# Job Aid: Run Reports: Basic Tasks

## Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the basic tasks to work with reports in Plateau.

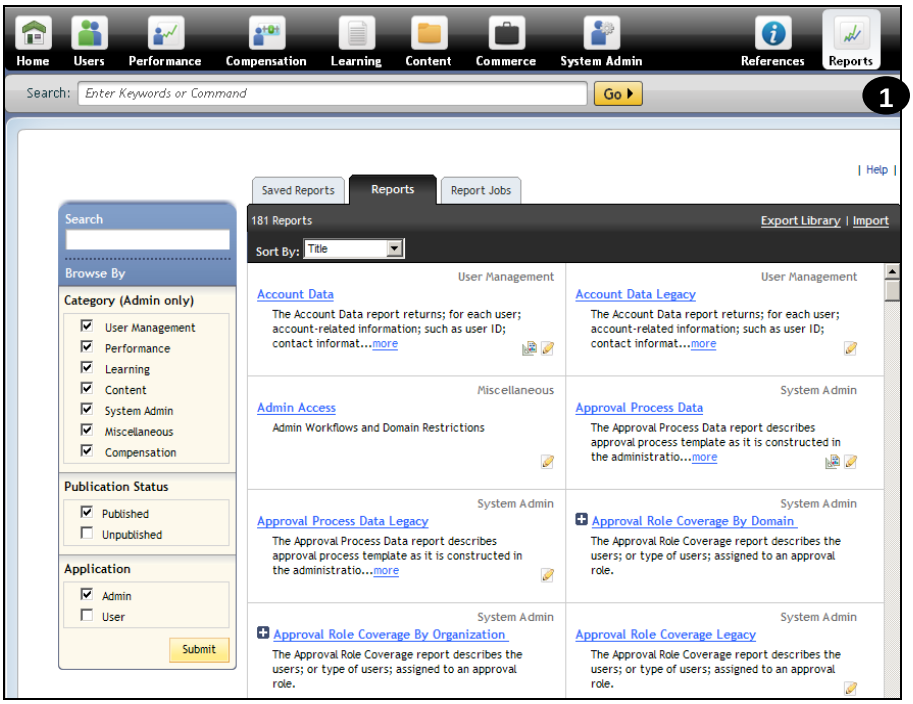
## Tasks

A. Access and Search for Reports
B. Run a Report
C. Schedule a Report
D. Save a Report

## Task A. Access and Search for Reports

***Note:*** *Verify the* ***Admin*** *tab is selected.*

1 Navigate to **Reports**.



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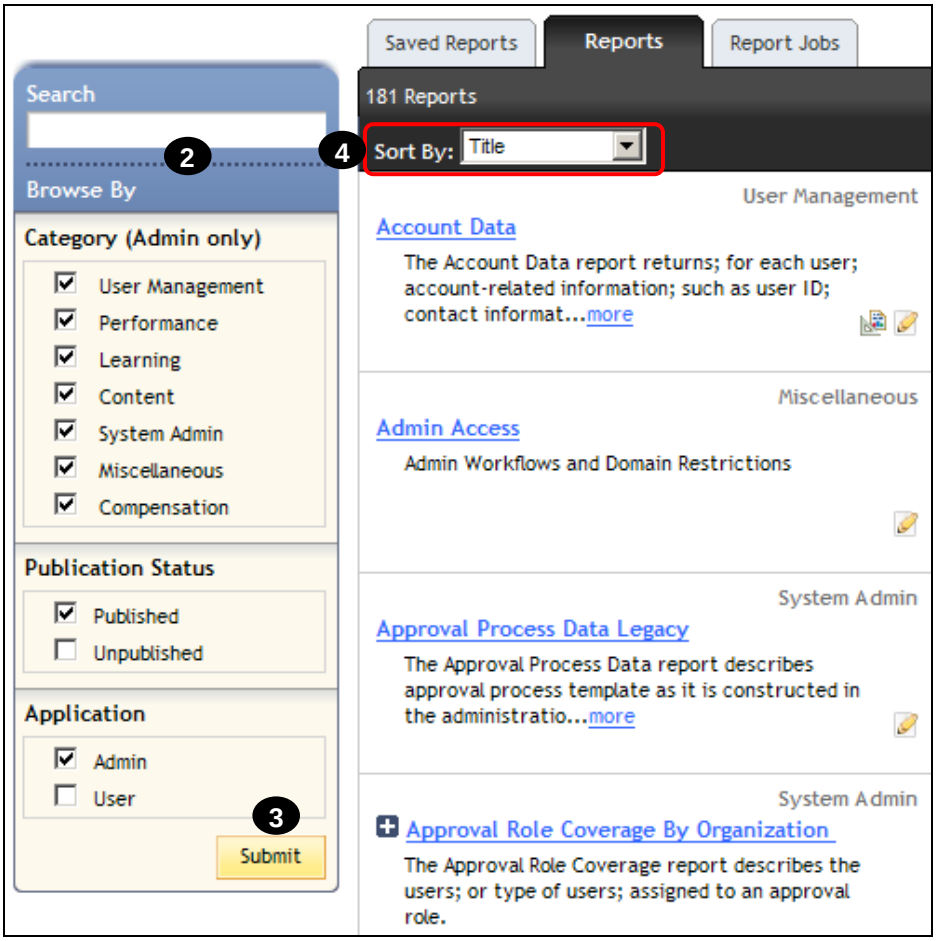
|---|---|
| 2 Use the **Search** and **Browse By** features to filter the reports list.<br>3 Select **Submit**.<br>4 Select **Sort By** to sort the reports list by *Title* or by *Category*. |  |

