Job Aid: Running Reports: Basic Tasks

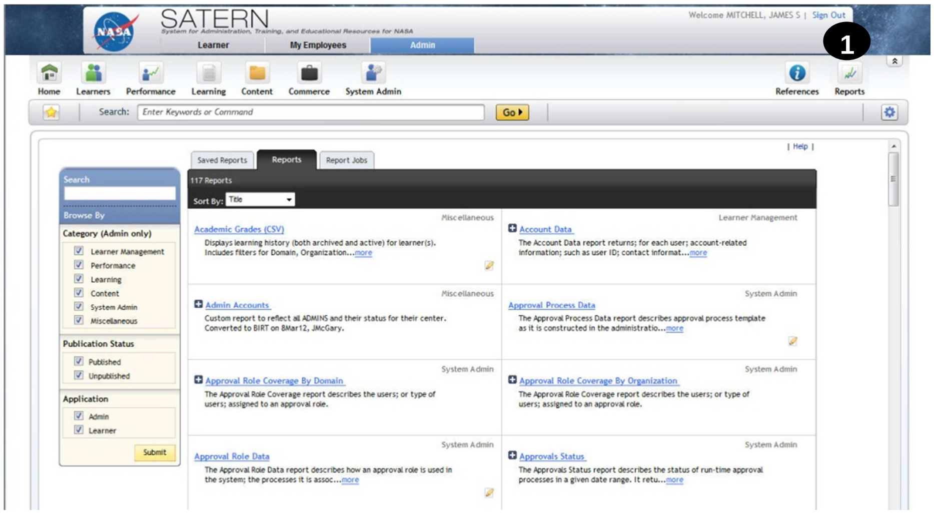
Description

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 SATERN.

