

Xavier University Report Portal Reference

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Logging in to Xavier University Reporting Services

- 1.) Using your web browser, navigate to <https://reports.xavier.edu/>.
- 2.) You may be prompted for a username and a password. Use your Xavier username and password.

This site is asking you to sign in.

Username

Password

Sign in Cancel

- 3.) Once you have supplied your username and password, click *Sign in*.

Report Portal

- The Report Portal contains all of the folders and reports that you are authorized to view and is organized by folder.

The screenshot shows the top navigation bar with the 'REPORTING SERVICES' logo and a 'Browse' button. Below the navigation bar, there is a 'Home' link. The main content area is titled 'FOLDERS (11)' and displays a grid of folder icons with labels and three-dot menus. The folders are:

- Academic Advising/Center
- ADP
- Residence/Personal Office
- Admission/Student Support Services
- Career Services
- Center for International Education
- Center for Teaching Excellence
- Class Center

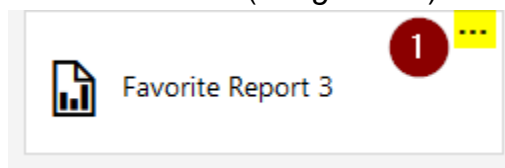
- You may then click on a folder to enter and view its contents.

- For example, within this folder, there are three reports and another folder containing more reports.

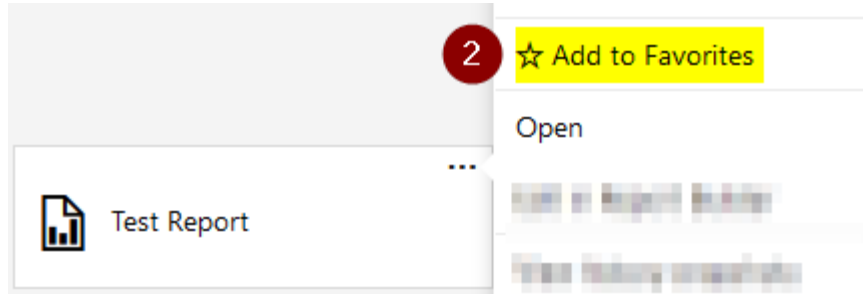
The screenshot shows the Reporting Services interface. At the top, there is a dark blue header with the 'REPORTING SERVICES' logo and text. Below the header, there are two buttons: 'Favorites' (with a star icon) and 'Browse' (with a folder icon). The main content area is titled 'Test Folder' and includes a breadcrumb trail 'Home > Test Folder'. Under the heading 'FOLDERS (1)', there is a single folder named 'Another Folder'. Below that, under 'PAGINATED REPORTS (3)', there are three report cards: 'Test Report', 'Test Report 2', and 'Test Report 3'. Each report card features a bar chart icon and a three-dot menu icon in the top right corner.

Favoriting Reports

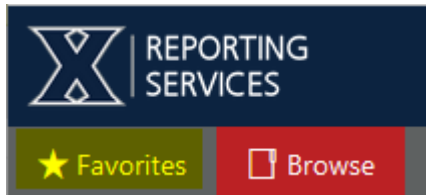
- The Report Portal allows you to *favorite* a report, which will list all of your favorite reports in one convenient location.
- Instructions on how to *favorite* a report:
 - 1.) Click on the “...” (or *right click*)



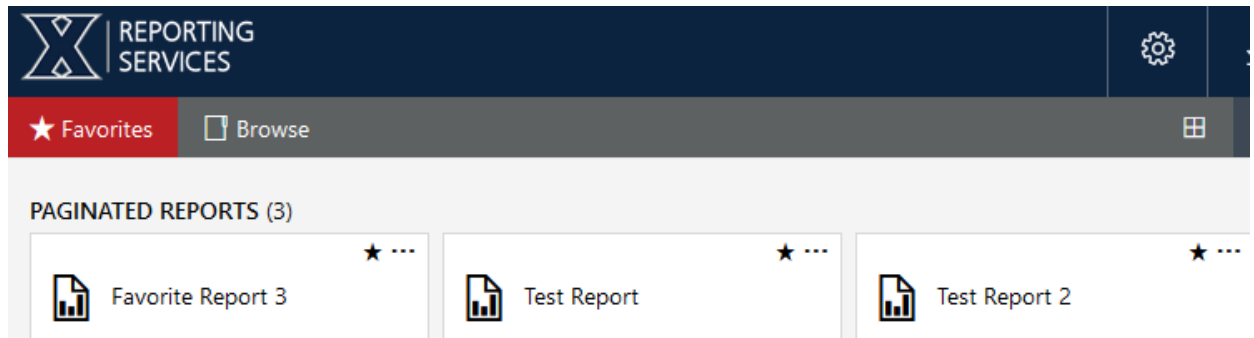
2.) Click *Add to Favorites*.



