

Administrative Office of the Courts

Supreme Court of New Mexico

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Judicial Information Division (JID)

General Information about Odyssey Reports

Standard Operating Procedure

Version 1.0

Updated: (04/2017)

General Information about Odyssey Reports

COURT / DEPARTMENT / DIVISION

Courts that use Odyssey reports

USER

Court staff

PURPOSE

To provide general information regarding the report functionality in Odyssey

INTRODUCTION

Odyssey provides two types of reports. There are **Canned Reports** which were provided to us as part of the Odyssey Case Management Application and **Enterprise Custom Reports (ECR)** which are reports that New Mexico Judiciary developers write and add to Odyssey. These reports have common features. Once these common features are understood working with reports becomes much easier.

Basic Definitions:

- The **“Clear”** button. Clicking on this button will clear out all the fields so the report can be set up from scratch.
- Odyssey reports can be configured and **“Memorized.”** Memorizing a report allows one to run the report with the same parameters whenever desired. A “Memorized” report can then be **“Recalled”** and run again.
- Odyssey reports can also be **“Scheduled”** to run. Using this feature allows the user to set up a report and “schedule” it to run periodically. For example, a user could schedule the Event Review Report (tickler report) to run every Monday morning. Once the report has been scheduled, the user can come to work every Monday morning and find the report in their e-mail.
- When a user wants to run a report now, the user configures or recalls the report and clicks the submit button.
- If the user decides not to run the report, the page can be exited by clicking the Exit button or the hot keys ALT + X.

Options	Description
Clear (ALT+C)	Clear the information from the fields.
Memorize (ALT+M)	After you enter information into the report fields, save your report settings, so you can run the report at a later date with the same data.
Recall (ALT+R)	Load a setting that you previously saved and automatically populate the fields.

Options	Description
Schedule (ALT+H)	Schedule the report or export file to run at a later time.
Submit (ALT+U)	Submit the report or export file immediately.
Exit (ALT+X)	Exit the page without generating the report or export file.

1. Instructions for Saving or “Memorizing” report configurations

After configuring a report, the user can save the settings for that report so they can easily be recalled the next time it is run. After configuring the report, click **Memorize (ALT+M)** to access the **Save Current Report Settings** dialog box.

From this dialog box, use the **Name to Save** field to enter a name for the report configuration you are saving. If you want to save over an existing setting, type the name of the existing setting in the **Name to Save** field. You can also click the existing setting on the **Save Current Report Settings** dialog box to automatically display that name in the Name to Save field.

Click Save (ALT+S) to store the new report setting in Odyssey. If you are saving over an existing setting, a warning is displayed. Click Yes (ALT+Y) to overwrite the original setting with the new one.

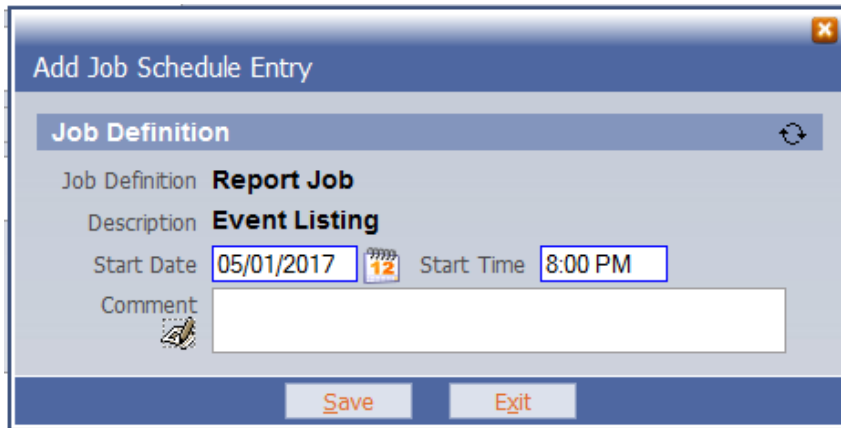
2. Instructions for Loading a Saved or “Memorized” Report Configuration (Recall)

After a report configuration has been memorized, it can be “Recalled.” Navigate to the Report page. Click the **Recall** button to access the **Load Report Settings** dialog box. Scroll down through the list of memorized reports and select the report to run. When the report is selected, the save report configuration will load into the report fields and any fields that currently hold values will be overwritten.

3. Instructions for Scheduling Reports to run at a Future Date and Time

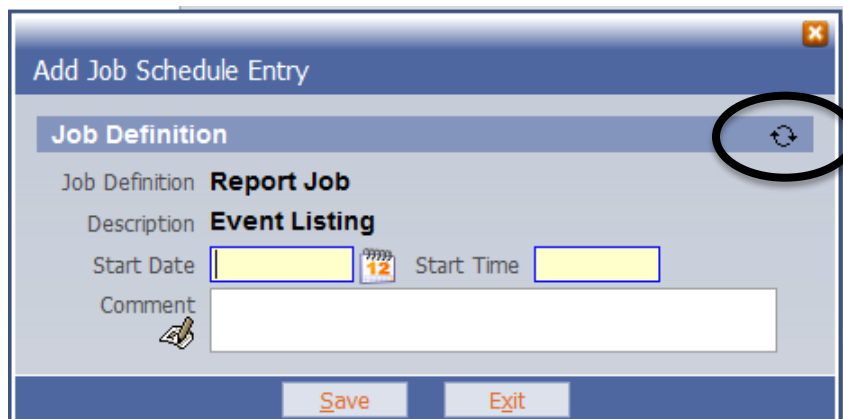
Odyssey allows users to schedule report jobs that will automatically begin processing on a specified day and time. This option is useful if the process will take a long time to process the job because jobs can be scheduled to run after working hours.

Click the Schedule button at the top of the Report page. The Add Job Schedule Entry dialog box will appear. Enter the Start date and time and click Save.



4. Instructions for Scheduling Reports to run automatically on a recurring basis

Odyssey also allows users to schedule recurring report jobs. This means that a user can schedule a report to run at the same time every day, week, or month. To set this up click on the recurring symbol on the Add Job Schedule Entry dialog box.



The Add Job Recurrence dialog box will appear. Complete the fields in this dialog.

- Start Time: Choose a time between 6 pm and 6 am.
- How often does this job recur? Select from Hourly, Daily, Weekly, Monthly, Yearly. Weekly and Monthly are the most common choices. Depending on the choice, more fields will appear to the right. The fields will be appropriate for the choice selected e.g., if weekly is chosen it will allow selection of the day of the week.
- When does this recurrence end? Select a start date and choose from the following for end date: No end date; End after ____ occurrences, End by: ____.
- What is the approach for job sequencing on this recurrence? Select the first choice Run recurring job as configured. Then click Save.

Add Job Recurrence

Job Definition **Report Job**
Description **Event Review**
Comment

Recurrence

Start Time

How often does this job recur?

Hourly Recur every week(s)
 Daily Monday Thursday Saturday
 Weekly Tuesday Friday Sunday
 Monthly Wednesday
 Yearly

When does this recurrence start and end?

Start Date: No end date
 End after: occurrences
 End by:

What is the approach for job sequencing on this recurrence?

Run recurring job as configured
 Do not start next recurrence of job until the current job in this job definition has completed processing
 Do not start next recurrence of job until the following jobs have completed processing

Job Definitions

- The Add Email Notification Recipients dialog box will appear. Add the email addresses of the people who should receive this report and click the middle check box which says, "Attach Any Filed Generated by Job and Keep Files in Job History. Then click the Finish button.