

Scheduling Reports in CU Data

The schedule function in CU Data allows users to customize report options and have them automatically delivered via email. This is convenient for users who need to run reports on a regular basis for which specific options will not frequently change. For example, a user may need a daily or weekly enrollment report for a specific term over the duration of multiple weeks. Creating a schedule in a report allows the user to receive automated reports that are executed with the prompt options the user designates, without the user logging into CU Data each time to run the report.

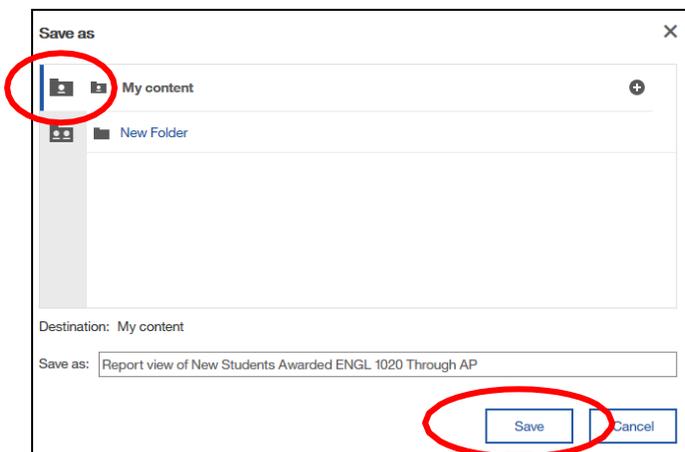
Scheduling is done through the settings in each report's properties.

First, a shortcut to the report needs to be created in your "My Content" area for quick access and customization.

- 1) Locate the report that you wish to schedule.
- 2) Click the three ellipses "... " of the report, and then click **Create report view**.

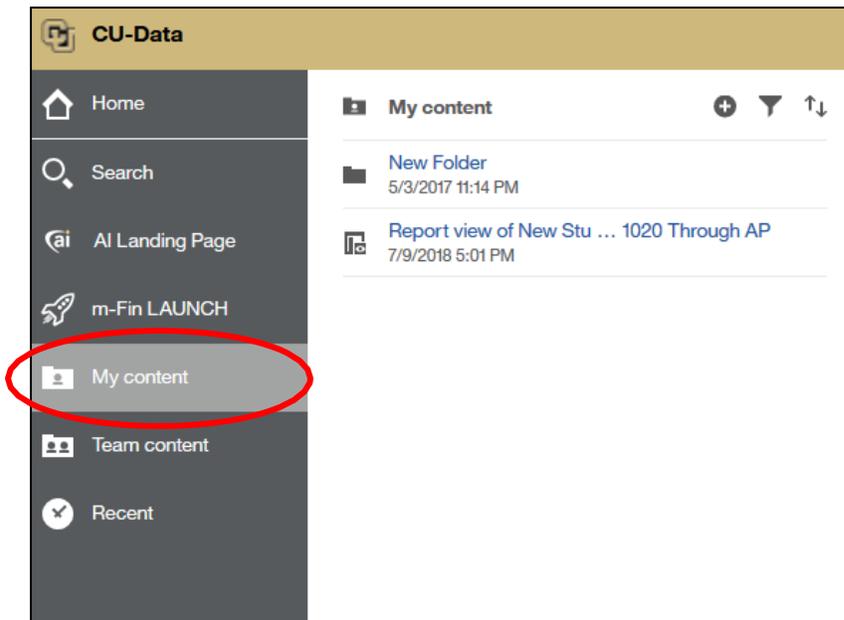


- 3) In the new window, select the **My Content** folder icon and then **Save**.
This will create a shortcut to the report in your own CU Data account that will allow a schedule to be created. This is also the location to modify the schedule properties or remove the schedule altogether.

