PeopleSoft Data Dictionary EPM: **Scheduling Reports**

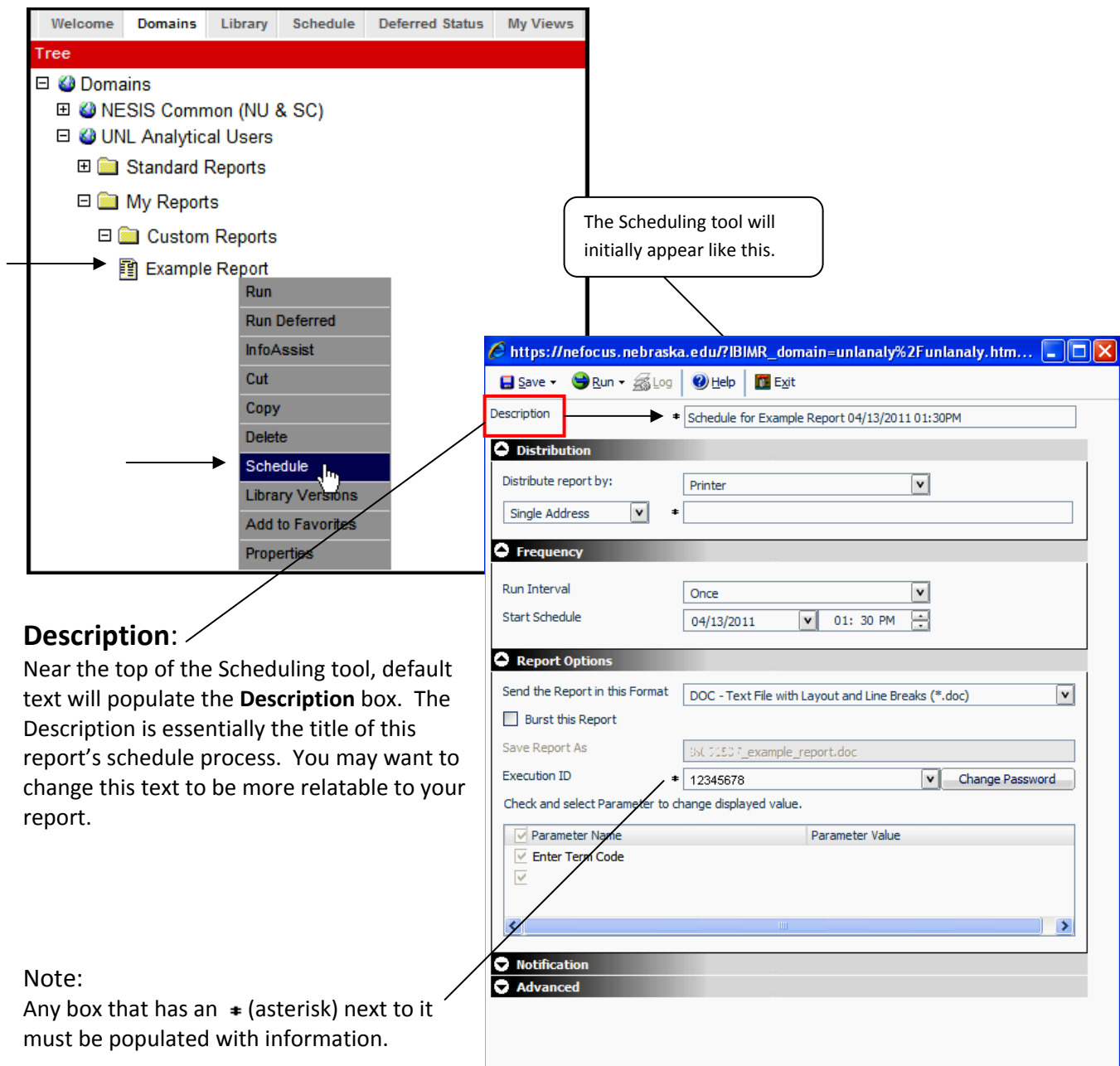## Table of Contents

Scheduling Reports

After a query has been designed and saved, some may find it useful set it up so that the job (query) runs at a certain time(s) or at specific intervals and the report is distributed in certain ways. This can be accomplished with the Dashboard Scheduling tool.

Launch the Scheduling Tool:

To launch the Scheduling tool from Dashboard, choose the report you wish to schedule from your "Custom Reports" folder, right-click on it, and select **Schedule**.

The Scheduling tool will initially appear like this.

Description:

Near the top of the Scheduling tool, default text will populate the **Description** box. The Description is essentially the title of this report's schedule process. You may want to change this text to be more relatable to your report.

Note:

Any box that has an ✱ (asterisk) next to it must be populated with information.

Overview of Scheduling Components:

In addition to **Description**, the Scheduling tool contains five main areas/components that need to be considered when scheduling a job:

1) Distribution
2) Frequency
3) Report Options
4) Notification
5) Advanced

These five areas each require different information and settings that need to be set, confirmed or inputted before running or saving a scheduled query. Each area can be collapsed or expanded by clicking on the triangles next to their titles.
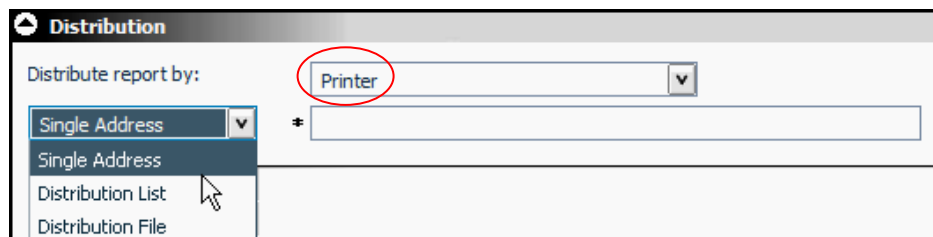
Distribution

