

## EP Web Report - Scheduling

**1) New Report Schedule** - Equipment Providers can schedule report to run on a defined frequency (like daily, weekly & monthly). Here's how to do.

Login to your account -> Click on Web Report Generator link-> Select Report Criteria-> Scroll down to the bottom of the page-> Click on "Schedule Report" button. It will open popup which will allow you to schedule your report with the criteria you have selected.

Existing Report Schedule				
Scheduled Report Name	Schedule Type	Schedule Time	Report Criteria	Report Schedule
		<input type="button" value="Generate Report Now"/>	<input type="button" value="Schedule Report"/>	<input type="button" value="Reset"/>

testapp.uiia.org/application/WebValidator.do?forward=load

testapp.uiia.org/application/WebValidator.do?forward=reports - Google Chrome

testapp.uiia.org/application/WebValidator.do?forward=reports

### Web Report Scheduling

**Selected Report Criteria**

Field Set: Company Contact Info, All Insurance Expiration Dates & UIIA Status  
File Type: Excel  
Sort Order: Company Name  
MC Filter: All Member Carriers

Schedule Report Name:

Email:

**Select the frequency to run this report**

Daily  Weekly  Monthly

**Start Time**

Start Hour:

**Days of month/week**

All Days  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Days:  Day Of Month:

Company Profile

Equipment Type

48'  53'

Existing Report Schedule		
Schedule Time	Report Criteria	Report Schedule
16	VIEW / EDIT	EDIT / DELETE
16	VIEW / EDIT	EDIT / DELETE
16	VIEW / EDIT	EDIT / DELETE

It shows the criteria selected

Enter the email address where you wish to send the report to and select the frequency and the day & time and hit schedule report button to schedule the report.

**Note: Start Time – reports will be generated/received within 15 minutes of the Start Hour selected.**

**2) Existing Report Schedule** - User can view existing report schedule at the bottom of "Web Report Generator" page.

Scheduled Report Name	Schedule Type	Schedule Time	Report Criteria	Report Schedule
APL-Schedule 1	daily	8	<a href="#">VIEW / EDIT</a>	<a href="#">EDIT / DELETE</a>

[Generate Report Now](#) [Schedule Report](#) [Reset](#)

**3) Report Criteria (View/Edit)** - User can view existing report criteria and modify as per needs following instructions below in 3.1. and 3.2.

**3.1 View Report Criteria:** User can click on the link named "View" to view the existing report criteria.

Scheduled Report Name	Schedule Type	Schedule Time	Report Criteria	Report Schedule
APL-Schedule 1	daily	8	<a href="#">VIEW / EDIT</a>	<a href="#">EDIT / DELETE</a>

[Generate Report Now](#) [Schedule Report](#) [Reset](#)

CTPAT Certified?

DOT Background Inves

Type Of B

MC

DOT

Fed

Common A

Contract A

Broker A

Top

Pow

Chassis 20'

Dro

F

Vans

PUPS

Company Driver

Owner Operators

Cargo Handled

testapp.uiia.org/application/scheduleDetail.do?forward=viewReport&schid=2 - Goog...

testapp.uiia.org/application/scheduleDetail.do?forward=viewReport&schid=2

### Schedule Report Criteria

**Report Criteria**

Field Set: Your Field Picks

Fields Selected: MC Company Name, SCAC, Known As, Address1, Address2, AL Expiration Date, GL Expiration Date,

File Type: Excel

Sort Order: Company Name

MC Filter: All Member Carriers

[Close](#)

Scheduled Report Name	Schedule Type	Schedule Time	Report Criteria	Report Schedule
APL-Schedule 1	daily	8	<a href="#">VIEW</a> <a href="#">EDIT</a>	<a href="#">EDIT / DELETE</a>

