

Simply Reports

Saving Report Parameters and Scheduling Regular Run Dates

Created November 13, 2013

1. Build your desired report in Simply Reports. Note the type of report you are creating, i.e. the *tab* and *sub-tab* you've chosen at the top of the screen.



2. When choosing your date range as you create your report, do NOT use the *Date Filters*; instead, USE the *Relative Dates Filters*. This is because the *Date Filters* are for a concrete date range, such as “October 1 – 31”. Should you choose to save and schedule this report to run every month, it will always give you data just from October 1 – 31. However, using the *Relative Dates Filters*, such as choosing “between 30 days ago and the report run date”, will always give you data in the range from the run date and back 30 days. For example, if you schedule the report to run on the 1st of each month, you will always get data current for the last 30 days.
3. Once you've created your report, click the Submit button, as usual. The report will generate on your screen; however, do not Download it to Excel. Instead, beneath the Download option, click the box for *Save report parameters for later use*. This box will appear. Give your report a name, and a description if you wish, and click *Save report parameters*. You are saving the parameters (columns chosen, filters chosen, etc.) of the report.

Download report output

Save report parameters for later use

Report name

Report description  **Save report parameters**

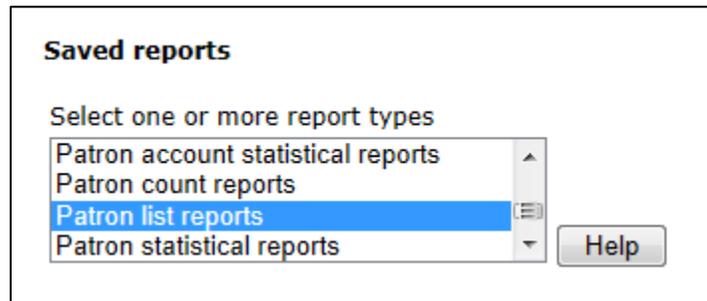
Create patron record set from report results

4. Then you can click the *Close window* button, which will return you to the previous screen.

- To retrieve report parameters that you have saved, click the *My Reports* tab and the *My reports* sub-tab. The *Saved reports* menu will appear.



- In the *Saved Reports* menu, select the TYPE of report you created, i.e. in step #1, I created a report under the *Patron list reports* sub-tab, so this is the type of report I must highlight in the menu now.



- Highlighting your report type in the menu will display all the reports you have created and saved, of that type.



- If you decide you no longer need the report parameters that you saved, you can click the *Delete* button. If you decide you want to change some of the columns you had set up in the report's parameters, you can click *Edit*. However, the *Edit* option is quite limited – you cannot change any *Filter* setting or any *Date* range setting that you had set up. Usually, if you are not satisfied with the parameters you have created, you will need to delete the saved report parameters, and re-create and re-save your report.

9. If you are happy with your saved report parameters, you can choose to run the report whenever you need to by clicking the *Run reports* button. The display will say *execution complete* To download this report click [here](#). Click “here” and choose whether to *open* or *save*; if you choose *open* the report will display in Excel.

Selected reports

Report number	Report name	Report description
915	Patron Expirations	

Execution summary:

Report Number: 915 Patron Expirations **execution complete** To download this report click [here](#)

10. From the screen in #7, you may also choose to schedule regular run dates of the report by clicking the *Schedule reports* button. The *Schedule jobs* menu will appear. You must give the schedule a name, which can be the same name as what you saved the report parameters under, if you wish. Entering a description of the schedule is optional. Choose the start date for the schedule. You may leave the schedule’s expiration date blank. Then select how frequently you want the report to run. If you choose *monthly*, it is recommended to choose to run the report on the 1st day of each month. (You cannot select for the 29th, 30th, or 31st, as not all months have that many days. Click the *Save schedule* button.

