

Scheduling for ReportMart3

Running Reports Automatically!

Benefits of Scheduling

- ▶ No need to be tied down to your computer
- ▶ Reports can be scheduled to run during off-peak hours
- ▶ Allows repeated runs without re-entering prompts
- ▶ Reports delivered to your Inbox in RM3 or via email in PDF or Excel format

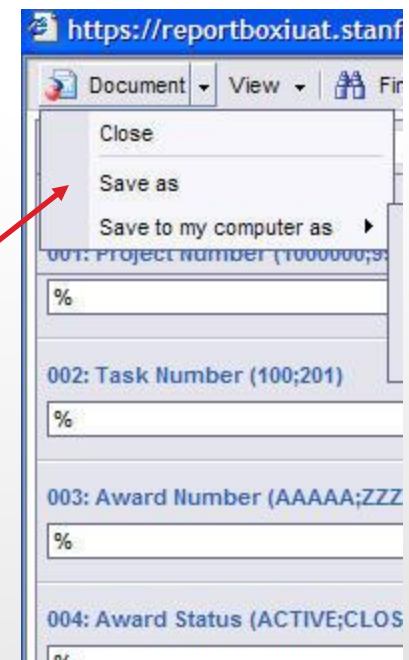
High Level Steps for Scheduling

1. Save a report with your prompts in Favorites
2. Go to Favorites and click on Arrow to enable Schedule link to show
3. Click on Schedule
4. Modify three attributes:
When, Format, Destination
5. Press Schedule button in lower right
6. Results delivered to your RM3 or Email Inbox

Step by Step directions in slides to follow

Saving a report with your prompts

- ▶ Open a report
- ▶ Enter your prompts
 - Use “Virtual Dates” to avoid having to edit dates later (currently only available on 279A report)
 - See: http://fingate.stanford.edu/docs/report_279A.pdf
- ▶ Run the report
- ▶ If the report is displayed in PDF mode click the “View HTML” icon
- ▶ Choose Document/Save as
 - Continued on next slide



Saving a report with your prompts

https://reportboxuat.stanford.edu - InfoView - FIN_EXP_279A_TRANS_D...

Save Document

General

Title: FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_CBMH

Description: This version of the 279 report runs against a smaller amount of data limited to the current fiscal year in order to improve performance. The report features the ability to search based on "relative dates". Enter "LCM"

Keywords:

Refresh on open Permanent Regional Formatting

Location

- My Folders
 - Favorites
- Public Folders

Categories

OK Cancel

Give your report a unique name. Please keep the original report number

Click on Favorites

Click on OK

Find the saved reports in your Favorites

- ▶ Return to Home Page
- ▶ Click on “Go to my Favorites” link

Business Objects STANFORD UNIVERSITY ReportMart3 Welcome: svemp

Categories Home

Home
Personal Categories
Corporate Categories

ReportMart3

System Support and Maintenance Hours
ReportMart3 Availability Hours:
8:00 AM - Midnight Pacific Time, 7 Days a Week
ReportMart3 HelpSU Support Hours:
8:00 AM - 5:00 PM Pacific Time, Monday through Friday

Links
[Hardware, Software, and Browser requirements](#)
[Fingate - Gateway to financial activities](#)
[Training - Classroom, Online, and Guides](#)
[HelpSU - Submit a help ticket](#)
[Subscribe to ReportSU - Finance mailing list](#)

[Go to my Favorites](#) [Go to my Inbox](#)

Please note the Go to my Inbox link for later use

Find the saved reports in your Favorites




The screenshot shows the Business Objects ReportMart3 interface. The top bar includes the Business Objects logo, the title "STANFORD UNIVERSITY ReportMart3", and a user greeting "Welcome: svemp". Below the title bar is a menu bar with options like "New", "Send", and "My InfoView", along with a search box containing "279a". The main area is divided into two panes: "Folders" on the left and "Favorites" on the right. The "Favorites" pane shows a list of three reports, each with a down arrow icon to its left. The reports are:

Title	Type
FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_CBMH	Web Intelligence Document
FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_CBMH_LCM	Web Intelligence Document
FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_EAHOK-EAGHG	Web Intelligence Document

