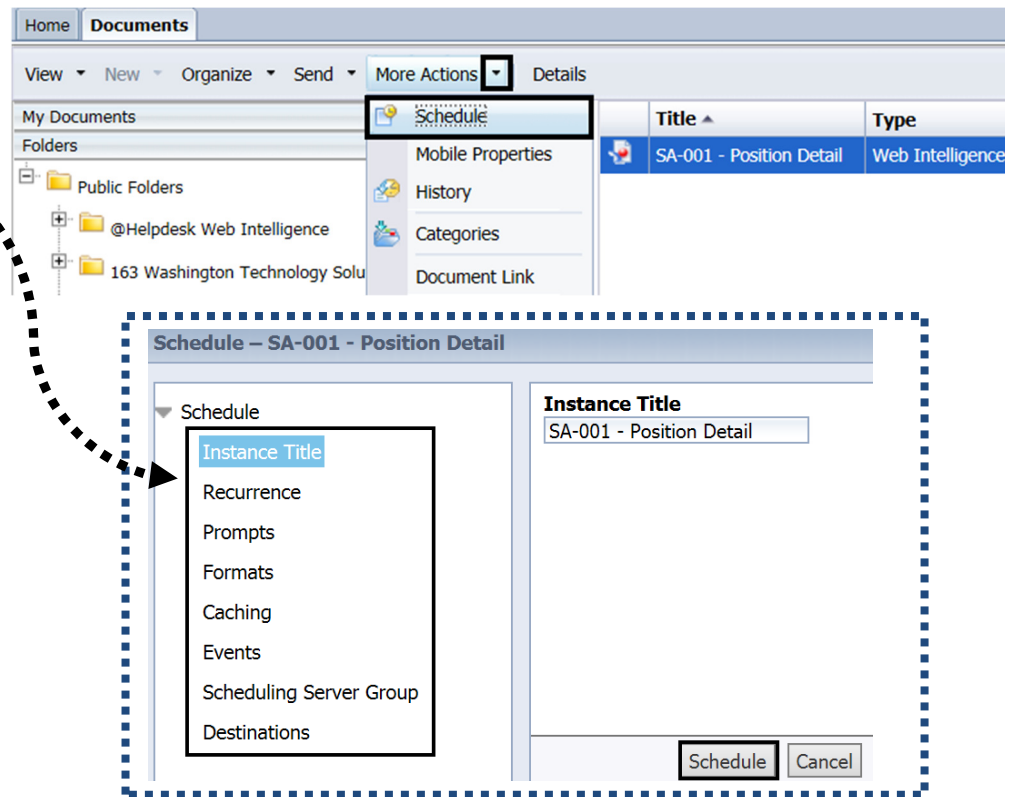# Schedule a Report

Web Intelligence (WebI) reports can be scheduled from the BI launch pad. Scheduling reports with large data sets reduces time out issues and improves system performance and is the recommended best practice.

✓ Scheduling reports allows you to set parameters such as when a report (document) should be refreshed, what name and format to use, and where it should be sent or saved.

✓ Always consider data contents before sending a document to other people. If your document contains employee name or personnel number, you may need to purge or anonymize the personal information before sending it to a non-secure location.

1. Select: **Title** to highlight the report without opening it.
2. Select: **More Actions**.
3. Select: **Schedule.**
   a. WebI will display schedule options based on your security/permissions.
4. **Instance Title** (default)
5. **Recurrence**
6. **Prompts**
7. **Formats**
8. **Caching**
9. **Events**
10. **Scheduling Server Group**
11. **Destinations**
12. Select: **Schedule Option**.
   a. Each schedule option will display default values.
13. Input: **Values for Schedule Option (**if different than default values**).**
   a. More information for each scheduling option is available on the following sections.
14. Select: **Schedule**.

In this example, we selected the standard SA-001 - Position Detail report from the Staffing Assignments public folder.

Instance Title

1. Input: **Instance Title**.

➔ The instance title will default to the report you selected to schedule.

➔ You can change the name for the scheduled document for reference. This will **not** change the original name of the document.
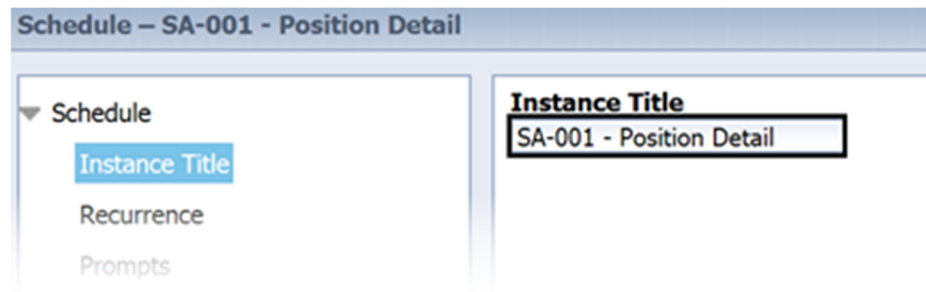
Recurrence

✓ Before scheduling a recurring report, you will need to remove the existing Date object from the Query Filter section and replace it with one of the pre-defined Date Filters. To modify a report, it must be your own so you'll need to do a "Save As" to save modifications.

