- Report Schedules -

FOR RISKMAN VERSION 2010

Last reviewed November 2020

Create a schedule so a report is generated automatically

If you have the permission to do so, you can optionally create a **schedule** for a report, so that is generated automatically based on the interval you specify.

To create a schedule for the selected report, click the Schedule icon 🗓. You will then see the Scheduler dialog:

❶ **Schedule Name:** We recommend naming the schedule based on the frequency that the report will be generated; for example, "Monthly version", "Quarterly version", etc.

❷ **Schedule Description:** Enter a description that explains the purpose of this particular schedule.

❸ **Report Time Frame:** This is the time frame (i.e. the date range) that should be selected when the report is run. See further notes on the following pages.

❹ **Run Frequency:** How often should the report be generated? See further notes on the following pages.

❺ **Send Success Email?:** When checked, RiskMan will send you an email to let you know that your report has successfully generated. Note that RiskMan <u>does not</u> send your report to you as an

attachment to that email. Instead, your report is stored within RiskMan. Nobody else can see it, and you simply need to open RiskMan to retrieve it. See further notes on the following pages.

❻ **Send Failure Email?:** When checked, if for some reason your scheduled report wasn't generated successfully, RiskMan will send you an email to let you know that this occurred.

❼ **File Format:** Choose the format you want the report to be generated in when the schedule runs.

❽ **Save** and **Close:** Click the Save Schedule button once you're done. The schedule will then be visible in the **Current Schedules** table.

❾ **Current Schedules:** All the schedules for the selected My Report are shown here. See further notes on the following pages.

Report Time Frame

The following are the available configuration options for the time frame the report should be run for:

Whilst many people might expect to see commonly used choices such as "Previous calendar month" here, the method used is instead far more flexible in meeting various requirements for time frames. For example, your organisation might require a monthly report, but it is from the 5th to the 5th of each month, rather than a calendar month.

The following are some examples of common time frames:

DESIRED OUTCOME	TIME FRAME	FREQUENCY
A weekly report, generated first thing on Monday morning	The previous 7 days, up to the prior day end, OR The previous 1 week, up to the prior day end	Every Monday at 8am
A weekly report, generated on Wednesdays, including data from last Wednesday to yesterday (Tuesday)	The previous 7 days, up to the prior day end	Every Wednesday at 8am
A monthly report, which needs to report on data from the previous calendar month	The previous 1 month, up to the prior month end	Arbitrary; e.g. 7th of each month
A monthly report, generated on the 6th of the month, reporting on data from the 5th of the previous month to the 5th of this month	The previous 1 month, up to the prior day end	Every month on the 6th of the month at 8am

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Run Frequency

When setting the run frequency for your report, note that you can even go so far as to specify the exact time of day that the report should be generated. Our advice here is to set your report to generate during the quiet hours – perhaps between midnight and 6am. If you set your report to be generated during a typically busy time, for example 1pm, it will only add more load to the server RiskMan runs on!

Send Success Email

The email RiskMan sends you does not attach the generated report. Instead, the email contains a link, which when clicked on, takes you into RiskMan and automatically opens the report for you. <u>The link in the email works for you, and no other user</u>. Forwarding the email to another person will <u>not</u> allow them to see the report.

Current Schedules

Current Schedules							
Schedule Control	Report Schedule ID	Schedule Name	Schedule Status	Most Recent Run Time	Next Scheduled Run Time	Schedule Description	File Format
⏸ 🗑 ⚡	27	Monthly version	Normal		12/5/2017 7:00:00 AM	At 07:00 AM, on day 5 of the month	PDF

The schedules in place for the current My Report reside in the table at the bottom of the Scheduler dialog. This table contains useful information, such as when each schedule most recently ran, and when each one is next due to run.

Highlighted in the above screenshot are the Schedule Controls; you can **pause** a schedule and un-pause it whenever you need to; **delete** a schedule; and **execute** the next scheduled version of the report now.

Accessing reports generated by schedules

There are two ways to view reports generated by schedules:

- Click the **link** in the email you received. If you aren't logged in to RiskMan at that time, you will need to enter your username and password. Your report will then open, and from there you can either save a local copy or print it.
- Browse all of the generated reports. To do this, locate the desired My Report and select it ❶. In the Report Details section, click the link titled **Click here to view generated reports** ❷, or click the View icon 👁 ❸:

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You will see the **All generated reports** dialog. Click the respective icon ❶ of each edition of the report to open it.

- To **delete** a generated report file, click its respective checkbox ❷, and then click the Delete button ❸.