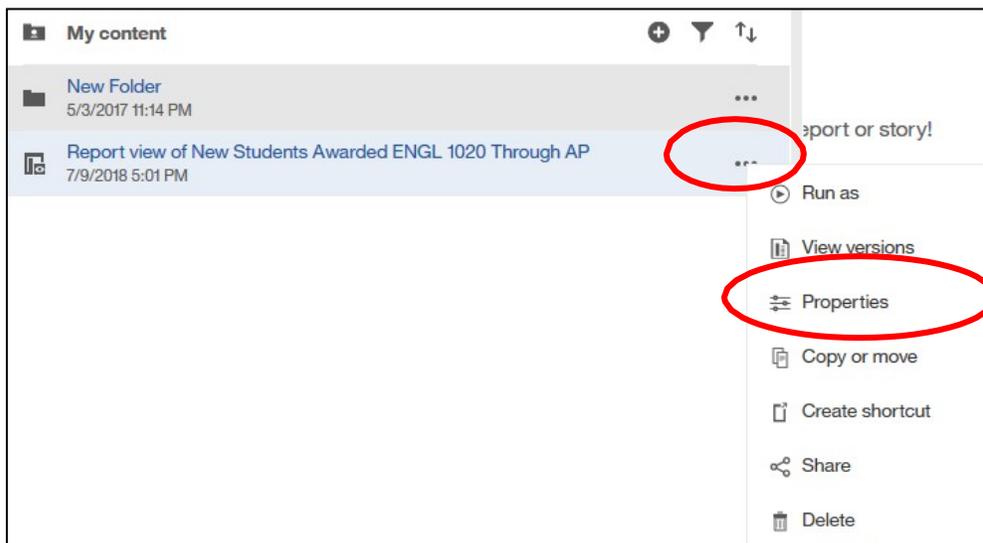


A report has now been added to your **My Content** area so you can now create a schedule.

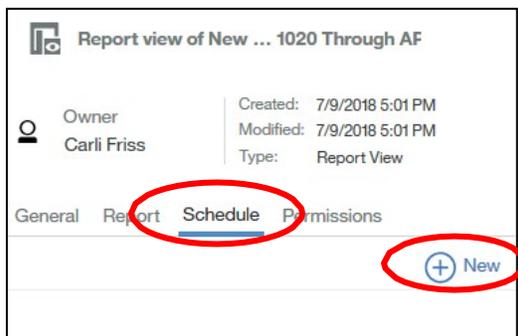
4) In CU Data, click the **My Content** tab on the left to view the reports saved here.



5) For the report you want to schedule, click the three ellipses “...” to open the report’s **Properties**:



6) Select the **Schedule** tab, click + New



- 7) Set the:
- Schedule Recurrence (daily, weekly, monthly, etc.)
 - Start and End Dates
 - Days of week to run
 - Format (recommend to check Excel only)

The image shows a 'Create schedule' form with several sections and red arrows pointing to specific elements:

- Schedule:** A dropdown menu set to 'Weekly'.
- Period:** A section containing:
 - Start:** A date picker set to '2018-07-09' and a time picker set to '8:00 AM'.
 - End:** A date picker set to '2018-09-10' and a time picker set to '5:03 PM'.
 - No end date
- Run every:** A field set to '1 week(s)'.
- On day(s):** A row of buttons for days of the week: M (selected), T, W, T, F, S, S.
- Daily time interval
- Options:** A section containing:
 - Format:** A dropdown menu with 'Excel' selected.
 - Delivery:** A dropdown menu with 'Email' selected.

To the right of the main form is a 'Format' dialog box with the following options:

- HTML
- PDF
- Excel
- Excel Data
- CSV

A blue 'Done' button is located at the bottom right of the 'Format' dialog.

- Delivery:
 - o Check **Send report by email**
 - o Check **Attach the report**
 - o Type in your or the intended recipient's email
 - o Modify the subject if necessary and add any text to be delivered in the body of the email
 - o Uncheck **Include a link to the report**
 - o Uncheck **Save report**

Delivery

Send report by email

Attach the report

To:

Subject: A new version of Report view of New Students Av

cc: bcc:

Include a link to the report

Print report

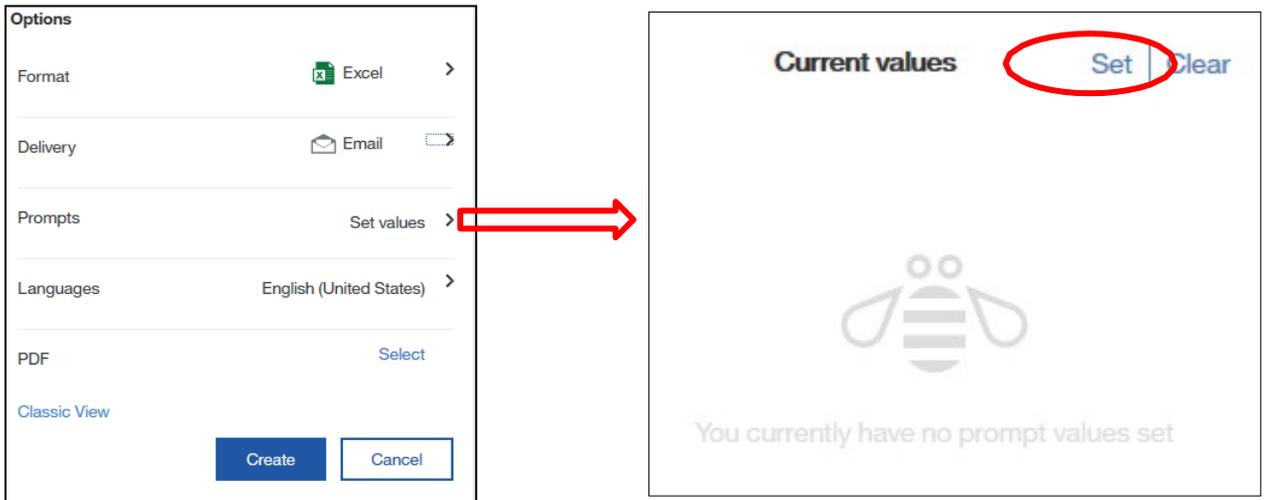
Save report

Done

8) Select **Done** on Delivery window.

Most reports have prompting options. The options will need to be set and will then be used each time the report generates until the options are changed.

- 9) In the Create Schedule window, set the prompts by clicking on the **Set values** arrow, then click **Set**



A Mock report will run.

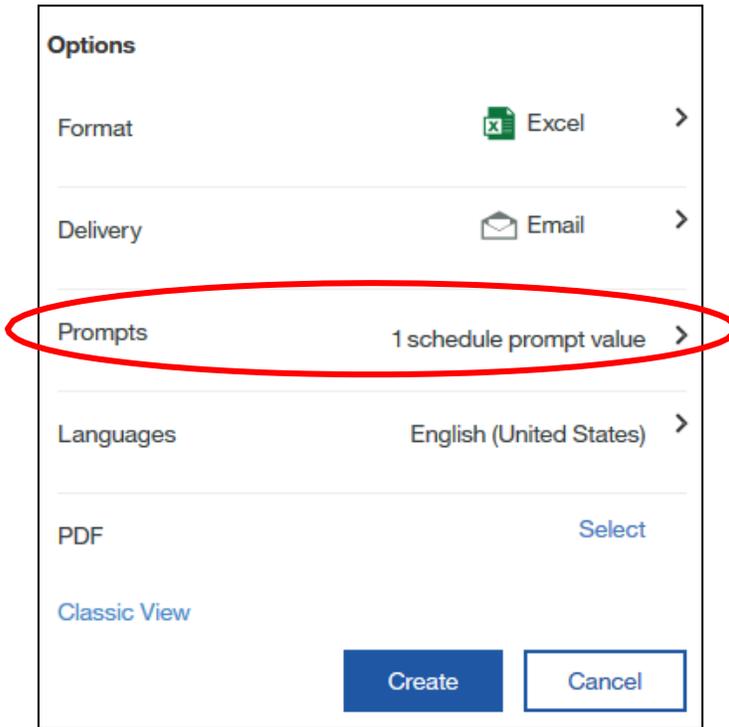
- 10) Select the prompt option(s) for the parameter(s) you would like your report to contain each time it is delivered:

The screenshot shows the 'Reporting System' window for the University of Colorado Denver | Anschutz Medical Campus. It features a dropdown menu labeled 'Please Select a Term:' with 'TERM SD' selected. Below the dropdown are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

The screenshot shows the 'Reporting System' window for the University of Colorado Denver | Anschutz Medical Campus. It features a dropdown menu labeled 'Please Select a Term:' with '2018 Fall' selected. Below the dropdown are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

- 11) Click **Finish** in the mock report window.

In the Create Schedule window, you will see that a prompt value has been selected.



12) Select **Create** in the Create Schedule window.

You can now see that a schedule has been created for this report.

To **disable**, click on the **Enable** pill.

To **delete** this schedule, click the **Delete** button.

To **modify** this schedule, click the **arrow**.

