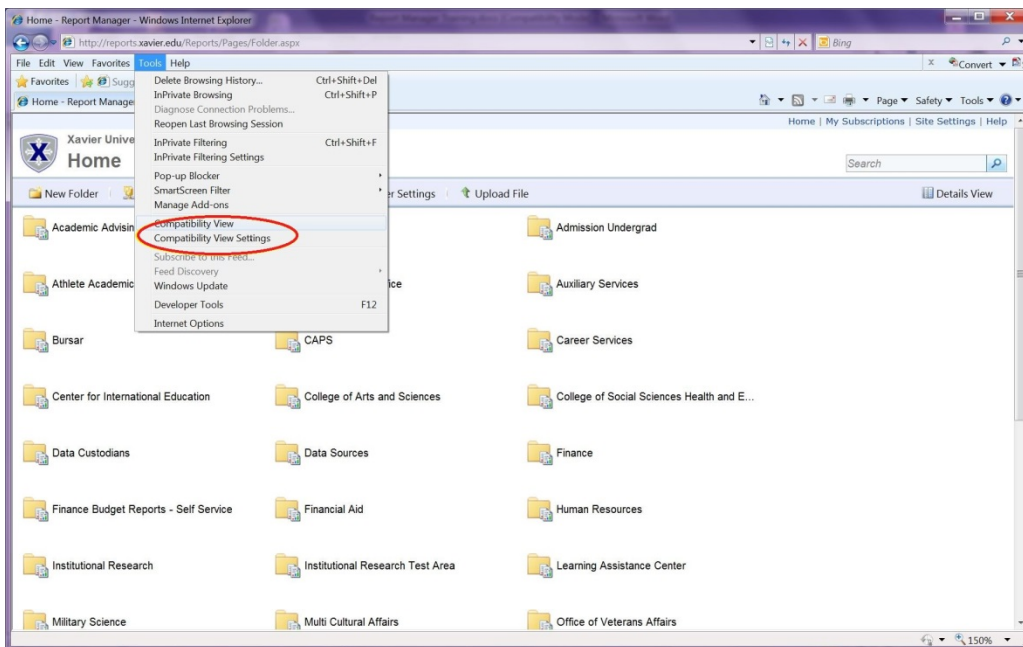


Reporting Services Training

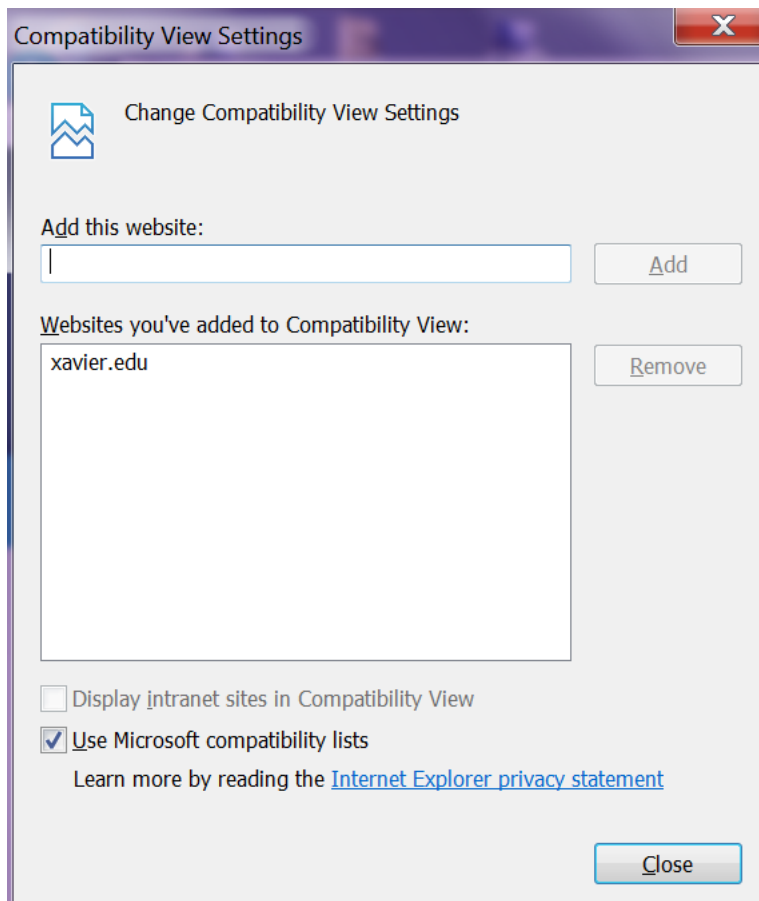
1) URL: Reports.xavier.edu

- i. Reporting Services is a Microsoft Product, however, you can use Internet Explorer, Firefox or Google Chrome to access your reports.
- ii. If you are asked for a user name and password (it will only be the very first time you open Report Manager if this occurs).
 1. Username = Xavier\your *username*
 2. Password = your myxu password
- iii. When using Internet Explorer check to see that your compatibility view is checked in Internet Explorer/Tools. In Internet Explorer go to Tools/Compatibility View Settings.