Schedule jobs

Report number	Report name	Report description
915	Patron Expirations	

Schedule name (required)

Schedule description (optional)

Schedule start date 

Schedule expiration date (leave blank to never expire) 

Schedule Options

<input type="checkbox"/> Run one time on (date)	<input type="text"/> 	At	Hour: <input type="text" value="12 AM"/>	Minute: <input type="text" value="00"/>
<input type="checkbox"/> Run weekly on (day of week)	<input type="text" value="Sunday"/>	At	Hour: <input type="text" value="12 AM"/>	Minute: <input type="text" value="00"/>
<input checked="" type="checkbox"/> Run monthly on the (day of month)	<input type="text" value="1"/>	At	Hour: <input type="text" value="2 AM"/>	Minute: <input type="text" value="00"/>
<input type="checkbox"/> Run daily		At	Hour: <input type="text" value="12 AM"/>	Minute: <input type="text" value="00"/>

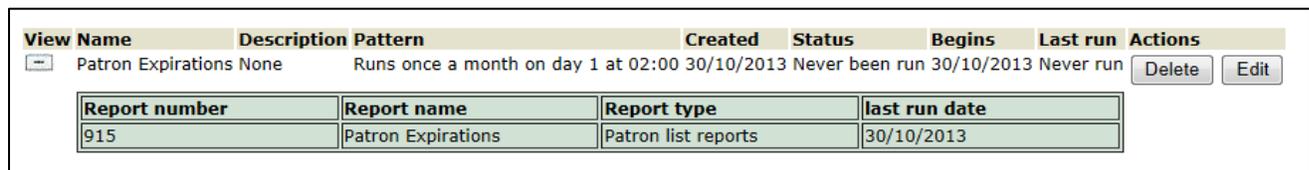
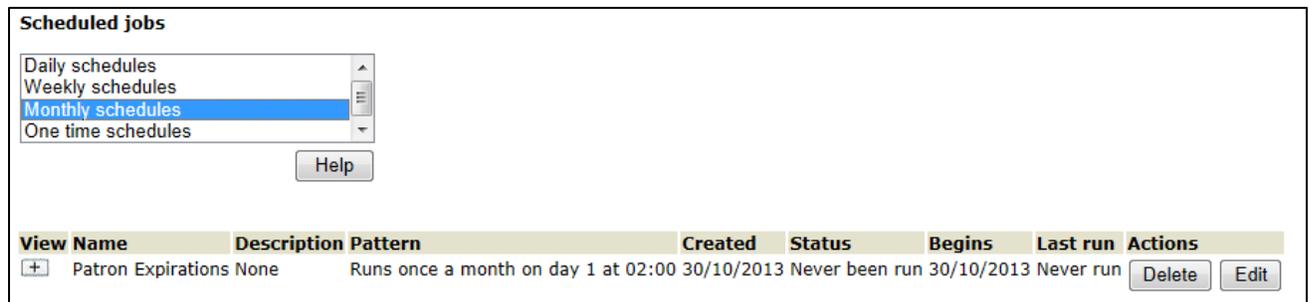
11. This message will appear.

Your schedule named: Patron Expirations has been saved. This schedule will run 1 reports.

12. To retrieve report schedules that you have set up, select the *My Reports* tab and the *Scheduled reports* sub-tab.



13. The *Scheduled jobs* menu will appear. In step #10, the report was scheduled to run monthly, so I must click *Monthly schedules* in the menu. This will display all of the reports that you have scheduled to run monthly. Clicking on the + sign to the left of each scheduled report will provide a little more info. You can *delete* a schedule once you no longer need it to run, or you can *edit* a schedule to run at a different interval.

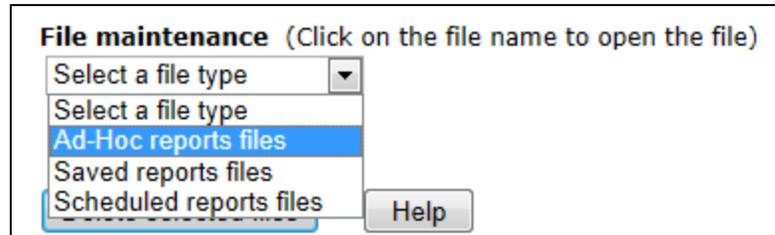


14. To view the data that was generated when a report was run, select the *My Reports* tab and the *File maintenance* sub-tab.

