

Scheduling Business Objects Web Intelligence Reports

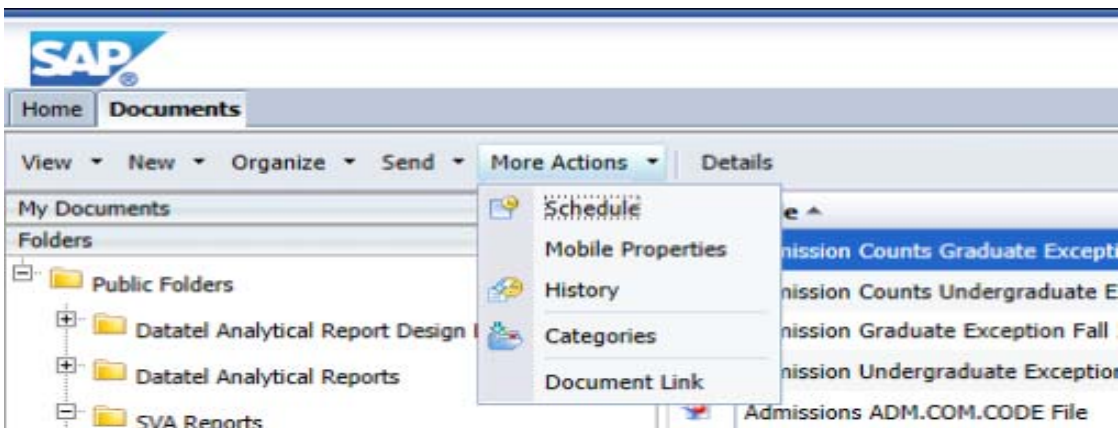
Introduction

Scheduling Business Objects (BO) Web Intelligence (WebI) reports allows you to run reports automatically at specified times. When you schedule a report you choose the recurrence pattern that you want, for example daily or weekly. You also specify additional parameters to control when and how often the report will run. When you schedule a report, the system creates a scheduled instance of the report. A scheduled instance appears in the “**History**” dialog box of a report with a status of “**Recurring**” or “**Pending**”.

Scheduling a Web Intelligence (WebI) Report

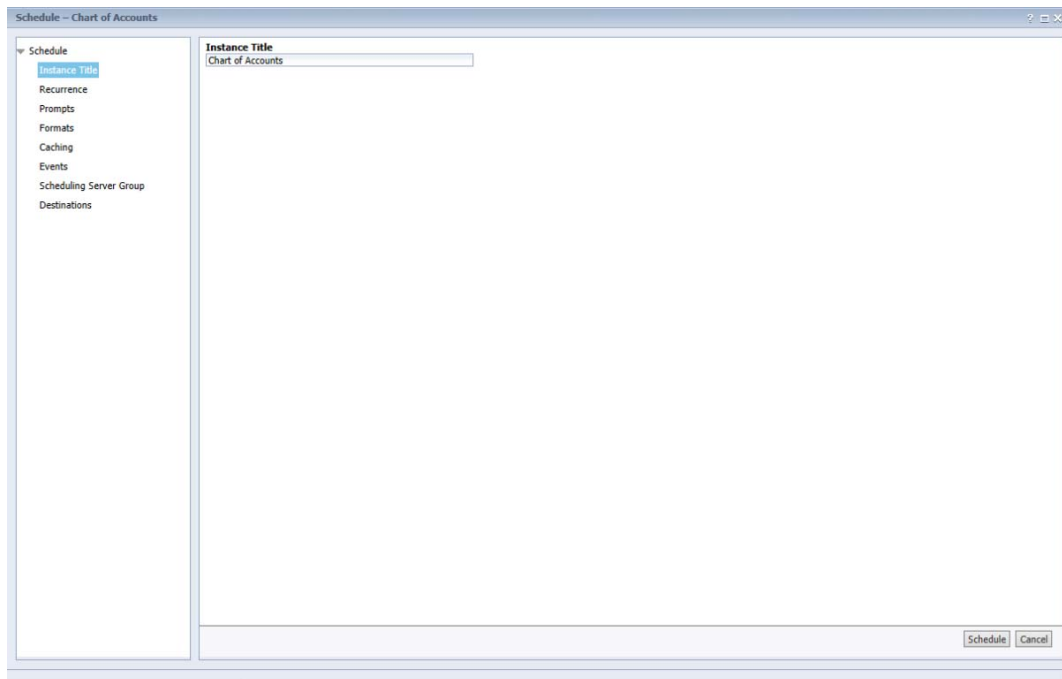
Step 1. Go to the folder that contains the report you want to schedule.

