

Scheduling a Report

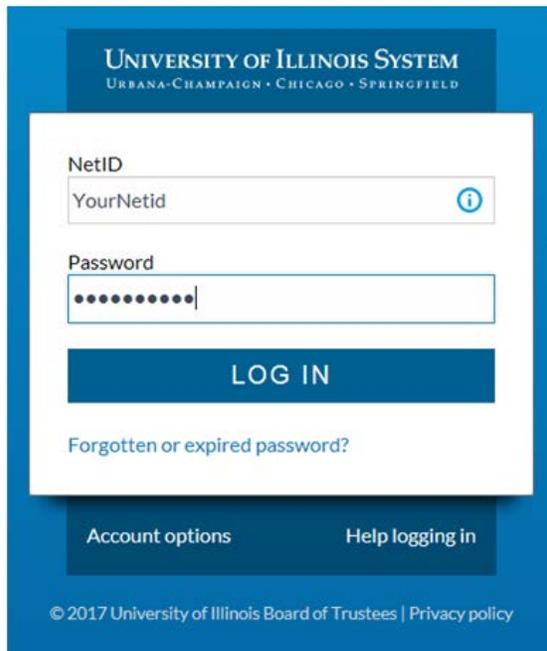
Scheduling reports to run automatically, lets you automate the process of refreshing your documents and can also reduce the run time by allowing you to scheduling your reports to run during off-peak periods. Reports can be sent to other users, or groups of users, in Web Intelligence format, or as Excel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

Schedule – FIGL_Detail_Operating_Ledger_Summary

- Instance Title: FIGL_Detail_Operating_Ledger_Summary_Monthly
- Recurrence
- Prompts
- Formats

- 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.

Recurrence

Run object: Monthly

Object will run

- 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

- 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.

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

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

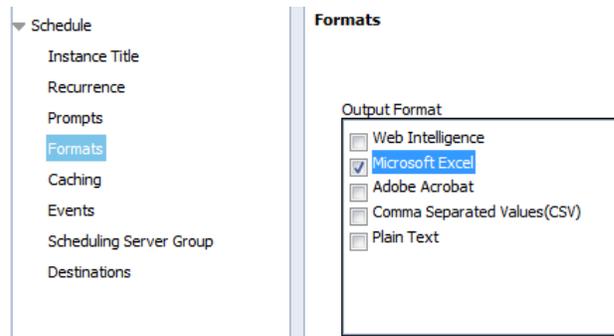
- If you need to modify the prompt values, click the **Modify** button.

Prompts

Modify values for: FIGL_Detail_Operating_Ledger_Summary

Enter Chart of Account:	9 - University of Illinois - Admin
Enter FUND GL report contact:	*
Enter Fiscal Year:	15
Enter Fund Code:	100015
Enter ORG GL report contact:	*
Enter Organization Code:	699001
Enter PROG GL report contact:	*
Enter Period:	06
Enter Program Code:	699002
VDR Date-For ViewDirect use only:	(optional) *

- Select the **Formats** menu.



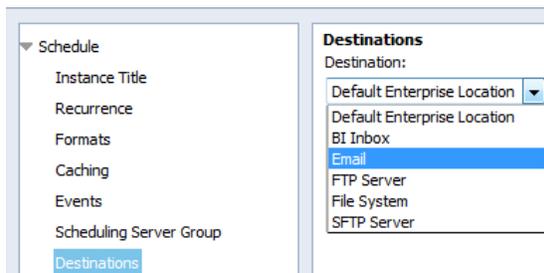
14. Select the desired Output Format. Options are **Web Intelligence, Excel, PDF, CSV, and Text.**

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: Add Placeholder

To: Add Placeholder

Cc: Add Placeholder

Bcc: Add Placeholder

Subject: 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
 Find result for "Cmerle" in "User List"
 User List
 Group List
 Group Hierarchy

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
 Find result for "Cmerle" in "User List"
 User List
 Group List
 Group Hierarchy

Title	Full Name
cmerle	Miller, Colleen Rose

Selected Recipients:

Title	Full Name
trishak	Curry, Patricia Ann

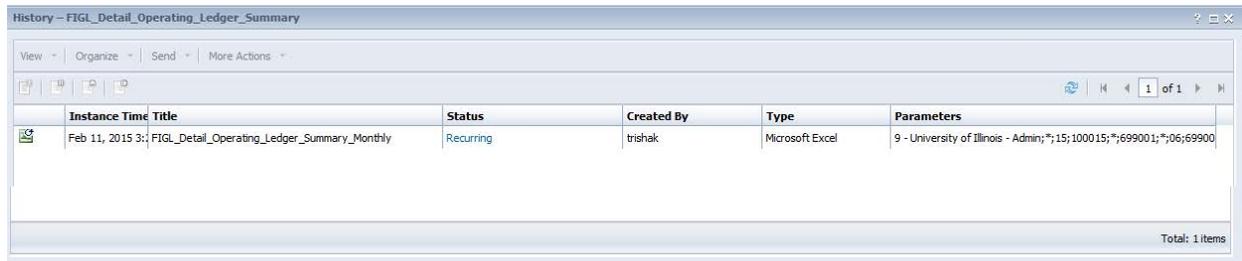
Target Name:
 Use Automatically Generated Name
 Use Specific Name [Add Placeholder]
 Add File Extension

Send As:
 Shortcut
 Copy

 **Schedule** **Cancel**

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.