With the Distribution component, you can specify how the report will be distributed, and to whom or where. There are three main distribution options: "Printer", "Library", and "Managed Reporting". Each have different settings that need to be set or comfirmed in order to distribute the report correctly.
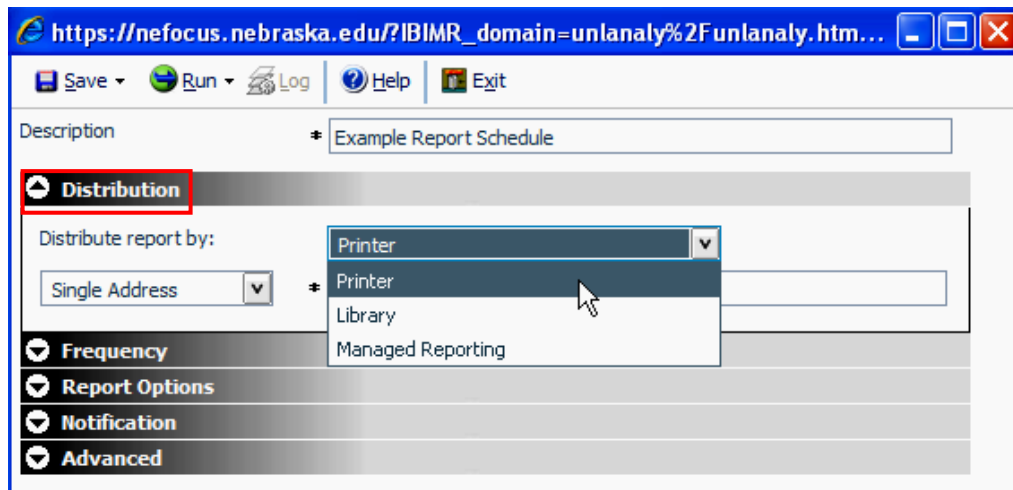
Printer:

Distributing a report to a printer may not be the most common option, but it can be handy to have a report print out automatically at a scheduled time. When distributing a report to a printer, there are a few different options to select from. You can distribute a report to a **Single Address**, or send it to a **Distribution List**. The other option, **Distribution File** is not suggested for use.

Single Address:

When distributing to a single printer, simply enter the IP address of the printer you wish to distribute the report to in the textbox next to the **Single Address** drop-down box.
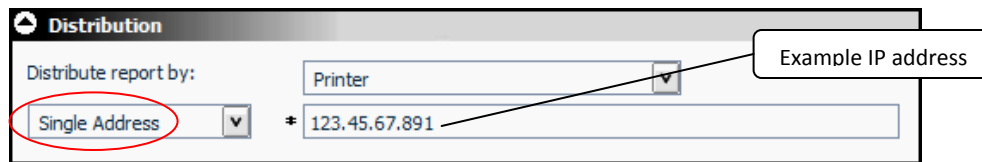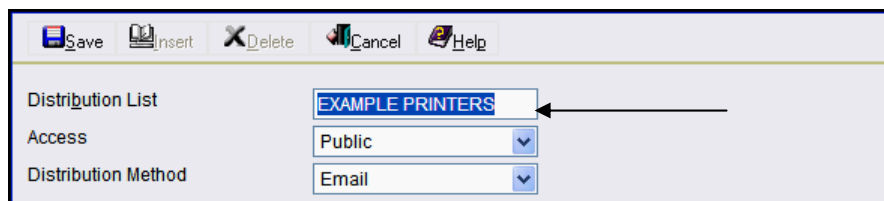

Distribution List:

This option allows you to send the report to several different printers that have been previously established on a distribution list. To create a new distribution list that can then be selected from the **Distribution List** drop-down box, follow the these steps:
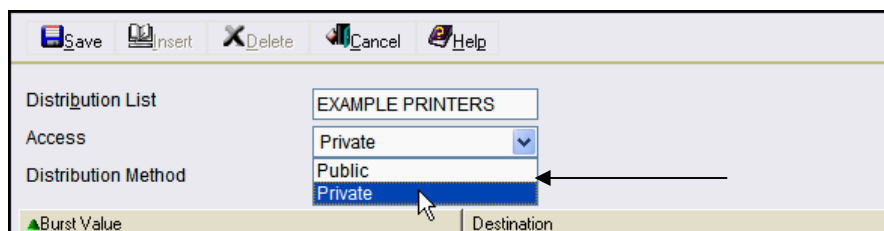
1. In WebFocus Dashboard, navigate to the "Schedule" tab, select **Distribution List** and click **New**.
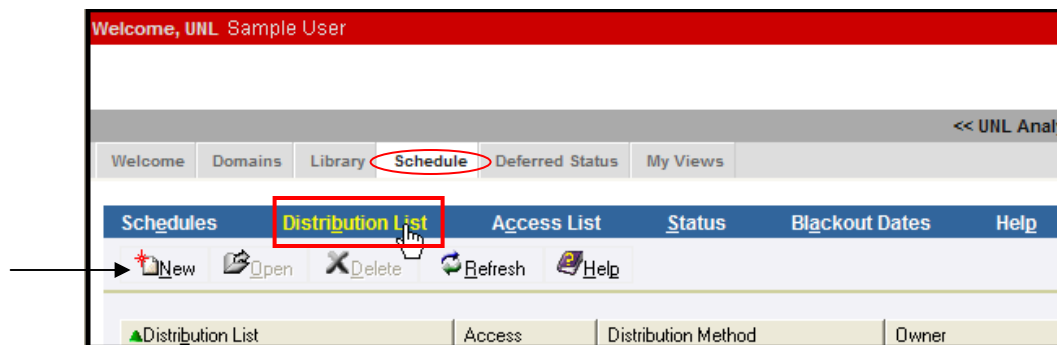
2. A new window should pop up with several boxes. Enter the name of your new distribution list in the box next to Distribution List.
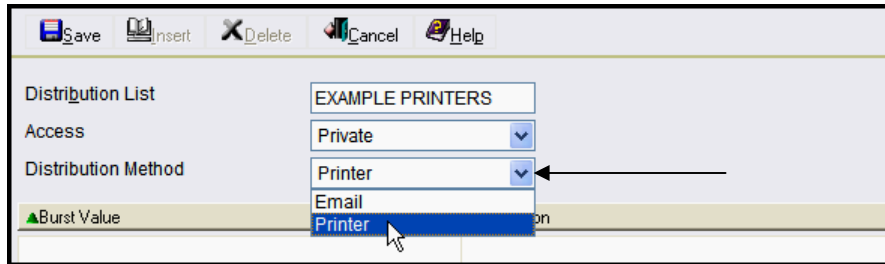

