Report Submission
User’s Manual

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Introduction

The Report Submission system developed by Virginia Tech allows the submission and retrieval of reports over the web. Netscape 4.7, Internet Explorer 5.5, or Firefox 2.0 or later versions should be used to access the system.

Reports are run against the Data Warehouse or the Banner database. The Data Warehouse data is extracted from the production Banner database, and is at least one day older than Banner.

Virginia Tech’s Web Report Distribution processes report output from the Report Submission system. You will receive an email notification when the report is complete. The email notification provides the web address you will need to retrieve the report output. See the Web Report Distribution User Manual for details.

The Report Submission system offers several benefits:

1. Your computer is not tied up while reports are running.
2. You can create personal folders and save a report with its entered parameters. The report can then be submitted without re-entering the parameters. All saved reports in a personal folder can be submitted with a single click.
3. The same report can be saved multiple times under different names with different parameter values.
4. Reports can be distributed to one or more recipients.
5. You can delay the distribution of your report until a ‘reviewer’ approves the report results.
6. It ties seamlessly with the Report Distribution system to offer many options for viewing, printing, downloading and distributing report output.

There is a companion documents—the Report Distribution User Manual—to provide help with your questions regarding the distribution of your submitted reports.

There is another document—the Report Submission Developer’s Manual—to assist report developers in defining a report so that it can be submitted using the Report Submission system.

After reading this manual, if you have questions or comments regarding the use of the Report Submission system, send email to iwa@vt.edu. If you have questions regarding specific aspects of a report, you will need to contact the administrative office that developed that report.
I. Who can use the Report Submission System

How to gain access to the Report Submission system depends on the type of reports that you wish to submit. Finance users are automatically granted access to run Finance Web Reports when their Banner Finance access is established. Other functional areas grant access on an “as needed” basis. If you have questions about access to reports for a particular functional area, you will need to contact the appropriate administrative office.
II. Accessing Report Submission – Login

The first step is to open your web Browser (Firefox, Internet Explorer, or Chrome) and enter the URL for the initial web page:

https://webapps.es.vt.edu/webreport/submit

The Report Submission login page is shown below. You may want to bookmark this URL.

![Login Page Screenshot]

Normal hours of operation for the warehouse are 7:30 am through 11:30 pm. Login to the system is allowed only during the warehouse hours of operation. Reports running at 11:30 pm will be terminated and must be resubmitted the next day.

**Login Procedure**

The Report Submission system requires an Oracle userid that is valid on the Data Warehouse system. In most cases, this will be the same Oracle userid and password that is used to access Banner.

Enter your Oracle userid and password and then click on Login.

**NOTE:** If the authentication page re-displays with an authentication failed message, the Oracle userid and password were not valid. Verify that you entered them correctly. If the error persists and you know you are using the correct userid and password, contact the appropriate administrative office.
III. Folder Navigation

The Folder Navigation page is the first page displayed after a successful login. Since all report definitions and saved reports are contained in folders, the Folder Navigation page is a fundamental and important part of the system.

The folders that you can access are displayed in yellow. The gray folders preserve the folder hierarchy. Yellow folders ( ) can be selected or opened by clicking on the folder name or icon. When a folder is opened, its icon changes to an open folder ( ). The folder contents are displayed in the Folder’s Report Definitions column and any actions that you may perform are displayed in the Maintenance column. An open folder can be closed by clicking on the name or icon.

If the box to the left of a folder contains a +, that folder has sub-folders. Click on the + to display the sub-folders. The + is replaced by a -. Click on the - to hide the sub-folders.

The Scheduled Reports button displays your current scheduling requests and allows you to edit a request or create a new scheduling request.

The Report Status button displays the status of any incomplete submitted reports.

The Log Out button terminates your Report Submission session.
IV. Selecting a Folder

An example of an open or selected folder is displayed below.

The name of the selected folder is displayed over the Folder’s Report Definitions and Maintenance columns.

In the Folder’s Report Definitions column are all of the reports in the selected folder. Clicking on the report name or icon accesses a report definition for submission.

The Maintenance column now contains a Personal Folders button. This is used to create and maintain personal sub-folders of the selected folder.
V. Submitting a report – entering parameter values

To submit a report, click on the report name or icon in the Folder’s Report Definitions column. This displays the parameter page for that report.

