

## Saved Actions Quick Step Guide

In every SchoolDude product, you can save frequently used searches and reports to run quickly and easily again in the future. Saved Actions can be scheduled to run on a recurring basis and automatically email you the results. All Advanced Searches and several reports in every product can be saved using the Saved Action feature. To find out if a particular report can be saved, check at the bottom of the screen. If there is a **Save and Print This** icon at the bottom of the page, then the report can be saved and scheduled to run as a Saved Action.

### How to save an Advanced Search or Report

- Click on the Advanced Search link or go to the report screen you would like to save.
- Select the fields to be included in your search or report.
- When selecting a **Date Range** for your saved action, avoid using actual dates. You want to choose the generic ranges, such as Last Week, This Month, or Fiscal Year, so that the report will give you up-to-date results.
- Enter a **Title** for your saved search or report at the bottom of the screen. Example: "Weekly Events", "All Open Incidents", or "Last Week's Completed Work".
- Click the **Save and Search Now** button to save an Advanced Search or click **Save and Print This** to save a report.

**Custom Report Title**

### Running a saved Advanced Search or Report

You can run a saved search or report any time you want.

- Click on the **List** link in the Action menu located under the Search For box, then click the **Saved Actions** link.
- Click on the title of the search or report you want to run.
- You will be taken to the Advanced Search or Report screen with your saved criteria already selected.
- Scroll down to the bottom of the page and click **Search Now** for an Advanced Search or **Print This** for a report.

Saved Actions						
ActionTitle ▲	Action Category ▾	Created By ▾	Date Modified ▾	View ▾	Schedule	Delete
👍 1 CY WO Report	Report	DeGroote, Jed	10/12/2011	Public	New	✖
👍 2 Beardshere Hall Completed WOs	Search	DeGroote, Jed	10/12/2011	Public	New	✖
👍 Completed/Closed WOs for Chatham Central High	Search	DeGroote, Jed	1/16/2012	Public	New	✖
👍 Curtis Hall Completed WOs	Search	DeGroote, Jed	3/27/2012	Public	New	✖
👍 East Campus Completed WOs	Search	DeGroote, Jed	3/27/2012	Public	New	✖
👍 Electrical WO's Completed Last Week	Search	DeGroote, Jed	4/5/2012	Public	New	✖



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## How to schedule a Saved Search or Report to run automatically

- Click on the **List** link in the Action menu located under the Search For box, then click the **Saved Actions** link.
- You will see a list of all the Saved Actions in your account. Find the one you want to schedule and click on the word **New** under the Schedule column. The next screen gives you options for setting up the recurrence pattern for the saved action.
  - Select **Recurring** as the Schedule Type.
  - In the **Frequency** drop down box, choose whether you want to receive these search results Daily, Weekly, or Monthly.
  - For **Daily**, you can choose Every Day or Every Weekday.
  - For **Weekly**, select which day(s) of the week you want to receive these search results.
  - For **Monthly**, you can choose either the date (Ex: Day 15) of the month or you can choose the day of the week in the month (Ex: the first Monday of every 1 month). The monthly option also allows you to run this search every other month, once a quarter, etc. by changing the number in the box that precedes month. (Ex: the first Monday of every 3 months)
  - Select the **Output Format** for your results. The most common choices are PDF and Excel.
  - Enter the **Email Address(es)** that these search results need to be sent to each time. To enter multiple email addresses, separate them with a semicolon. The email addresses do not have to belong to registered users. You can send these search or report results to anyone you choose.
  - Click **Save Schedule**.

### Schedule Saved Action

Schedule your advanced search to be run on a one-time or recurring basis

Schedule Type  One-Time  Recurring

Frequency

Daily  Every Day  Every WeekDay

Weekly   
Sunday  
Monday  
Tuesday  
Wednesday  
Thursday  
Friday  
Saturday

(Note: hold down the CTRL key to make multiple selections.)

Monthly  Day  (or  Last Day) of every  month(s)  
 The   of every  month(s)

Output Format  PDF  Excel  Tab delimited text  XML

Email addresses to receive report   
(separate email addresses by a semicolon, i.e. test1@test.com; test2@test.com)