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- iv. Add Xavier.edu if it is not already there and check "Use Microsoft compatibility lists"

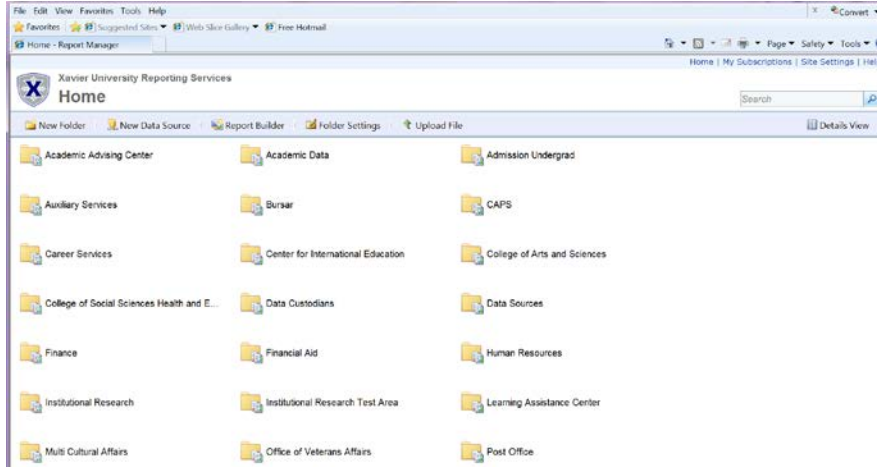


2) Data

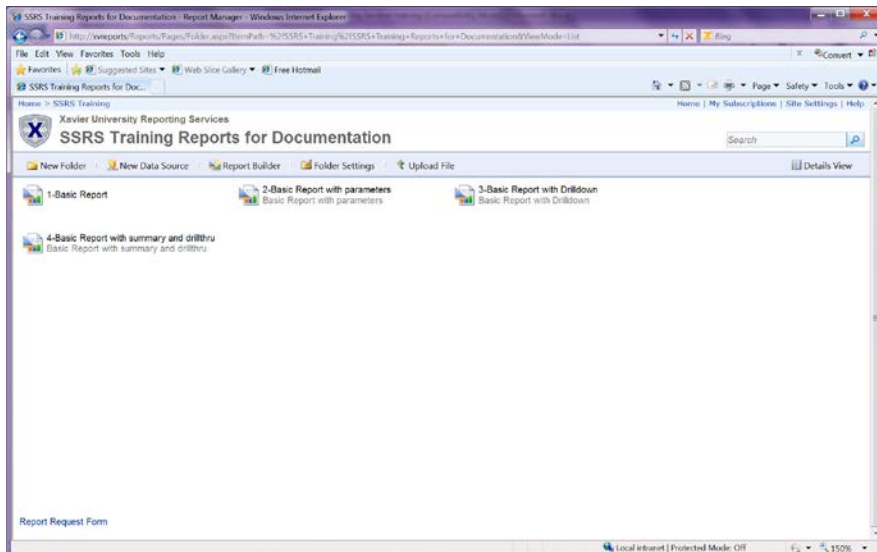
- i. Reporting is done from a copy of Banner that is taken every night. Therefore,
 - 1. data does not change during the day
 - 2. data is "a day behind"
 - 3. availability of reports:
 - a) as early as 7:00 am, but most reliably by 8:00 am
 - b) keep this in mind when scheduling reports to run. Therefore, do not schedule reports to run between 11:00 p.m. and 8:00 a.m.