The Parameters section is used for entering parameter values. The left column contains a description of each parameter that may be entered for this report.

The middle column contains text boxes, select lists and check boxes that are used to enter parameter values.

The right column contains Help buttons, which display the rules for entering parameter values and some hints about parameter values.

The forms and buttons below are displayed following the Parameters section. The labeled boxes with plus ‘+’ signs provide additional options for the submission process. To use any of these options, expand the form by clicking on the plus sign. Each of these optional forms is explained in following sections.
VI. Submitting a report – deferring report execution

The **Deferred Execution** option allows delaying the execution of a report until after a specified date and time.

**Note**: Deferred execution cannot be specified for interactively submitted reports. Therefore, if the report must be submitted interactively, there is no deferred execution form displayed.

If the **Deferred Execution** form is not expanded, click on the plus ‘+’ sign.

Enter the desired date and time in the expanded Deferred Execution form. When the report is submitted, it will not be eligible for execution until after the entered date and time.

**Note**: If you save the report and parameter values using the **Save** or **Save As** button, the deferred execution date and time are not saved.
VII. Submitting a report – distributing and reviewing output

The distribution option provides for distributing report output files to one or more recipients and optionally reviewing the output prior to distribution. If the distribution form is not expanded, click on the plus ‘+’ sign in the collapsed form.

Note: Output distribution cannot be specified for interactively submitted reports. Therefore, if the report must be submitted interactively, there is no output distribution form displayed.

A Distribution Group is a specification that distributes one or more of the report’s output files to one or more recipients. An unlimited number of distribution groups may be specified for a report.

If a report has no distribution groups, the default recipient is the person who submitted it. If a distribution group is specified, the submitter will not receive any report output unless the submitter’s pid is included in one of the distribution groups.

To add a distribution group or edit an existing distribution group, click on the Add/Edit Distribution Group button. A page is displayed for working with distribution groups.

To review a report’s output before it is distributed, check the Review before distribution check box and enter the reviewer’s pid under Reviewer. The Reviewer will receive all of the report’s output files. The report’s files will not be distributed as specified in the report’s distribution groups until the Reviewer uses the Web Distribution Release function.

Web Distribution will send email notifications to the recipients specified in the distribution groups. To specify a Reply-To address for those email notifications, enter a pid or email address in the Reply-To text box. If no Reply-To address is specified, the default is the pid of the report’s submitter.
Note: If the report is saved using the Save or Save As button, the distribution groups and review settings are saved as part of the saved report.

Add/Edit Distribution Groups

If the Add/Edit Distribution Group button is clicked, a page is displayed for working with distribution groups.

In the example, the report has one distribution group that will distribute three report files log, sqrlog, and lis to two recipients pid1 and pid2. The email notification sent to the two recipients will have the subject line New Subject and the line Additional text will be added to the body of the email.

To add another distribution group, click on the Add button. To edit or delete a distribution group, click on the appropriate Edit or Delete button.

Select the type of notification. If you select None, the recipient will not receive an email notification.

Specify which files are to be included. An * means all files. To determine the file names for a report, see the Web Distribution File Menu screen. The pids may be separated by commas, spaces, or new-lines (carriage return).
Enter a list of pids to receive the report. Do not include @vt.edu. The pids may be separated by commas, spaces, or new-lines (carriage return).

Email Subject is an optional field that specifies the subject line for the email notification.

Email Text is an optional field that specifies additional text for the body of the email notification. This text will appear ahead of the standard notification text and URL that is automatically generated in the email notification message.

Click the Save button when the Add/Edit form is complete.

Click the Return button to return to the Report Submission page.

**Note:** If you are updating the distribution groups of a saved report, you must also click on the Save Parameters button in order to accept the changes to the distribution group. You should see a Saved “name of report” replaced prompt (see sample image below) after clicking the Saved Parameters button. Click OK to update the distribution groups.
VIII. Submitting a report – saving parameter values

For reports that are submitted repeatedly, it may be advantageous to save the report and a set of parameter values. The saved report (and the parameter values) can then be submitted whenever required. If desired, any of the saved parameter values can be changed during the submit process.

You must have a personal folder available to receive the saved report. See Creating Personal Folders for help on creating a personal folder. A report may be saved multiple times with different parameter values, in different personal folders, and under different names.

If the Save Parameters form is not expanded, click on the plus ‘+’ sign.

