Business Objects/Report Scheduling via InfoView

As of November 2013
InfoView Report Scheduling

The purpose of this job aid is to provide you with guidance for scheduling InfoView Reports in the Enterprise Reporting tab in myColumbia.
The scheduling functionality allows you to schedule reports to run automatically at specified times. When a scheduled report runs successfully, an instance of the report is created. A report instance is a version of the report that contains data from the time it was run.

To Schedule a report

1. Right ‘click’ on the report you wish to schedule and select ‘Schedule’.
The ‘Schedule’ page appears.

Only the Scheduling options which must be set are reviewed.

- Recurrence
- Parameters
- Report (Instance) format
- Report Destination
**Report (instance) Title**

The default report name is displayed. If you choose to rename the report, type the name in the Instance Title field.

Note: this only renames the report that will be delivered to your “Inbox”. It does NOT rename the report found in the Public folder.
Recurrence

Here you specify a date and time for running the report. Each option in the Run object drop-down list has its own specific data entry requirements.

Some popular options are:

**Now** - When you click Schedule, the report runs immediately.

**Daily** - This option requires a start and end time parameter. The report runs once every N day at the time specified. The report will not run after the end time that you specify.

**Weekly** - This option requires a start and end time parameter. Each week, the report runs on the selected days at the time specified. The report will not run after the end time that you specify.

**Monthly** - This option requires a start date and time, along with a recurrence interval in months. The object runs on the specified date and time every N month. The report will not run after the end time that you specify.
Parameters

If the scheduled reports require input, then these must be provided via the Parameters option. All required values must be supplied otherwise report will not run.

Note: All *required values must be provided.
**Report (Instance) format**

You can select the format in which the report is generated. The default value for FDS reports is ‘Crystal Report’.

Some popular report format options are Excel & PDF.
Report Destination

A report destination needs to be specified. We recommend setting the report destination to either the:

- ‘Business Objects Inbox’
- ‘Email’
Using the Business Objects Inbox

- Select Business Objects Inbox from the Destination drop-down list
- Unselect the ‘Use default settings’ to allow uni selection

- Enter your uni in the Search title, search for it and select it.
- Target Name ‘Use Specific Name’ and select from drop-down list.
- Send As set to ‘Copy’.
Using Email

- Select Email from the Destination drop-down list
- Unselect the ‘Use default settings’ to allow email set up

All email components are needed (ex. From, To, Subject & Message).

This option will send the report as an attachment.
Report will be sent to email.
Business Objects Inbox – Viewing Reports

Your scheduled reports are delivered to your Business Objects Inbox.

To open report you can either:

- ‘Right’ click on the report email and select ‘View’
- OR double click on the report email.

Note: For ‘Crystal Report’ formats only, the report’s ‘Parameter’ page is displayed. You must close parameter page and reopen report.
The report is then presented:

**‘History’ of Scheduled Reports**

To view a scheduled report’s history, first find the report in the appropriate ARC folder, ‘Right’ click on the report and choose ‘History’.
The selected report’s History screen is displayed.

- The report’s status is displayed.
- Report can be ‘rescheduled’ is the status is ‘Failed’.
  - Report can be ‘rescheduled’ to use different parameter values (all set up values are inherited from the original report schedule).
- Report can also be viewed from the list when the report’s ‘Date/time’ is selected.

Note: CUIT will keep the latest two runs of each scheduled report.

Need additional assistance with Scheduling, please contact us via email at: businessobjects@columbia.edu or via Service Now/Assignment Group: EBIS-InfoView.