

# - Report Schedules -

FOR RISKMAN VERSION 2403


Last reviewed September 2023

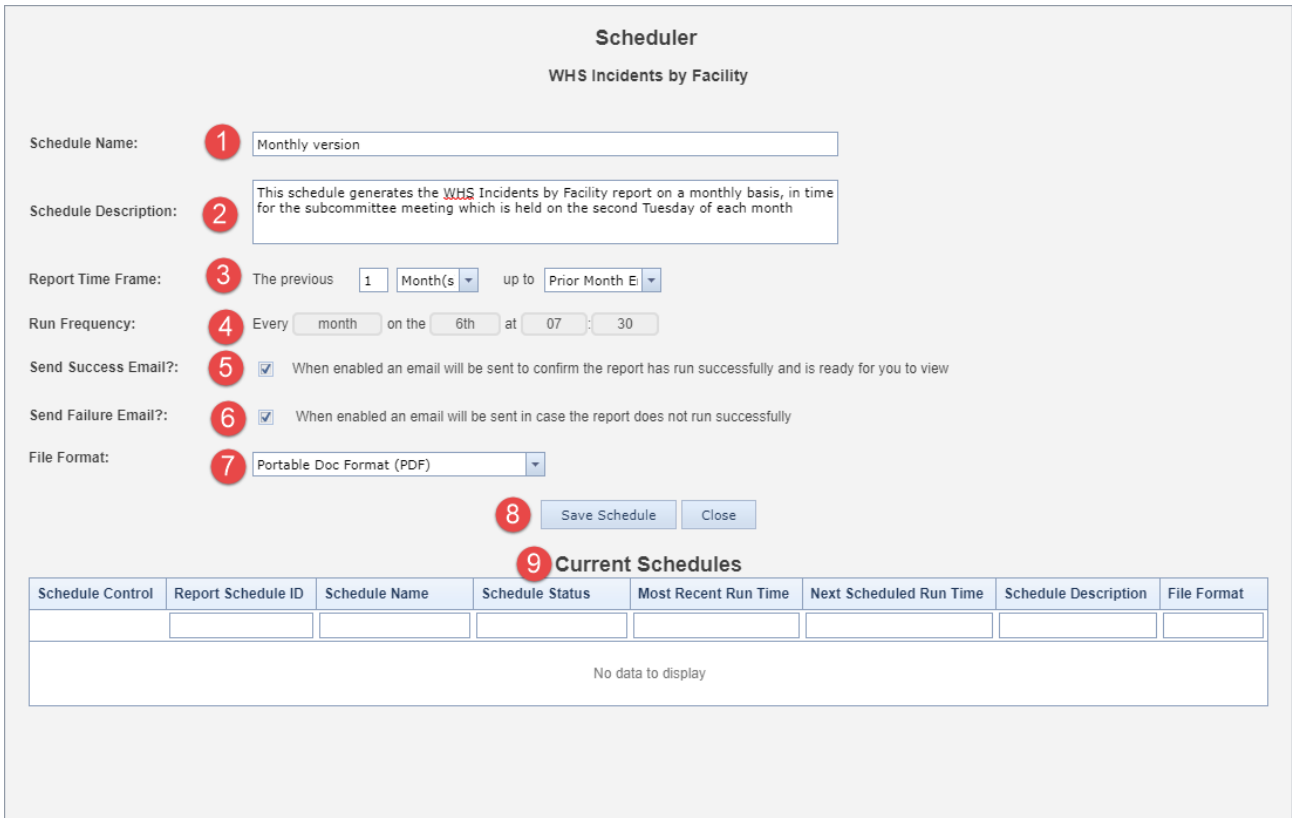
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## Create a schedule so a report is generated automatically

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:



**Scheduler**  
WHS Incidents by Facility

Schedule Name: 1 Monthly version

Schedule Description: 2 This schedule generates the WHS Incidents by Facility report on a monthly basis, in time for the subcommittee meeting which is held on the second Tuesday of each month