- Once you have added a report to your favorites, they will all display on the Favorites page (accessible by clicking *Favorites*).

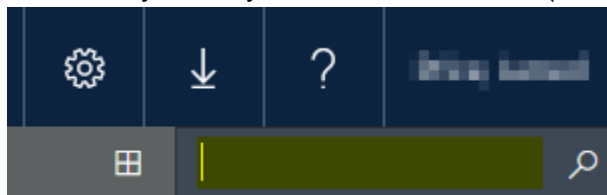


- In the below example, three reports have been favorited (denoted by *star* icon).



Searching for Reports

- If you need assistance locating a report that you may have forgotten the full name of, you may use the search bar (located in the top right corner).

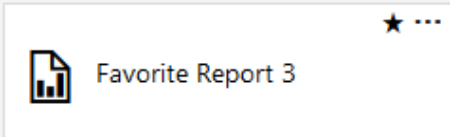


- For example, "Favorite" was the search term, and all reports with "Favorite" in the title were returned in the results.

Favorite

Search results for name and description including **Favorite**.

PAGINATED REPORTS (1)



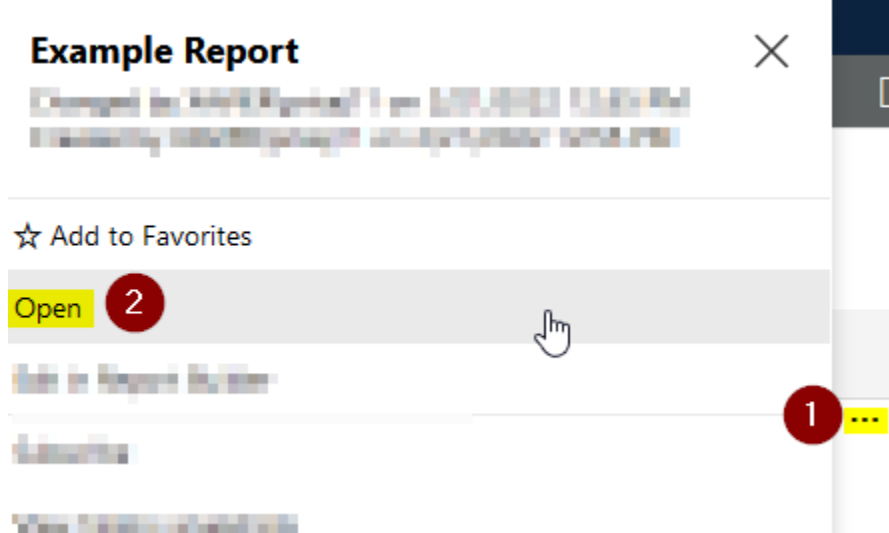
Xavier University Reporting Services Data

- The majority of reports within Reporting Services are connected to a copy of Banner data that is produced nightly (unless otherwise noted by the report name and/or description).
 - Data will not change throughout the day.
 - Data is “a day behind” as the copy of Banner is current up to the end of the previous day.
 - These reports that are connected to this copy of Banner data cannot be run between 8:00 p.m. and 5:00 a.m. while the data is refreshing.
 - Do not schedule reports to run between 8:00 p.m. and 5:00 a.m.

Running Reports

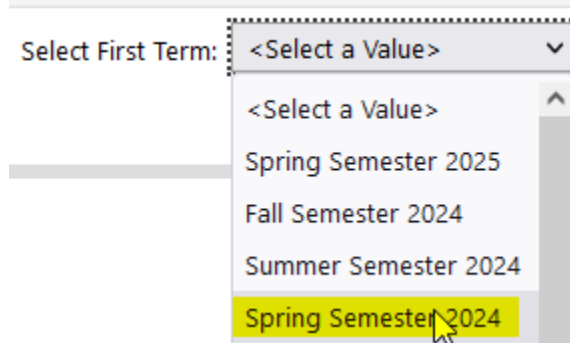
1. To run a report, you will need to open the report.
 - Clicking the report will open it.

