

# How to...

## Prepare a Sessional Schedule Data Report

### Introduction

This guide will show you how to prepare a sessional schedule data report. This process is only available to supervisors and School Administration Officers. There are three report options:

- **Employee Report** – data per individual sessional staff member
- **Summary Report** – data per Element
- **All Data Report** – all data for all relevant Elements.

### Step 1: Navigate to the Sessional Schedule Data Report

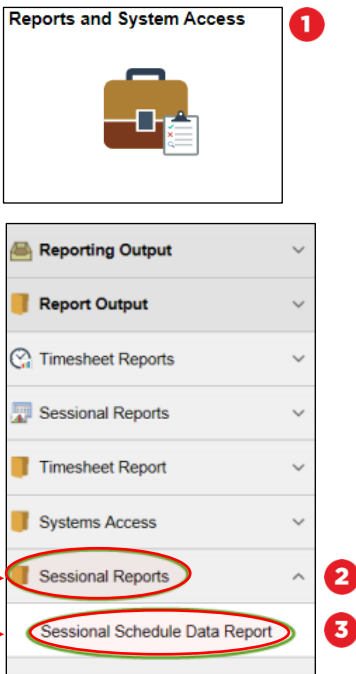
- Log in to the **staff portal** and select **My Staff Page**.

**1** Select the **Reports and System Access** tile.

**2** Select **Sessional Reports**.

**3** Select **Sessional Schedule Data Report**.

**4** If you have previously created a report, proceed to **Step 2**. If you have never created a report, please proceed to **Step 3**.



The screenshot shows a web interface with a 'Reports and System Access' tile at the top, which contains a briefcase icon. Below this is a list of menu items: 'Reporting Output', 'Report Output', 'Timesheet Reports', 'Sessional Reports', 'Timesheet Report', 'Systems Access', 'Sessional Reports', and 'Sessional Schedule Data Report'. Red arrows and numbers indicate the navigation path: 1 points to the top tile, 2 points to the 'Sessional Reports' menu item, and 3 points to the 'Sessional Schedule Data Report' menu item.

## Step 2: Find an existing report

- Please note that Run Control ID's are the unique Report ID names. To find an existing report, you will need its Report ID name. This will only be available to you if you have created a report previously. To add a new report, proceed to **Step 3**.

- 1 Select the **Find an Existing Value** tab.
- 2 Enter the Report ID name in the **Run Control ID begins with** box and select **Search**.
- 3 When the list appears, select the **Report ID** of the report you want.
- 4 If the search doesn't return any matching values, you will need to create a new report. Proceed to **Step 3** for guidance.

**Sessionals Schedule Data Rpt**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | Add a New Value

▼ Search Criteria

Search by: Run Control ID begins with

☐ Case Sensitive

**Search** | Advanced Search

Find an Existing Value | Add a New Value

**Sessionals Schedule Data Rpt**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | Add a New Value

▼ Search Criteria

Search by: Run Control ID begins with

☐ Case Sensitive

**Search** | Advanced Search

No matching values were found.

Find an Existing Value | Add a New Value

## Step 3: Add a new report

1 Select the **Add a New Value** tab.

2 Enter a report name in the **Run Control ID** box. Tip: It's a good idea to:

- label your report with something easy to remember
- include your initials
- ensure they are no spaces

3 Select **Add** and proceed to step 4.

The screenshot shows the 'Sessionals Schedule Data Rpt' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and highlighted with a red circle and a red '1'. Below the tabs is a 'Search Criteria' section with a 'Search by:' dropdown set to 'Run Control ID begins with' and an empty text input field. There is a 'Case Sensitive' checkbox and 'Search' and 'Advanced Search' buttons. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

The screenshot shows the 'Sessionals Schedule Data Rpt' form. The 'Add a New Value' tab is still selected. Below the tabs, the 'Run Control ID' text input field is highlighted with a red circle and a red '2'. Below the input field, the 'Add' button is highlighted with a red circle and a red '3'. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

## Step 4: Enter selection criteria

1 Enter the **Start** and **End** dates to set the report's data range.

2 Select **Search**.

3 Select the **Report Type** you require.

4 Additional selection parameters will appear. You can filter the report by Element, Workflow Status, Campus, Course Code, Course Convenor, and/or sessional employee.