- Select the report to schedule
- Click the “**More Actions**” button then select “**Schedule**”.



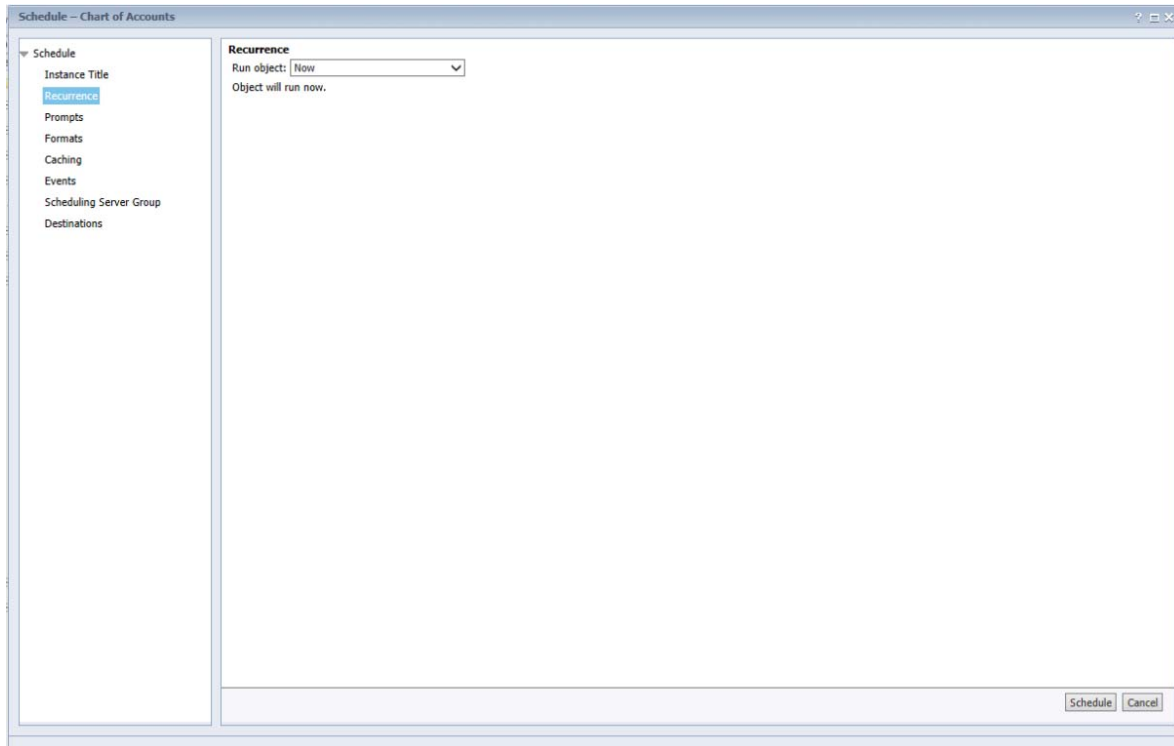
NOTE: You may also right click on the name of the report and select “**Schedule**” from the shortcut menu.

The “Schedule” page appears as displayed below.



NOTE: The “Instance Title” field is pre-populated with the title of the report and is modifiable.

Step 2. Click “Recurrence”. The “Recurrence” page is displayed.



The recurrence page is used to specify a schedule for running the report. The “**Run object**” drop down list has the following recurrence patterns:

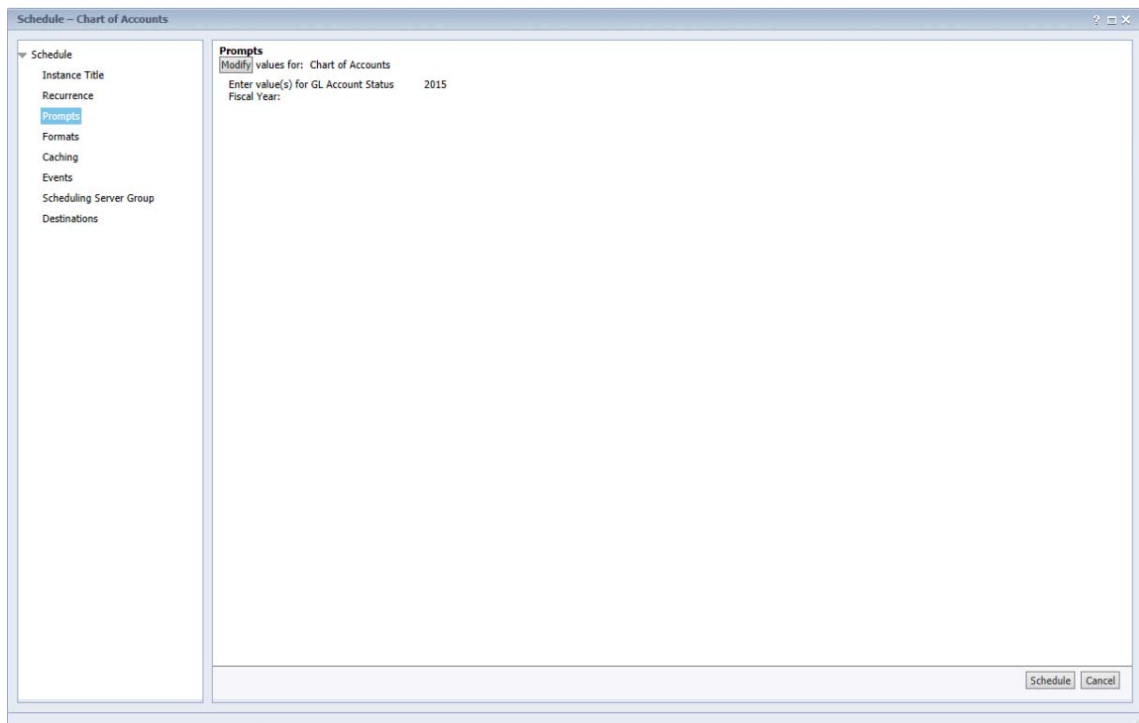
- **Now** - The report runs as soon as the “**Schedule**” button is clicked.
- **Once** - This option requires a start and end date/time parameter. The report runs only once at the time you specified.
- **Hourly** - This option requires information in hours and/or minutes for how frequently the report is run.
- **Daily** - This option requires a start and end date/time parameter and runs the report once every N days at the time specified.
- **Weekly** - This option requires a start and end date/time parameter. The report runs each week on the selected day(s) and at the time specified.
- **Monthly** - This option requires a start and end date/time along with a recurrence interval in months. The report runs on the specified date and time every N months;

that is, the report will run every month or every several months on the date and time specified.

- **Nth Day of Month** - This option requires a day of the month on which the report is run. The report runs each month on the day and start time specified.
- **1st Monday of Month** - This option requires a start and end date/time parameter. The report runs on the first Monday of each month at the time specified.
- **Last Day of Month** - This option requires a start and end date/time parameter. The report runs on the last day of each month at the time specified.
- **X Day of Nth Week of the Month** – This option requires a start and end date/time parameter. The report runs monthly on a day of a week specified.
- **Calendar** - This option allows you to select a calendar of dates to run the report. Please note that calendar dates are created by the system administrator.

Step 3. Select the desired run option and the start and end date/time parameters.

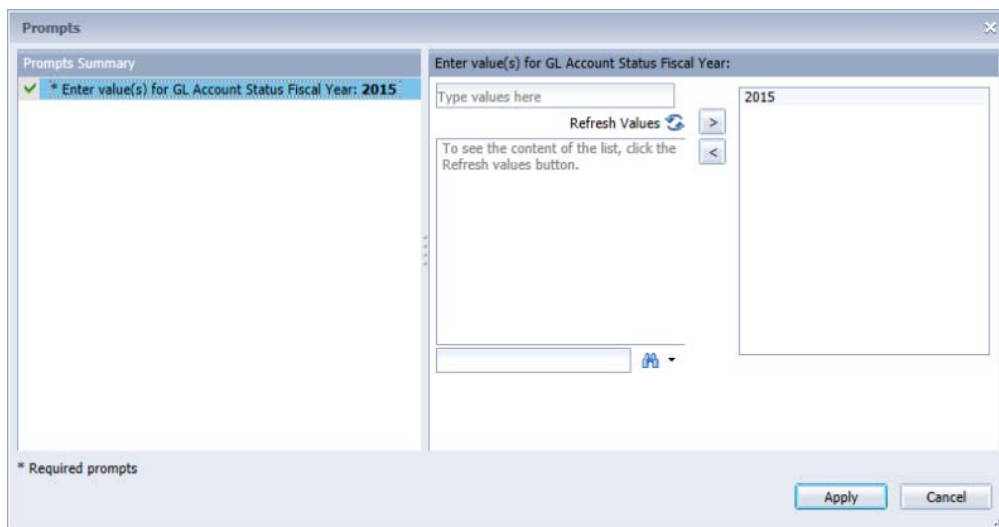
Step 4. Click on “**Prompts**”. The “**Prompts**” page appears as displayed below.




