



## Scheduling Reports in ART

### ServicePointer – Advantages to Scheduling Reports (vs. “Viewing” a Report)

- ❶ Scheduling a report runs the report “behind the scenes”, allowing you to complete other data entry while you wait.
- ❶ A file is automatically saved in your ART inbox and will remain there until you delete the file.
- ❶ Helpdesk has access to your ART inbox and can, therefore, quickly access a report you ran for troubleshooting assistance
- ❶ You can schedule a report to automatically on a daily, weekly, or monthly basis.

1. Log into ServicePoint
2. Access ART:
  - Click on “ART” just below the “Back Date” function in the top right-hand corner of the screen, **OR**
  - Click on the “Reports” module and click on “ART,” **OR:**
  - Click the triangle to the left of the “Reports” module and select “ART” from the drop-down list.
3. Select the report to run:
  - Click on the arrow in front of “Public Folders.” Additional folders will appear.
  - Click on a folder’s name to display the available reports on the right-hand window. If nothing displays, click on the arrow one more time to reveal additional folders. Most funding sources have sub-folders, with the data check and counting reports separated.
  - Click the magnifying glass to the left of the report you wish to run.
  - Click Schedule Report.
4. Respond to report prompts in pop-up:
  - The prompts are the same if you view, edit, or schedule a report, although they may appear in a different order with a different entry format.
  - Not all prompt instructions listed in 4c-4g apply to each report. Review those that apply to your report.
  - EDA Provider
    - Leave set at Default Provider unless you have a Case Manager 2 license in SP. Then select the provider for which you want to run the report.
  - Start Date
    - The first day of the report period
    - if PM, change to AM
  - End date + 1 day
    - The last day of the report period +1 Day
    - For example: if the last day of your report period is 12/31/2015, you will enter 1/1/2016 as the end date
    - If PM, change to AM
  - Enter Effective Date
    - the last date of the report period + 1 Day
    - if PM, change to AM
  - Provider
    - Click on provider in the prompt section
    - Click on the “Select” button that appear below
    - In the pop-up, search for the provider(s) by entering provider name(s) or number(s). The search results will appear below.



- Choose the provider(s) by pressing the green (+) button. The provider(s) will appear under the “Selected Values” menu.
  - If you accidentally added a provider, you can remove the provider from the report prompt by clicking the red (-) button.
  - Once all correct providers appear in “Selected Values,” click “Submit” and you will return to the report prompts pop-up.
    - Click “Next” once you have entered all report prompts correctly.
5. Respond to schedule report prompts in the pop-up to indicate HOW you want the report to run.
- Name
    - You can change the name of the report file (you may leave as is)
  - Report Format
    - Select PDF or Excel
  - Users Inbox
    - Your Name (leave as is)
  - Interval
    - In most instance, you will want to select “Once.” However, if there is a report you like to run frequently, you can schedule the report to run automatically on a daily, weekly, or monthly basis. If you want the report to run in an interval other than “Once,” be sure to change the start date and end date prompts to set a reoccurrence pattern for ART to automatically generate a report.
  - Start/End Dates
    - In most instances, you will leave as current date and time (this is when you want the report to run). However, if you selected an option other than “Once” for the interval prompt, be sure to change the start date and end date prompts to set a reoccurrence pattern for ART to automatically generate a report.
6. Click “Send” once all your schedule reports prompts are entered.
7. Once report is ready, it will appear in your ART inbox.
- The report may take a while to run.
  - When complete, you will see “ART: Unread Messages” in the top-right hand corner of your ServicePoint screen
  - To navigate to you ART inbox, click on the arrow alongside the “Inbox” folder on the main page of ART to reveal your scheduled reports.
  - You can view the status of the report by checking the Scheduled Reports sections at the bottom of the ART main page. Click Refresh button to view recently scheduled reports. The report will appear in your ART inbox once the status changes from pending/running to “Complete.”
8. Download the report
- Once you report appears in your ART inbox, click the magnifying glass icon next to the report and select “Download” to download to your computer.
  - Depending on what browser you are using, you may see a new pop-up that asks if you want to open or save the file.
  - The report will stay in your ART inbox and can be downloaded multiple times until you delete the report from your ART inbox.
  - To delete the report, click on the magnifying glass and select “Delete.”