1. Select: **Report** to add Pre-defined Date Filter to.

2. Right click: **Modify**.

In this example, we selected the SA-001 – Position Detail report that we saved as our own.

3. Select: **Edit Data Provider** when the report opens.

To remove the existing Date Filter:

4. Select: **Date object** from the Query Filters.

5. Select: **Remove**.

To add the new recurring Date Filter:

6. Select: **Pre-defined Date Filter** from the Date Filters and **drag & drop Date Filter** into the **Query Filters** section.
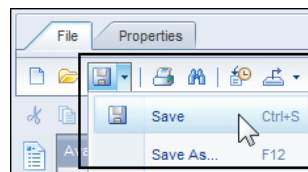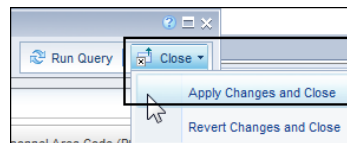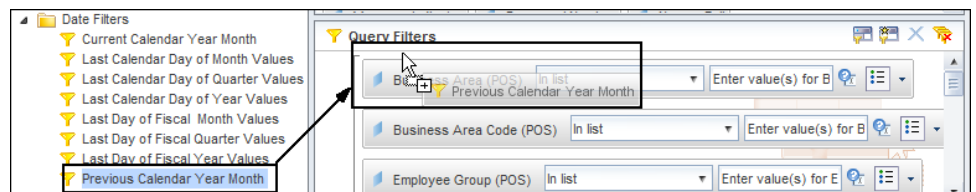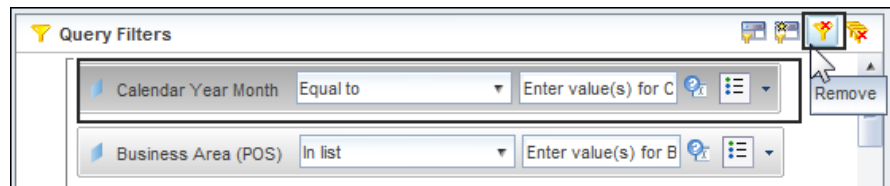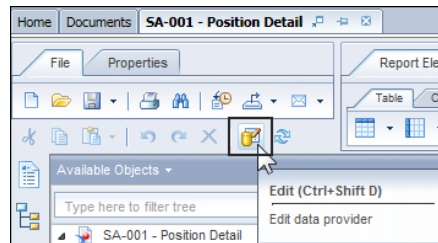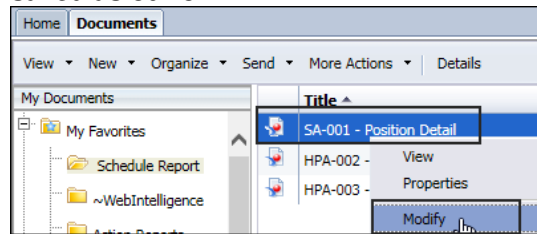

7. Select: **Close → Apply Changes and Close.**

8. Select: **Save/Save As**

9. Select: **Close this tab** to close the report to schedule it.

Your report is now ready to schedule a recurrance.

To schedule the recurrence:

10. Select: **Recurrence**.

➔ You can change the recurrence using an option from the **Run Object** dropdown.

11. Select: **Run Object** option.
➔ The default is 'Now'.
➔ If you select a recurrence other than 'Now', you will need to input additional criteria for that option. Input: **Additional criteria for option if needed.**

Schedule – SA-001 - Position Detail

▼ Schedule

　Instance Title

　Recurrence

　Prompts

　Formats

　Caching

　Events

　Scheduling Server Group

　Destinations

Recurrence
Run object: Now ▾
Object will run now.

Now
Once
Hourly
Daily
Weekly
Monthly
Nth Day of Month
1st Monday of Month
Last Day of Month
X Day of Nth Week of the Month
Calendar

Recurrence	Document is scheduled to run
Now	Immediately.
Once	One time based on date/time criteria.
Hourly	Hourly based on date/time criteria.
Daily	Once every day based on date/time criteria.
Weekly	Weekly based on day(s) of the week and date/time criteria.
Monthly	Monthly based on month interval and date/time criteria.
Nth Day of Month	Specific day of each month based on date/time criteria.
1st Monday of Month	First Monday of each month based on date/time criteria.
Last Day of Month	Last day of each month based on date/time criteria.
X Day of Nth Week of the Month	Specific week and day of the month based on date/time criteria.
Calendar	Specific calendar date/time. This option includes customized calendars for State of Washington activity. For example, AFRS Fiscal Month Closing.

