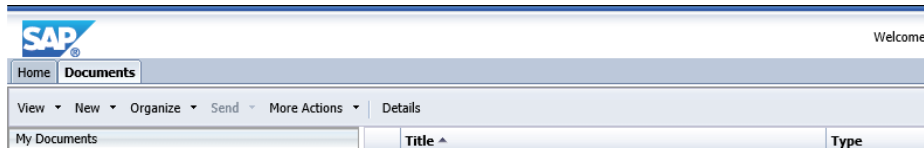
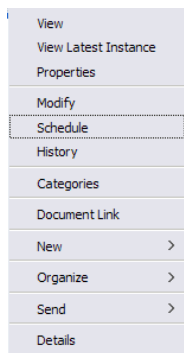


Scheduling a Report in Excel Format for Downloading

For reports that you want to email the output, you may want to run the report in Excel Format to facilitate the download. The formatting of a report defaults to Webi. However within the Format section of the Schedule option, the user has the ability to change the output format Excel, CSV and PDF.



After locating the report name, right click on the report and then click on schedule.



After choosing schedule, a screen will open that allows you to enter an instance title, recurrence, prompt value and format.

Instance Title: The instance title allows you to edit the name of the report without changing the query name. If no change is made, the report name will default to the name of the query.

Recurrence: If you have a report that does not require you to update a prompt value each time it is run, you have the ability to set the report to run at different time intervals by updating the recurrence. If your report requires you to update prompts then no enter is required. The recurrent option defaults to “now” meaning once you select the schedule button the report will run.

Formats: The format option allows you to change the output format of a report. The Output Format will default to Web Intelligence. If you are intending to download the report and send the report via email, this is where you will choose the Format Microsoft Excel.

Destinations: The Destination option allows you to set a destination for the output of the report. Destinations defaults to “Default Enterprise Location”.

Although there are a few options listed based on software capability, options are only available if permitted by GSA’s ISSO .

Caching, Events, Scheduling Server Group and Delivery Rules: These are not utilized and can be ignored.

Prompts: Some reports contain user defined prompts which are required to be input before scheduling in order for the report to return data.

To Input Prompts click on Prompts and then Modify. Some input values are simply typed in an open block while others are chosen from a list of Refresh Values. Where < or > is present, the user is required to move the value to the open box on the right of the screen. After choosing prompt values be sure to choose Apply in the bottom right hand corner of your screen.

After inputting prompts and selecting apply, schedule should appear in the bottom right hand side of your screen and a new window will open up to show history of reports that are scheduled. The status of a scheduled report will change from Pending to Running and then to Success.

Downloading a Report with a Status of “Success”

Once a report has completed running the status will show “Success” Click on the instance time to open the report. The report will then download where it will be accessible on your pc.