

Scheduling a Report

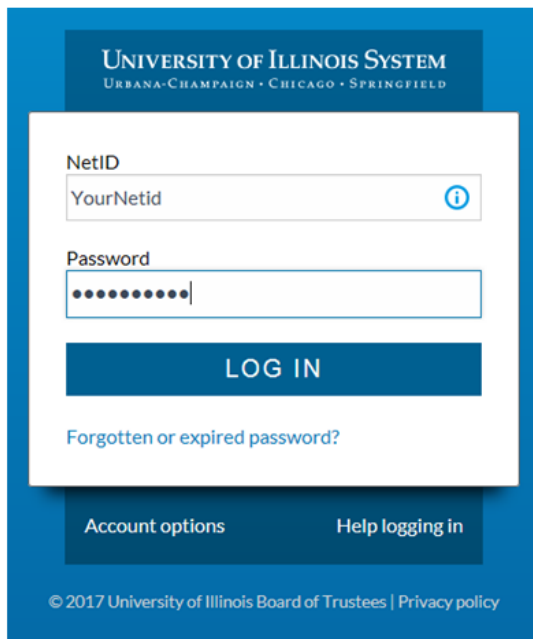
Scheduling reports to run automatically lets you automate the process of refreshing your documents and can also greatly reduce the run time by allowing you to schedule your reports to run during off-peak periods. Reports can be automatically sent to other users, or groups of users, in Web Intelligence format, or as Excel or PDF files. Note that reports must be saved to your Favorites folders in EDDIE prior to being exported.

Note:

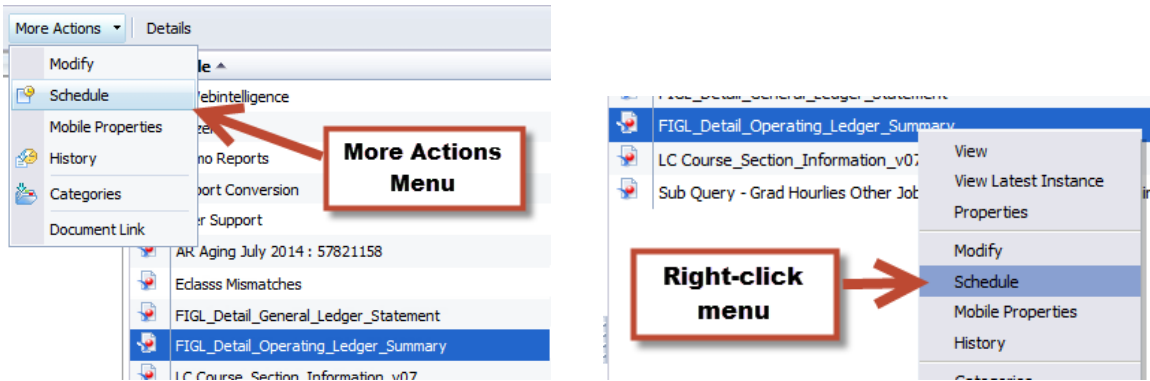
Scheduling will not work for reports that have prompt values that need to change with each refresh. When building the schedule, you are required to enter the prompt values for all prompts in the report.

Creating a Schedule

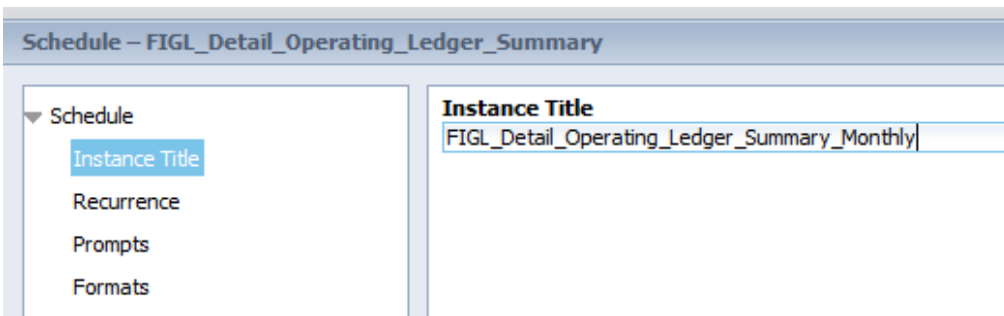
1. Go to the EDDIE login page: <https://eddie.ds.uillinois.edu/>.
2. Enter your University NetID and Password and click Log in