- Clicking the “...” (or *right click*) and clicking *open* will also open the report.



2. Once the report has been opened, you will need to supply the parameters for the report run.

- The parameters supplied are the values used when the report is run.
- All parameters must have a valid selection.
- There are four major parameter types:
 - i. Single-selection dropdown
 - o Allows one option from the list to be selected.



- ii. Multi-selection dropdown

- o Allows multiple options from the list to be selected.

Select Terms: (Select All)

Select End Term: Spring Semester 2025

Fall Semester 2024

Summer Semester 2024

Spring Semester 2024

Fall Semester 2023

Summer Semester 2023

Spring Semester 2023


Fall Semester 2022

Summer Semester 2022

Spring Semester 2022

iii. Date

- o Allows a date to be selected.

Select Terms Since: 2/15/2022 

February 2022						
S...	M...	T...	W...	T...	F...	S...
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5

Today is Monday, February 21, 2022

iv. Text

- o Allows text to be supplied to the report.

Include a Note:

- Once the report parameters have been selected, you will then click *View Report* for the report to run (located to the right of the report parameters).

Select First Term:

- Once the report has finished running, the output will display within Interactive Mode.

Select Terms: ▾

Select End Term: ▾ Select Terms Since:

of 1

 ▾
 ▾

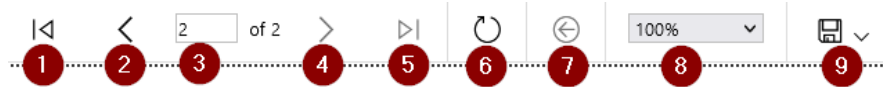
Xavier University

Run Date: 2/21/2022

Example Report

Term Code	Term Description	Term Start Date	Term End Date	Comment
202205	Summer Semester 2022	5/16/2022	8/5/2022	Example Text
202209	Fall Semester 2022	8/22/2022	12/16/2022	Example Text

- Interactive Mode button descriptions:



- Return to page 1
- Go back one page
- Select page number to navigate to
- Advance one page
- Advance to the last page
- Refreshes the report
- Go back to the parent report (if applicable)
- Adjusts the zoom (display size)
- Exports and downloads the report to selected file type
 - Recommended file types:
 - Word
 - Excel
 - PDF
 - CSV

Report Subscriptions

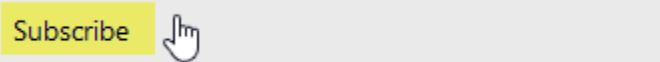
- Report subscriptions allow you to receive a report on a schedule via email.
- Multiple subscriptions may be created for the same report with different parameter selections (such as a report for Fall '22 and another for Summer '22).

Creating a Subscription

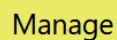
1. Locate the report within the Report Portal.
2. Click the “...” (or *right click*) next to the report title.



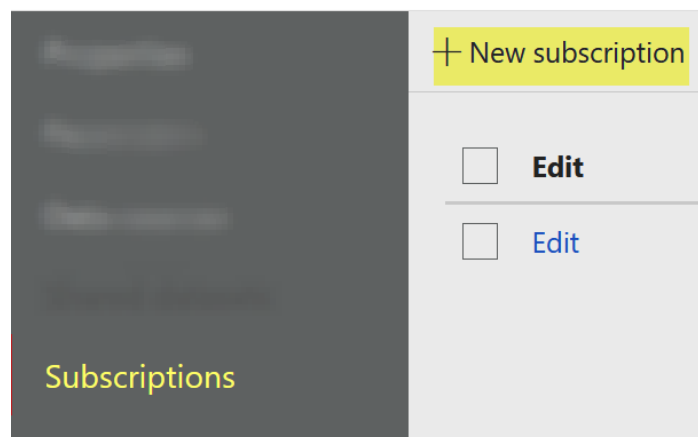
3. Click *Subscribe*.



- If the *Subscribe* button doesn't appear, click *Manage*.

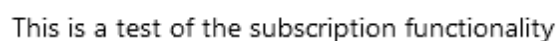


- Next, click *Subscriptions* on the left hand side, and then click *+New subscription*.



List of Subscription Fields to Fill Out

- Description



- Attaches an optional description to the report subscription.

- Type of subscription

Standard subscription
Generate and deliver one report

- Always select *Standard subscription* (this is the default option).