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3) Everything is organized into folders. Open up the folder you are interested in.



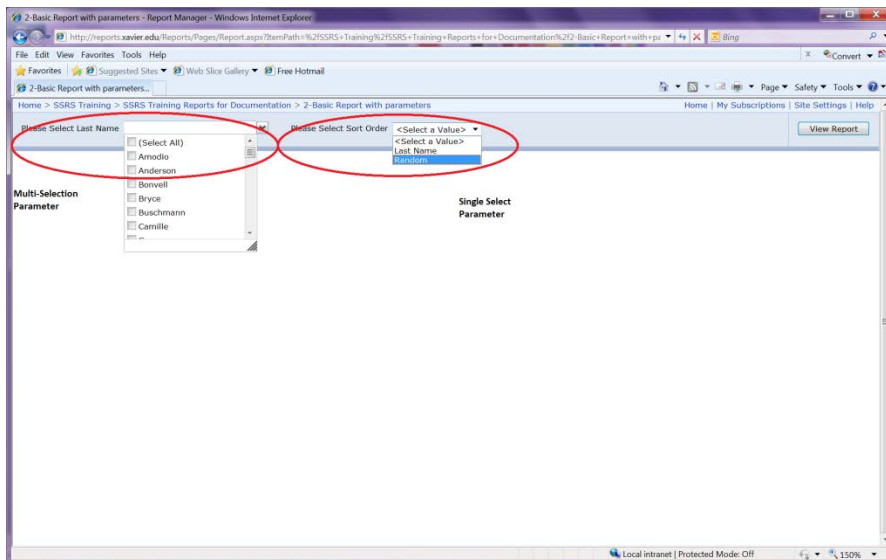
4) Within the folder you will see a list of reports that are available for you to run.



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5) Running Reports

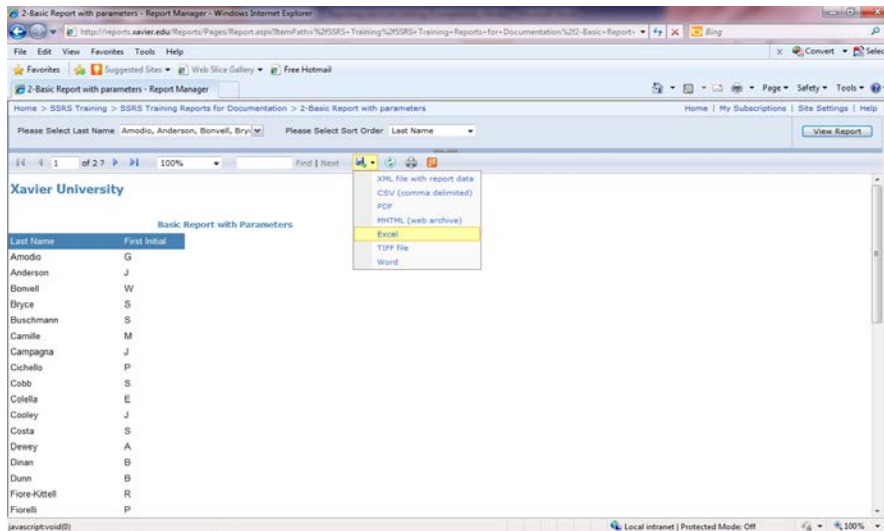
- i. Click on the report you wish to run
- ii. Supply the Parameters
 1. Supply the Data for whom you want to run the report on
 2. Cannot leave any parameters blank
 3. Types of Parameters
 - a) Single selection
 - (i) Only allows one selection
 - b) Multi-selection
 - (i) Allows one or more selections to be checked
 - c) Text box
 - d) Date
- iii. Click on 'View Report' to run report