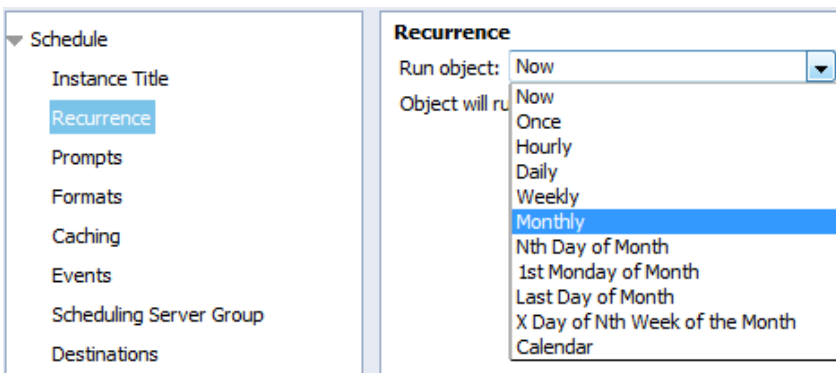
3. Click on the **Documents** tab.
4. Select the report to schedule in your **Favorites** folder.
5. Click the **More Actions** drop-down menu on the toolbar and choose **Schedule** (or right-click on the report title and choose **Schedule**)



6. Enter a title for the instance you are creating



7. Select the **Recurrence** option. The recurrence indicates how often you want to the scheduled report to run.
8. Select the recurrence frequency from the **Run Object** drop-down list.




9. Complete the remaining recurrence fields (They will vary depending on which recurrence you select).
10. Enter a **Start Date / Time** and an **End Date / Time** for recurrence.


Recurrence

Run object: Monthly ▼

Object will run every N months.

Month(N) = 1 ▼

Start Date/Time: 07 ▼ 30 ▼ AM ▼ 2/10/2015 

End Date/Time: 07 ▼ 30 ▼ AM ▼ 2/10/2025 

11. Select the **Prompts** menu. (Only available if query has prompts)
12. If you need to modify the prompt values, click the **Modify** button.

<ul style="list-style-type: none"> ▼ Schedule Instance Title Recurrence <li style="background-color: #e0e0e0;">Prompts Formats Caching Events Scheduling Server Group Destinations 	<p>Prompts</p> <p>Modify values for: FIGL_Detail_Operating_Ledger_Summary</p> <p>Enter Chart of Account: 9 - University of Illinois - Admin</p> <p>Enter FUND GL report contact: *</p> <p>Enter Fiscal Year: 15</p> <p>Enter Fund Code: 100015</p> <p>Enter ORG GL report contact: *</p> <p>Enter Organization Code: 699001</p> <p>Enter PROG GL report contact: *</p> <p>Enter Period: 06</p> <p>Enter Program Code: 699002</p> <p>VDR Date-For ViewDirect use only: (optional) *</p>
---	--

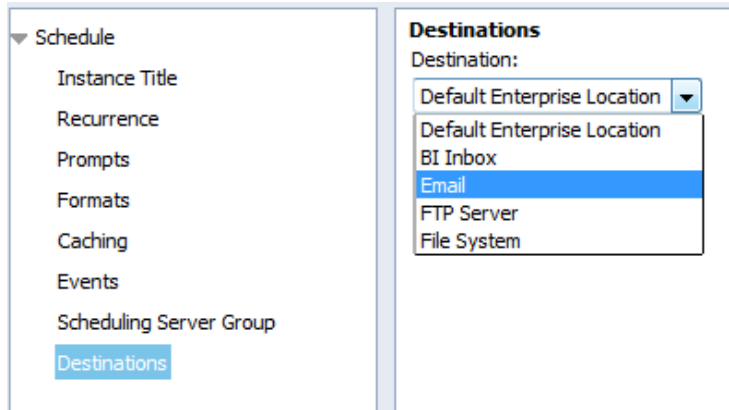
13. Select the **Formats** menu.
14. Select the desired Output Format. Options are **Web Intelligence, Excel, PDF, CSV, and Text**.

<ul style="list-style-type: none"> ▼ Schedule Instance Title Recurrence Prompts <li style="background-color: #e0e0e0;">Formats Caching Events Scheduling Server Group Destinations 	<p>Formats</p> <p>Output Format</p> <div style="border: 1px solid black; padding: 5px;"> <p><input type="checkbox"/> Web Intelligence</p> <p><input checked="" type="checkbox"/> Microsoft Excel</p> <p><input type="checkbox"/> Adobe Acrobat</p> <p><input type="checkbox"/> Comma Separated Values(CSV)</p> <p><input type="checkbox"/> Plain Text</p> </div>
---	---

Note:
Caching, Events, and Scheduling Server Groups are not enabled features. No values are required on these menus.

15. Click **Destinations**

16. Select the desired destination for the scheduled reports to be delivered to. Valid options include **BI (EDDIE) Inbox** and **Email**.