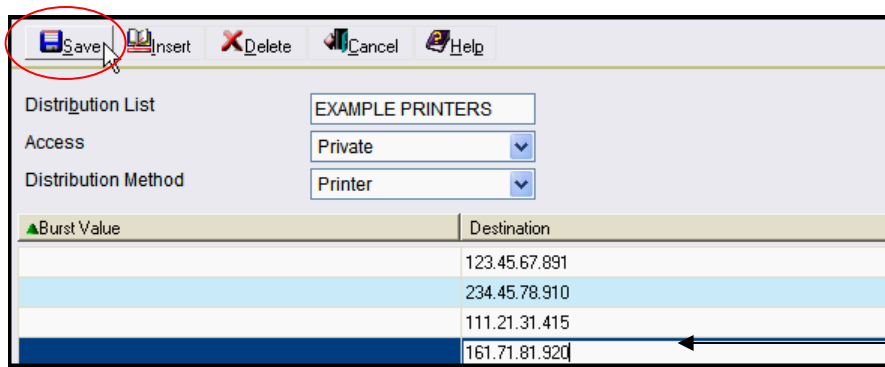3. Change the Access from "Public" to "**Private**".

4. Change the Distribution Method from "Email" to "**Printer**".

5. Under the "Destination" column, add IP addresses one at a time for printers you wish the report to be distributed to. When finished adding IP addresses, click **Save**.

After you have created your new distribution list, you can select it from the drop-down box next to **Distribution List** in the Distribution section of the Scheduling tool.
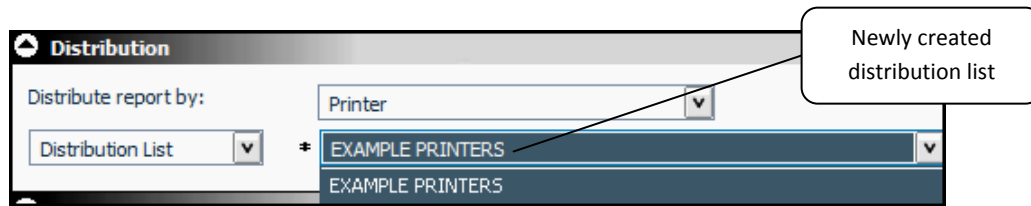
Library:

Distributing a report to one or more Dashboard libraries is perhaps the most common way to distribute a scheduled report. When choosing **Library** as the distribution setting, several more settings and information boxes appear regarding how and to which libraries the report is sent to.

The Distribution section with the default **Library** settings.
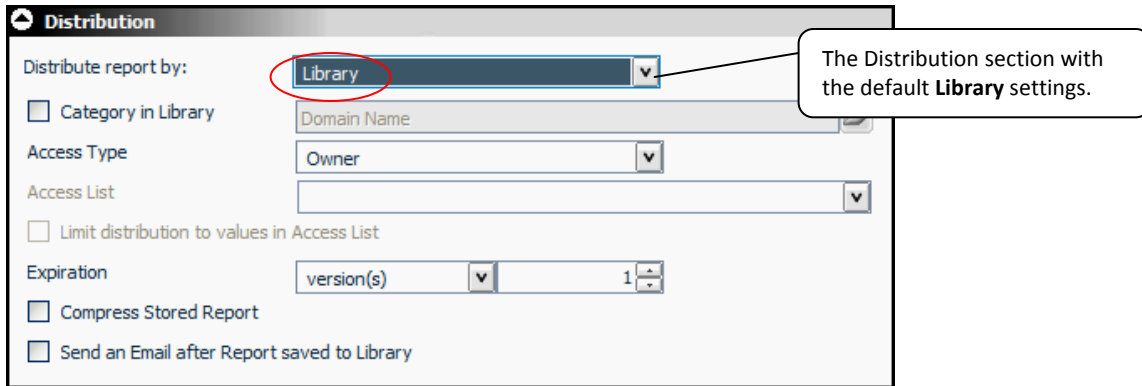
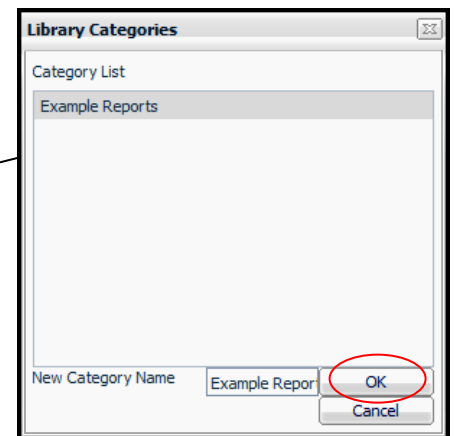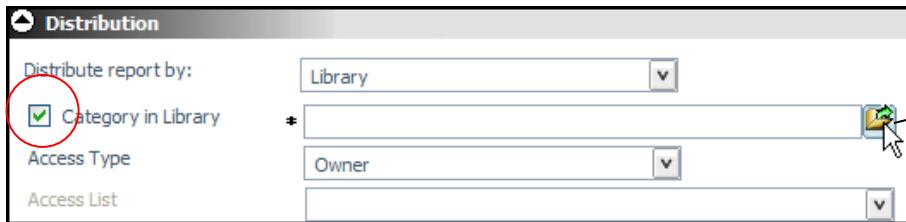**Category in Library:**

By leaving this box un-checked, the report will be distributed to a default category within the Dashboard library called "Domain Name" (see above example). If you would like a more specific destination for the report, you can check the box and select another category.
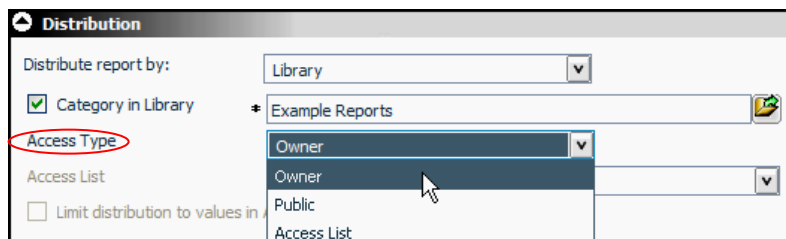

After checking the box, you will be required to select a category by clicking on the folder icon. This will open a screen for you to either choose a category, or create a custom category name. Once selected, click **OK** to set.

