# Web Report Library Changes

The WRL has been updated the latest version available and this document will describe some of the differences from the last version we have installed.

- To get to the new version, go to https://reports.utoledo.edu/ and click on the WRL Production button. Log into the WRL with your UT Active Directory credentials.

- This version of the WRL will not be available off campus unless you use one of the approved remote access methods listed in the link below.

  https://www.utoledo.edu/it/remote-access-and-virtual-class-technologies.html

- The web workspace in the upgraded environment is called **BI Launchpad** and after logging in you should be defaulted to the Documents tab and Folders list. If you start out in the Home tab, simply click on the Document tab, and then the Folders list item, to get a familiar list of folders and reports.
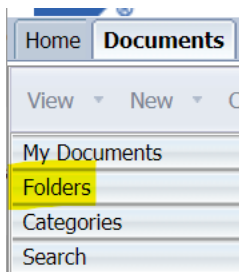
- Clicking on the **My Documents** list item in the Documents tab is where your Inbox and Favorites have been moved to.
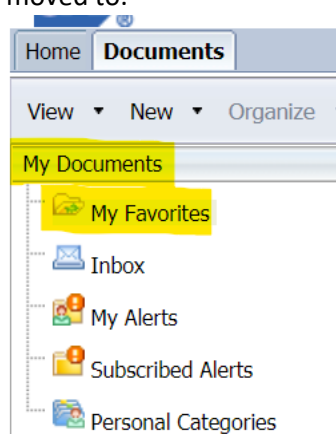
- **Personal Categories**
  If you want to arrange your reports differently from the pre-defined folder views, you can do this with Personal Categories.
  - To **create Personal Categories**, right click Personal Categories and choose New > Category.
  - To **delete Personal Categories**, right click the category and choose Organize > Delete.
  - To **add reports to Personal Categories,** right click the report in the folder list, and choose Categories. Then pick the Personal Category you want the report to show up in and click the OK button.

- The **Home** tab is useful to see a list of recently viewed reports and a list of recently scheduled reports. You can click on any of the items listed here to view them.

- There is quite a bit more you can do with personalizing the BI Launchpad that you can read about in the help menu.

- Scheduling and viewing history works about the same as the previous version. This is described some more below and even more detailed information can be found in the help menu.

Scheduling and Report History

Scheduling a report allows you to set up a time for the report to run. If parameters are used, you can set these up when you schedule the report. You can also choose the destination, or delivery options, when scheduling. The scheduling feature is very useful for long running reports when you don't want to wait for them to finish, or when you want to keep a copy for reference. DTAS does not maintain rep

Scheduling an object

1. Go to the Folders area of the BI Launchpad.
2. Select the report to schedule.
3. Click the **More Actions** menu item and then choose **Schedule**.
   You can also right click the report and choose **Schedule**.
4. The Schedule dialog box appears, showing the default settings for the object.
5. Enter a title for the instance.
6. Click **Recurrence**, and select a recurrence pattern.
   For example, select Weekly to run the object one time per week.
7. Specify prompts/parameters if used.
8. Choose the **Destination**
   a. **Default Enterprise Location** – This will save the report in the WRL and may be viewed in the report history.
   b. **BI Inbox** – This will deliver the report to your WRL Inbox.
   c. **Email** – This will deliver the report to an email address.
9. Specify the **Format** of the report. There are no hard rules and you can choose what you want, but here are the formats typically used based on the Destination.
   a. Crystal Reports for the Default Enterprise Location BI Inbox destinations
   b. Excel or PDF for Email.
10. You should never have to change the **Database Logon, Scheduling Server Group**, or **Languages** options.
11. Click Schedule.

The BI platform creates a scheduled instance and runs it according to the schedule you specified. You can view scheduled instance in the History dialog box for the object.

History

You can view the scheduled run, and the report itself if you chose **Default Enterprise Location** destination. To view the scheduled instances, right click the report and choose **History.**