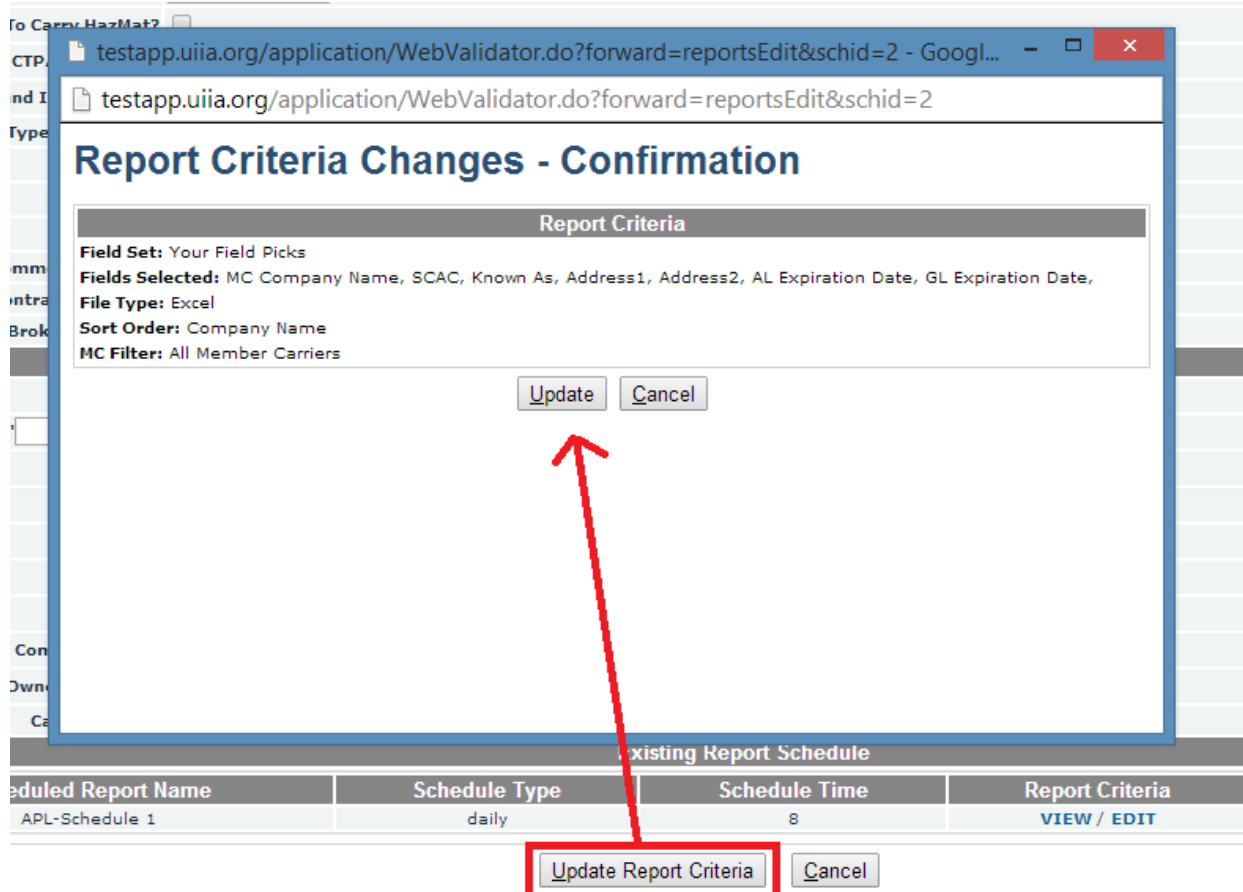
[Generate Report Now](#) [Schedule Report](#) [Reset](#)

**3.2 Edit Report Criteria:** As soon as user clicks on "Edit" link, "Generate Report Now", "Schedule Report" & "Reset" button will disappear. User will see "Update Report Criteria" button and "Cancel". The system will populate existing report criteria selection or values on Web Report Generator page. Users can add/modify field selection depending on output fields they want to see in the report.

