Student Information System

Using the Scheduling Manager in Discoverer Plus

Updated May 2011

Discoverer Scheduling Manager has been activated for all SIS Discoverer users. If after reading these instructions you have any difficulty using the Scheduling Manager, send an email to RPTSupport@virginia.edu describing the problems you are having.

Because scheduled reports consume database space, there are some default restrictions on its usage:

- Users are permitted a maximum of 7 scheduled workbooks at a time. This is not as restrictive as it sounds. For example, if you schedule a workbook with multiple sheets to run daily, that only counts as one workbook.
- Users are allowed to retain the results of a scheduled workbook for a maximum of 5 days.

If these limits prove to be too restrictive for you, email us and explain your needs. We may be able to grant an exception.

Sharing Scheduled Workbooks

There are two ways to schedule a workbook.

1. If you already have the workbook open, from the menu bar select File, Schedule:
2. From the menu bar, select **Tools, Manage Schedules**, and then click the **Schedule** button:
Regardless of which method you use to get there, the **Scheduling Wizard** will now launch and guide you through the scheduling process.
1. **All scheduled workbooks must have a unique name.** Not only can you not use the same name twice, but you can’t use a name that anyone else is using. If you don’t change it here Discoverer prompts you when you leave this screen and will make the name unique for you (see next screenshot).

2. **All worksheets are selected by default.** Click the checked box to de-select worksheets you do not wish to schedule.

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**Schedule Wizard - Step 1 of 5: General**

<table>
<thead>
<tr>
<th>What do you want to name this scheduled workbook?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sr. Schedules of Classes Galley Report</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What description do you want for this scheduled workbook?</th>
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<tbody>
<tr>
<td>For use in preparing the Schedule of Classes for a future term after the previous term has been rolled forward</td>
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</table>

<table>
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<tr>
<th>Which worksheet(s) do you want to include in this scheduled workbook?</th>
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<tbody>
<tr>
<td>Galley Report</td>
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<tr>
<td>Galley Report - Excel Version</td>
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<tr>
<td>Class Searien Sort</td>
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</tbody>
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Click Next.
Note: All scheduled workbooks must have a unique name. If anyone has a workbook with the same name as yours, you will get this dialog prompting you to change the name.

This option only works if the scheduled workbook with the same name belongs to you. Otherwise you will get an error with the obscure message BR1.
You are presented with the Parameter Values dialog box (if any) for each sheet that you scheduled. Enter your desired parameters. Note that * indicates a required field.

Repeat this step for each of the worksheets that you scheduled.
You can choose to schedule your workbook to run immediately or on a specified date and time. The default is the next day at 12:01 AM. To schedule the report to run on a specific date/time, use the calendar wizard icon to select month, day, and year. Click on the hour, minute and AM/PM section(s) to type in the desired values.

You can choose to just run it once (default), or schedule it to run every day, week, month, year, etc.

If you choose to repeat the scheduled report, you can choose how many copies you want to keep (in case you want to do comparisons of the data, etc).

You can also choose how long you wish to keep the results stored in the database. (Note: the ODS Administrator ultimately sets the max number of days data can be retained.)

Adjust entries as needed and click **Finish**.
If you scheduled your workbook using the **File, Schedule** method, you are returned to your open workbook. If you used **Tools, Manage Schedules**, you are returned to that dialog:

The Scheduling Manager dialog box displays your report with a status of “Scheduled” or “Pending”.

Note: The icon of a clock over a workbook is used to denote scheduled workbooks.

You may click **Schedule** to continue scheduling other workbooks, or **Close** to exit Scheduling Manager.

Your workbook has successfully been scheduled.

**NOTE:** A scheduled report is a copy of the report that runs on the server. You do not need to leave your computer “on” or even be logged onto Discoverer Plus once the report has been scheduled. The results of a scheduled report are saved in the database and available to you when completed, freeing you to do other things rather than waiting for the report to run.
Sharing Scheduled Workbooks

Note that the Manage Schedules dialog has a Share button.

This enables you to share your scheduled workbook with others. This way one person can run the report instead of several people, but all can see the results. Even if you schedule the report to run each day, you need only share it once.

The people you share with do not need to have Scheduling Manager access, but they do need to have access to the data on which the report is based. They will see the report listed when they go into open a workbook:
Note the clock on top of the Workbook icon. This indicates the results of a scheduled workbook.

Opening Scheduled Workbook Results

After you submit a scheduled workbook you can continue to monitor its progress using the Manage Schedules dialog box. If you leave the dialog box open, be sure to click the **Refresh** button periodically to get the current status - the screen will not refresh automatically. If you close the dialog box to do other things and come back to it later, when you open it again you will get the current status.

Once the report has finished running, the status will change to **Complete** or to **Unscheduled**. If you’ve scheduled the workbook to run again on a regular basis, the status may change back to **Pending**.

Click on the **plus sign** to the left of the workbook name to display the results. Depending on whether or not you scheduled the workbook schedule to repeat, you may see more than one set of results. Select the completed results you wish to view and click **Open**:
All the worksheets you scheduled will open. As you click on each you are presented with this dialog:

This is similar to the dialog box you see any time you run a worksheet. However, when you click Yes, the worksheet query is not being run again; rather the results that have already run are being fetched from the database for you. You will get your data back almost immediately.

As mentioned previously, the second way to open your scheduled workbook results is to select **File, Open** from the menu. Scheduled workbooks appear with a small clock on top of the workbook icon. To see them more easily you can change the View of the page to Scheduled Workbooks. Only scheduled workbooks are displayed.
Managing your Scheduled Workbooks

When you no longer need report results, return to **Tools, Manage Schedules** to delete them.
Highlight the scheduled workbook and click **Delete**. Deleted report results no longer display in the Scheduling Manager window.

Note there is also an **Edit** button. If you’ve scheduled a workbook and wish to modify the schedule, you can do so here.

If you have any problems using Scheduling Manager, please email **RPTSupport@virginia.edu**.