Workforce Management Web for Supervisors (Classic) Help

Reports Scheduler

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Contents

Use Report Scheduler to schedule reports and then, view and edit those schedules.

Related documentation:
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When you select **Reports Schedule** in the module pane, a list of the schedule(s) you have created appears in the data pane. The list is a grid that has these columns:

- **Enabled**—Cells in this field can contain the values true or false.
- **Name**—Name of the report.
- **Report type**—Type.
- **User**—User who created the schedule.
- **Schedule**—Lists the specifics of the schedule.
- **Next run**—Lists the date / time of the next run of a recurring report.

Commands (also on the Actions menu)

Icon	Name	Description
	New	Display the Scheduled Report Task dialog in the data pane.
	Edit	Edit the selected overlay using a limited version of the Scheduled Report Task dialog.
	Delete	Delete the selected overlay.
	Show All	This button is a toggle. Select it to display all report schedules, that have been created by all users (the icon becomes darkened). Clear to display only schedules that have been created by the current user.
	Enable	Enable the selected report.
	Disable	Disable the selected report.

To schedule a report:

1. Select **Reports Scheduler** in the modules pane.

2. Click the **New** ( ) icon or select **New** from the **Actions** menu.
     The Scheduled Report Task dialog appears in the data pane.

3. For each page of the dialog, make the appropriate selections and click **Next**.

4. On the final page, click **Finish**.

Scheduled Report Task dialog

The pages are:

- Scheduled report task page
- Data page
- Date Range page
- Pages that correspond to your selection in the **Report Type** field.

Scheduled Report Task page

There are three sections on this page.

General Parameters:

- **Name** — Enter a name for the schedule task.
- **Report type** — Select a report type from the drop-down menu.
- **Export to** — Select an output format from the drop-down menu.

Run Time:

- **Start date** — Select or enter a start date to generate the report.
- **End date** — Enable by clicking the **Enable end date** check box, then select or enter an end date to generate the report.
- **Run time** — Select or enter a time of day to generate the report.
- **Time Zone** — Select the time zone from a drop-down list. View a list of choices.

Frequency:

- **Daily** — Specify that the report will be produced every day.
- **Weekly** — Also specify one or more days of the week by clicking the corresponding check box(es). Default: all days of the week are checked.
- **Monthly** — Also specify the day of the month by selecting or entering a day in the **Day of month** field. Default: 1.

Data page

Available User:

- Select the check box of every user who you wish to be able to see the generated report.

All subsequent pages that appear correspond directly to the report type. (For example, if you select **Time-Off Balance Report** in the **Report Type** field (in the **General Parameters** area below), then see the Time-Off Balance Report topic in this Help for descriptions of the rest of the pages.

Date Range page

You are specifying the range of data that the report will contain.

Start Date Offset:

- Adjust the data's starting date, relative to the start date of the report's generation. You can select a positive or negative integer, or 0 (zero, the default). The increment is Days.

End is Relative to [start date | generation date]:

- Specify if the data's ending date will be relative to the data's start date (specified above) or the data's generation date (the Run Time date, which you specified on the first page).

- Adjust the data's ending date, relative to your selection. You can select a positive or negative integer, or 0 (zero, the default). The increment is Days.

If your selection is incorrect, an error message will appear to explain why.