Report Time Frame: 3 The previous 1 Month(s) up to Prior Month E

Run Frequency: 4 Every month on the 6th at 07:30

Send Success Email?: 5  When enabled an email will be sent to confirm the report has run successfully and is ready for you to view

Send Failure Email?: 6  When enabled an email will be sent in case the report does not run successfully

File Format: 7 Portable Doc Format (PDF)

8 Save Schedule Close

9 **Current Schedules**

Schedule Control	Report Schedule ID	Schedule Name	Schedule Status	Most Recent Run Time	Next Scheduled Run Time	Schedule Description	File Format

No data to display

- 1 **Schedule Name:** We recommend naming the schedule based on the frequency that the report will be generated; for example, “Monthly version”, “Quarterly version”, etc.
- 2 **Schedule Description:** Enter a description that explains the purpose of this particular schedule.
- 3 **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.
- 4 **Run Frequency:** How often should the report be generated? See further notes on the following pages.
- 5 **Send Success Email?:** When checked, RiskMan will send you an email to let you know that your report has successfully generated. Note that RiskMan does not send your report to you as an

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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.

- 6 **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.
- 7 **File Format:** Choose the format you want the report to be generated in when the schedule runs.
- 8 **Save and Close:** Click the Save Schedule button once you're done. The schedule will then be visible in the **Current Schedules** table.
- 9 **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 5<sup>th</sup> to the 5<sup>th</sup> 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. 7 <sup>th</sup> of each month
A monthly report, generated on the 6 <sup>th</sup> of the month, reporting on data from the 5 <sup>th</sup> of the previous month to the 5 <sup>th</sup> of this month	The previous 1 month, up to the prior day end	Every month on the 6 <sup>th</sup> 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. The link in the email works for you, and no other user. Forwarding the email to another person will not 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.

If a report, which also has a schedule, is deleted then the corresponding schedule will also be deleted.

## 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 schedule will open with a list of reports previously generated. From there you can either click to view, save a local copy, or print it.

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- 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:

The screenshot shows the 'My Reports' interface. At the top, there is a navigation bar with 'My Workspace', 'Management', 'Administration', 'Analysis', and 'Help' menus, along with a 'Log Out' button and the user name 'USER: System Manager (Manager)'. Below this is a 'Reports' header with a dropdown menu set to 'Incident'. The main area is titled 'My Reports' and contains a search bar and a table of reports. The table has columns for 'Report Name', 'Has Schedule?', 'Generated Reports', and 'Date Created'. The first row is 'WHS Incidents by Facility', which is highlighted in yellow and has a red circle ❶ next to it. Below the table is the 'Report Details' section for 'WHS Incidents by Facility'. It lists various details: Target register (Incidents), Created on (14 Nov 2017), Created by (Manager), Report description (This report should be tabled every month at the WHS review committee meeting), Reports generated by schedules (2 - Click here to view generated reports), Added from library? (No), Original report title (WHS Incidents by Facility), and Original organisation title (RiskMan Education). A red box highlights the 'Reports generated by schedules' row, with a red circle ❷ next to the link. At the top of the 'My Reports' section, there is a toolbar with icons for lightning bolt, pencil, trash, document, calendar, and eye, with a red circle ❸ next to the eye icon.

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.

The screenshot shows the 'All generated reports' dialog for 'WHS Incidents by Facility'. At the top, there are 'Delete' and 'Close' buttons, with a red circle ❸ next to the 'Delete' button. Below this is a 'Schedule Name' dropdown menu. The main area is a table with columns for 'Generated Date'. The table is expanded to show a 'Schedule Name: Monthly Version' with two rows of generated reports. The first row is 'Thu 16 Nov 2017 01:17 PM' and the second row is 'Thu 16 Nov 2017 01:06 PM'. Each row has a checkbox ❷ and a document icon ❶. A red circle ❶ is also next to the first document icon.