How to Schedule a Report in ART

Advantages to Scheduling Reports

- **The report runs behind the scenes, allowing you to do other work simultaneously**

- **You can run multiple reports at the same time**

- **The file automatically saves to your inbox**

- **Does not rely on your internet speed or use Java**

- **You can schedule reports to run automatically on a daily, weekly, or monthly basis**

Getting Started

- **Log in to ServicePoint and then click on Connect to ART**

- **The process for scheduling a report begins the same as the process for running a report. However, rather than select "View Report", you will select "Schedule Report".**

- **After you select "Schedule Report", you will be directed to the same report prompts that you use when running the report in real time. You will notice that the layout is a bit different.**

- **You will have to click on each prompt one at a time. Each prompt will generate a new pop-up for you to input your report parameters.**

- **Special note: Clicking on the "Next" button before all parameters are set will generate an error message.**

Prompts

- **EDA Provider**
  - **Leave set as default**
- **Start Date**
  - **The first day of the report period**
  - **If PM, change to AM**
- **End Date Plus 1 day**
  - **If PM, change to AM**
- **Enter Effective Date**
  - **The last day of the report period plus one day**
  - **If PM, change to AM**
- **Provider**
  - **You will need to perform a search to come up with the Provider or Provider Group that you want to run the report for.**
  - **Once you click Search, a list of results will appear below**
  - **Click on the green plus to select the correct Provider or Provider Group.**
  - **Once you have input all of your reporting prompts, click on the "Next" button. You will then be directed to the "Schedule" screen.**

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Format Your Report

- **This is the schedule prompts screen**
- **Name**
  - **edit or leave at default**
- **Format**
  - **pdf or Excel**
  - **Excel allows for the ability to work with the data**
- **User Inbox**
  - **usually this is you but it is possible to send to another user in certain circumstances**
- **Interval**
  - **once, daily, weekly, monthly**
- **Start Date - End Date**
  - **To run the report once, the dates can be left at the default.**
  - **For intervals, you will set up the schedule that you want reports run on**
- **When all prompts are input, click on "Send"**

Schedule

Name *	0625 - HUD CoC APR - v29
Report Format *	-Select- ∨
Users Inbox *	Jennifer Ross (6493) Search My User Cl
Interval *	-Select- ∨
Start Date *	02 / 24 / 2017 🗓🔄🗓✓ 8 ∨ : 14 ∨ AM ∨
End Date *	02 / 24 / 2017 🗓🔄🗓✓ 8 ∨ : 14 ∨ AM ∨
	Send

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Find Your Report

- **The report will appear in your Inbox**
  - Located under ART Browser near report folder
- **Click on the magnifying glass next the report that you want to work with**
- **Download**
  - To generate report to view, print, and/or save to desktop
- **The report will stay in your Inbox until you delete it**
- **You can check on the status of a schedule report by looking under "Scheduled Reports" toward the bottom of the screen**
  - Click on "Refresh" to update the status
  - The report can appear as running, pending, or complete