NOTE: Some reports use the prompt feature. This feature prompts you to enter information to determine what data appears in the report. In the screen above there is a prompt for the fiscal year.

To Modify the Prompt Value:

- Click on the **“Modify”** button. The prompt dialog box is displayed as shown below.

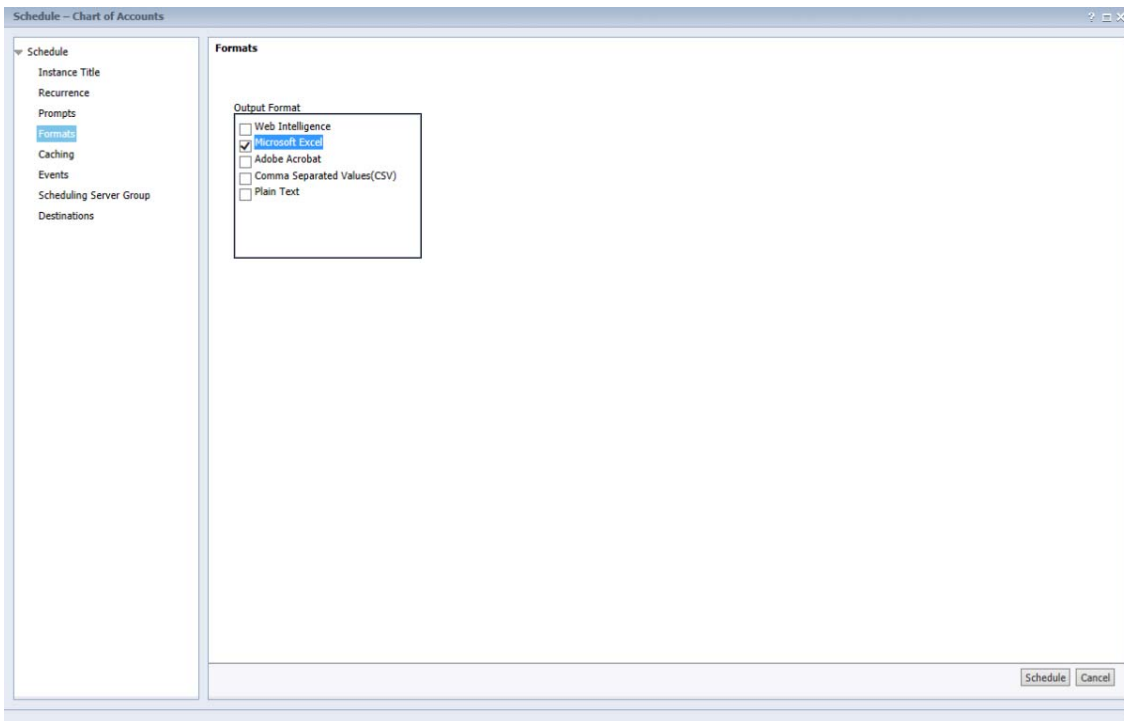


- Use the  and  arrows to add and remove the value(s).

NOTE: You may have to click **“Refresh Values”** to see a listing of values.

- Click **“Apply”** to save changes.

Step 5. Click **“Formats”**. The **“Formats”** page is displayed as shown below.



Step 6. Select the desired report output you which to schedule the report to by clicking the check box next to the desired output format.