Tasks

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

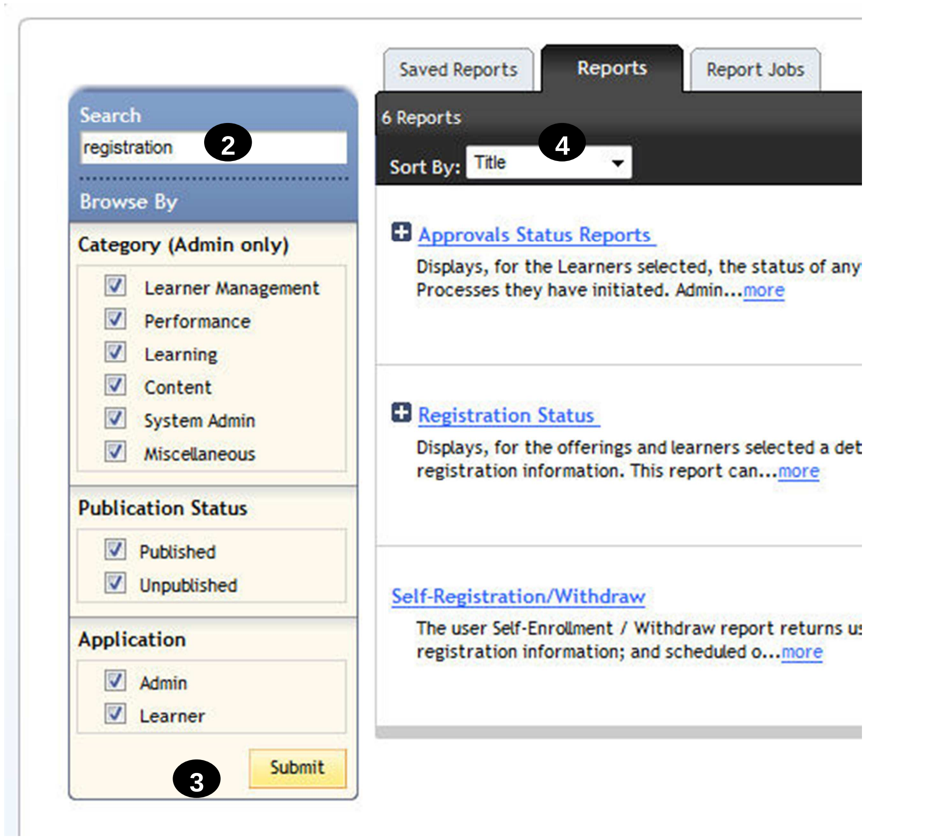
Task A. Access and Search for Reports

1	Navigate to **Reports.**	

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

3 Click **Submit**.

4 Click **Sort By** to sort the reports list by *Title* or by *Category*.



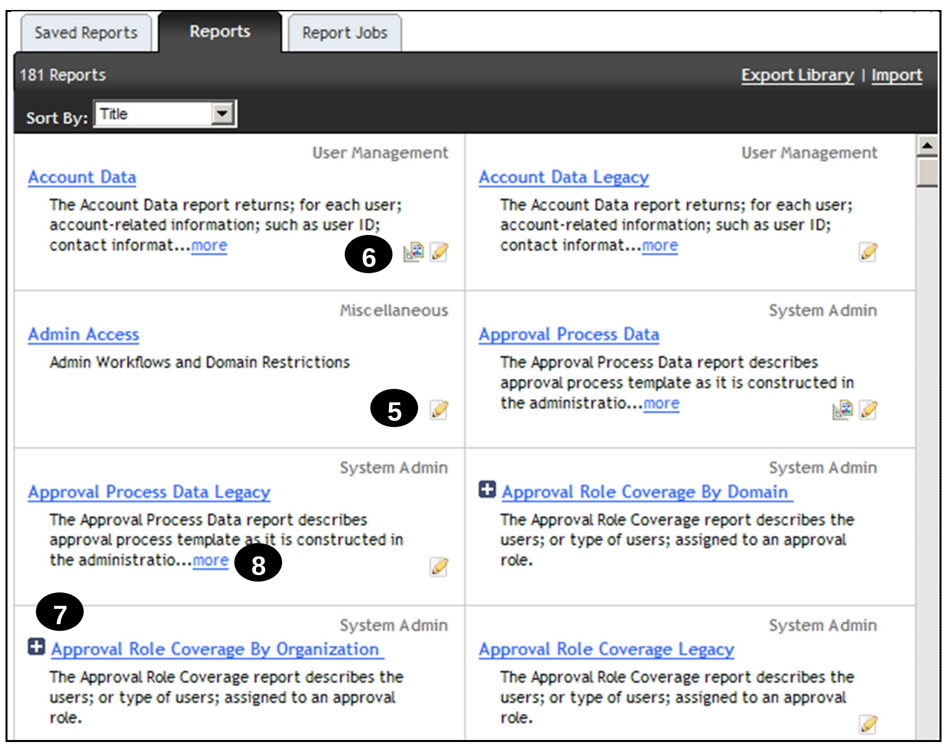
Click:

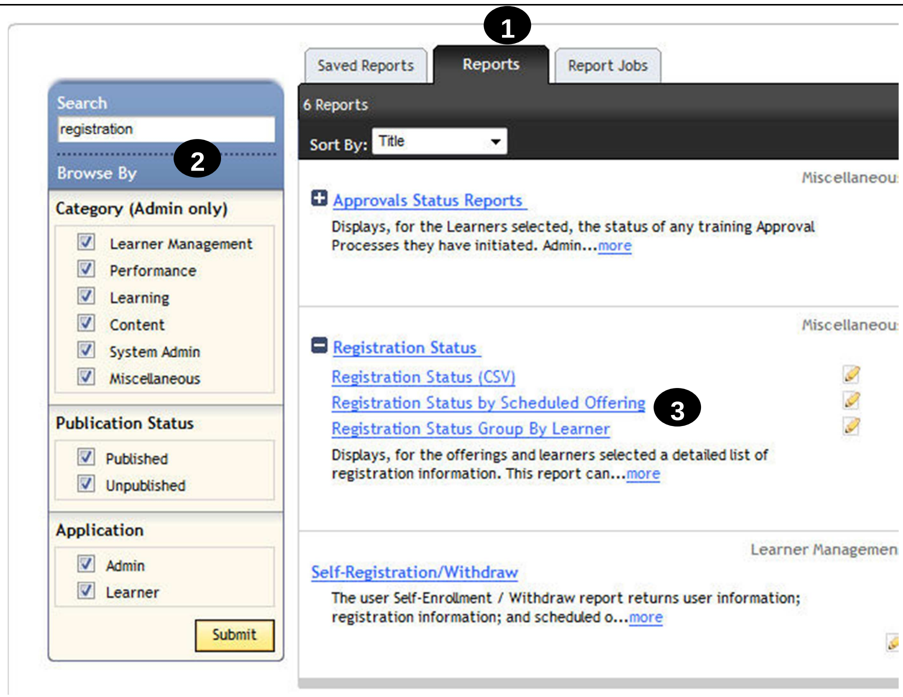
5 • : **Edit icon** to edit the report details, i.e., description, comments.