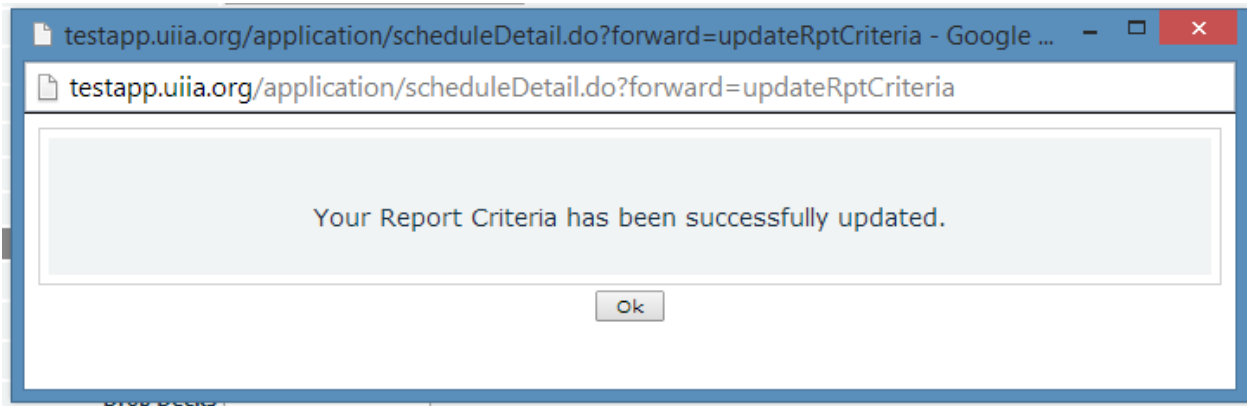
Scheduled Report Name	Schedule Type	Schedule Time	Report Criteria	Report Schedule
APL-Schedule 1	daily	8	<a href="#">VIEW</a> <a href="#">EDIT</a>	<a href="#">EDIT / DELETE</a>

[Update Report Criteria](#) [Cancel](#)

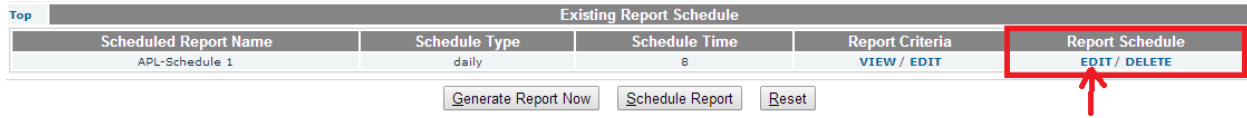
Once the desired modification is done to update the criteria user can click on "Update Report Criteria" button. The system will again display report criteria changes for confirmation in popup and from this screen either user can update the changes or cancel it.



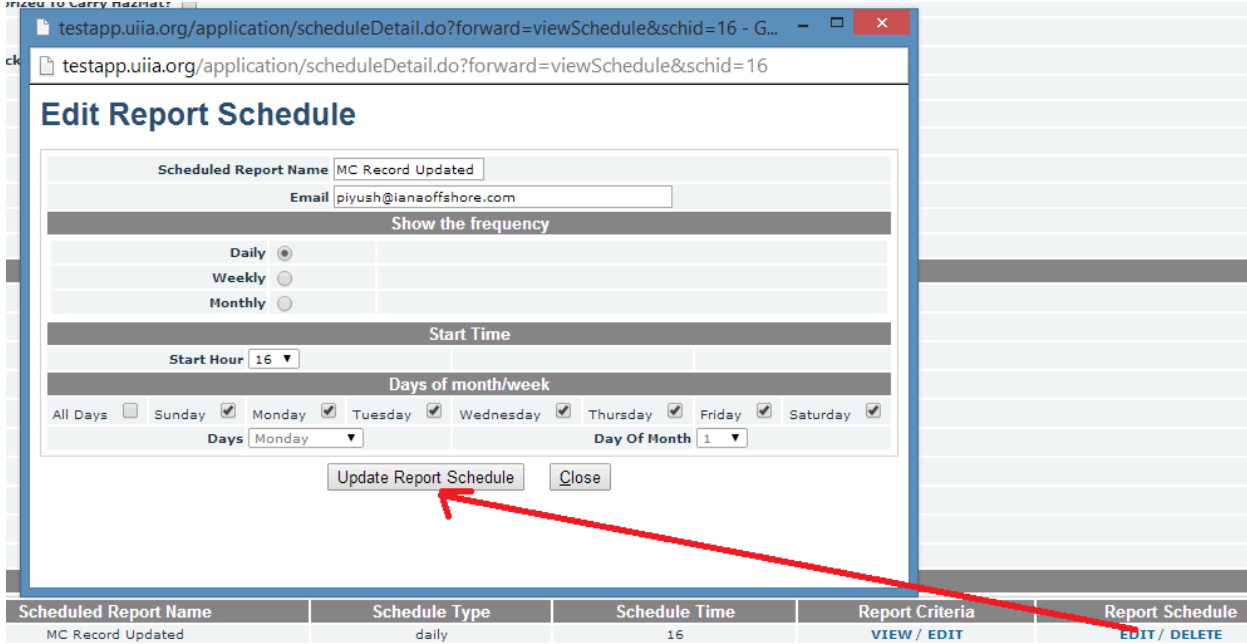
If user hits "Update" button then the system will display below message as a confirmation that the criteria has been successfully updated. If user hits "Cancel" button then the popup will be closed.