If the report that is being saved is a saved report and the parameter values are to replace those previously saved, use the Save Parameters button. The parameters will be saved and you will be returned to the Folder Navigation page. If you use the Save Parameters button on a non-saved report, it performs the same actions as the Save Parameters As button.

When using the Save Parameters As button, you must select a personal folder and a name for the saved report. The Save Parameters As button displays a form containing your personal folders that are eligible to receive the report. If any of these folders contain sub-folders, indicated by a +, you may include those sub-folders by clicking on the +.

Select a folder to receive the saved report by clicking on the folder icon. In the example, the Latest Submissions folder is selected (note the open folder icon).

Enter the desired name for the saved report in the text box following Save As.

Click the Save button. The report and parameters will be saved and you will be returned to the Folder Navigation page.
**Note:** When you use the **Save Parameters** or **Save Parameters As** button to save a report and its parameter values, the job is not submitted for execution.
IX. Submitting a report – the Submit, Submit Interactive, and Cancel buttons

Finally, we get to submit the report for execution. There may be more than one way to submit it.

If the report can’t be submitted interactively, there is only a Submit button.
If the report can be submitted interactively, there are both Submit and Submit Interactive buttons.
If the report must be submitted interactively, there is only a Submit Interactive button.

Cancel
Use the cancel button to cancel report submission and return to the navigation page.

Submit
If you click the Submit button, the report will be queued for execution and you will be returned to the Folder Navigation page.

A dialog box will be displayed verifying the report submission and showing the report’s assigned sequence number.

If you did not elect to defer execution, the report will be run as soon as possible.

The time required to complete the report depends on the type of report and how many other reports are queued.

When the report is complete, its output will be sent to the Web Report Distribution system, and email notifications will be sent to all recipients.

Note: The default recipient is the report submitter.

Note: The Report Status button on the Folder Navigation page displays the status of any incomplete reports that were submitted non-interactively.
Submit Interactive
If you click the Submit Interactive button, the report will be executed and the report output will be returned directly to your web browser. Reports that can be submitted interactively execute quickly (maximum of two minutes).

A screen is displayed showing that the report has been submitted and asking that you wait for the report’s output. Please wait for the report to execute.

When the report is complete, the screen display will show either:
1. One of the report’s output files.
2. A menu showing a list of the report’s output files.

Use the menu’s View button to view an output file, or the Save button to download the file to your PC.

To recall the file menu after viewing an output file, use the File Menu button in the heading.
X. Report Status Query

You may check on the progress of reports you have submitted by using the Report Status button on the Navigation Page.

A separate window will appear containing a list of any of your reports that have not completed execution.

The Report Status listing contains:

<table>
<thead>
<tr>
<th>Sequence Number</th>
<th>Name</th>
<th>Status</th>
<th>Position</th>
<th>Submitted</th>
<th>Run After</th>
</tr>
</thead>
<tbody>
<tr>
<td>562</td>
<td>Demonstration Only</td>
<td>delayed</td>
<td></td>
<td>7:35 AM Apr 4</td>
<td>9:00 AM May 1</td>
</tr>
<tr>
<td>564</td>
<td>Test authentication</td>
<td>queued</td>
<td>1</td>
<td>2:05 PM Apr 4</td>
<td></td>
</tr>
</tbody>
</table>

- **Sequence number** - unique number assigned to a report when it is submitted
- **Name** - delayed, queued or running
- **Status** - if the report is queued for execution, its position in the queue
- **Submitted** - the time and date when the report was submitted.
- **Run After** - the time and date specified for deferred execution

Reports that you have scheduled to be submitted using the Report Scheduling function will not appear on a Report Status until they are actually submitted for execution.
XI. Log Out—Terminating a Session

It is highly recommended that you terminate each report submission session by using the Log out button on the navigation page.

This terminates your session by deleting any temporary information stored by the report submission web application during your session.

If the session is not terminated, and someone gains access to your computer, they could accidentally or maliciously submit or modify your reports.

Note: A session is automatically terminated when there is no activity for 15 minutes.
XII. Latest Submissions Folder

Whenever a report is submitted for execution, the Report Submission system automatically saves a copy of the report and the parameters values in a Latest Submissions folder under the folder containing the submitted report. If necessary, the system creates the Latest Submissions folder.