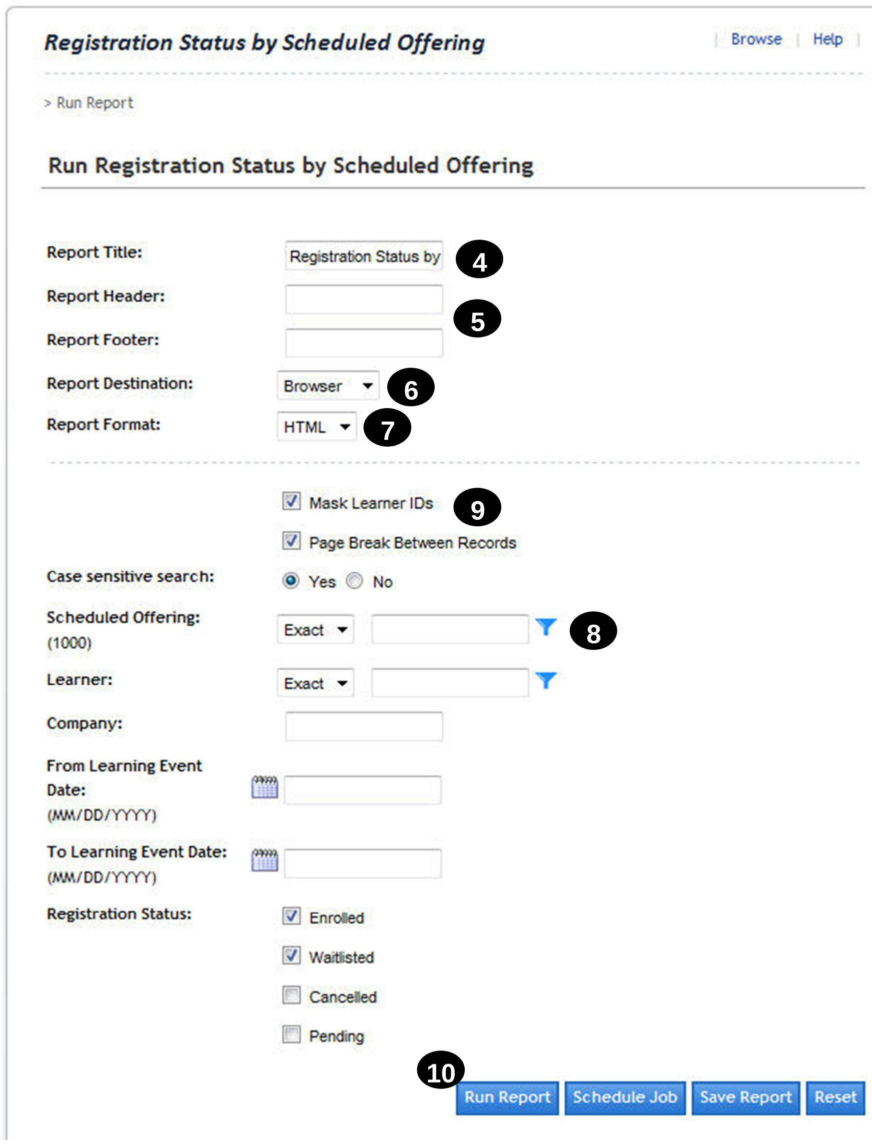
6 • : **Export icon** to export the report as a zip file.