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6) Exporting the Report

- i. Click on the dropdown for exporting, select what type of form you want and then click on "Open" and save your report
 1. PDF – exactly as you see it
 2. Excel – keeps drilldown and drill-through functionality



7) Consideration: How to get your data to others

- i. A subscription is a standing request to deliver a report at a specific time and in an application file format that you specify in the subscription. Subscriptions provide an alternative to running a report on demand. It gives access to results but not to the report itself.
- ii. You can create multiple subscriptions for a single report to vary the subscription options; for example, you can specify different parameter values to produce two versions of a report.

Reporting Services Training

8) Creating a Subscription

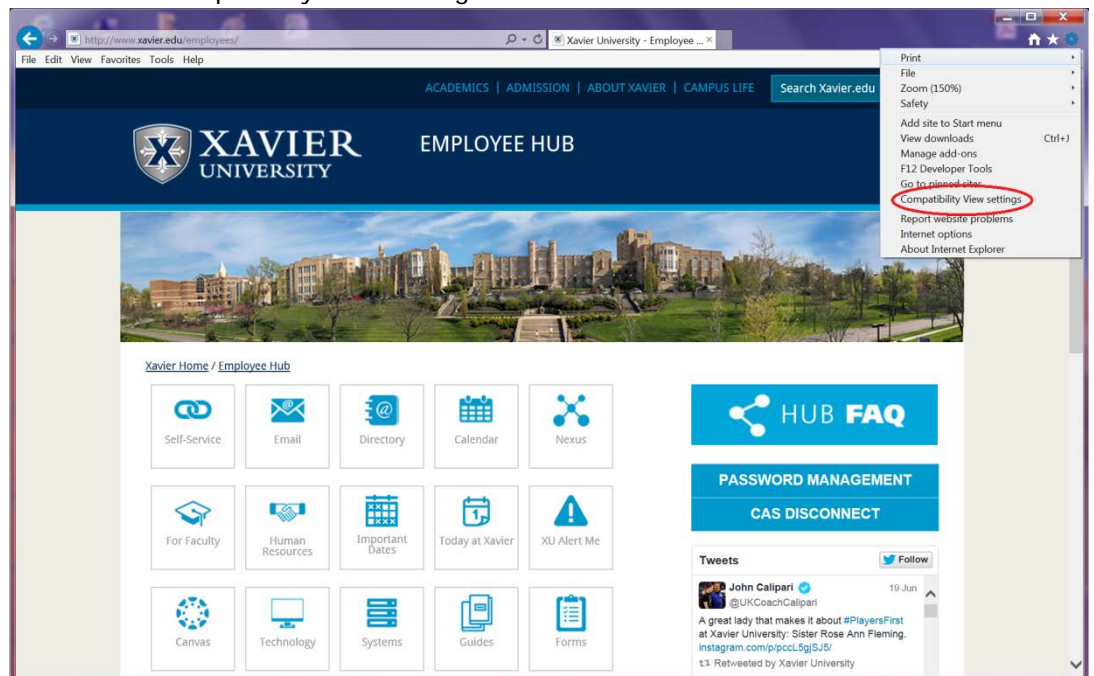
i. Locate the report in Report Manager

1. Hoover the cursor over the report link
2. Click on the highlighted drop-down arrow

a) If you do not see the drop-down arrow or you see the arrow but nothing is there you can do one of two things.