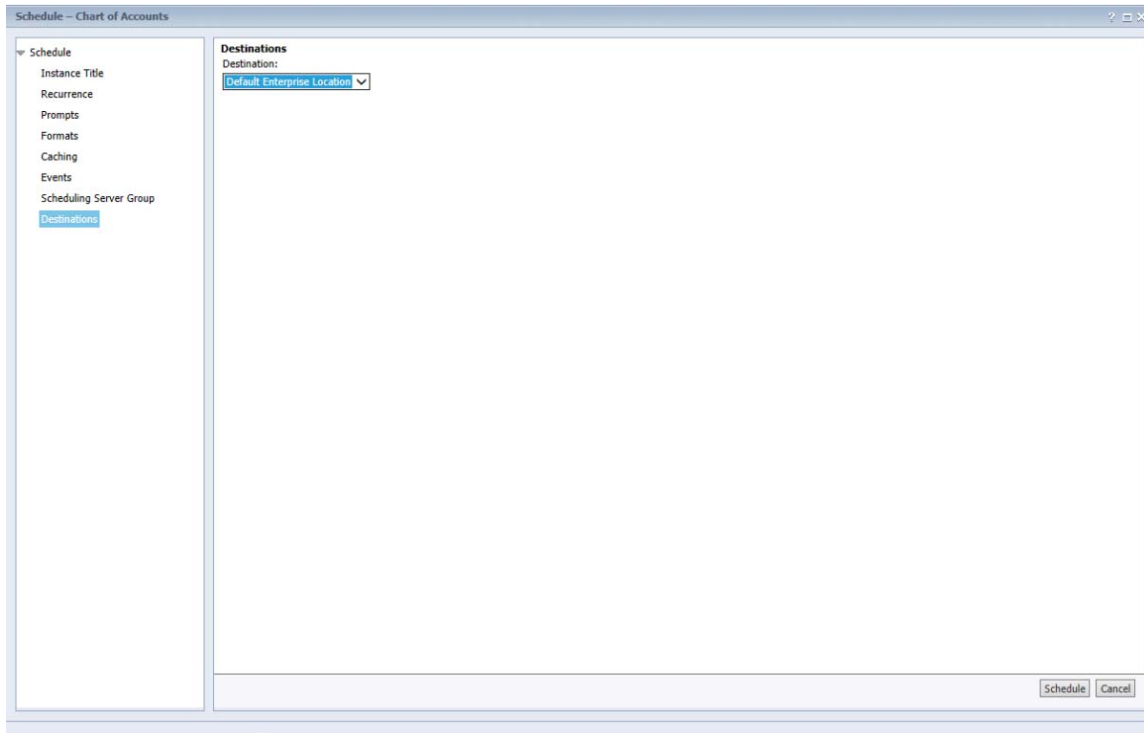
Report Formats

There are four report output formats in which the report can be saved when it is generated:

- Web Intelligence
- Microsoft Excel
- Adobe Acrobat
- Comma Separated Values (CSV).

NOTE: Web Intelligence output format works only for the Inbox output destination.

Step 7. Select “Destinations”. The “Destinations” page is displayed as shown below.