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

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



Task B. **Run 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 run. In this case, let's run the **Registration Status by Scheduled Offering.**	
3	Click the report title link.	

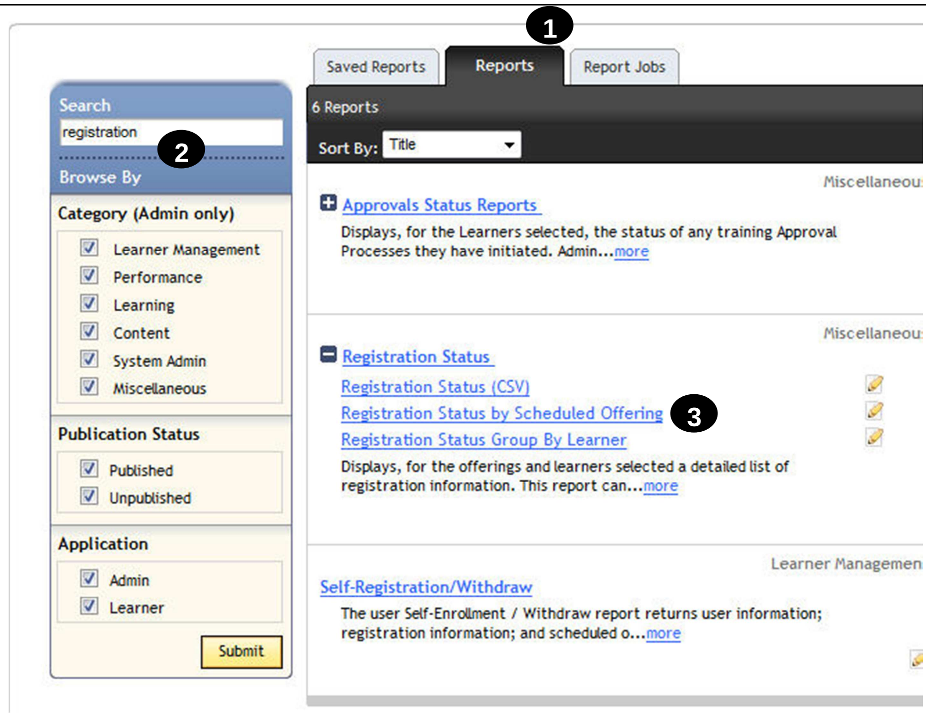
4	Modify the report title if necessary.	
5	Enter a report header and footer to add to the report.	
6	Select a report destination from the drop-down menu.	
7	Select a report format from the drop-down menu.	
8	Click the **filter icon** to search for and select the scheduled offering(s) to run this report.	
9	Click to mask or unmask Learner IDs on the report.	
10	Click **Run Report** to run the report immediately.	