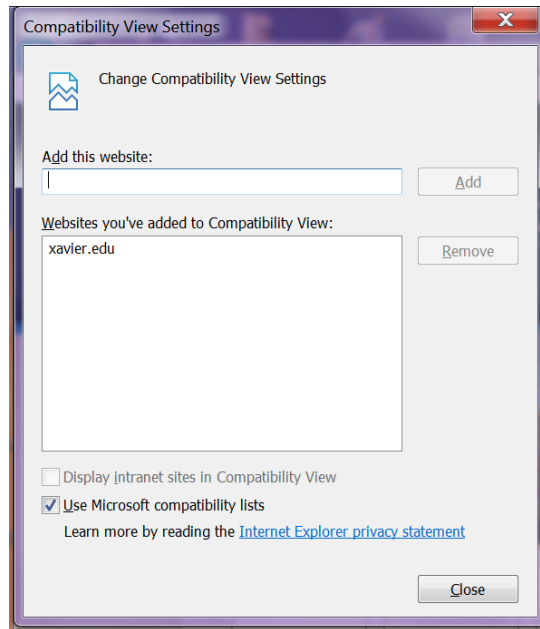
(i) Go to step 4 below or

(ii) Open up Internet Explorer, left click on the tool symbol that appears on the right, and click on 'Compatibility View Settings'



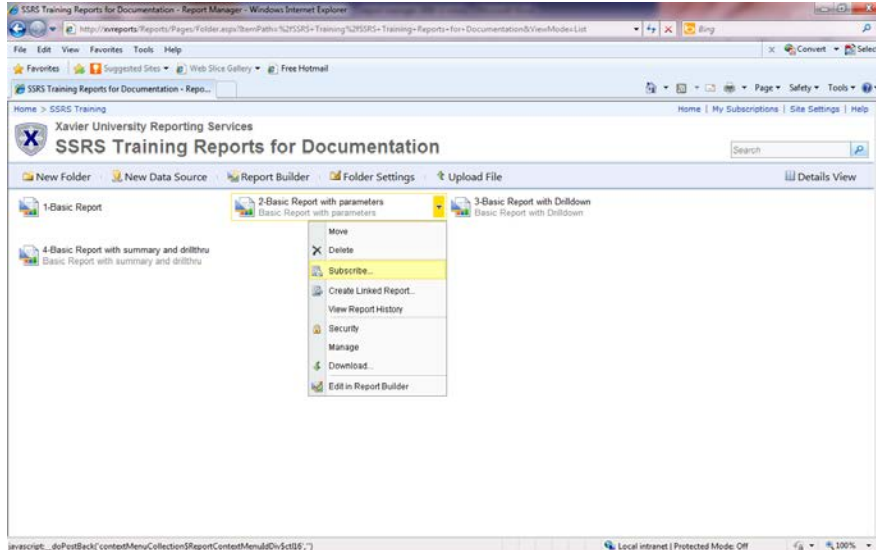
Reporting Services Training

- (iii) In 'add this website:' type in Xavier.edu and click on add. It will now appear under Websites you've added to Compatibility View. Also, check where it says use Microsoft compatibility lists.



- (iv) You should now see the dropdown arrow.