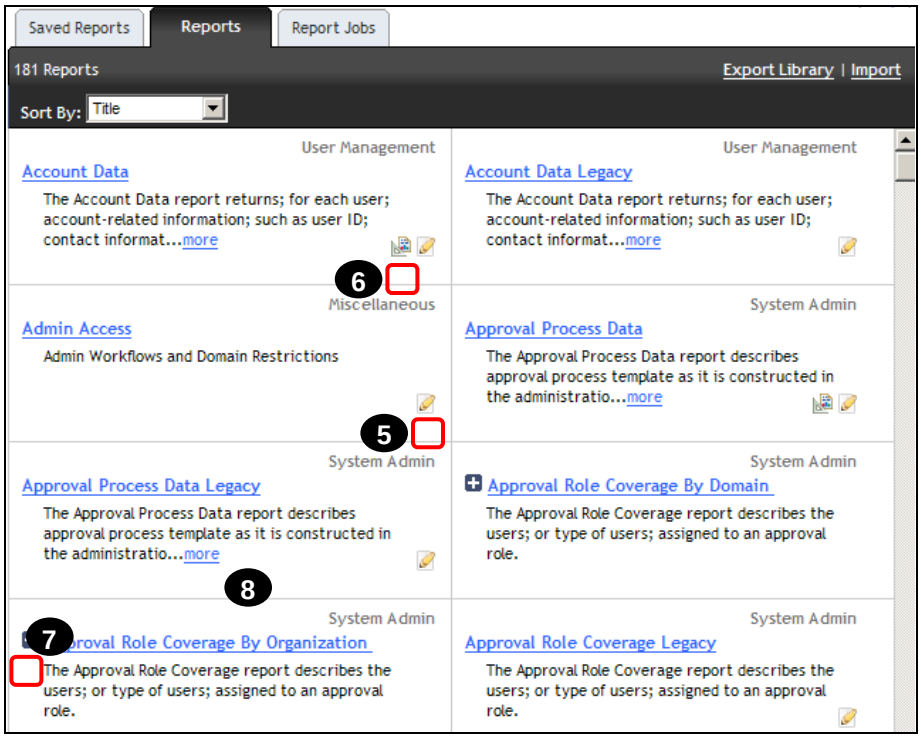
Select:

5 • : **Edit icon** to edit the report details, i.e., description, comments, domain.

6 • : **Export icon** to export the report as a zip file.

7 • : **Expand icon** to expand the list of available reports in the report group.