The screenshot shows the 'Sessionals Schedule Data Rpt' form. The 'Run Control ID' is 'SRtest1'. Below it is the 'Report Date Range' section with 'Start Date' and 'End Date' input fields, each with a calendar icon. The 'SEARCH' button is highlighted with a red circle and a red '2'. Below the date range are 'Save', 'Notify', and 'Refresh' buttons. At the bottom right are 'Add' and 'Update/Display' buttons.

The screenshot shows the 'Report Type' section. There are three radio buttons: 'Employee Report' (selected), 'Summary Report', and 'All Data Report'. A red '3' is next to the 'Employee Report' radio button.

The screenshot shows the 'Additional Selection Parameters' section. It contains several filter sections, each with a 'Leave Blank for All' option, a search input field, and a 'View All' link. The filters are: Element, Workflow Status, Campus, Course Code, Course Convenor, and Sessional Employee. A red '4' is next to the 'Element' filter section. At the bottom are 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display' buttons.

## Step 5 – Run the report

- 1 Once you have entered all the filters needed, select **Run**.
- 2 Select **OK** when the Process Scheduler Request displays.
- 3 The Sessionals Data Report will display. Take note of the **Process Instance** number and proceed to step 6.

The first screenshot shows the top of the interface with 'Run Control ID SRtest1' and a 'Run' button circled in red with a red '1' next to it. Below it is a 'Report Date Range' section with 'Start Date' 02/01/2020 and 'End Date' 02/29/2020, and a 'SEARCH' button.

The second screenshot is titled 'Process Scheduler Request'. It shows fields for 'User ID S2976092', 'Run Control ID SRtest1', 'Server Name', 'Run Date 02/06/2020', 'Recurrence', 'Run Time 4:02:33PM', and 'Time Zone'. Below these is a 'Process List' table with one row: 'Sessional Schedule CSV Report' (GUESRPT, SQR Report, Web, CSV, Distribution). At the bottom, the 'OK' button is circled in red with a red '2' next to it.

The third screenshot is titled 'Sessionals Data Report'. It shows 'Run Control ID SRtest1' and a 'Run' button. Below it is the 'Report Date Range' section. A 'Process Instance: 3418896' is circled in red with a red '3' next to it.

## Step 6 – Review the report data

- 1 Select **Report Manager** to view the report.
- 2 Select the report by the time and date it was run.
- 3 The report page will appear. To view the details easily, select the report in **.csv format**.
- 4 The report will display in Microsoft Excel where you can format and edit the report data.

The screenshot displays the 'Sessionals Data Report' interface. At the top, there is a 'Run Control ID' field with the value 'SR1est1'. To its right is a 'Report Manager' button, which is circled in red and labeled with a red '1'. Further right are 'Process Monitor' and 'Run' buttons. Below this, a 'Report Date Range' section contains 'Start Date' (02/01/2020) and 'End Date' (02/29/2020) fields, with a 'SEARCH' button to the right. The 'Process Instance' is listed as 3418896.

Below the search section is a 'Reports' table. The first row is highlighted with a red circle and labeled with a red '2'. The table columns are: Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance. The data row shows: 1, GUESRPT, SESSIONAL SCHEDULE CSV REPORT, General, 02/06/20 4:05PM (circled in red), 115 (circled in red and labeled with a red '2'), and 3418896.

Below the table is a 'Report' section. It shows 'Report ID: 3328115', 'Name: GUESRPT', 'Run Status: Success', 'Process Instance: 3418896', and 'Process Type: SQR Report'. There is a 'Message Log' link. Below this is a 'Sessional Schedule CSV Report' section with 'Distribution Details' showing 'Distribution Node: HR' and 'Expiration Date: 05/06/2020'.

Below that is a 'File List' section with a table. The first row is circled in red and labeled with a red '3'. The table columns are: Name, File Size (bytes), and Datetime Created. The data row shows: GUESRPT\_Employee Report\_3418896.csv (circled in red), 98,807, and 02/06/2020 4:05:00.260382PM AEST.

At the bottom is a 'Distribute To' section with a table for 'Distribution ID Type' and 'Distribution ID', and a 'User' field.