

NORTEC
CalJOBS – SAVING AND SCHEDULING REPORTS

Last Update: 2/8/2019

PURPOSE

These instructions serve to give staff a step-by-step guide to saving and scheduling reports through CalJOBS.

INTRODUCTION

All reports in CalJOBS can be saved and run quickly from the 'My Reports' menu.

Only 'Advanced Reports' can be scheduled and automatically emailed to staff.

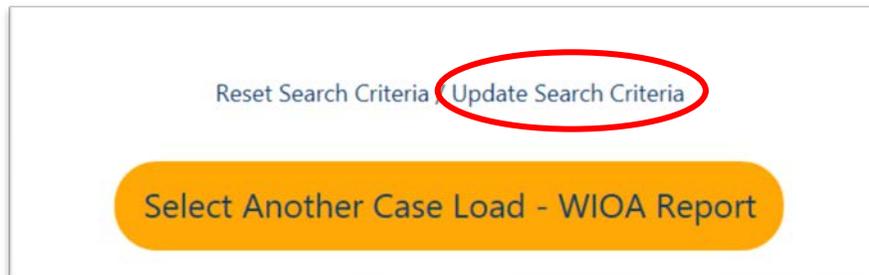
Unfortunately, there is not currently a list of reports that are 'Advanced' and those that are not.

SAVING REPORTS

The first step in saving a report is finding the report you want to save and ensuring the report criteria are correct.

After you run a report you would like to save, scroll to the bottom of the screen where the big yellow buttons are.

Select the 'Update Search Criteria' link, which will take you back to the previous menu with all your report selections unchanged.



Double check that your Search Criteria were actually saved and scroll to the bottom of the page.

Select the 'Save to My Reports' link:



A pop-up window will display asking you to name the report:

Please enter in a description for this report:

Do Not Share: Share with everyone that has access to this report:

If you have a pop-up blocker, you may have to disable it for CalJOBS.

There is also an option to share the report. If sharing the report, ensure the name you choose will be easy to find. A good practice is to start the report name with the letters of your agency (AFWD, SMART, JTC, STEP). Most of the reports saved by NoRTEC begin with 'NoRTEC - '.

When you are happy with the name for your report, select the 'Save' button.

Once you have saved a report, it will show up under 'My Reports' on the left-hand menu of CalJOBS:



Reports that were marked 'Do Not Share' will be under 'My Reports':

My Reports:		
Report Description	Action	Select
NoRTEC - Case Load Report	Update Filters Display Report Edit Delete Schedule	<input type="checkbox"/>

Reports that were marked 'Share with everyone...' will be under 'Shared Reports':

Shared Reports:	
Report Description	Action

There are several Actions you can take with a saved report:

- Update Filters
- Display Report
- Edit
- Delete
- Schedule

Update Filters

Selecting 'Update Filters' will take you to the Selection Criteria for the report and allow you to make changes.

This is useful if a report has been shared and you need to change only one or two criteria before running or saving it yourself.

Any changes you make will have to be saved again under a different report name.

Display Report

Selecting 'Display Report' will run the report with the saved settings.

Edit

Selecting 'Edit' will allow you to rename the report, shared a report, or change a report that you previously shared to 'Not Shared'

Delete

Selecting 'Delete' will remove the saved report from the list.

Schedule

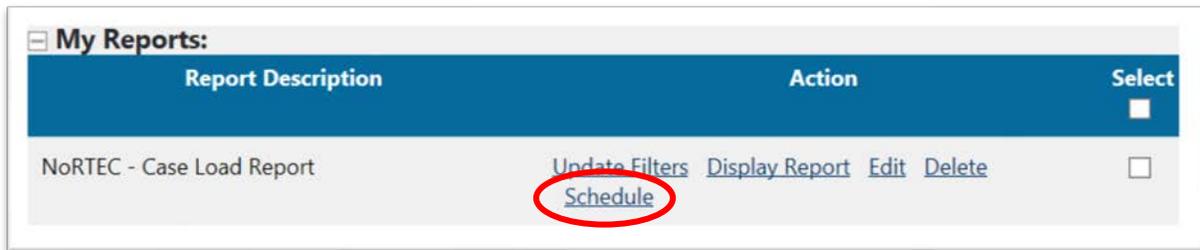
Selecting 'Schedule' will allow you to schedule a saved report to be emailed to one or more email addresses at a particular time or on regular intervals.