8 Select **more** to see additional report description.




## Task B. Run a Report

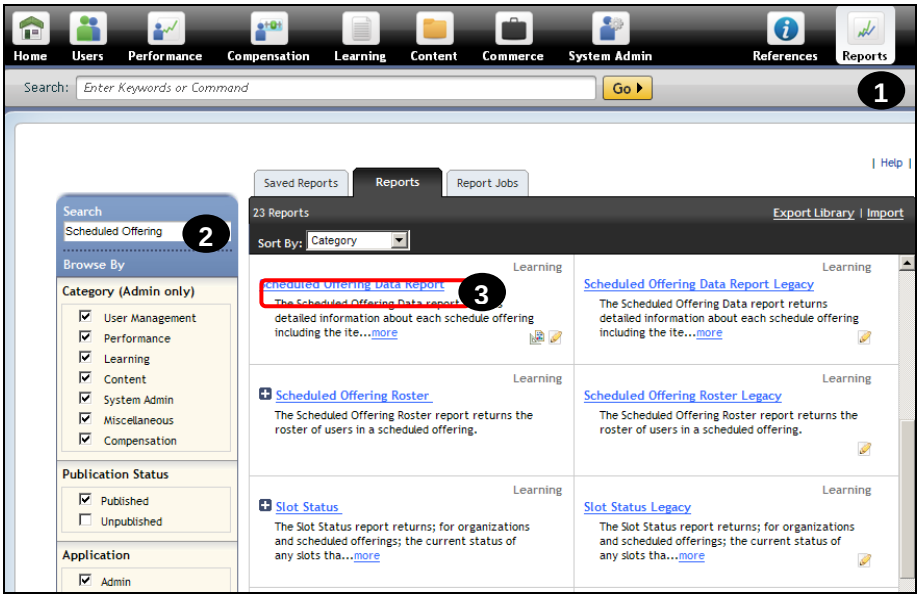
***Note:*** *Verify the* ***Admin*** *tab is selected.*

1 Navigate to **Reports**.

2 Use the **Search** and **Browse By** features to filter the reports list.

Locate the report you want to run. In this case, let's run the **Scheduled Offering Data Report.**

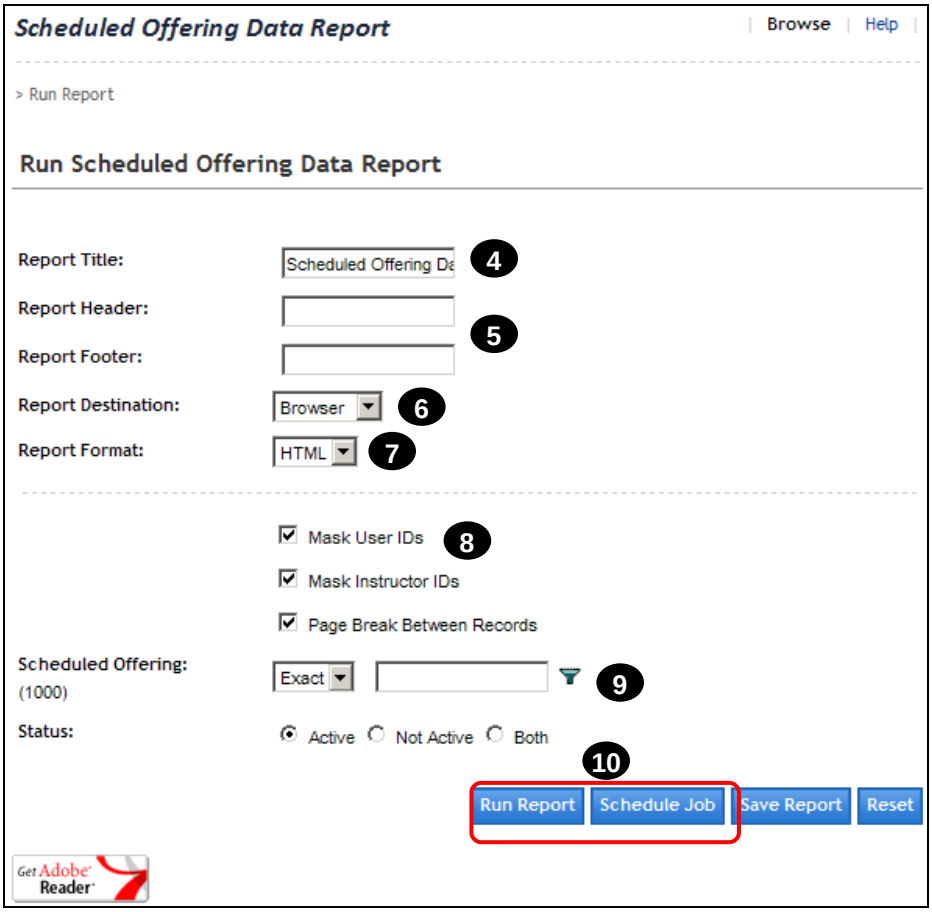
3 Select the report title link.