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

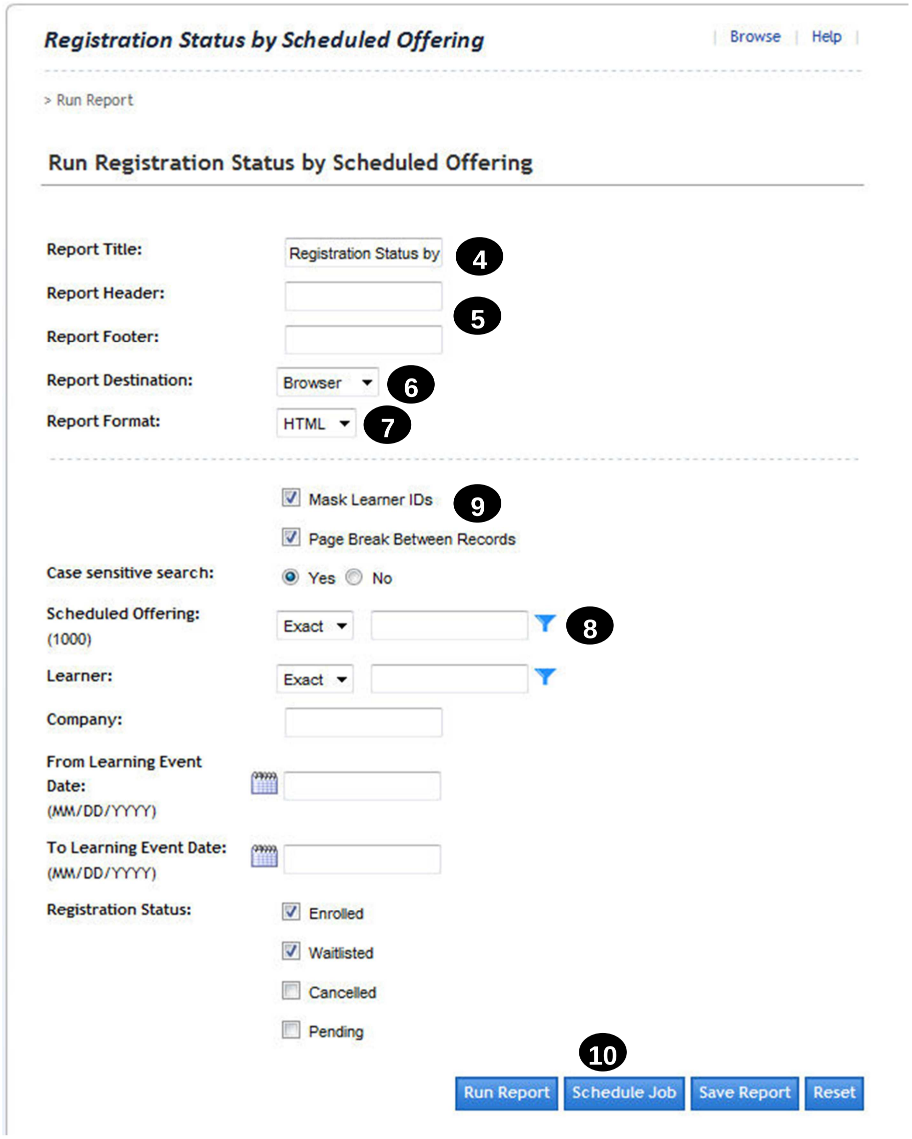
Task C. Schedule a Report

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

   Locate the report you want to run. In this case, let's run the **Registration Status by Scheduled Offering.**
3. Click 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. Click the **filter icon** to search for and select the scheduled offering(s) to run this report.
9. Click to mask or unmask Learner IDs on the report.
10. Click **Schedule Job** to schedule the report to run as a background job, once at a future date, or on a recurring basis.