Not all reports give you the ability to schedule them. Only 'Advanced Reports' will have this option.

SCHEDULING REPORTS

Most reports that has been saved, and not shared, under My Reports can be scheduled to run automatically and emailed to one or more email addresses.

Once the report is saved, select the 'Schedule' link:



Report Description	Action	Select
NoRTEC - Case Load Report	Update Filters Display Report Edit Delete Schedule	<input type="checkbox"/>

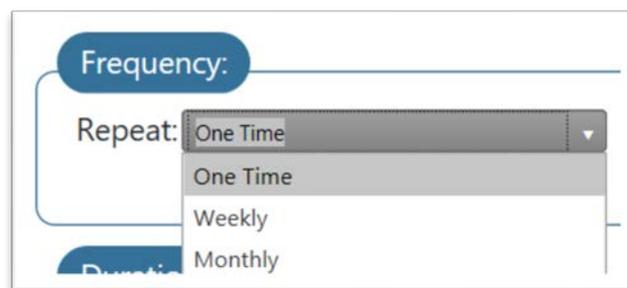
This will take you to the schedule reports page.



Email To:

The first selection asks who you will be sending this report to. Reports can only be emailed to staff that have a CalJOBS account with a correct email address.

Begin typing the staff member's name, then pause and a list of names will populate if a match can be found. Choose the staff member you would like to email the report to and click on the green plus button.



Frequency:

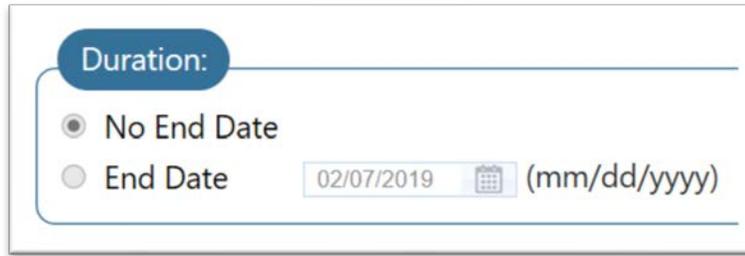
Repeat:

- One Time
- Weekly
- Monthly

The Frequency is how often you want the report to run:

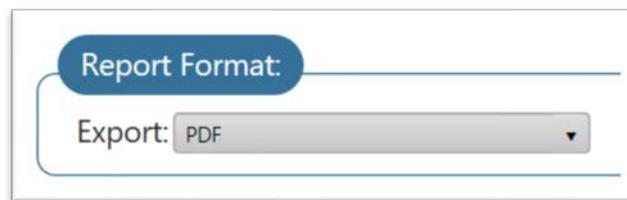
- One Time - Make this selection for 'on-demand' (the report will run sometime in the next 20 minutes).
- Weekly - This selection runs overnight, Monday - Friday, making your scheduled report available for viewing the following day. Your saved report will be scheduled to run for the scheduled day on a weekly basis.
- Monthly - This selection runs overnight, Monday - Sunday, making your scheduled report available for viewing the following day. Your saved report will be scheduled to run for the scheduled day every month.

The Duration is only used for Weekly or Monthly reports. You select what date you would like the report to stop being run.



The screenshot shows a configuration panel titled "Duration:". It contains two radio button options: "No End Date" (which is selected) and "End Date". The "End Date" option is followed by a date input field containing "02/07/2019", a calendar icon, and the text "(mm/dd/yyyy)".

Scheduled reports can be exported in pdf or excel format. Choose the format from the drop-down:



The screenshot shows a configuration panel titled "Report Format:". It contains a label "Export:" followed by a drop-down menu. The drop-down menu is currently set to "PDF".

Once all the criteria have been set, click the Save button.

The report will be emailed to the addresses selected during the times chosen.