4. Modify the report title if necessary.
5. Enter a report header and footer to add to the report.
6. Select a report destination from the drop-down menu.
7. Select a report format from the drop-down menu.
8. Select to mask or unmask user IDs and Instructor IDs on the report.
9. Select the **filter icon** to search for and select the scheduled offering to run this report.

Select:

10. 
    - **Run Report** to run the report immediately.
    - **Schedule Job** to schedule the report to run as a background job, once at a future date, or on a recurring basis.

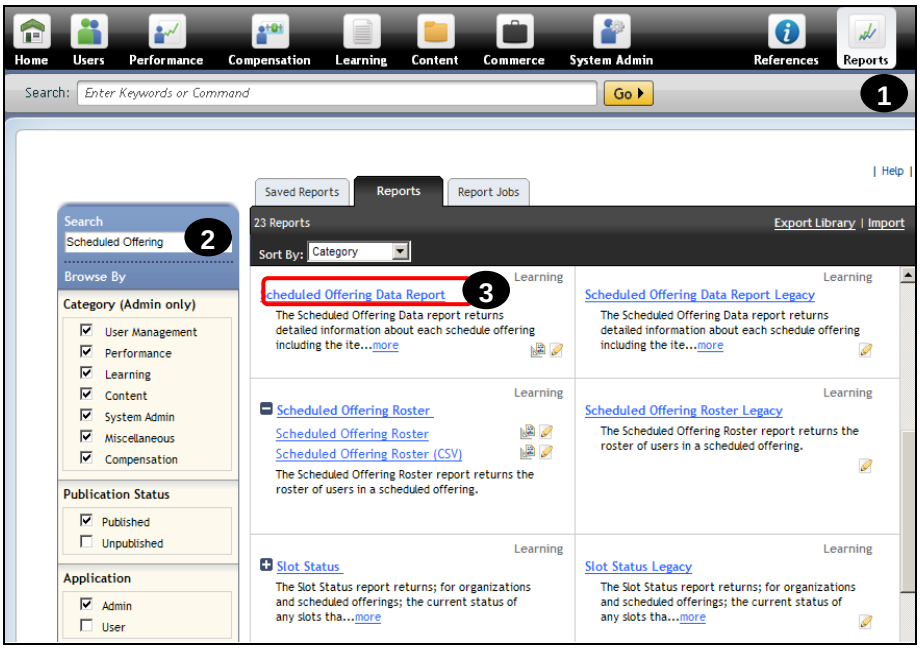



***Note:*** *Only published reports display the* ***Schedule Job*** *button.*

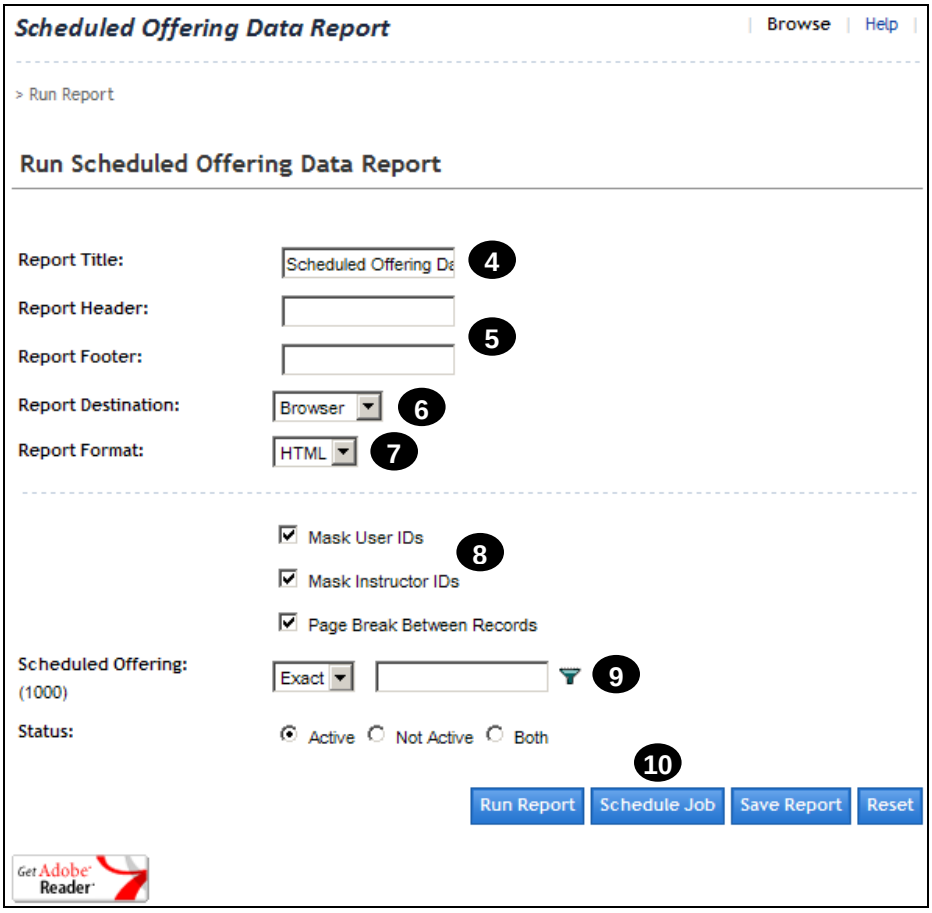
## Task C. Schedule a Report

1. Navigate to **Reports**.
2. Use the **Search** and **Browse By** features to filter the reports list.

   Locate the report you want to schedule. In this case, let's schedule the **Scheduled Offering Data Report**.
3. Select the report title link.




4. Modify the report title if necessary.
5. Enter a report header and footer to add to the report.
6. Select a report destination from the drop-down menu
7. Select a report format from the drop-down menu.
8. Select to mask or unmask user IDs and Instructor IDs on the report.
9. Select the **filter icon** to search for and select the scheduled offering to run this report.
10. Select **Schedule Job**.

