Unite Education Program v7.2
Job Aid: 5665

Schedule an Export Report

If you have an export report that you run on a routine basis, you can schedule the report to automatically run daily, weekly, or monthly. The following table provides a description of the options you can specify when scheduling a report.

Scheduling Option	Description
Start Date	The **Start Date** is the first day that Unite will run the scheduled report.
End Date	The **End Date** is the last day that Unite will run the scheduled report. If you do not specify an end date, Unite runs the report until you add an end date or remove the schedule from the report.
Frequency	The **Frequency** determines how often you want Unite to run the report.
Output	The **Output** defines the format in which Unite generates the report.
FileName (no. ext)	The **FileName** is the name assigned to the output file generated by the scheduled report.
Sent Data to University	The **Sent Data** to University check box is a flag to identify the records associated with the process of transferring data to a university system. The checkbox is updated whenever Unite generates the scheduled report.

Scheduled reports display on the HOME page in the *Scheduled Reports* section on the communications panel. At any time after you schedule a report, you can delete the schedule or specify an end date for the schedule to stop.

Export reports must be associated with a condition before you can set up a schedule. The steps to schedule an export report differ depending on whether the report is already associated with the correct condition, or you want to select a condition and then schedule the report.

To schedule a report that is associated with a condition

1. Open a browser and log on to Unite.

2. On the main menu, click REPORTS.

3. Verify you are on the *Exports* tab.

4. In the **Report Name** column, find the report you want to schedule.

5. In the **Condition Name** column, verify the report is associated with the correct condition.

6. In the **Output** column, select **Scheduled** from the list box for the report.

7. In the **Run** column, click ▷ for the report.

8. Specify the schedule options.

9. Click Save .

10. Click HOME.

11. On the communications panel, verify the name you specified for the output file displays in the *Scheduled Reports* section.

    > **Note**
    >
    > You can hover over the output file name and see a summary of the report schedule.

> **Note**
>
> If you want to delete a schedule, click 🗑 next to the output file name. Deleting a schedule does not remove the export report from Unite.

To select a condition and then schedule a report

1. Open a browser and log on to Unite.

2. On the main menu, click REPORTS.

3. Verify you are on the *Exports* tab.

4. In the **Report Name** column, click the export report you want to schedule.

   > **Note**
   >
   > If the correct condition is already associated with the report, you can select **Scheduled** for the **Output** and click ▷ on the grid to specify schedule options.

5. Click the *Condition* tab.

6. From the **Report Output Type** list box, select **Scheduled**.

7. From the **Condition Name** list box, select a condition for the report.

   > **Note**
   >
   > The condition determines which records Unite uses to generate the output file you want.

   > **Note**
   >
   > If there is not an existing condition you want to use, click New , and then enter a name in the **New Condition List Name** field. Select fields you want to add to the condition, and then configure options for each field.

8. Click **Save and Run** .

9. Specify the schedule options.

10. Click **Save** .

11. Click HOME.

12. On the communications panel, verify the name you specified for the output file displays in the *Scheduled Reports* section.

> **Note**
>
> You can hover over the output file name and see a summary of the report schedule.

> **Note**
>
> If you want to delete a schedule, click 🗑 next to the output file name. Deleting a schedule does not remove the export report from Unite.

Related resources

- 5636 – About Export Reports

- 5663 – Add an Export Report to Unite