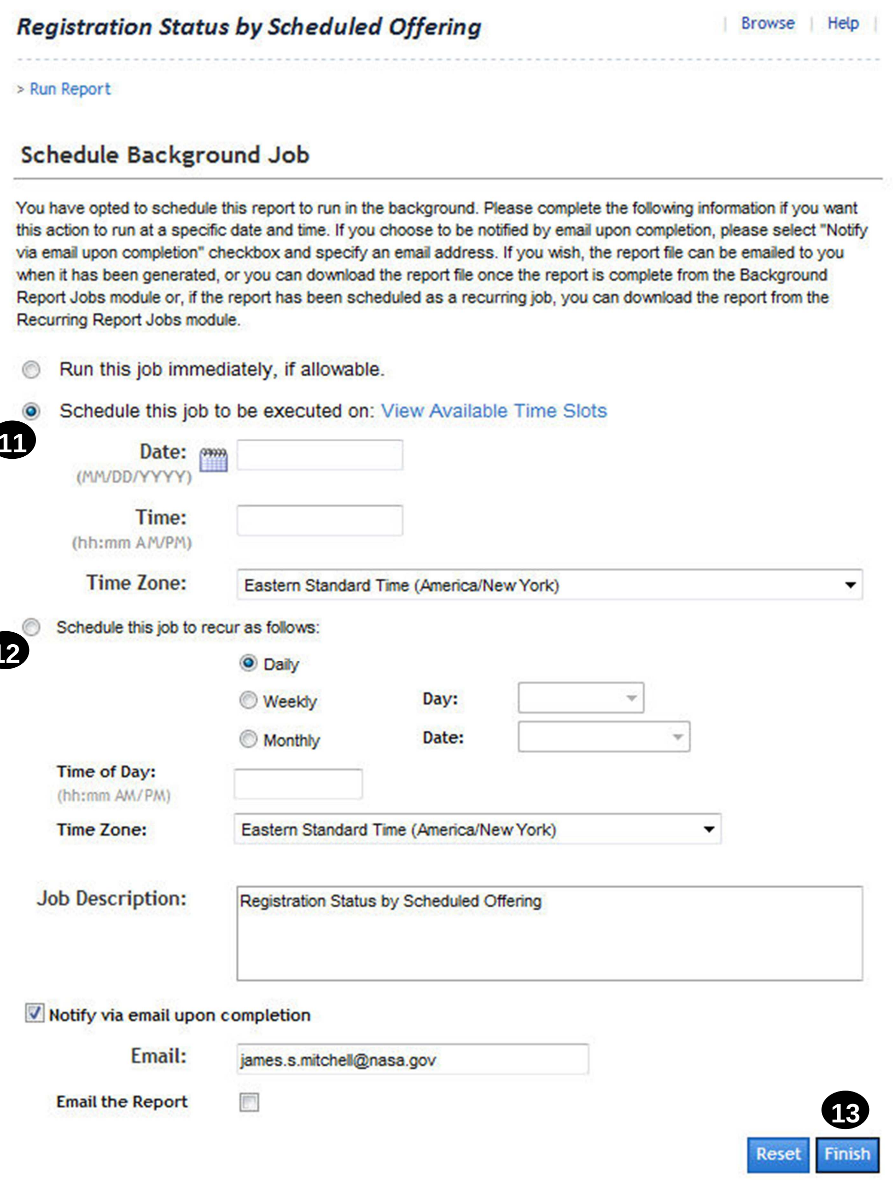
11 Click the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time.

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

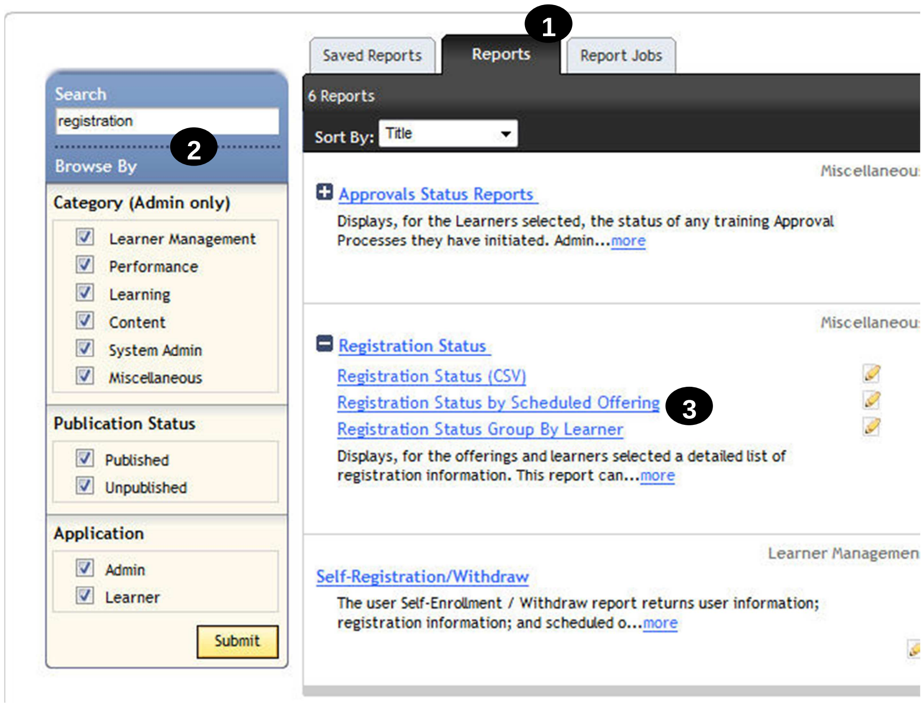
12 Click the **Schedule this job to recur as follows** radio button if you wish to schedule the report to run at the specified recurring basis.