Access Type:

Access Type indicates who will have access to this report. The default setting is "Owner", meaning that you alone have access and it will be distributed only to your library. The "Public" option is <u>never</u> to be used. The final option for access type is "Access List". Access List allows you to distribute the report to a list of recipients you choose. When creating an Access List, you must contact your WebFocus Administrator (Steve Booton, UNL Campus).

Expiration:

The **Expiration** setting allows you to indicate how long the report will be available in a library. Setting expiration will delete unwanted reports after they have expired. The default expiration is set to save one version of the report. When another version is created, the old one will be deleted. Settings other than "version(s)" include: "Never Expire", "days", "weeks", "months" and "years".

> To change the number of versions you want the library to save, simply click the arrow boxes next to the number.
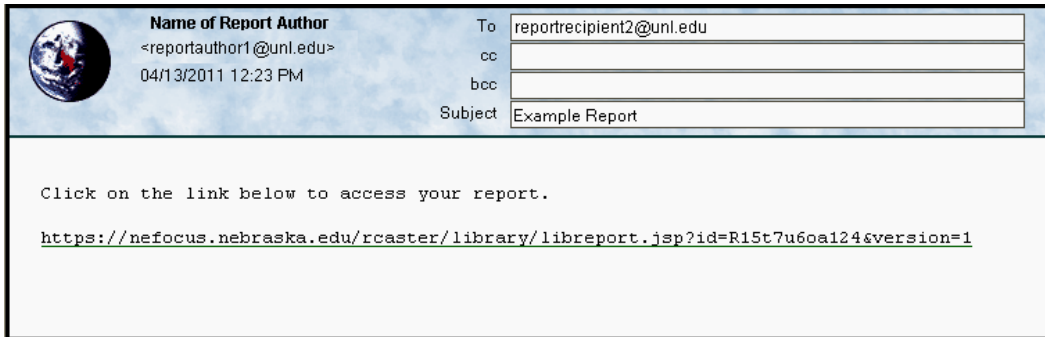
To change the Expiration to another setting, select one from the drop-down box. If you choose "Never Expire", the reports will remain in a library until they are manually deleted. The time-sensitive options will delete the report after the specified number of days, weeks, months or years.

> If you choose any of the time-sensitive options, you will be required to specify the number in the same manner you chose the number of versions.

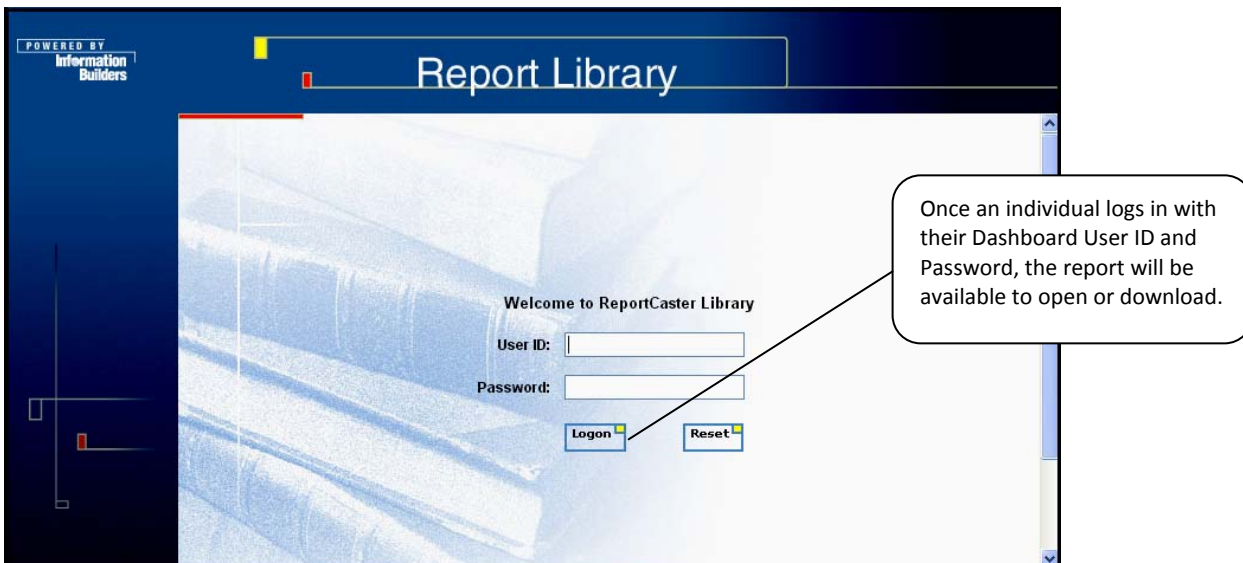**Send an Email after Report saved to Library:**

If this box is checked, an email notification will be sent out after the job has been run and the report has been saved to a library in Dashboard. This email will contain a link to the report and depending on the Access setting, will be sent either to you (Owner), or the individuals included on your Access List.

> The highlighted text indicates areas to fill in when setting up the email that will be sent out.

> "**From**" will appear as the sender of the email.

> "**Reply Address**" is the address of the person in the "From" line.

> "**Subject**" will appear in the subject line of the email.

> "**Message**" is the text that will appear above the link in the email.

A resulting email may look like this:

Clicking the link will open up a browser and take you to this screen:

Once an individual logs in with their Dashboard User ID and Password, the report will be available to open or download.
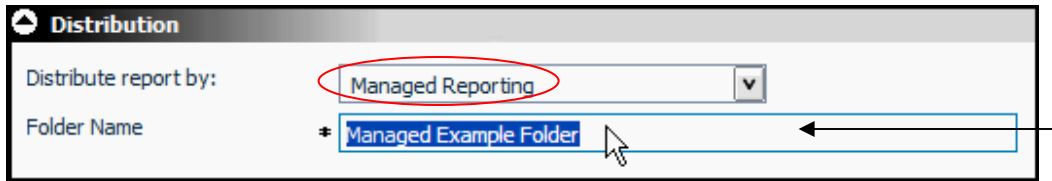
View Report in Library:

To view a report in your Dashboard library, simply click on the **Library** tab in Dashboard and select the category folder and your report should be inside.
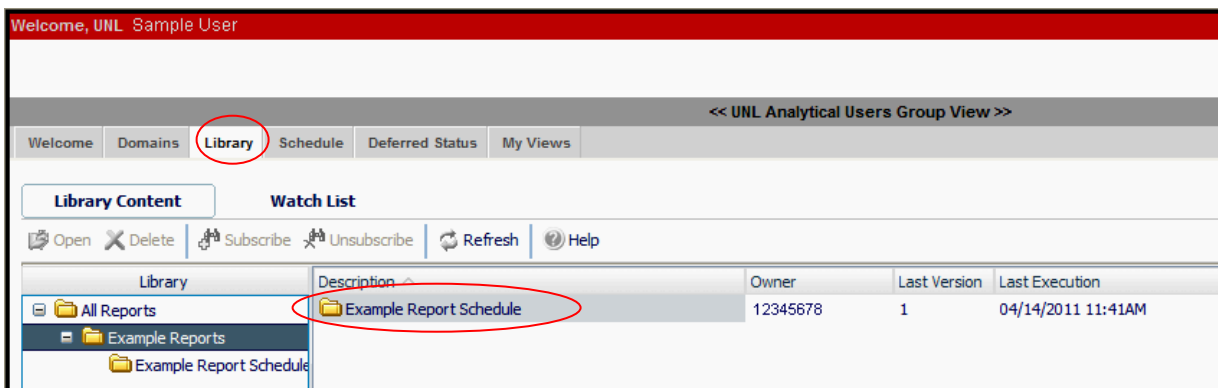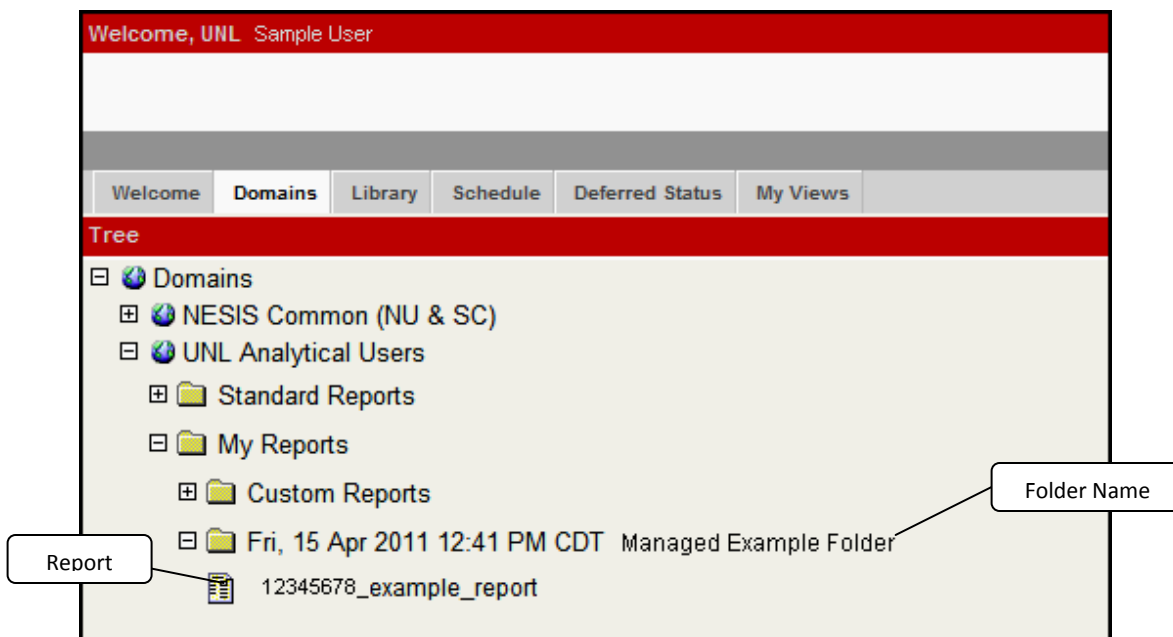
Managed Reporting:

The third distribution setting is **Managed Reporting**. This setting sends your report to a folder under "My Reports" in Dashboard with a folder name you specify on the Scheduling tool. To specify a **Folder Name**, simply type it into the box:

Here is an example of how to locate your report distributed by Managed Reporting:

Frequency

The second component that is key to scheduling reports is Frequency. Setting the frequency determines how often your job will run, at what intervals, and at what times. The Frequency component has several settings for **Run Interval**, but this document will only detail those most commonly used. The selected Run Interval option will determine what other frequency-related settings will be required.

Run Interval: "Once"
The default interval is "Once", meaning that unless otherwise specified, the report will only run one time. The day and time for the scheduled run will initially default to the current time. To indicate a different day or time you want the job to run, you will have to change the settings next to **Start Schedule**.

Run Interval: "Weeks"
To have the report run every week or several weeks, select "Weeks" from the drop-down box next to **Run Interval**.

Selecting the Run Interval to "Weeks" will change the Scheduling tool's Frequency view to the following:

Start and **End Schedule** indicate when the report will start and quit and will function the same as in the above example.

Clicking the up/down arrow buttons changes the number of weeks between each scheduled report.

Indicate which day(s) of the week you want the report to run by selecting one or more of the checkboxes.

Run Interval: "Months"
Selecting the Run Interval "Months" will schedule your report to run in specific months, on certain days of the month, and/or every so many months. The Scheduling tool's Frequency view will change to this:

Start and **End Schedule** function exactly the same as in the above example.

Same as above, except with **months** instead of weeks.

"**Days**" is the default selection allowing you to click on days on the calendar to indicate on which days the report will run.

"**The**" option allows you to specify the days in another way. (Ex: the second Monday)

Report Options

The Report Options component of the Scheduling tool relate to how the report will be formatted, the user's scheduling credentials, and the Parameters and respective Parameter values. It is important to note that the formatting function of Report Options is dependent on which Distribution Option a user selects (i.e. Printer vs. Library and Managed Reporting). The default settings for Report Options appear below.

