

Scheduling Report Writer Reports

Why Schedule Reports?

One word: Convenience. If you have reports that you are asked for monthly, weekly, or even daily, you can have Report Writer automatically run the report for you and even send the report to multiple people via a distribution list.

How Do I Schedule a Report Writer Report?

There are two ways to schedule a Report Writer Report:

1. Schedule to send to a single recipient.
2. Schedule to send to a group of recipients (Distribution List)

Sending to a single recipient:

1. Work your way to the “Execute Report” screen. There are three ways to get there:



Once you reach the “Execute Report” screen, select the Output Type as desired. Any choice is fine, but HTML is definitely the best choice for a read-only report.


Output Types	
<input checked="" type="checkbox"/>	HTML
<input type="checkbox"/>	Excel Compatible (csv)
<input type="checkbox"/>	Delimited Text
<input type="checkbox"/>	Fixed Length Text


Delimiter:

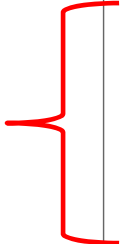
Delivery Options	
<input checked="" type="radio"/> Run for myself	<input type="radio"/> Distribute to List
Email address:	<input type="text" value="jasonisawesome@aesoponline.com"/>
Attach results to email:	<input checked="" type="checkbox"/>
Deliver to FTP Server:	<input type="checkbox"/>


Click “Run for myself”, enter your email address, and click “attach results to email”.

Now set your schedule:

Click Here. 

Choose the date/time you want the report schedule to start. 

You can schedule the report to run Daily, Weekly, or Monthly. 

You can enter a date to stop the scheduled report run here. 


Schedule:

☐ I want to run the report right away.

☐ Let me know when the report is ready

☐ Schedule at a specific time

☒ Set a recurring schedule


Start: 

Recur: (This schedule will use 2 of 8 remaining points)

☐ Daily ☐ Weekly ☒ Monthly

☒ Day


☐ The of every month.

End:  (leave blank for indefinite end)

You have a limited number of “points” for scheduling reports. A running balance will show here. If you need more “points”, contact Aesop Client Services.

Click the “run” button and your schedule is for this report is set! Next, you will be brought to a list of the scheduled reports that are configured for this single report.

Scheduled Reports for Unfilled Absences ([show all report schedules](#))

Name	Type	Scheduled By	Most Recent Run	Points	Delivery
Unfilled Absences	Absence Data	Nav. Super User		5	
Schedule: 7:00 AM Every 1 day(s) starting 7/1/2010					

To see a list of all the reports you have scheduled to run, go to **Reports > Scheduled Reports**.



Sending a Report to Multiple Recipients at Once

To send a report to multiple email addresses at one time, you will need to create a Distribution List. Go to **Reference Data | Distribution Lists**.

Click [Add Distribution List](#).

Absence/Vacancy	Reference Data	Security	Re
	Employee Types		
	Absence Reason		
	Vacancy Reason		
	Skills		
	Budget Codes		
	Pay Codes		
	Accounting Codes		
	Distribution Lists		
	Ethnicity		

Choose a name for this list (i.e. "Secretaries", "Principals", "HR", etc.)

List Name: Principals

You can create the list of recipients in a variety of ways. The first way is to select recipients according to their visibility or permissions

Search for Organization Users and/or Campus Users to email by entering their names here...

Find Users:

Name

...or narrow your search by using these three available filters.

School Visibility

-- Any --

Permissions

-- Any --

Employee Type Visibility

-- Any --

-- Any --
Bus Drivers
Classified
Nurses
paras

As you search for users to add to this distribution list, you will see the boxes containing their names dynamically change.

Organization Users	Campus Users	Generic School Users
Jason Francis	Al Franken	Massanutton School District
Joanna Hughes	Dennis Prager	Broadway Plantation Elementary
Saint Ignace	Duke Nukem	Central Office
	Ed Schultz	HR
	Glenn Beck	Payroll
Add All Visible	Add All Visible	Add All Visible

If you click on the “Add All Visible” button below a given list, all of those recipients will then be imported to the Distribution List. You can also click-and-drag names from any of the lists. Following is a screenshot showing “Jay Francis” being clicked and dragged down to the list where it says “Drop new members here”.

Organization Users	Campus Users
Jason Francis	Dennis Prager
Joanna Hughes	Duke Nukem
Saint Ignace	Ed Schultz
	Glenn Beck
	Jay Francis
Add All Visible	Add All Visible

Name	Permissions & Visibility	Send To User's Email
Drop new members here.	Jay Francis	

Once you have brought down a member into your list, you will see them added, along with pertinent information about them. In this case, I can see that Jay Francis is added, and he can be sent data from Report Writer, but the data he will see will only be what he is allowed to view because of his Permission Profile (“Campus User” listed in red) and he will only see data for the location(s) he is allowed to view, which in this case is “Killy Court HS”.

Name	Permissions & Visibility	Send To User's Email	Other Email Addresses
Jay Francis(CU)	Campus User Killy Court HS	<input checked="" type="checkbox"/>	<input style="width: 100%;" type="text"/> <div style="float: right; text-align: right;"> <input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="X"/> </div>

You can also add more email addresses in the “Other Email Addresses” box if you want other people to be part of this Distribution List that do not have an email currently listed in Aesop. If we add email addresses to the “Jay Francis” entry above, those folks will receive the exact same report that Jay does based upon the “Permissions & Visibility” settings by which Jay is constricted.

Once you have finished creating your list, click the “Save” button at the top of the page.

Once a Distribution List is created, you can schedule a Report Writer report to go to this list. When on the Execute Report screen for a given report (instructions on how to get there on page 1), select “Distribute to List”. Aesop will provide you with your Distribution List options.

The screenshot shows a 'Delivery Options' dialog box with a dark blue header. Below the header are two radio buttons: 'Run for myself' (unselected) and 'Distribute to List' (selected). Under 'Distribute to List', there is a 'Distribution List:' section with a dropdown menu showing 'Campus Users' and a 'Show Members' button. Below that is an 'Email subject:' field with the text 'Unfilled Absences'. Underneath is an 'Email message:' text area containing 'Your Unfilled Absences report is attached.' At the bottom is a 'Send empty reports:' checkbox, which is currently unchecked. Red arrows point from external text boxes to the 'Distribute to List' radio button, the 'Show Members' button, the 'Email subject' field, the 'Email message' text area, and the 'Send empty reports' checkbox.

Select which List to send this report to. You may only select one Distribution List at a time. If you want to see who the members are of a given list, select that list and then click the “Show Members” button.

Enter the subject line of the email as you want it to appear to the list members who will be emailed this report.

This box controls whether or not you want Aesop to send the report if the report has no data. For instance, if you were sending a daily report of unfilled absences, do you want Aesop to send a report if all of the absences are filled, creating a blank report?

Customize the default email message your list members will see when they receive this report.

After your Distribution List options are set, set your options for your scheduled report as shown on page 2. As always, if you need any assistance with this, contact Aesop Client Services.