Recurrence
Run object: Calendar ▾
The object will run based on the selected calendar.
Calendar: AFRS Fiscal Month Closing
Description AFRS Fiscal Month Closing-One Day Before
AFRS Fiscal Month Closing-Two Days After   one calendar day after the AFRS FM close.
Start Date AFRS Fiscal Month Closing-Two Days Before
End Date/ CAFR Closing
Fifth Business Day of the Month
First Paydate minus two days
Third Business Day of the Month
WWA Payroll Day 3
WWA Payroll Day 4
WWA Payroll Day 5

<<   >>   ■ Run Days

April 20   **June 2019**
Su Mo T   a   Su Mo Tu We Th Fr Sa

| | 1 | | | | | | | | | | | | 1 |

| 7 | 8 | 9 | 10 | 11 | 12 | **13** | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

| 14 | 15 | 16 | 17 | 18 | 19 | 20 | 12 | 13 | 14 | **15** | 16 | 17 | 18 | 9 | 10 | 11 | 12 | 13 | 14 | **15** |

| 21 | 22 | 23 | 24 | 25 | 26 | 27 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 16 | 17 | 18 | 19 | 20 | 21 | 22 |

| 28 | 29 | 30 | | | | | 26 | 27 | 28 | 29 | 30 | 31 | | 23 | 24 | 25 | 26 | 27 | 28 | 29 |

| | | | | | | | | | | | | | | 30 | | | | | | |

Prompts

1. Select: **Prompts**.

➔ If prompt values are needed, you may need to input additional information.

2. Select: **Modify**.

3. Select from: **Prompts Summary.**

4. Input: **Value(s)** for prompts.

5. Select: **Apply**.

➔ An asterisk * indicates a required prompt. All standard reports require at least one date value.

➔ Double check that all prompt values are visible before proceeding.

Note: If you added the "Previous Calendar Year Month" Date Filter for a recurring report, it will display in the Prompts section.

In this example, the Position Detail report provides prompts for more information.

In this example, there are multiple prompts. Calendar Year Month is a required prompt.

Format

1. Select: **Formats**.
2. Select: **Output Format**.

➔ The default is 'Web Intelligence'

➔ You can only select one output format.

Schedule – SA-001 - Position Detail

▼ Schedule
- Instance Title
- Recurrence
- Prompts
- **Formats**
- Caching
- Events
- Scheduling Server Group
- Destinations

Formats

Output Format
- ☑ Web Intelligence
- ☐ Microsoft Excel
- ☐ Adobe Acrobat
- ☐ Comma Separated Values(CSV)
- ☐ Plain Text

Caching

✓ Caching documents that will be opened from the BI launch pad and then converted into Excel or PDF (with no interactive filtering) may help to speed up the 'save as' process because the cached copies will be used.

✓ Caching is only available if the Output Format is 'Web Intelligence'.

1. Select: **Caching**.
2. Select: **Available Formats to Cache**.

➔ Caching is only availabe if the selected Output Format is 'Web Intelligence'.

Schedule – SA-001 - Position Detail

▼ Schedule
- Instance Title
- Recurrence
- Prompts
- Formats
- **Caching**

Caching

Select the formats to pre-load the cache with when scheduling (only applicable if scheduled to Web Intelligence formats).

Available Formats to Cache:
- ☐ Microsoft Excel
- ☐ Standard HTML
- ☐ Adobe Acrobat

Select the Formatting Locales to Pre-Load the Cache with when Scheduling

Available locales:
- Afrikaans (South Africa)
- Arabic (United Arab Emirates)
- Arabic (Bahrain)
- Arabic (Algeria)
- Arabic (Egypt)
- Arabic (Iraq)
- Arabic (Jordan)
- Arabic (Kuwait)
- Arabic (Lebanon)
- Arabic (Libyan Arab Jamahiriya)

Selected locales:

>
>>
<
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Events

✓ Events may be scheduled only if they have been defined by the OFM Enterprise Reporting team.

1. Select: **Events**.

2. Select: **Event option(s)**.

➔ Event options may prompt you for additional information.

