Scheduling a Recurring Report

ACE Reports Videos

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INTRODUCTION

Schedule reports to:

- Run automatically at specified time intervals.
- Run very large reports as a background process to avoid the report failing due to a time-out. Multiple schedules can be set for a single report. This allows multiple users to use a single shared report to retrieve data sets at personalized intervals.

**IMPORTANT:** Remember to account for the nightly data update of ACE Reports. Schedule reports after 5:00 AM Eastern Time to ensure the update process has completed and results will be most up to date.

**SCHEDULE A REPORT**

1. In the Documents tab, select the saved report you wish to schedule.
2. In the More Actions drop-down menu, select Schedule.
3. In the Schedule menu, if necessary, in the Instance Title field, type an instance title.
4. Select the Recurrence schedule menu.
5. In the Run object: drop-down menu, select a recurrence interval.
6. If necessary, select the Prompts option, and review and/or modify the prompts for the instance.
   
   **NOTE:** If the report does not have any User Prompts, this option will not be available.

7. Select the Formats option.
8. In the Output Format list, select a format for output.
   
   **IMPORTANT:** The Caching, Events, and Scheduling Server Group options are not applicable.

9. Select the Destinations option.
10. In the Destination: drop-down menu, select a destination.
11. Select the Delivery Rules option.
12. If necessary, select the checkbox for any applicable delivery rule for the instance.
13. At the bottom, select the Schedule button.

   In the History pane, the scheduled report displays. If the report was scheduled with a recurring interval, it will display with a Status of Recurring.