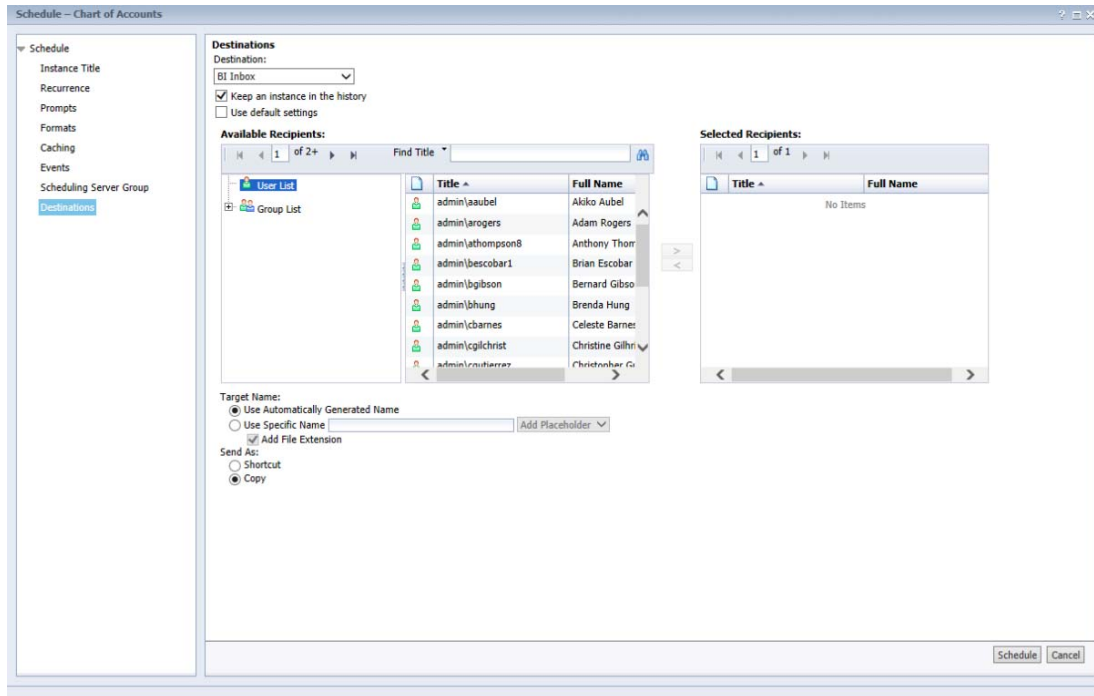
Step 8. Select an output destination for the scheduled report from the drop down list.

Output Destinations


The options to be used:




- **BI Inbox** - The report is sent to the WebI Inbox specified.
- **File location** – This option requires a shared file location, if you department has one.
- **Email** – The report is sent as an attachment to the email addresses specified.

If you chose **BI Inbox** as the report destination the following screen will be displayed.

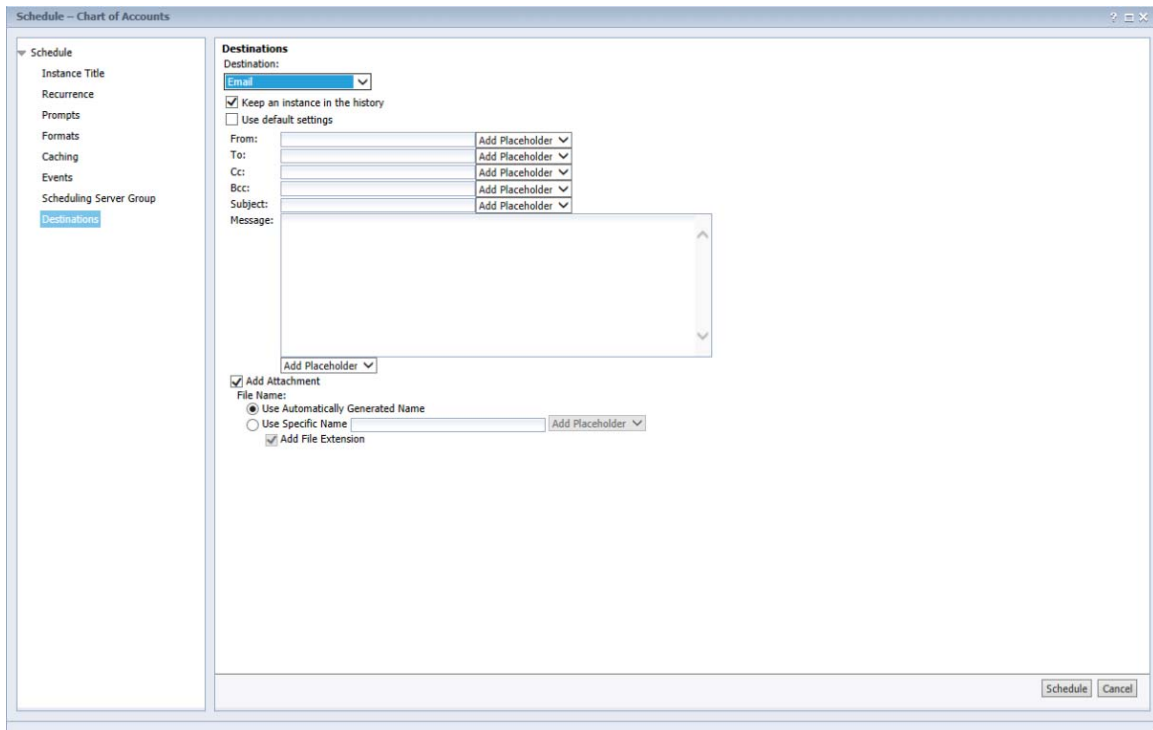


To Schedule a report for the Inbox destination:

- Navigate to and select the users or groups from the “**Available Recipients**” panel.
- Click  to add them to the “**Selected Recipients**” panel.
- Choose a name for the report by selecting “**Use Specific Name**” and enter the name in the text box provided or select “**Use Automatically Generated Name**” to let WebI generate a name.
- Choose whether to send a copy of the report by selecting “**Copy**” or to send a shortcut to the report by selecting “**Shortcut**”.

NOTE: You can click the  to add all the available recipients and  or  to remove the selected or all recipients.

If you chose email as the report destination the following screen will be displayed.



To schedule a report for emailing to recipients:

- Enter the return email address in the “**From**” area.
- Type the email addresses to which you would like to send the report in the “**To**” area. Separate multiple email addresses with semicolons.
- Type the email address to which you would like to send copies of the report in the “**Cc**” area. Again separate multiple email addresses with semicolons.
- Type the email address to which you would like to send copies of the report in the “**Bcc**” area. Again separate multiple email addresses with semicolons.
- Type the subject of the email in the “**Subject**” area. You may also select variables to be included in the subject from the list beside this field. The variables you can add include are:
 - i. The report’s title
 - ii. The report’s ID
 - iii. The report owner
 - iv. The date and time
 - v. Your email address
- Click the “**Add Attachment**” checkbox to add the report to the email as an attachment.
- Click the “**Add File Extension**” check box to add a file extension to the report.

- In the message area type the message that will appear in the body of the email. You can also add variables to the body of the email.

NOTE: WebI can automatically generate the name of the report by selecting “**Automatically generated**”. To specify a name for the report select “**Specific name**” and type the report name in the area provided. You can also add variables to the report name.

NOTE: Select the “**Clean up instance after scheduling**” if you would like to delete the report from the server after it runs and is sent to the destination(s).

NOTE: You may omit the “**Caching**” option at this time. This option allows you to cache the report on the server.

NOTE: You may omit the “**Events**” option at this time. This option allows you to schedule a report to run only after a specified event occurs.

NOTE: You may omit the “**Scheduling Server Group**” option at this time. This option is used to select the server group that the system uses to run the report.

Step 9. Click “**Schedule**” at the bottom right of the screen. The system will run the report according to the schedule information you specified.

Viewing Scheduled Report Instances

You can view the scheduled instance of the report on the “**History**” page for the report. In order to see the history of the scheduled report:

Step 1. Go to the folder that has the report and select the report.

Step 2. Click “**More Actions**” and select “**History**”.

NOTE: You may also right click on the name of the report and select “**History**” from the shortcut menu.

To view a report instance:

- Click the desired link under the “**Instance Time**” column. The report will open in a viewer that corresponds to the report type.

To delete a scheduled report:

- Select the report that you want to delete.
- Click **“Organize”**
- Select **“Delete”**



To pause a scheduled report:

- Select the scheduled report you want to pause.
- Click **“More Actions”**
- Select **“Pause”**

To resume a scheduled report:

- Select the paused report you want to resume.
- Click **“More Actions”**
- Select **“Resume”**

NOTE: Pause and resume can only be applied to scheduled reports; that is, they can be applied only to reports that have a status of **“Pending”** or **“Recurring”**.

NOTE: You can use the **“Pause”**  and **“Resume”**  icons to pause and resume a scheduled report.