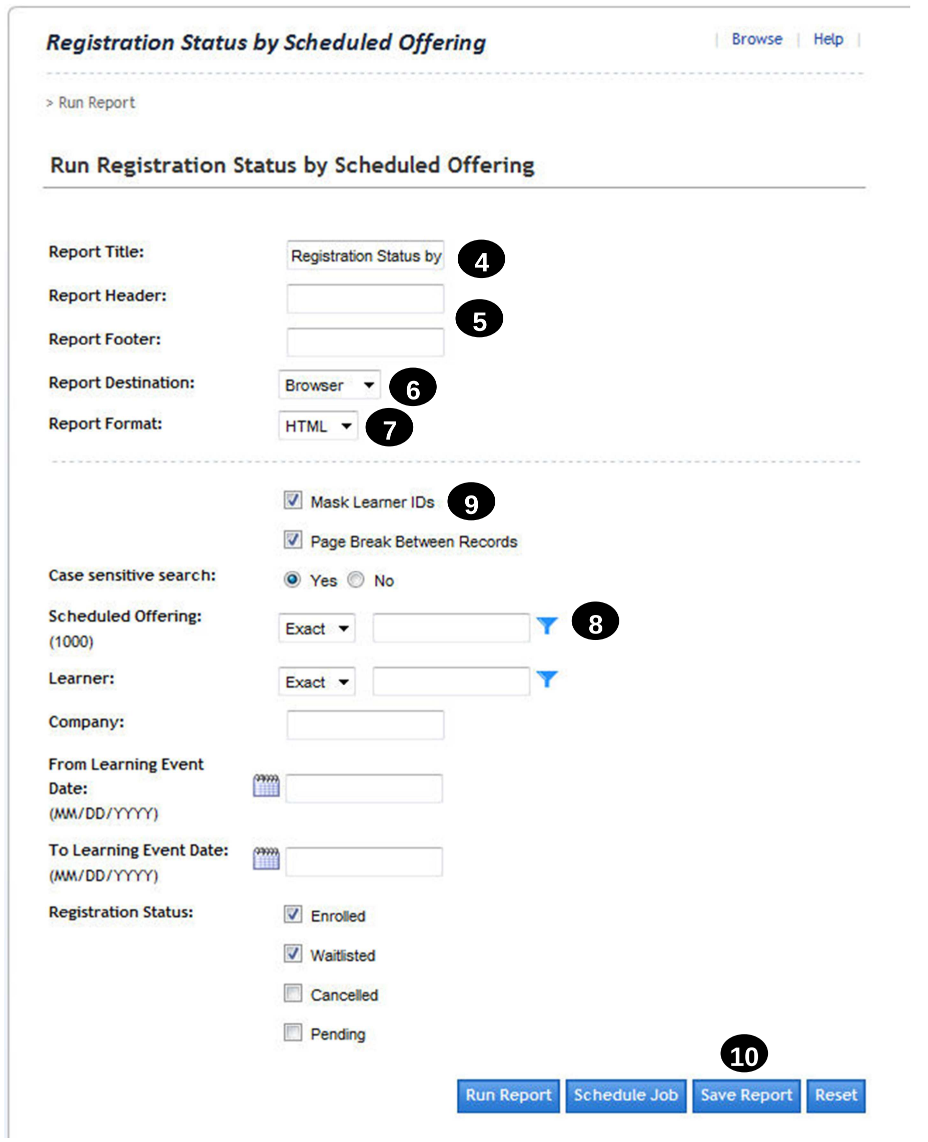
13 Click **Finish.**

Note: You may be asked to confirm the job. If so, click **Finished.**



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 **Registration Status by Scheduled Offering.**	
3	Click 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	Click the **filter icon** to search for and select the scheduled offering(s) to run this report.	
9	Click to mask or unmask Learner IDs on the report.	
10	Click **Save Report**.	
11	Enter an ID for the saved report.	
12	Enter a description of the saved report.	
13	Click **Submit**.	

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The saved report displays on the **Saved Reports** tab.

To run a saved report, click the **Run** icon ( ) in the Actions column.