3. Input: **Additional information for each event option**.
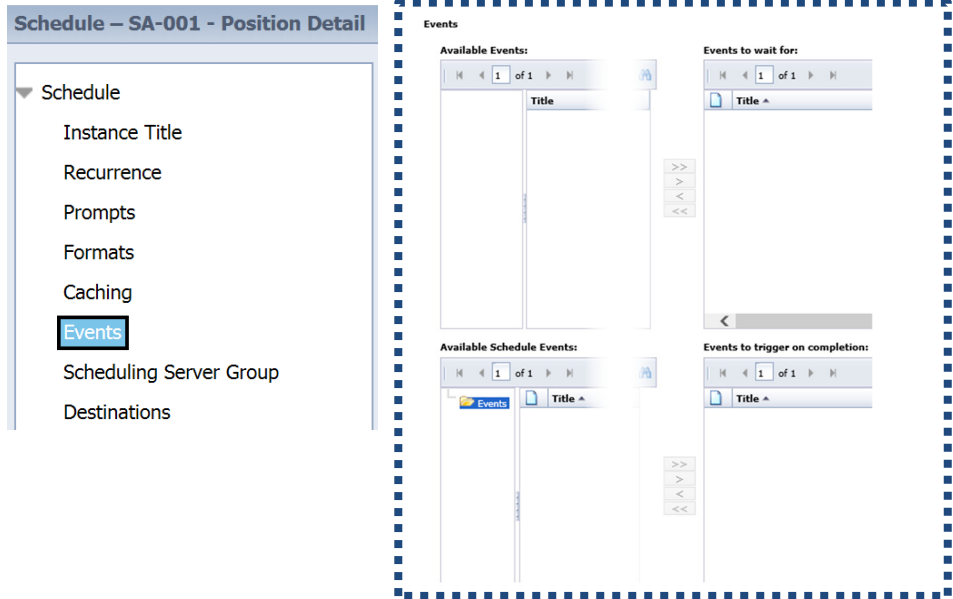
Scheduling Server Group

✓ OFM Enterprise Reporting team will set the default to '**Use the first available server**' to optimize performance.

1. Select: **Scheduling Server Group**.

➔ Please consult with the OFM Enterprise Reporting team **prior to** changing the Scheduling Server Group.
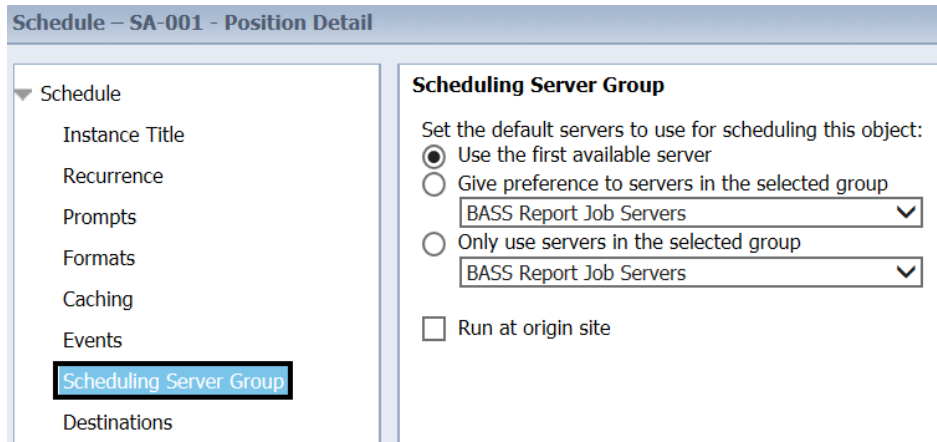
Destinations

✓ Users with the Secure User role have access to confidential data. For security purposes, users logged in with the Secure User role cannot schedule to destinations, or send queries to email, BI Inbox, or FTP.

1. Select: **Destinations**.

➔ If you log on with a secure user role, the Destinations schedule option will not be available.

2. Select: **Destination** option.

➔ Destination options may prompt you for additional information.

➔ A time stamped copy (instance) is automatically retained when using Default Enterprise Location.

➔ You can specify if you want to retain a time stamped copy (instance) in the history for destinations other than the Default Enterprises Location.

Schedule – SA-001 - Position Detail

▾ Schedule
   Instance Title
   Recurrence
   Prompts
   Formats
   Caching
   Events
   Scheduling Server Group
   Destinations

Destinations
Destination:

| Default Enterprise Location ▾ |
| Default Enterprise Location |
| BI Inbox |
| Email |
| FTP Server |
| File System |
| SFTP Server |

Destination	Document (with date/time stamp) is sent to
Default Enterprise Location	Default location. For example, your WebI personal folder.
BI Inbox	WebI inbox for people and/or groups.
Email	Email addresses.
FTP Server	Server location via File Transfer Protocol (FTP). Work with your IT Help Desk to determine the specific FTP server parameters.
File System	Directory location outside of WebI. Work with your IT Help Desk to determine the specific account settings and directory name.
SFTP Server	Server location via Secure File Transfer Protocol (FTP). Work with your IT Help Desk to determine the specific SFTP server parameters.