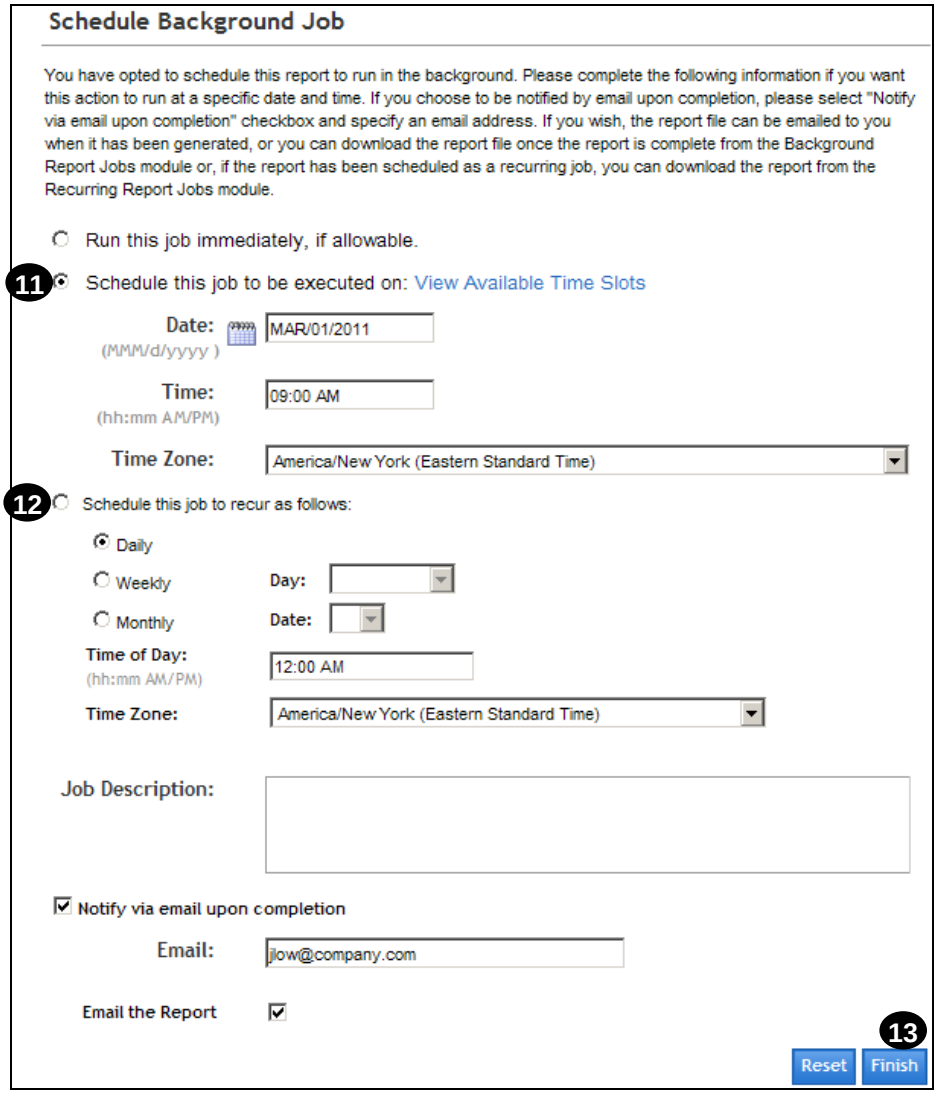


**11** Select the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time.

***Note:*** *Click* ***View Available Time Slots*** *to see a list of times you are allowed to run the report.*

**12** Select the **Schedule this job to recur as follows** radio button to schedule the report to run at the specified recurring basis.

