qt23

Schedule a Report

Note that these same instructions apply also to the Utilities and Exports modules.

Alexandria Version 6

Only Saved reports can run on a schedule, so select an already existing Saved report, or pick a report from the Reports list.
e.g. Copies > General > Copy List - 1 Line

Set the Selection for the report,
e.g. Copy Accession Date, last month to Today
and the Sort By.

Click Create New Saved Report, and give the report a name.
e.g. New Items

Locate that report under the Saved tab, and go to the Schedule tab.

Choose a Run Next On date and time, then set how often you want the report to Repeat.

For this example let's say we want to put up a list of all the new items every month.
So let's choose Monthly, every 1 month, on the 1st.

The report will run in Operation Management every month at this time. To be notified that it has run and is available for you to print it, check Send Email Notification and fill in your email.

Alternatively, go to Locations to change the Output. You can send the report link in an email, or upload the report to an FTP server.
Change the Output to PDF.

Don't forget to Save the report!

Alexandria Version 7

You can only schedule a Saved report, so select an already existing Saved report, or select a Quick report
e.g. Copies > Copy Information
and click on Create Saved Report.

Name the report,
e.g. New Items
and set the Selections and Options.
e.g. Copies added, Relative date, previous 1 month

Go to the Schedule tab and check the box to Schedule the report.

Choose a Frequency; Once, Daily, Weekly, Monthly, or Yearly.

For this example let's say we want to put up a list of all the new items every month.
So let's choose Monthly, select the 1st, and enter a time.

The report will run in Operation Management at this time; to be notified that it has run and is available for you to print it, go to the Notification tab and Enable Email Notification.
Enter your email, either for Notification only, or to also send the download link to yourself.

To upload the report to an FTP Server when it runs, go to the FTP tab and fill out the FTP information.

Don't forget to Save the report!