

Scheduling a Report

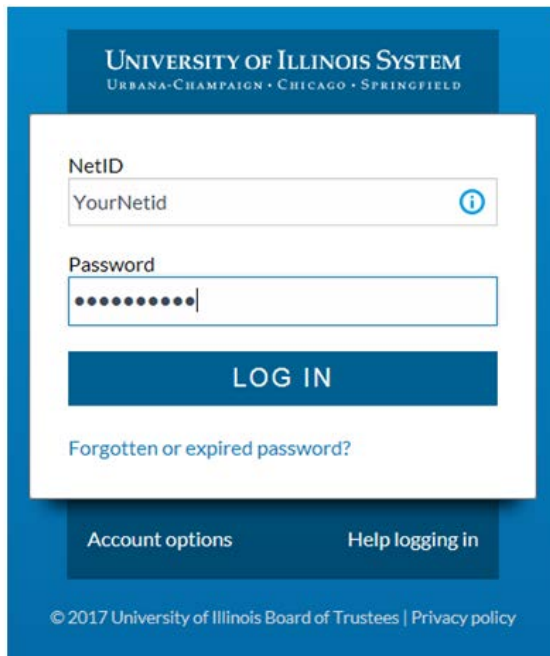
Scheduling reports to run automatically, lets you automate the process of refreshing your documents and can also reduce the run time by allowing you to scheduling your reports to run during off-peak periods. Reports can be sent to other users, or groups of users, in Web Intelligence format, or as Excel 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**)

- Enter a title for the instance you are creating

- Select the **Recurrence** option. The recurrence indicates how often you want to the scheduled report to run.

- Select the recurrence frequency from the **Run object** drop-down list.

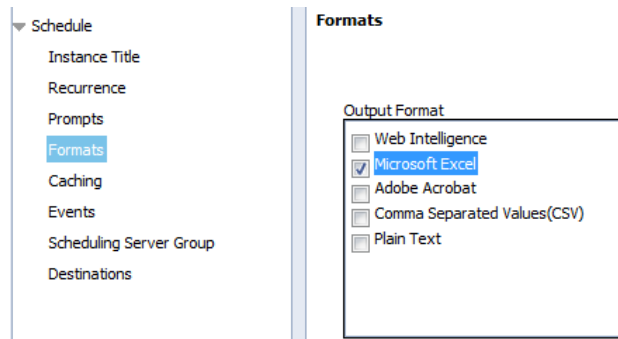
- Complete the remaining recurrence fields (They will vary depending on which recurrence you select).

- Enter a **Start Date / Time** and an **End Date / Time** for recurrence.

- Select the **Prompts** menu. (Only available if query has prompts)

- If you need to modify the prompt values, click the **Modify** button.

- Select the **Formats** menu.



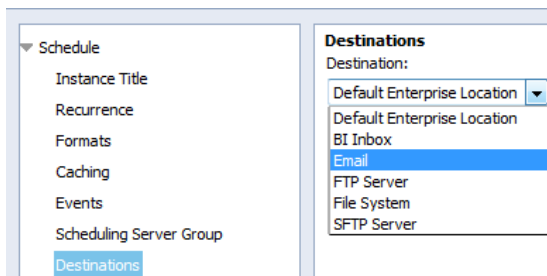
14. Select the desired Output Format. Options are **Web Intelligence, Excel, PDF, CSV, and Text.**

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**.



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:

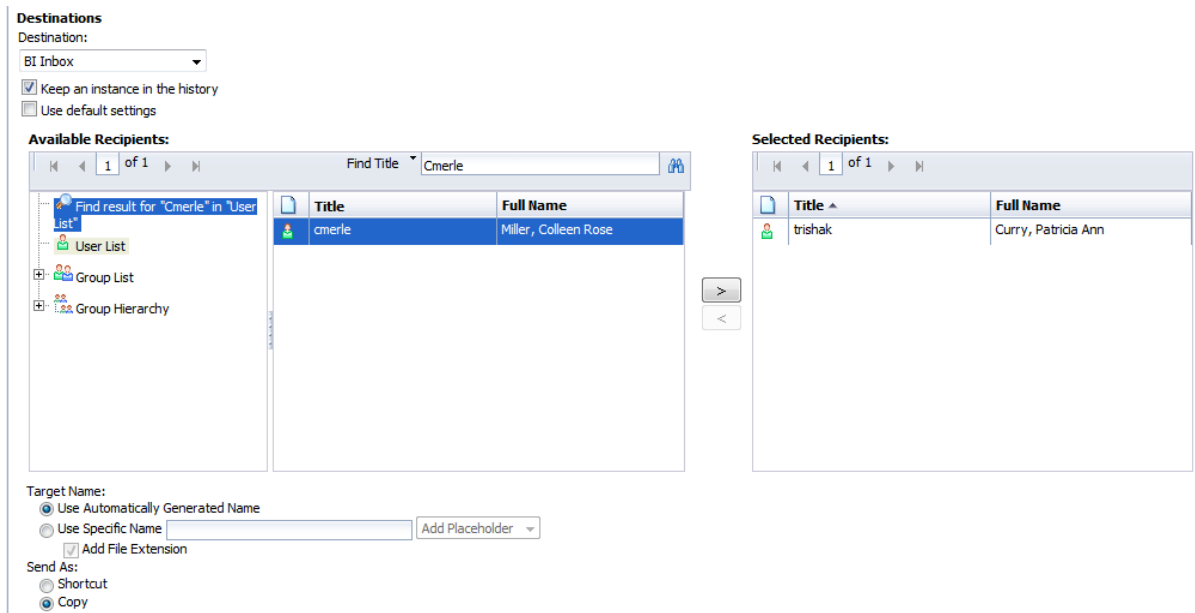
Use Automatically Generated Name

Use Specific Name Add Placeholder

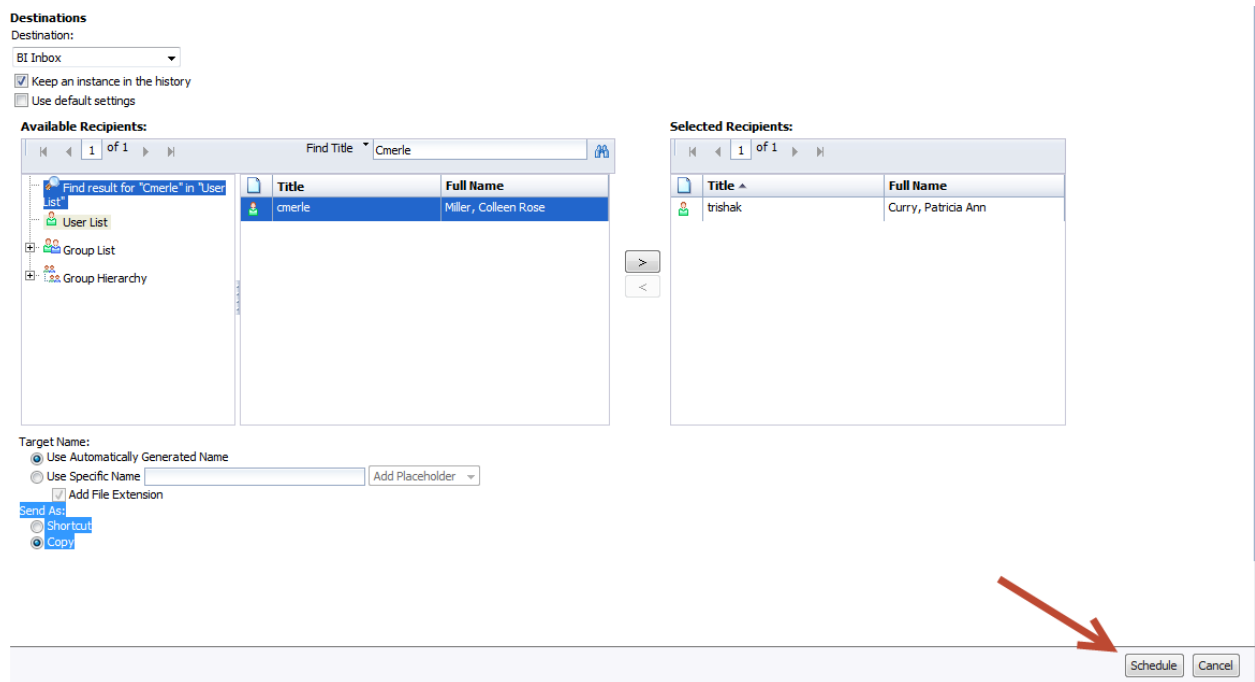
Add File Extension

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.

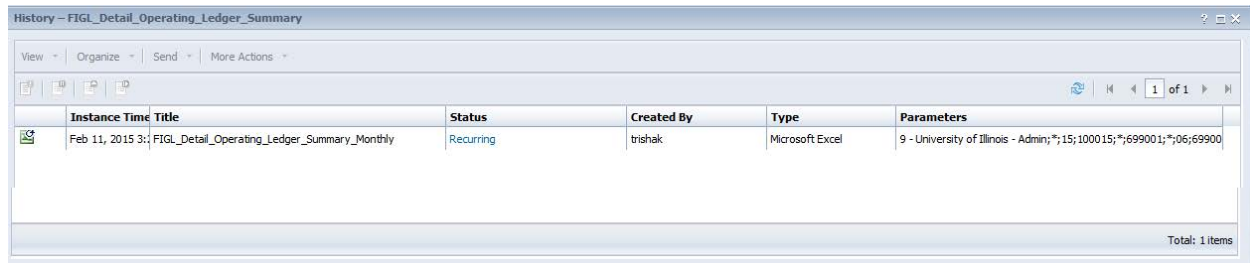


19. Click **Schedule** to complete the schedule. (located in the bottom right corner of the window).



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.