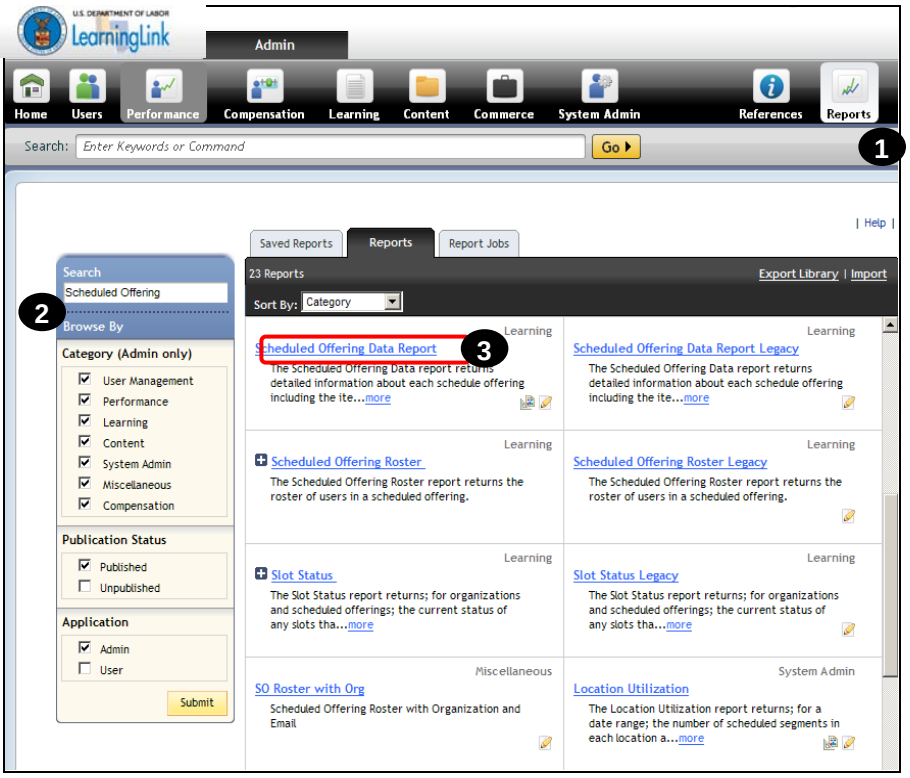
**13** Select **Finish**.



## Task D. Save a Report

1. Navigate to **Reports**.
2. Use the **Search** and **Browse By** features to filter the reports list.

   Locate the report you want to save. In this case, let's save **Scheduled Offering Data Report**.
3. Select the report title link.



