

# PIMA REPORTS

## Quick Reference for Scheduling a Report

1. 1<sup>st</sup> suggestion – Work for the first few times in full-screen view.
2. Log on to Pima Reports (<https://pimareports.pima.edu>);
3. 2<sup>nd</sup> suggestion – Go to your “Preferences”, click on the Arrow next to “General”:
  - a. Set my “InfoView Start Page” to “Folder” and Click on “Browse” set it to “Public Folders”;
  - b. If your having problems printing - Click on “Crystal Reports” and under “Select printing control” select PDF to utilize Adobe Printing Control;
4. Find your report (search function is your best bet on finding it quickly);
5. Highlight the report by clicking someplace around the title. Right Click anywhere that is highlighted. Then select “Schedule”.
6. 3<sup>rd</sup> suggestion – follow this order for scheduling your reports: “Parameters”, “Format”, “Destination”, “Recurrence” & “Database Logon”. It is advisable that you don’t click on the “Schedule” button until your ready or done entering your user name and password;
  - a. **Parameters** –
    - i. To change a parameter just click on the default selection for that parameter and enter your new selection. Remember if you don’t want all values to remove the “All” Line. Leave as many of the defaults in place until you’re familiar with how those parameters change your desired report.
    - ii. Click “OK” – If you can’t see the “OK” button you’ll need to scroll down a little.
  - b. **Format** – It is currently advisable that you change your format to Adobe Acrobat (PDF).
  - c. **Destination** –
    - i. If you don’t want to send this to yourself or others, leave as is;
    - ii. If you want to send the report to yourself or others via E-Mail:
      1. Click on the down arrow next to Default Enterprise Location
      2. Select the bottom entry “Specific E-Mail Recipients”
      3. You must utilize full e-mail addresses (example: [ddawley@pima.edu](mailto:ddawley@pima.edu)) in the From & To lines. If you have more than one recipient the e-mail addresses must be separated by a semicolon “;”. If one e-mail address is wrong this will in effect “Fail” the report.
      4. 5<sup>th</sup> Suggestion – If you want a quick way to add a subject click on the down arrow next to “Add Placeholder” & Select Title
      5. 6<sup>th</sup> Suggestion – If you want a quick way to add a “Viewer Hyperlink” click in the Message Box & then click on the down arrow next to “Add Placeholder” and select “Viewer Hyperlink”
      6. At this point you can just select the “With automatically generated name” option; however if you want to utilize the “Specific name” option you’ll have to:
        - a. Select “Specific name”
        - b. Click in the name box and click on the down arrow next to “Add placeholder” & select “Title” then you’ll have to physically put in the period “.”
        - c. Click on the down arrow next to “Add Placeholder” and now select “File Extension” it should appear as such: %SI\_NAME%.%EXT%
    - iii. **Recurrence** – This is where you actually setup the schedule for a number of options.
    - iv. **Database Logon** – All you have to enter is your user name & password, all other required entries are already made.
  7. Lastly, click on the schedule button, this will initiate the report. It will also take you to the History page and allow you to see the current status of your report. If the report runs successfully then all you have to do is double click on the date and time to view your report.
  8. If the report fails ... you can click on the word “Failed” and it will tell you why a report fails.
  9. Also, a great function you have is the ability to “Reschedule” reports. This means that you only need to change what every you would like and not touch any other area to include, database log-on. All you have to do is click on the arrow next to the “Actions” button and you’ll see the word “Reschedule”. It will give you the option to create a new scheduled report or replace the one you just scheduled. If you do reschedule you’ll not be required to put in your username & password again as you’re the only one (with exception of the Pima Report Administrators) that can reschedule your reports.