

Web Intelligence (WebI) reports can be scheduled from the BI launch pad. Scheduling reports with large data sets reduces time out issues and improves system performance and is the recommended best practice.

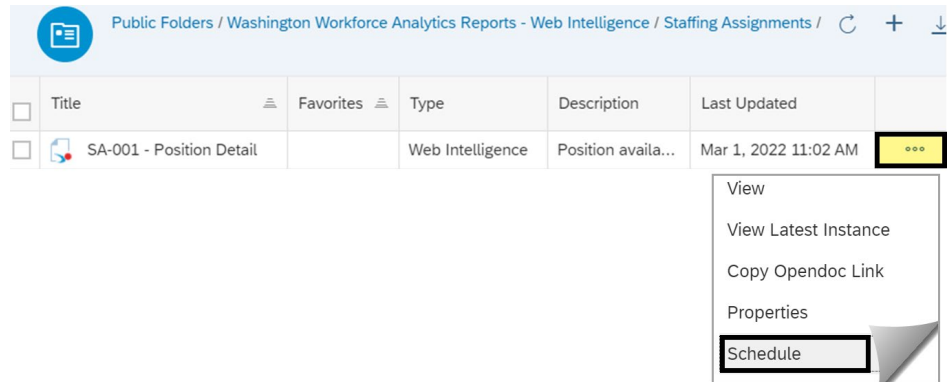
- ✓ Scheduling reports allows you to set parameters such as when a report (document) should be refreshed, what name and format to use, and where it should be sent or saved.
- ✓ Always consider data contents before sending a document to other people. If your document contains employee name or personnel number, you may need to purge or anonymize the personal information before sending it to a non-secure location.

1. Select: Ellipses (three dots).

➔ You can also right-click the report title (or anywhere on the row) to display options.

2. Select: Schedule.

➔ WebI will display additional schedule options based on your security/permissions.



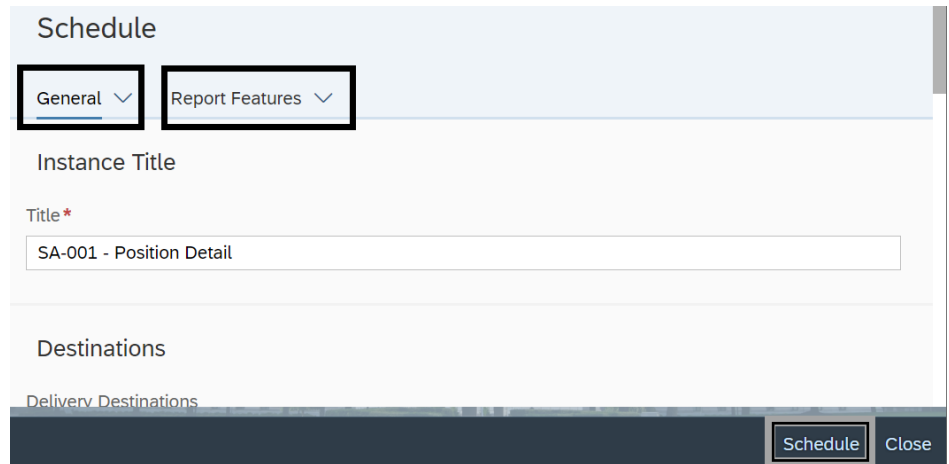
3. Select: General scheduling options.

4. Select: Report Features scheduling options.

5. Select: Schedule.

➔ This job aid includes separate sections with additional information for each of the scheduling options:

- ✓ [Instance title.](#)
- ✓ [Destinations.](#)
- ✓ [Recurrence.](#)
- ✓ [Events.](#)
- ✓ [Scheduling Server Group.](#)
- ✓ [Notification.](#)
- ✓ [Formats.](#)
- ✓ [Prompts.](#)
- ✓ [Delivery Rules.](#)



Instance Title

WebI will display the report title as the default instance title.

- 1. Input: Title.**
- You can change the title for the scheduled document for reference. This will not change the original title of the document.

The screenshot shows a 'Schedule' configuration window with two tabs: 'General' and 'Report Features'. Under the 'General' tab, there is a section for 'Instance Title' with a label 'Title *' and a text input field containing 'SA-001 - Position Detail'.

Destinations

WebI will display destination options for scheduling the report. In most cases, you will use the default enterprise location for the destination.

- ✓ Users with the Secure User role have access to confidential data. For security purposes, users logged in with the Secure User role cannot schedule to other destinations, or send queries to email, BI Inbox, or FTP.

- 1. Select: Add.**
- WebI will display additional options to add a destination.
- If you log on with a secure user role, the option to add a delivery destination will not be available.