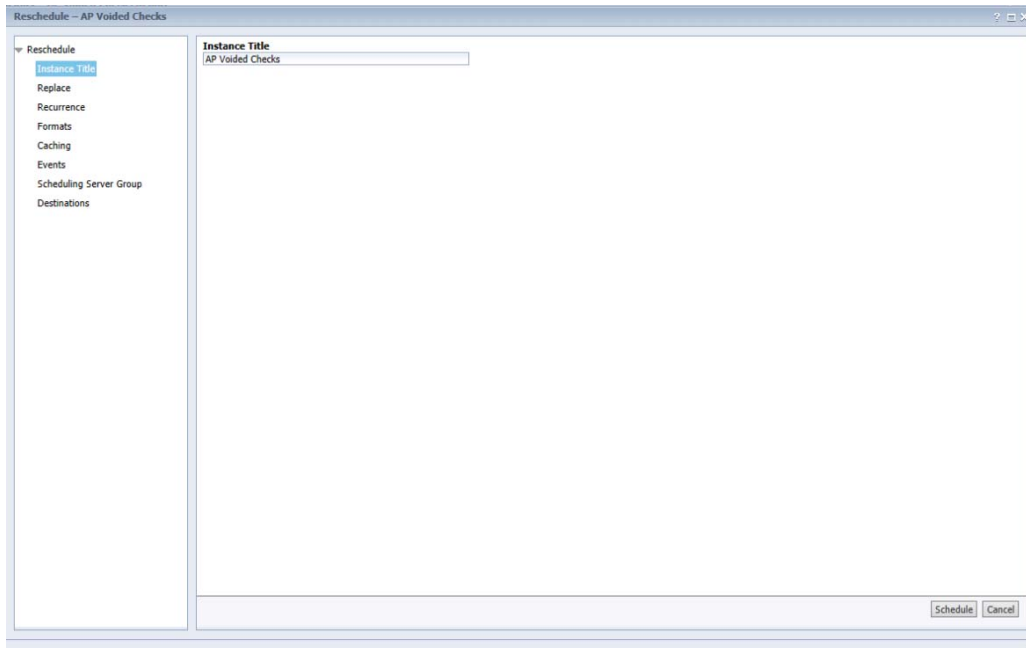
NOTE: You can use the **“Instance Details”** icon  to view the details of a scheduled report.

Rescheduling Reports

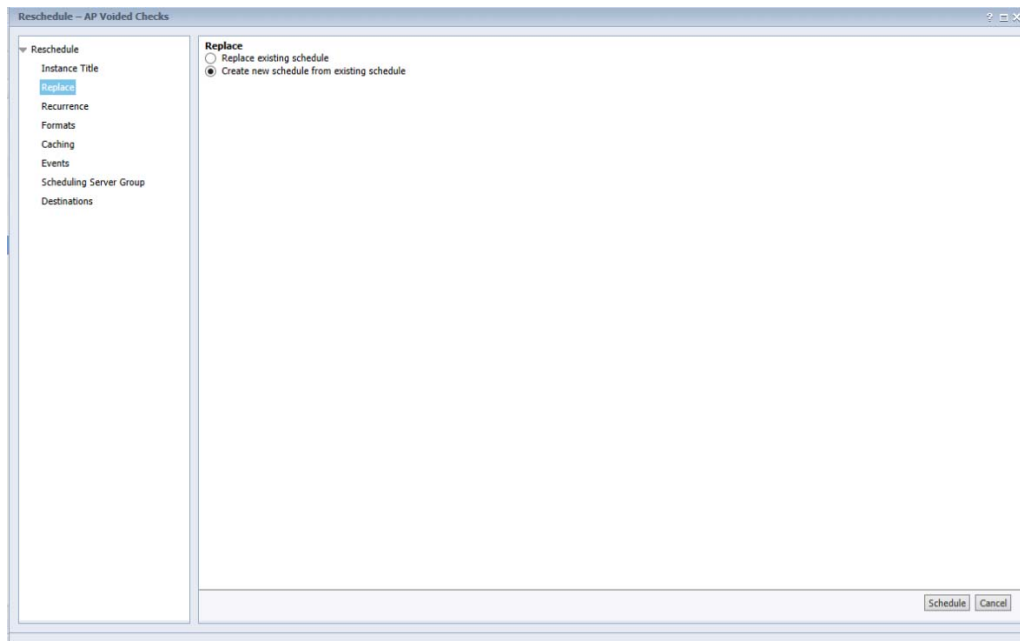
You may reschedule an existing scheduled report.

To reschedule a report:

- Select the report
- Click **“More Actions”**
- Select **“Reschedule”**. The **“Reschedule”** page appears as displayed below.



NOTE: The “Reschedule” page is similar to the “Schedule” page. The only difference is the “Replace” option. Selecting the “Replace” option displays the “Replace” page as shown below.



Select the desired replace option. Make the necessary changes on the reschedule page and click the “Schedule” button at the bottom right of the screen.