- Schedule

Deliver the report on the following schedule:

Shared schedule Select a shared schedule ▾

Report-specific schedule [Edit schedule](#)
At 10:30 AM every day, starting 3/7/2022

- Shared schedule
 - Pre-defined schedules that may be used in multiple reports.
- Report-specific schedule
 - Sets the schedule for this specific report subscription.
 - May subscribe to the report on a one-time or recurring basis.

Choose whether to run the report on an hourly, daily, weekly, monthly, or one time basis.

i All times are expressed in (UTC-05:00) Eastern Standard Time.

Hour Day Week Month Once

- The subscription may be set to run on particular days of the week, etc.

Daily schedule

On the following days:

Sun Mon Tue Wed Thu Fri Sat

Every weekday


Repeat after this number of days:

Start time: :


- The subscription may be set to run for a specified time period as the start and end dates of the schedule may be set.

Specify the date to start and optionally end this schedule.

Begin running this schedule on:



Stop this schedule on:



- Delivery Options (Email)

To:

Cc:

Bcc:

(Use (;) to separate multiple e-mail addresses.)

Reply-To:

Subject: @ReportName was executed at @ExecutionTime

Include Report Render Format: Excel

Include Link

Priority: Normal

Comment:

- To, Cc, Bcc, Reply-To, Subject
 - These work exactly as they do when creating an email within Outlook.
- Include Report
 - Ensure that this is *checked* as it will include the file.
- Render Format
 - This is the specified file type for the output, such as Excel.
- Be sure to *uncheck* the Include Link option if there is no need for a link to the report to be included.

- Report Parameters

Parameter	Source of value	Value/field
Select Fiscal Year:	Enter value <input type="text"/>	<input type="text"/>
Select as of Date:	Enter value <input type="text"/>	<input type="text"/>

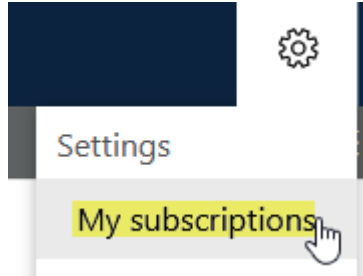
- This is where the parameters for the report subscription are selected.
- These must be filled out.

- Viewing Your Subscriptions

- Click the *Settings* button at the top right corner of the Report Portal

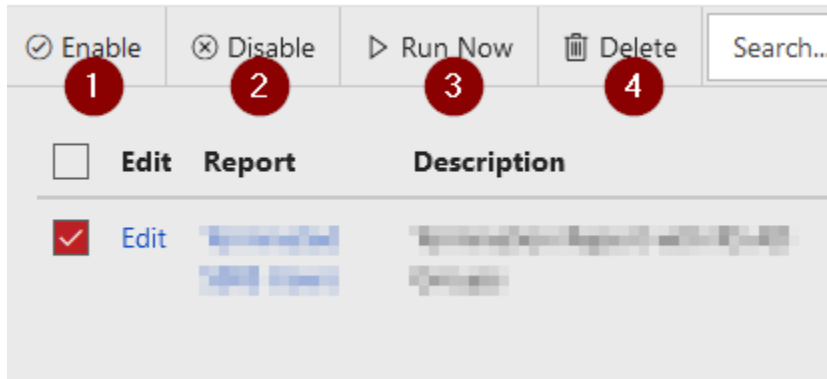


- Click *My subscriptions*



- You will then see all of the report subscriptions that you have created with these fields:
 - Edit
 - Allows you to open up the subscription and modify the subscription.
 - Report
 - This is the report title.
 - Description
 - This is the description that was set within the subscription.
 - Status
 - Will display as disabled or enabled.
 - Folder
 - Where the report is located.
 - Delivery
 - How the report is being sent (generally email).
 - Last run
 - The last time the report subscription ran.
 - Result
 - Will specify that the email was sent to the recipients or display any errors that occurred.

- Enabling, Disabling, and Deleting Subscriptions



- Within My subscriptions and with a report checked you may:
 - *Enable*
 - This enables the report subscription if it was disabled (paused).
 - *Disable*
 - This pauses the subscription and the subscription will no longer run.
 - This is useful when there is a period of time when the report is not needed, such as during the summer months.
 - *Run Now*
 - This causes the subscription to run as soon as the button is pressed. It will not interfere with the set schedule.
 - *Delete*
 - This deletes the subscription.
 - If a subscription is no longer needed, please delete rather than disable.