

2. On the **Delete** pop up message, click **OK**.

3. Deleting the report will removed it from the report History screen.

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**.
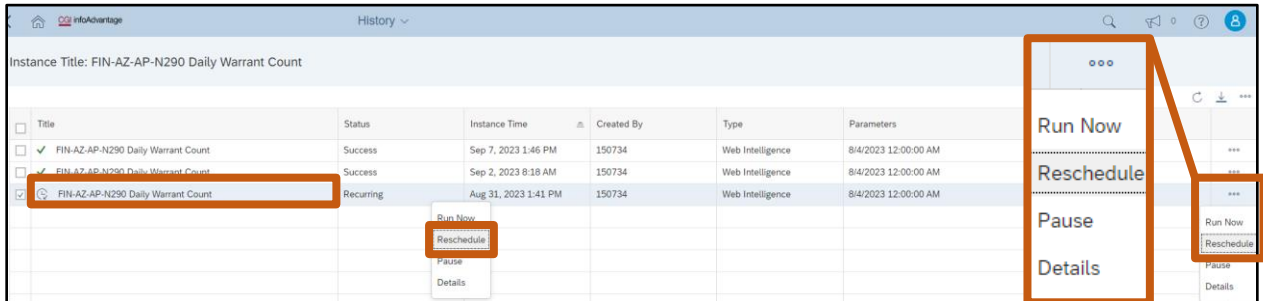

Rescheduling Instances After User Departure

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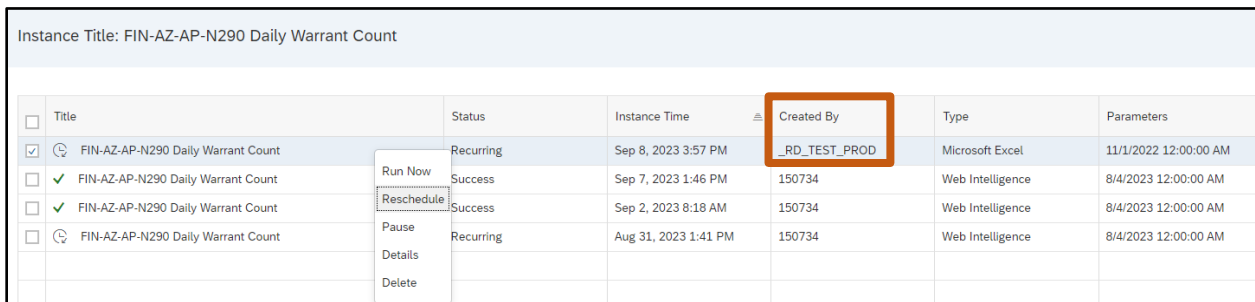
3. On the **Schedule** screen, **General** tab, **Replace** section select **Replace existing schedule**.

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	Type	Parameters
☑	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