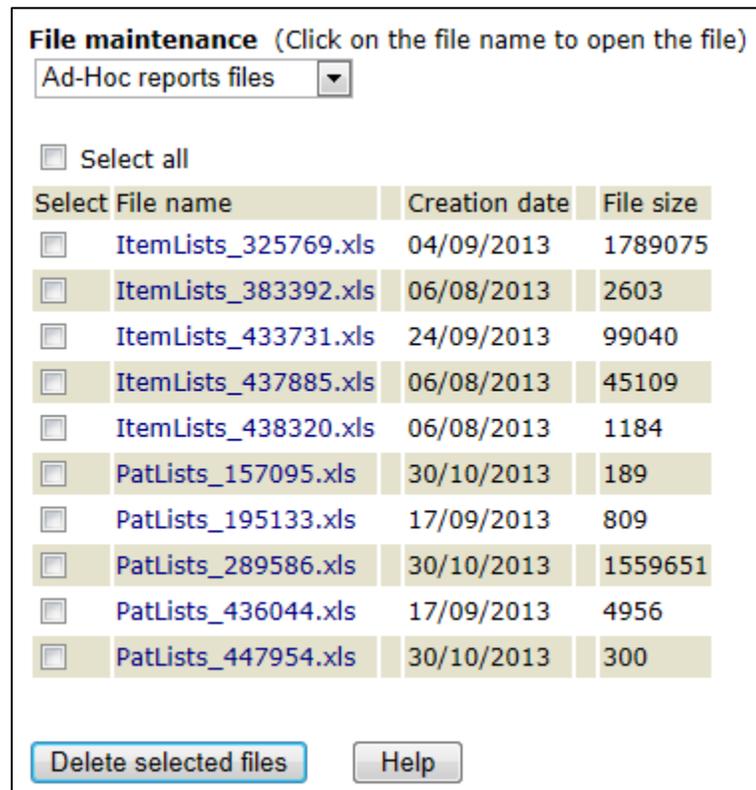


15. The *File maintenance* menu will appear. Here you can view a number of things:

- a. Click *Ad-Hoc reports files* to see a list of reports you have created and generated, but did not save or schedule, such as one-offs.



It is a good idea to purge this list every six months or so to keep it uncluttered.



Clicking the file name of an *Ad-Hoc report* will display the data that was generated when the report was run. The data displays in Excel format. The *Creation date* is the date the report was generated.

- b. Click **Saved reports files** to view a list of saved reports that you manually selected to Run. The *Creation date* is the date the report was run. Clicking the file name of a *Saved report* will display the data that was generated when the report was run. (The run date also appears in the file name.) The data displays in Excel format. You can delete previous runs if you only want to keep the data from the most current time you chose to run the report.

File maintenance (Click on the file name to open the file)

Saved reports files ▼

Select a file type

Ad-Hoc reports files

Saved reports files

Scheduled reports files

		Creation date	File size
<input type="checkbox"/>	Patron_Expirations_1_11_2013_13_58_33_.xls	01/11/2013	181
<input type="checkbox"/>	Patron_Expirations_30_10_2013_12_23_0_.xls	30/10/2013	300

Delete selected files Help

- c. Click **Scheduled reports files** to view a list of reports that have automatically run from a schedule you set up. The *Creation date* is the date the report ran. Clicking the file name of a *Scheduled report* will display the data that was generated when the report ran. (The run date also appears in the file name.) The data displays in Excel format. You can delete previous runs if you only want to keep the data from the most current time the report was automatically run.

File maintenance (Click on the file name to open the file)

Scheduled reports files ▼

Select a file type

Ad-Hoc reports files

Saved reports files

Scheduled reports files

		Creation date	File size
<input type="checkbox"/>	Patron Expirations_10_30_2013_16_30_1_.xls	30/10/2013	397
<input type="checkbox"/>	Patron Expirations_10_31_2013_0_0_5_.xls	31/10/2013	292
<input type="checkbox"/>	Patron Expirations_11_1_2013_0_0_52_.xls	01/11/2013	181

Delete selected files Help