The screenshot shows a 'Delivery Destinations' section with an 'Add' button highlighted by a black border. Below it, a 'Selected Delivery Destinations' section shows 'Default Enterprise Location' with a close icon (X).

- 2. Select: Destination.**
- 3. Select: Confirm.**

The screenshot shows a 'Select a destination' dropdown menu. The dropdown is open, showing a list of options: 'Default Enterprise Location' (checked), 'BI Inbox', 'Email', 'FTP Server', and 'SFTP Server'. At the bottom of the window, there are 'Confirm' and 'Cancel' buttons.

Recurrence

WebI will display recurrence options for scheduling the report.

- ✓ Before scheduling a WWA report on a recurring schedule, you will first need to [modify the report to replace the existing date object](#) in the query filter section with one of the pre-defined date filters. You will then save it as your own report and schedule your report to run on a recurring schedule.

1. Select: **Recurrence**.
→ WebI will display additional information if needed based on the option you select.

Recurrence

Run Report:

Allow Retries
 OFF

Now

Once

Recurring

Calendar

In this example, additional information will be needed based on the recurrence option selected.

Run Report:

Start Date:

End Date:

Run Report:

Repeat:

Every:

Hour(s):

Start Date:

End Date:

Run Report:

Calendar Name:

Start Date:

End Date:

AFRS Fiscal Month Closing

AFRS Fiscal Month Closing-Day Of (closing occurs after 6pm)

AFRS Fiscal Month Closing-One Day Before

AFRS Fiscal Month Closing-Two Days After

AFRS Fiscal Month Closing-Two Days Before

CAFR Closing

Fifth Business Day of the Month

First Paydate minus two days

Third Business Day of the Month

WWA Payroll Day 3

WWA Payroll Day 4

WWA Payroll Day 5

Calendar:
 March 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
9			1	2	3	4
10	5	6	7	8	9	10
11	12	13	14	15	16	17
12	19	20	21	22	23	24
13	26	27	28	29	30	31

April 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
13						1
14	2	3	4	5	6	7
15	9	10	11	12	13	14
16	16	17	18	19	20	21
17	23	24	25	26	27	28
18	30					

Show Selected Scheduled Date(s)

Recurring Schedule (Modify Report Date Filter)

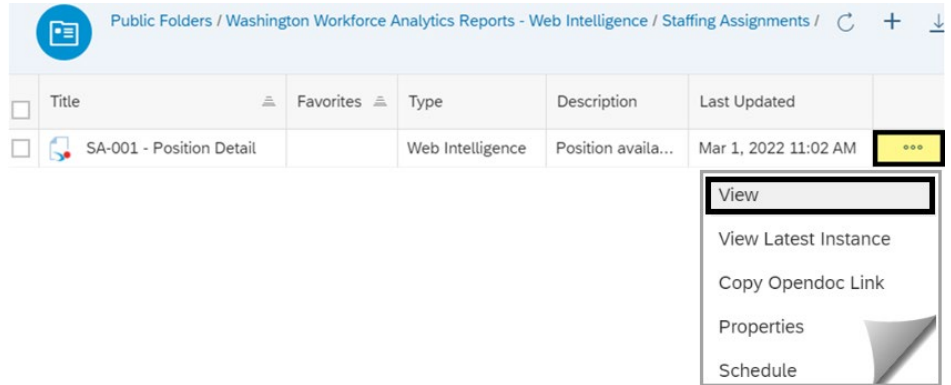
Before scheduling a WWA report on a recurring schedule, you will first need to modify the report to replace the existing date object in the query filter section with one of the pre-defined date filters. You will then save it as your own report and schedule your report to run on a recurring schedule.

1. Select: Ellipses (three dots).

→ You can also right-click the report title (or anywhere on the row) to display options.

2. Select: View.

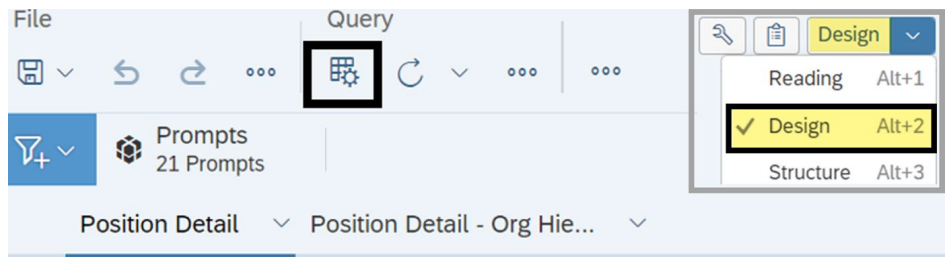
→ Webl will display the report in reading mode.