Send the Report in this Format:

This setting determines how the report will be formatted. A report can be formatted as a text document, an Excel spreadsheet or an XML file just to name a few. There are many variations to formatting when distributing reports to a library or using managed reporting. However, as mentioned above, the choices in this drop-down box are different for reports being distributed to a printer. The printer formatting options are limited to only the following:
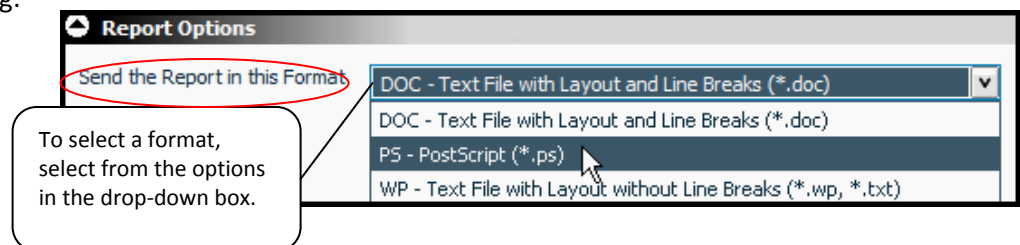
DOC – will format the report as non-formatted text
PS – most likely option, has formatting (only used when report is to be a PDF file)
WP – very similar to DOC

Note: This limited list of formats is only applicable to printer distribution. Library and Managed Reporting have a much longer, extended list of format options.

Execution ID:

Execution ID refers to the ID number for the individual that will be associated with the scheduled report. The Execution ID may appear in red with an error message the first time a user schedules a report. To correct this, type in your NU ID and click "Set Password".
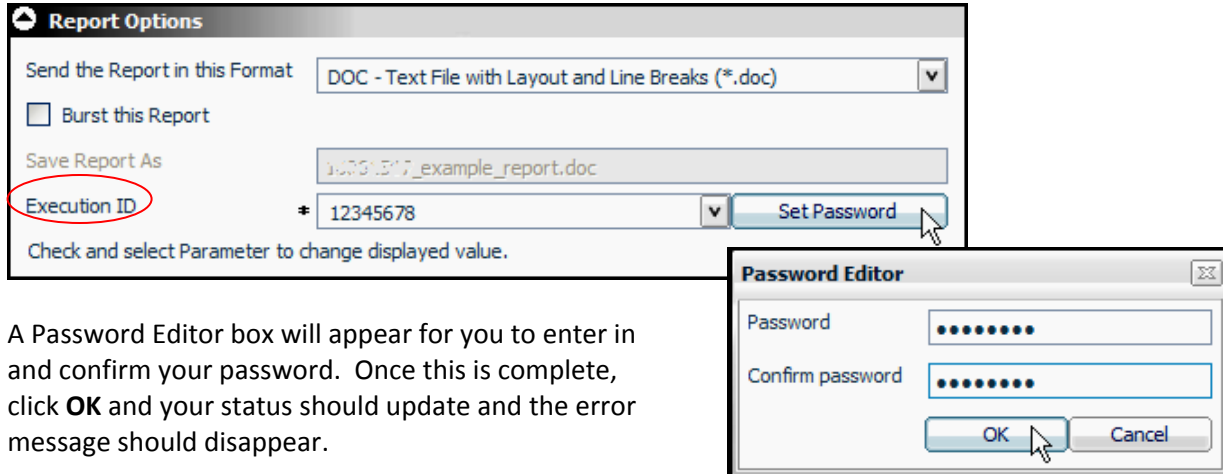

A Password Editor box will appear for you to enter in and confirm your password. Once this is complete, click **OK** and your status should update and the error message should disappear.

Parameter Name/Value:

This section will contain the text you've set as your filter(s)'s prompt and clicking on it will prompt you to enter the value(s) you desire for the report.
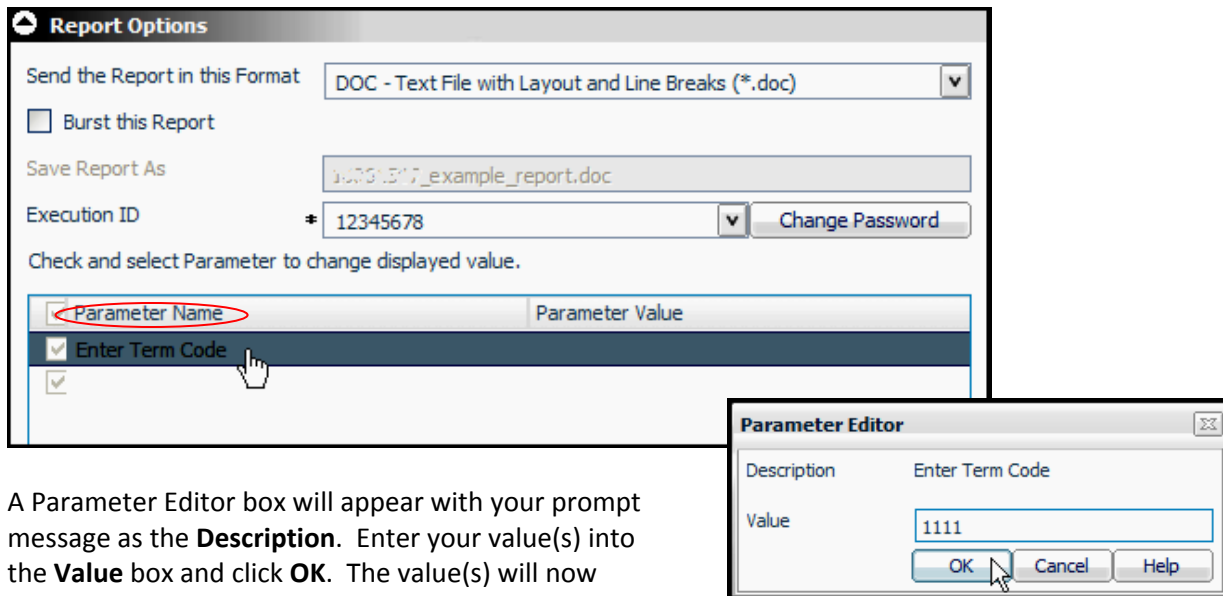
A Parameter Editor box will appear with your prompt message as the **Description**. Enter your value(s) into the **Value** box and click **OK**. The value(s) will now appear under "Parameter Value".
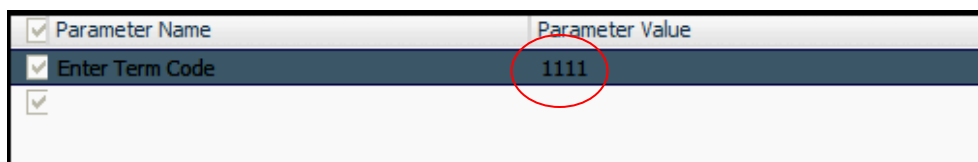
Notification

