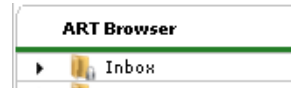


Scheduling ART Reports

ART Reports may be scheduled and sent to your ART inbox in ServicePoint. This will allow you to do other work in ServicePoint while you wait for your report to run.



To schedule an ART report click on the magnifying glass to the left of the report name and click Schedule Report or simply click the last icon on the line (it's hard to tell, but it is a sprocket on top of a calendar).



Clicking the schedule report icon or button will open a prompt window. Enter the prompts. Remember each report has its own set of prompts. If you are scheduling a report, read this entire handout before entering your Effective Date.

The image shows a dialog box titled 'Prompts'. It contains a section 'Fill out each of the prompts below *'. Inside this section, there is a text input field labeled 'Enter effective date' and a dropdown menu labeled 'Provider Group:'. Below these, there is another 'Enter effective date' label followed by a date/time picker showing '01/19/2011 12:00:00 AM'. At the bottom right of the dialog is a 'Next' button.

The prompts for scheduling the report will open. These prompts do not pertain to the data being report on, but rather when and how you want the report run. The schedule prompts will be the same regardless of what report you run.

Name: The name that the report will be saved as in your ART Inbox

The name will pre-fill with the name of the report. Please feel free to change it if desired.

Report Format: Select Excel or PDF.

Remember, some reports are best viewed as Excel (to more easily manipulate the data) and others as PDFs

Users Inbox: The name of the user where the ART report will be sent.

Your name will automatically be selected. You may have access to send an ART report to the ART inbox of another user at your agency with an ART license. This depends on what how the accounts have been set up (who are your default providers). Please note we are not able to change this.

Interval: Select Once, Daily, Weekly, Monthly.

If you select Daily or Monthly a pull-down menu will appear that will ask you how often you want to run the report, for example if you select Daily you can select Run every 21 days or if you select Monthly you can select Run every 3 months.

When you run recurring reports, remember that you must select the correct Effective Date in your report prompts. The Effective Date should be the day after the last date you have scheduled to run the report. If your Effective Date is the date you are scheduling the report or the date the first report will run, not all of the reports will be accurate.

Start Date: When do you want the report to start running (note this is not the start date that you want the data from).

The Start Date pre-fills with the current date and time.

End Date: When do you want the report to stop running (note this is not the end date that you want the data from).

The End Date pre-fills with the current date and time. Remember to change this, even if you are only running the report once. Many ART reports can take a while to run (which is why scheduling reports can be so handy). If you schedule a report that normally takes 10 minutes to run and the Start and End Date and time are the same, your report will not run because you did not allow enough time for the report to run. When I run reports once, I simply change the end date to the next day.

The image shows a dialog box titled 'Schedule Report'. It has a 'Schedule' section with the following fields: 'Name' (pre-filled with 'Client Caseload_No Service Rec'), 'Report Format' (a dropdown menu), 'Users Inbox' (pre-filled with 'Sherry Yan (2360)' and buttons for 'Search', 'My User', and 'Clear'), 'Interval' (a dropdown menu), 'Start Date' (pre-filled with '07/05/2012 11:21 AM'), and 'End Date' (pre-filled with '07/05/2012 11:21 AM'). At the bottom right is a 'Send to Inbox' button.