3. Select: Design.

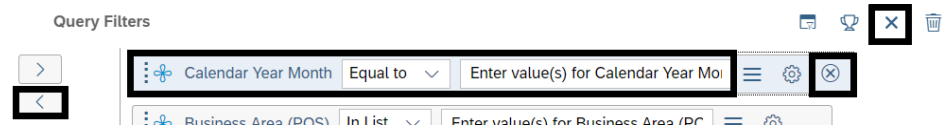
4. Select: Edit.

→ Webl will display the query panel so that you can edit the query to remove the existing date filter and replace it with a pre-defined filter.



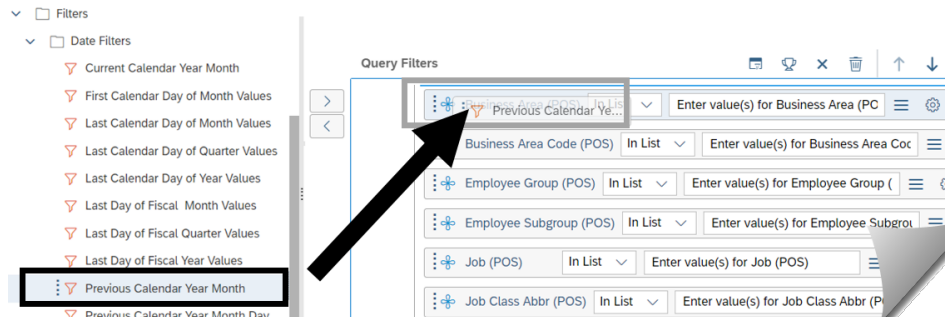
5. Remove: Existing date filter.

→ You can select the existing date filter and select delete or remove. You can also use the < arrow to remove it.



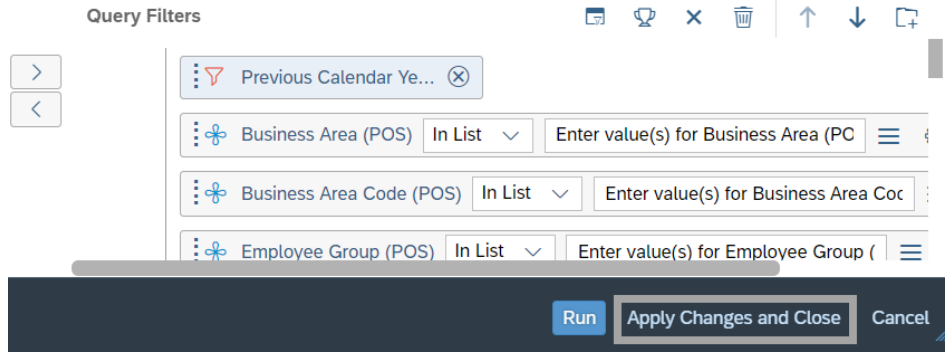
6. Add: Pre-defined date filter.

→ In this example, we add the pre-defined date filter for previous calendar year month.

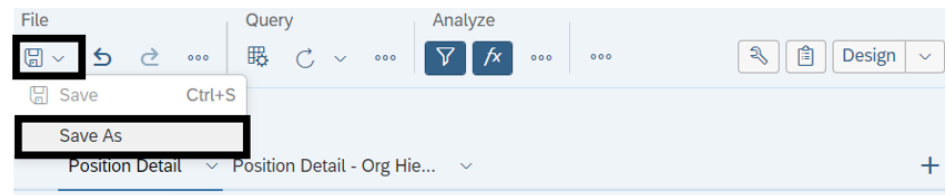


7. Select: Apply Changes and Close.

→ Webl will close the query panel.



8. Select: Save As.

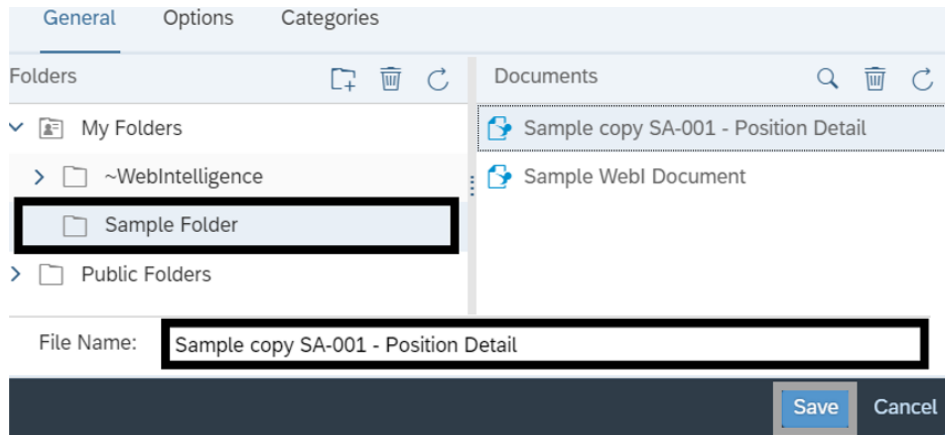


9. Select: Folder.

10. Input: File Name.

11. Select: Save.

→ Your report can now be scheduled to run on a recurring schedule.