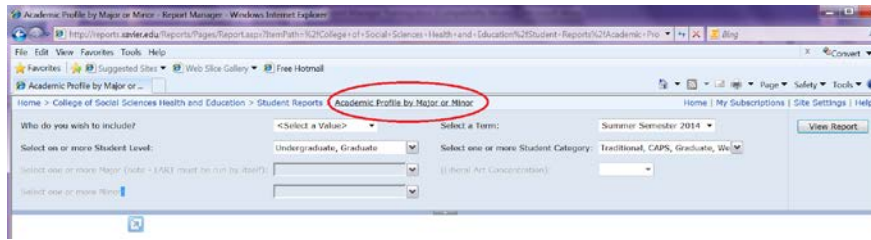
3. Click on Subscribe from the menu



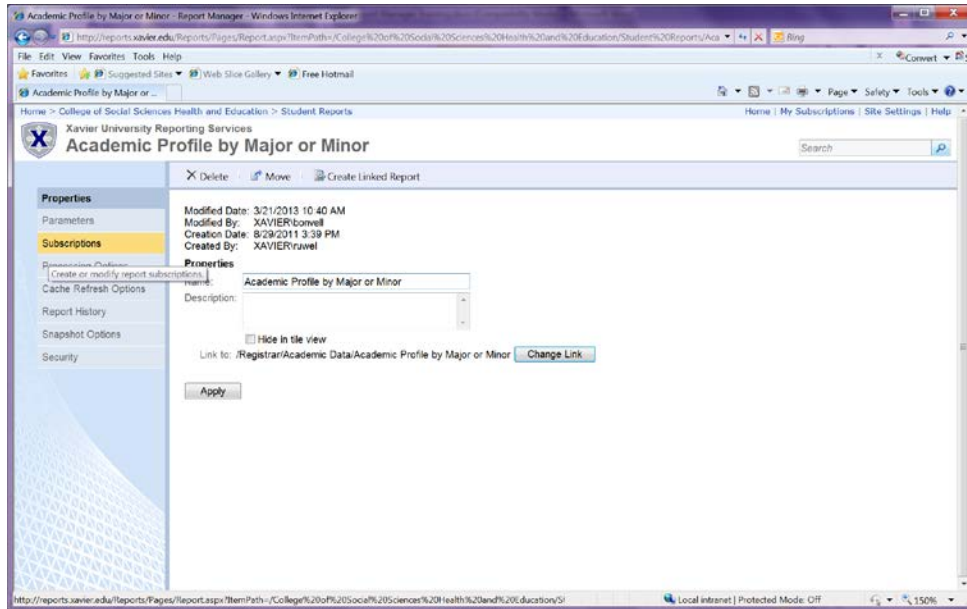
4. If you do not see the anything when you click on the drop-down arrow

- a) Click on the report as if you are going to run it
- b) Do not run the report but click on the report name in the bread crumb

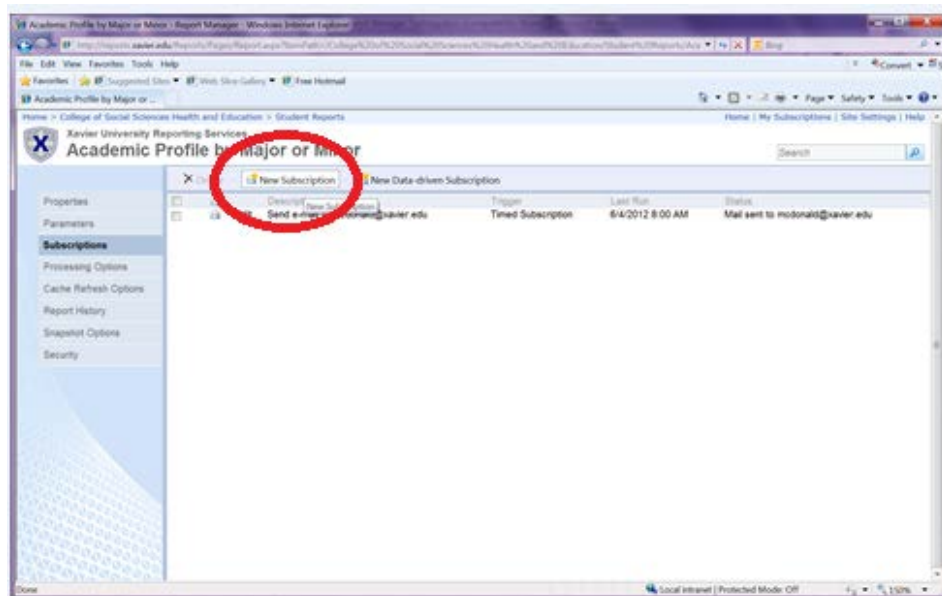
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c) Click on Subscriptions in the box on the left