The Latest Submissions folder is a personal folder and the saved report can be submitted the same as saved reports that were created by using the Save Parameters buttons.

The only exception is when a saved report is submitted from a Latest Submissions folder. In that case, the saved report is updated with any new parameter values.
XIII. Submitting Saved Reports

When you have saved the parameters for your recurring reports, you can begin to truly appreciate the efficiency and convenience of the Report Submission System. Now you have the capability to submit several reports at once, using the saved parameters—and you’ll be notified by email as each report is completed.

On the Folder Navigation page, select the personal folder containing the saved report. The list of saved reports is displayed in the **Folder’s Report Definitions** column. The icons for saved reports contain an “S” (§). To submit a report, click on the report name of icon. You may then submit the report with the saved parameters, change any of the parameter values, or use any of the options on the report submission page.

There is also a **Submit All** button in the **Folder’s Report Definitions** column. Clicking this button submits all of the reports in the folder, using the saved parameters.
XIV. Creating Personal Folders

You can create a personal folder (no one else has access) or a hierarchy of personal folders, to save reports with your parameter values.

This enables you to run reports when desired without having to re-enter parameter values.

To create a new personal folder, you must first select the folder that is to be its parent. This may also be a personal folder. Click on the parent folder in the Folder Navigation column. In the illustration below, the Demo folder has been selected. A new personal folder can be created under it by clicking on the Personal Folders button in the Maintenance column.

Clicking on the Personal Folder button opens a page similar to the illustration below. The first table contains a list of all current personal folders that have Demo as a parent. There are currently Latest Submissions and My Reports folders.

In the New Personal Folder section, enter the name of your new folder. In the illustration, the new folder is to be named Monthly Reports.

Click the Add button to create the new personal folder. You may create as many as desired. Click the Navigation Map button when finished.

The new Monthly Reports folder now appears as a sub-folder of Demo.

You may use the Personal Folders maintenance page to add, rename, or delete personal folders.

Note: Before a personal folder can be deleted, it must be empty. To delete a saved report, select the personal folder on the Folder Navigation page, then use the Saved Jobs button to access the Saved Jobs maintenance page.
XV. Scheduling Reports for Deferred Execution

A group of reports may be scheduled for submission/execution at a future date. The scheduling request may be for a single submission or for recurring submissions at a specified interval.

Each report to be scheduled must be saved, and must not be in a Latest Submissions folder. All reports that are scheduled as a group must be in the same personal folder.

There is a Scheduled Reports button on the navigation page. Clicking on it displays your current scheduling requests.

Each scheduling request is displayed on a separate line. The following items are displayed for each request:
- The folder containing the report group.
- The name for the report group.
- The submission frequency.
- The date and time of the next submission.
- The date and time of the last submission.
- Edit and Delete buttons.
To create a scheduling request, click on the Schedule a Report button. The page below is displayed to create or edit a scheduling request.

1. Use the navigation map to select the desired folder. Only personal folders are displayed as accessible in the navigation map.
2. Select the report(s) to be scheduled.
   - Check one or more reports. The reports you select will be submitted at the specified time(s).
   - Or click on Select All to select all of the reports in the folder. You may unselect a report by clicking on its checkbox. The reports you select will be submitted at the specified time(s). If reports are added to the folder, they will not be submitted. You may edit the scheduling request to add reports.
   - Or check ‘Folder Contents’. This will select all of the reports in the folder. You cannot un-select a report by clicking on its checkbox. All of the reports in the folder will be submitted at the specified time(s). If reports are added to the folder, they will also be submitted.
3. Give the report group a name.
4. On the calendar, select the first submission date.
5. Enter the time of day for the first submission in the ‘Start Time’ box.
6. Select a frequency and any recurrence options.
   - Once: the request is deleted after the first submission.
   - Daily:
     - Every Day: report group is submitted every day.
     - Every Weekday: report group is submitted Monday thru Friday.
   - Weekly: Check one or more days. The report group will be submitted each week on those days.
   - Monthly:
     - Selected Date: report group will be submitted each month on the selected date. Example: 16\textsuperscript{th}
     - Numbered Weekday: report group will be submitted each month on the selected numbered weekday. Example: 2\textsuperscript{nd} Monday
   - Yearly: The report group will be submitted each year on the selected date.

7. Click on the Save button to save the request.