1. ***Click*** on Reports Wizard Group.
2. ***Click*** on Schedule New Reports Wizard.
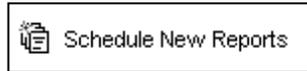
Schedule New Reports: Display Template Reports screen displays.
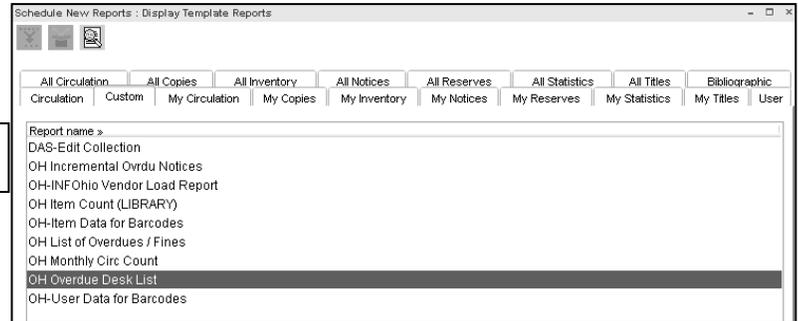
3. ***Select*** a Template or a generic report from the list to base your report on.
4. ***Click*** Setup and Schedule button at the bottom of the screen.
5. Basic Information Tab make changes to report name, description, title and footer information if desired.
6. Select appropriate Tab(s) to select your criteria for running the report.
7. Use the gadgets to customize report information.
8. Select Sorting Tab to select options for sorting your report.
9. ***Click*** on the schedule button or Run Now button to run the report or Save as Template to save your settings.

Schedule Options:

10. **ASAP and OK** will run the report immediately.
11. **Once** –Run the report one time ASAP or one time at a scheduled time and date.
12. **Daily** – For reports that are run every day or every so many days.
13. **Weekly** - Schedule specific days of the week.
14. **Monthly** - Schedule a report to run on a specific date or dates of the month.
15. **Send to Printer** – Sends report directly to the printer.

Schedule New Reports : Schedule OH Incremental Ovrdu Notices

Report name: OH Incremental Ovrdu Notices

Schedule

⦿ ASAP ◯ Once ◯ Daily ◯ Weekly ◯ Monthly

Printing/Distribution

☐ Send to printer [⌄] ☑ Format
☑ Save to Finished Reports Wizard
☐ Email to Individual(s) [   ] ◈ ☑ Format
☐ Auto email to recipients with email addresses in their patron record
Reply to: [⌄]

16. **Save to Finished Reports Wizard** – Adds this run report to the Finished Reports List. Always Check this.
17. **Email to Individual(s)** – Click the email gadget to enter the address.
18. **All emails originate from** –The email address of the originating logged in user.
19. **Format** – This selection is a system predefined format for the report and email. (The format options should always have a check, unless otherwise noted in specific report instructions.)