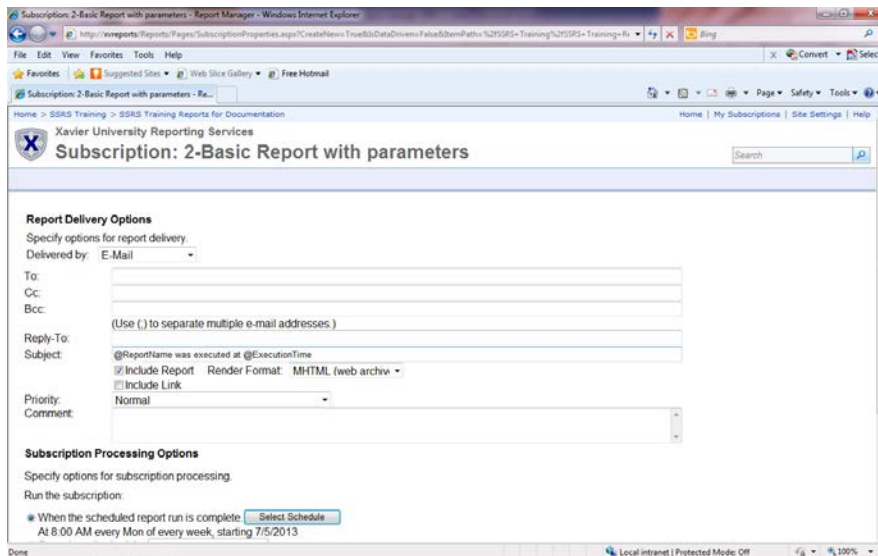
d) Click on New Subscriptions



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ii. Report Delivery Options

1. For each subscription that you create, you must specify delivery options. Delivery options are determined by the delivery extension you choose. Choose Email.
 2. To, CC, BC – same as creating an email in Outlook
 - a) Cannot look up an email address in an address book
 - b) Need full email address (username@xavier.edu) of report recipient(s)
 - c) To send to multiple recipients separate names by a semi-colon
 3. Include Report
 - a) this will make the report be sent as an email attachment
 4. Render Format
 - a) Click on the dropdown and select the format of the report
 - (i) PDF
 - (ii) Excel



iii. Subscription Processing Options

1. Select Schedule
 - a) Set up the Schedule Details
 - (i) Do not run reports between 11:00 p.m. and 8:00 a.m.
 - b) Start and end Dates

Reporting Services Training

- (i) Start Date - Supply the date that you want the subscription to start
- (ii) End Date – Only supply this date if needed. If a date is supplied, that will be the last day the subscription will run
- (iii) Click on OK

Subscription: 2-Basic Report with parameters - Report Manager - Windows Internet Explorer

Use this schedule to determine how often this report is delivered.

Schedule details
Choose whether to run the report on an hourly, daily, weekly, monthly, or one time basis.
All times are expressed in (GMT -04:00) Eastern Daylight Time.

Hour
 Day
 Week
 Month
 Once

Daily Schedule

On the following days:
 Sun Mon Tue Wed Thu Fri Sat

Every weekday
 Repeat after this number of days: 1

Start time: 08 : 00 A.M. P.M.

Start and end dates
Specify the date to start and optionally end this schedule.
Begin running this schedule on: 7/18/2013
 Stop this schedule on:

OK Cancel

iv. Report Parameter Values

1. Supply your parameters
 - a) This will be just like you are running the report on demand
2. Click on OK

Subscription: 2-Basic Report with parameters - Report Manager - Windows Internet Explorer

Cc:
Bcc:
(Use ; to separate multiple e-mail addresses)
Reply-To:
Subject: @ReportName was executed at @@ExecutionTime
 Include Report Render Format: MHTML (web archiw...
 Include Link
Priority: Normal
Comment:

Subscription Processing Options
Specify options for subscription processing.
Run the subscription:
 When the scheduled report run is complete [Select Schedule](#)
At 8:00 AM every Mon of every week, starting 7/18/2013
 On a shared schedule [Select a shared schedu...](#)

Report Parameter Values
Specify the report parameter values to use with this subscription.
Please Select Last Name
Please Select Sort Order

OK Cancel

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9) Edit or View a Subscription

- i. Click on 'My Subscriptions'
- ii. Click on Edit, make modifications and Hit OK