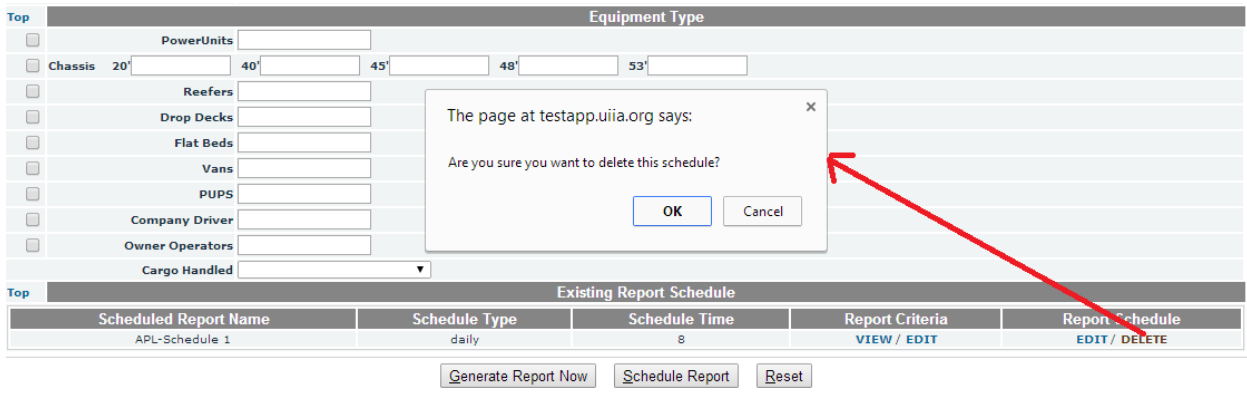
**4) Report Schedule (Edit/Delete) - User can modify or cancel existing report schedule.**



As shown in below screen shot, use can change the timing schedule or frequency of existing report.



As show in the screenshot below users can cancel their existing report schedule by clicking "DELETE" link shown for each schedule. The will again ask for confirmation whether user wants to delete the schedule or not if user clicks on "OK" then system will go ahead and remove existing report schedule.



**5) Dynamic Date Range Selection** - User can select dynamic date range in order obtain report on for a specific date range on a daily basis. For example, user wishes to pull the report from Previous day's update through today then they can. Here is how.

Top		Status	
Static Date Range		OR	Dynamic Date Range
MC Record Updated	<input type="text"/>	OR	From Current date minus <input type="text" value="0"/> days - To Current date <input type="text" value="NO"/>
MC Status Changed	<input type="text"/>	OR	From Current date minus <input type="text" value="0"/> days - To Current date <input type="text" value="NO"/>
Policy Expiration Date	<input type="text"/>	OR	From Current date minus <input type="text" value="0"/> days - To Current date <input type="text" value="NO"/>
UIIA Acceptance Date	<input type="text"/>	OR	From Current date minus <input type="text" value="0"/> days - To Current date <input type="text" value="NO"/>
UIIA Reinstated Date	<input type="text"/>	OR	From Current date minus <input type="text" value="0"/> days - To Current date <input type="text" value="NO"/>
Deleted From UIIA	<input type="text"/>	OR	From Current date minus <input type="text" value="0"/> days - To Current date <input type="text" value="NO"/>
MC Will Become Not Approved	<input type="text"/>		

Note: To pull report by specific date range, use static date range fields OR to pull or schedule the report that uses dynamic date range each day then use dynamic date range fields. When using dynamic date range fields please make sure that "From Current date minus...days" field must contain value greater than zero and "To Current Date" field is set to YES.

New fields under "Dynamic Date Range" have been added. User can either enter static date range or choose to pull the report by entering dynamic date range by entering days in current date minus field and set current date field to YES.