Events

In most cases, you will use the default settings for events.

✓ Events may be scheduled only if they have been defined by the OFM Enterprise Reporting team.

Events

Wait For

Trigger

Scheduling Server Group

WebI will display additional options for scheduling the report. In most cases, you will use the default settings.

- ✓ The default setting uses the first available server to optimize performance. If you want to use a different setting, please consult with the OFM Enterprise Reporting team.

Scheduling Server Group

Default Server

Use first available server ▼

Use first available server
Give priority to a server group
Use specific server group

Run at origin site

OFF

Notification

WebI includes options for scheduling the report with notifications. In most cases, you will use the default settings.

Notification

When scheduling an object, you can also enable email notification.

Email when job ran successfully:

OFF

Email when job failed to run:

OFF

Formats

WebI includes several options for the report format.

1. Select: **Report Features.**
 2. Select: **Format.**
- ➔ You can only select one format.
 - ➔ Web Intelligence is the default report format.
 - ➔ If scheduling the report to Excel format, it is recommended you use Microsoft Excel - Reports to retain the original formatting of the report.

General ▼
Report Features ▼

Formats

Web Intelligence ▼

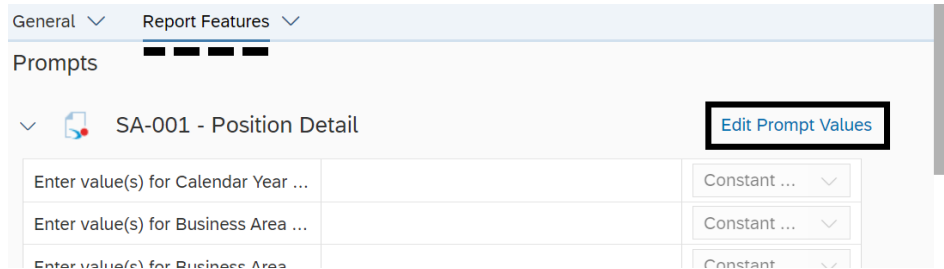
Web Intelligence
Microsoft Excel - Data
Microsoft Excel - Reports
Adobe Acrobat
Comma Separated Values (CSV) - Data
Comma Separated Values (CSV) Archive - Reports
Plain Text
HTML Archive

Prompts

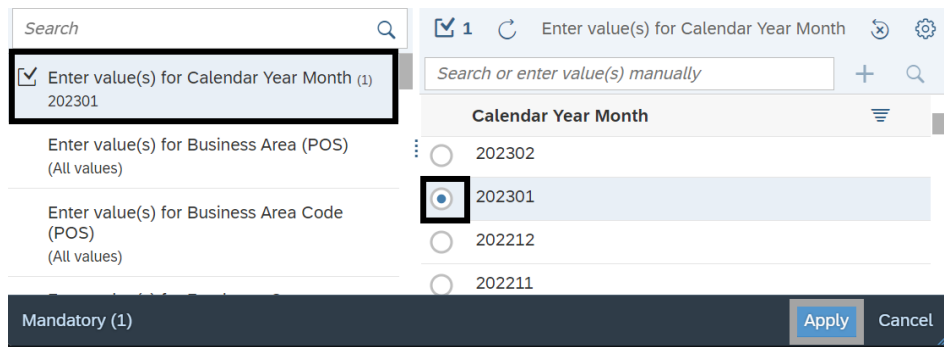
All standard reports require at least one date value. For example, if you added the “Previous Calendar Year Month” date filter for a recurring report, WebI will display it as a mandatory prompt.

✓ You may need to input additional information for prompt values.

1. Select: **Report Features.**
 2. Select: **Edit Prompt Values.**
- ➔ WebI will display additional information for the prompt values.



3. Select: **Prompt.**
4. Select: **Values for the prompt.**
5. Select: **Apply.**



Mandatory prompt

Reload (refresh) list of values

Reset prompt values with default values

Sort values (ascending / descending)

Switch between show/hide mandatory prompts

Delivery Rules

WebI includes options for scheduling the report with delivery rules. In most cases, you will use the default settings.

General ▾ Report Features ▾

Delivery Rules

The scheduled content has been successfully refreshed and is not partial.If this condition is not met, return the following status:

- Warning
- Failed

The scheduled content contains data.If this condition is not met, return the following status:

- Warning
- Failed