The screenshot displays the configuration interface for report destinations. On the left, a sidebar menu lists various settings: Schedule, Instance Title, Recurrence, Prompts, Formats, Caching, Events, Scheduling Server Group, and Destinations (which is currently selected). On the right, the 'Destinations' section is active, showing a 'Destination:' label above a dropdown menu. The dropdown menu is open, showing the following options: 'Default Enterprise Location' (selected in the dropdown), 'BI Inbox', 'Email' (highlighted in blue), 'FTP Server', and 'File System'.

17. For **Email Delivery**:

- a. Enter an Email address in the **From:** field.
- b. Enter the Email address(es) to deliver reports to in the **To:** field. Separate email addresses with a semicolon (;)
- c. Enter an email subject line in the **Subject:** field. Click the **Add Placeholder** drop-down to insert the report title, date and time, etc.
- d. Enter a message if desired (optional)

Destinations

Destination:
Email

Keep an instance in the history
 Use default settings

From: trishak@uillinois.edu Add Placeholder

To: bodine@uillinois.edu; cmerle@uillinois.edu Add Placeholder

Cc: Add Placeholder

Bcc: Add Placeholder

Subject: %SI_NAME% %SI_STARTTIME% Add Placeholder

Message: Monthly Operating Ledger Statement attached.

Add Placeholder

Add Attachment
File Name:
 Use Automatically Generated Name
 Use Specific Name Add Placeholder
 Add File Extension

18. For **BI Inbox** Delivery:

- a. Enter the BO User Name in the Find Title box.
- b. Click the Find Text icon.
- c. Select the user from the List of matches.
- d. Click the > to select user.
- e. To search for another user, click **User List** on the left panel, and then repeat the above steps to search and add recipients.

Destinations
Destination: BI Inbox
 Keep an instance in the history
 Use default settings

Available Recipients:
Find Title: Cmerle

Title	Full Name
cmerle	Miller, Colleen Rose

Selected Recipients:

Title	Full Name
trishak	Curry, Patricia Ann

Target Name:
 Use Automatically Generated Name
 Use Specific Name Add Placeholder
 Add File Extension

Send As:
 Shortcut
 Copy

19. Click **Schedule** to complete the schedule. (located in the bottom right corner of the window).

Destinations
Destination: BI Inbox
 Keep an instance in the history
 Use default settings

Available Recipients:
Find Title: Cmerle


Title	Full Name
cmerle	Miller, Colleen Rose

Selected Recipients:

Title	Full Name
trishak	Curry, Patricia Ann

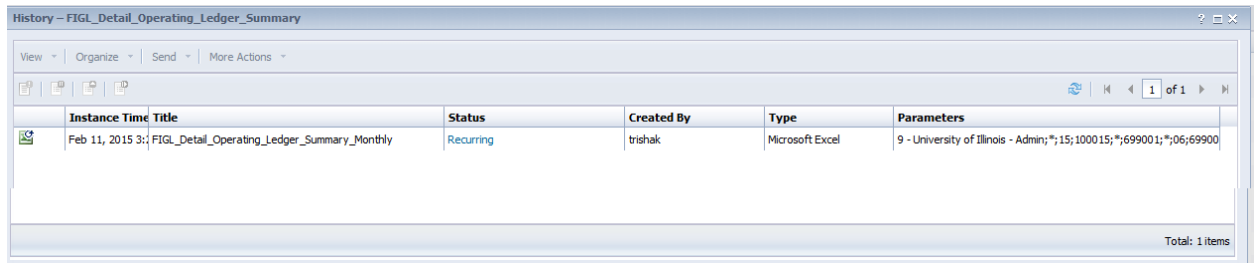
Target Name:
 Use Automatically Generated Name
 Use Specific Name Add Placeholder
 Add File Extension

Send As:
 Shortcut
 Copy



Viewing / Deleting a Schedule

1. Select the report to schedule in your **Favorites** folder.
2. Click the **More Actions** drop-down menu on the toolbar and choose **History** (or right-click on the report title and choose **History**)



Instance Time	Title	Status	Created By	Type	Parameters
Feb 11, 2015 3:	FIGL_Detail_Operating_Ledger_Summary_Monthly	Recurring	trishak	Microsoft Excel	9 - University of Illinois - Admin; *;15;100015; *;699001; *;06;69900

Total: 1 items

Deleting the Schedule:

1. Click on the Instance that shows **Recurring** in the status.
2. Click on **Organize > Delete** (or Right-click on the instance and choose Organize > Delete from the right-click menu).
3. The report will no longer be scheduled to run.

Changing Schedule Parameters:

1. Click on the Instance that shows **Recurring** in the status.
2. Click on **More Actions > Reschedule** (or right-click and choose **Reschedule**)
3. Follow the steps for creating a schedule to make changes to the schedule parameters.