Notification is the component of the Scheduling tool that allows you to schedule an email to be sent out notifying you or someone else that the job ran. In addition, you can specify where you want the notification sent, under what circumstances, and whether you want a brief or full notification. The main options for notification can be seen in the drop-down box below:
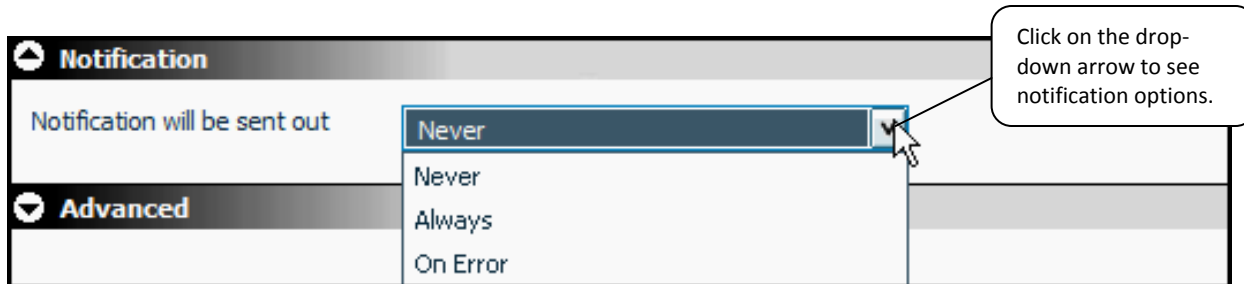
Notification Options:
There are three different options for Notification: "Never", "Always", and "On Error".

Notification: "Never"
"Never" is the default option for notification. Unless you change this option, you will never receive an email notification regarding your scheduled job.

Notification: "Always"
When "Always" is selected, an email will be sent out to you or whomever you specify with details about the scheduled job every time the process is run. This means that regardless of whether there were errors or it was successfully completed, you will be notified when the process is finished. When "Always" is selected, a new set of information will need to be inputted to confirm notification type and email destinations.

Notification: "On Error"
"On Error" is a common setting for notification options. This means that an email will only be sent out in the event of an error occurring during the process of running the query. As with "Always", the "On Error" option will require you to fill in several other information boxes about the notification (as can be seen in the next example).

Additional Notification Settings:

When using notification options "Always" or "On Error", one must also indicate the type of notification, the email address of the individuals receiving the notification, the address that they can reply to, and the Subject line of the email.
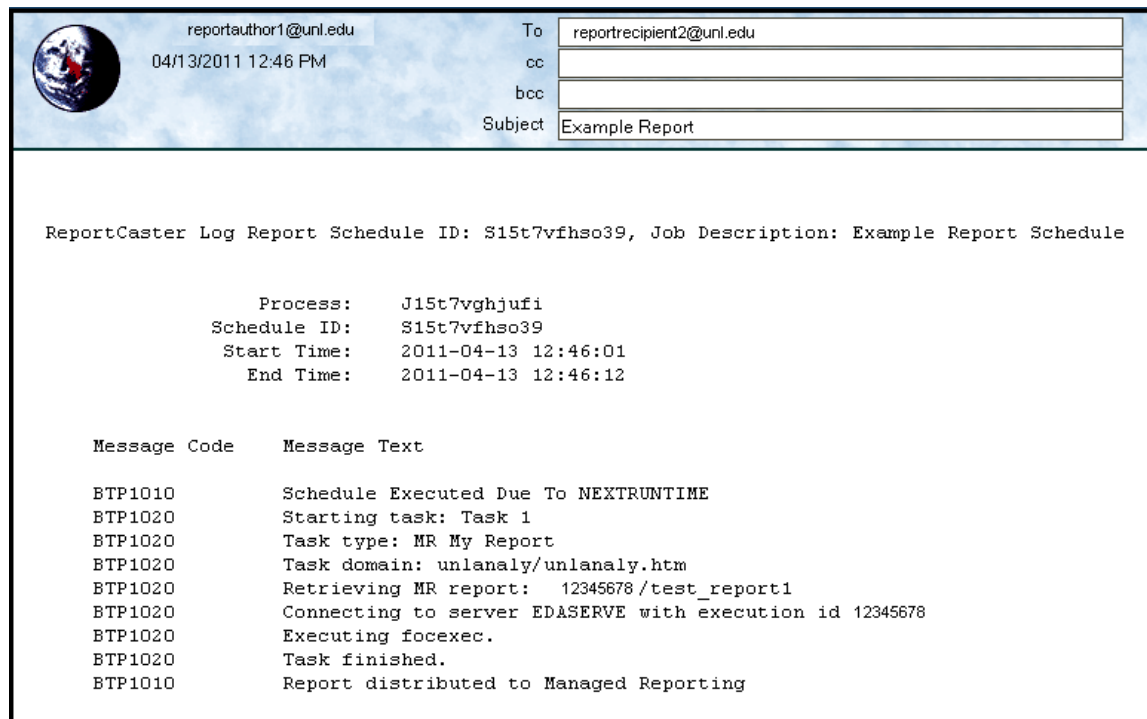
Notification Type:

One can either choose to have a "Full Notification", a "Brief Notification", or a "Full & Brief Notification".
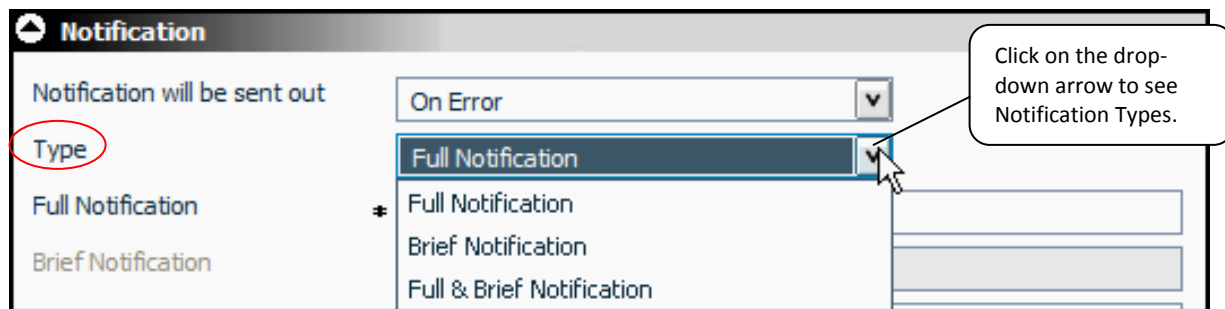
Full Notification:

A "Full Notification" email contains a large amount of information about the job that was run. A full notification may look similar to the following:

To schedule a Full Notification, select it from the drop-down box, and insert the email address of the recipient in the box next to **Full Notification** and an address for this individual to reply to if necessary (often the address of the report author). Finally, specify your text in the box next to **Subject** or leave it in its default form.

Brief Notification:

A "Brief Notification" contains some of the same information as a Full Notification, but collapses much of it into a format that just highlights the essential information. A Brief Notification may look like this:

The steps involved in scheduling a Brief Notification are very similar to those of a Full Notification:

Full & Brief Notification:

This option sends out notifications of both types, either to the same individual, or to different individuals. The example below shows a report scheduled to send a Full Notification to the author of the report (You), and a Brief Notification to another individual.
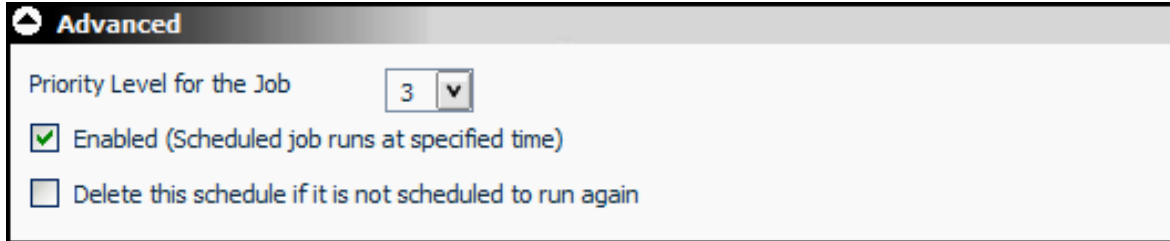
Advanced

Advanced is the final component to consider when scheduling a report. The Advanced default settings will most likely remain unchanged for most scheduling purposes.

Priority Level:
Priority Level has a range from 1 to 5. *Always* leave your priority setting at "3".

Enabled/Disabled:
This box enables the job to run on the schedule that you set up. Scheduling will be enabled by default unless you click this box to remove the checkmark. This disables the schedule but does not delete what has been set up and saved.

Delete:
By checking this box, you are setting the Scheduling tool to delete the schedule you set up after the job has run all of the scheduled processes. If the schedule expires, it will be deleted. If this box remains unchecked, the scheduling settings will not be deleted.
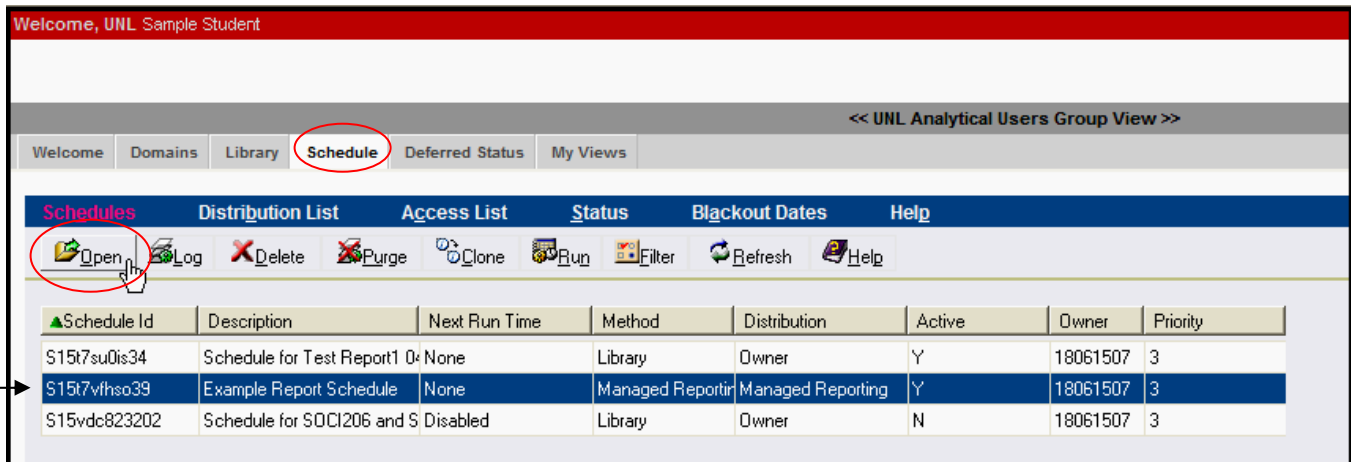
Additional Information

Once you have set up your Scheduling tool to run your process, you can click the [Run ▼] icon at the top of the scheduling tool to run a report. This is helpful for testing.

When you've finished confirming all of the scheduling settings, you need to click the [Save ▼] icon to save your scheduled process. If the Start Schedule is set to the current time, the job will run immediately after you save.

Edit:

To go back and edit your saved schedule, click on the **Schedule** tab, select the schedule you want to edit and click **Open**. You may need to disable the pop-up blocker on your browser for the saved schedule to appear for editing.

Welcome, UNL Sample Student

<< UNL Analytical Users Group View >>

| Welcome | Domains | Library | Schedule | Deferred Status | My Views |

Schedules   Distribution List   Access List   Status   Blackout Dates   Help

Open   Log   Delete   Purge   Clone   Run   Filter   Refresh   Help

▲Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S15t7su0is34	Schedule for Test Report1 0	None	Library	Owner	Y	18061507	3
S15t7vfhso39	Example Report Schedule	None	Managed Reportir	Managed Reporting	Y	18061507	3
S15vdc823202	Schedule for SOCI206 and S	Disabled	Library	Owner	N	18061507	3