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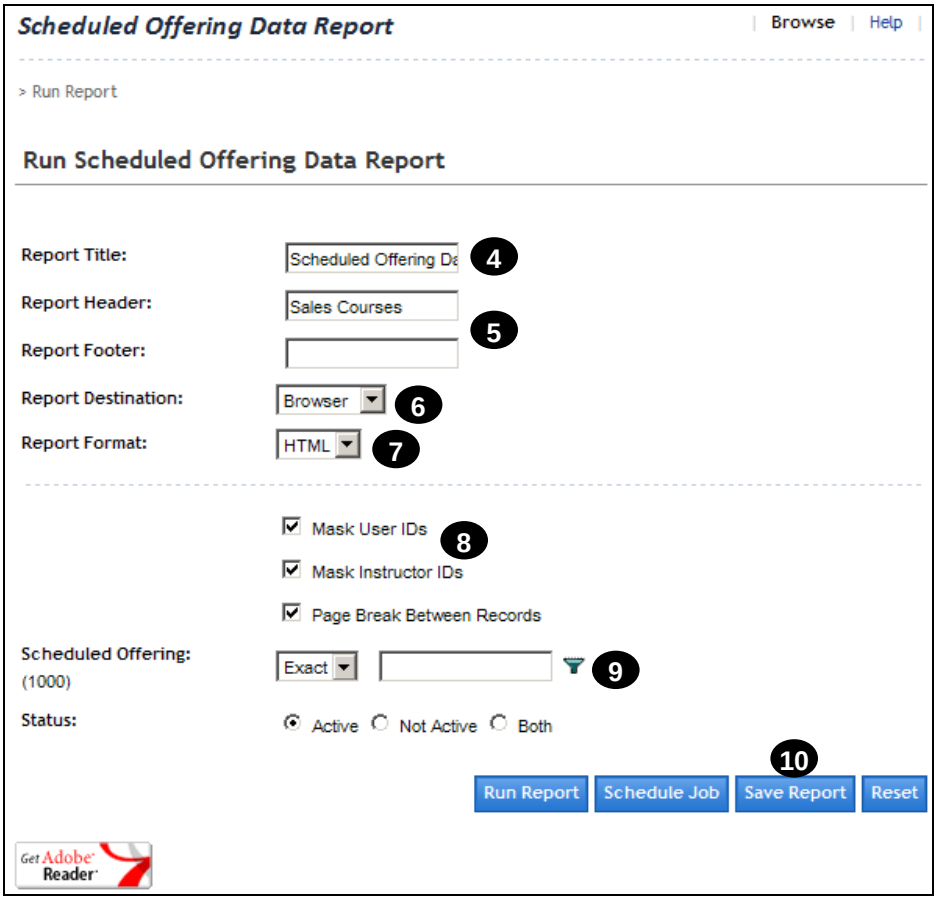
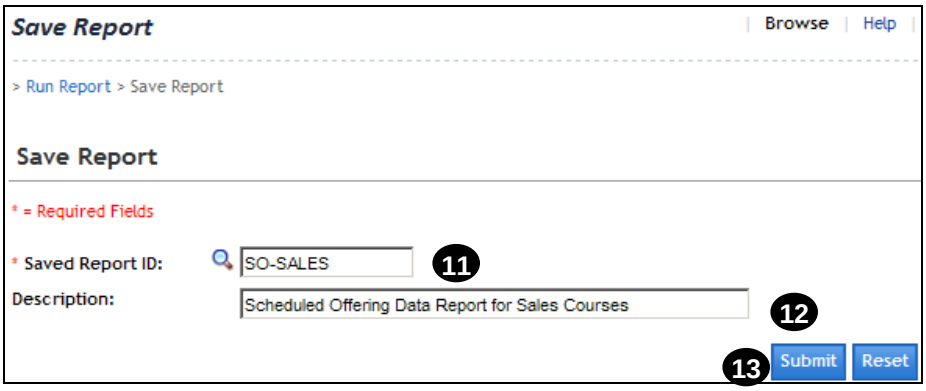
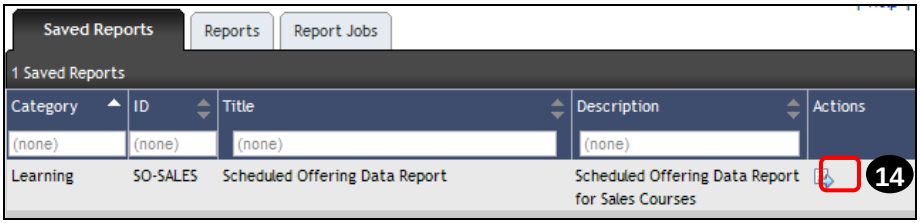
|---|---|
| 4 Modify the report title if necessary.<br>5 Enter a report header and footer to add to the report.<br>6 Select a report destination from the drop-down menu<br>7 Select a report format from the drop-down menu.<br>8 Select to mask or unmask user IDs and Instructor IDs on the report.<br>9 Select the **filter icon** to search for and select the scheduled offering to run this report.<br>10 Select **Save Report**. |  |
| 11 Enter an ID for the saved report.<br>12 Enter a description of the saved report.<br>13 Select **Submit**. |  |
| The saved report displays on the **Saved Reports** tab.<br>14 To run a saved report, select the **Run** icon ( ) in the Actions column. |  |