Click on the down arrow

Multiple versions can be saved with different prompts

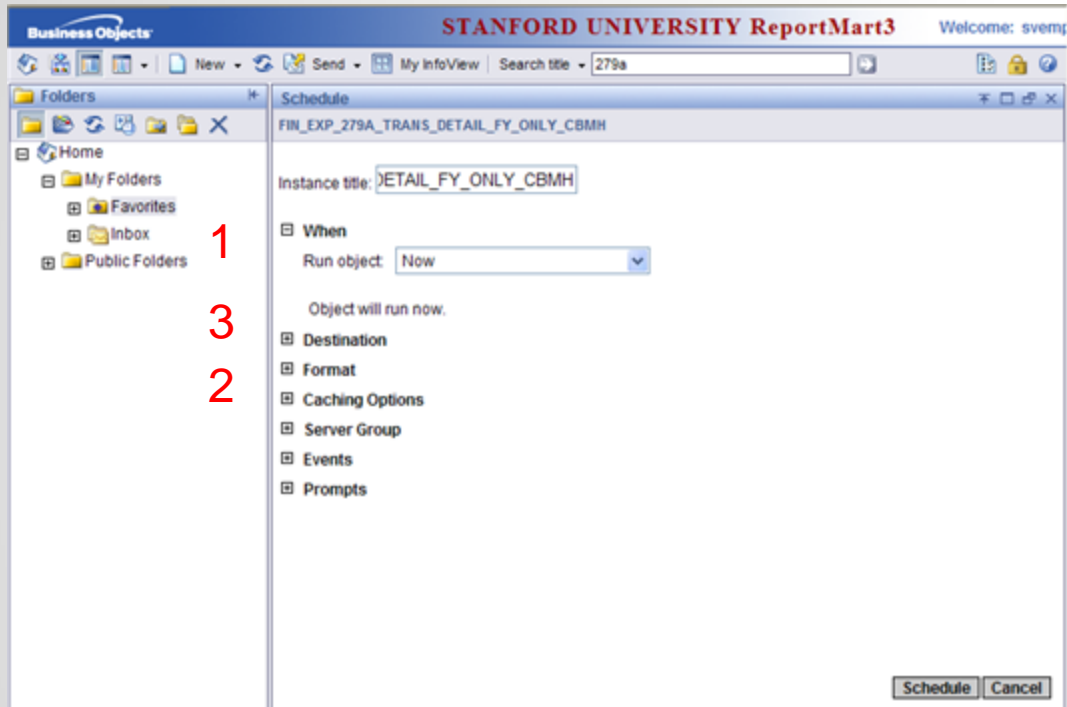


The screenshot shows the Business Objects ReportMart3 interface with the "Favorites" pane displaying the details of the selected report: "FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_CBMH". The report is identified as a "Web Intelligence Document". Below the title, there are links for "History", "Schedule", "Modify", and "Properties". A descriptive text block follows:

This version of the 279 report runs against a smaller amount of data limited to the current fiscal year in order to improve performance. The report features the ability to search based on "virtual dates". Enter "LCM" in the date search prompt(s) to retrieve data as of the "Last Closed Month"; enter "COM" to retrieve data as of the "Current Open Month". This feature eliminates the need to update the date prompts for each run of a saved report. See the full description of the standard 279 for more usage information. Authority is required.

Click on Schedule

Scheduling Main Screen



Specify the following 3 scheduling options:

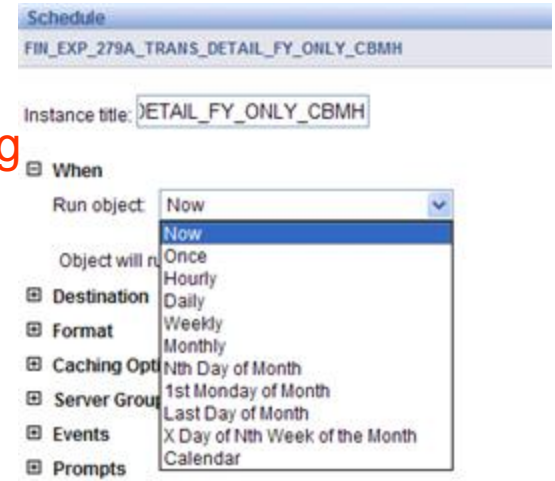
- 1When (to run)
- 2Format
- 3Destination

Please Note: Choose Format before Destination as this will allow you to attach a report if you choose the Email destination option.

When to schedule?

Note: Slides 20 and 21 will cover 'Event'-based scheduling

- ▶ Daily – The report runs once every N days at the time that you specify.
- ▶ Weekly – Each week, the report runs on the selected days at the time that you specify. (Can pick days of the week)
- ▶ Nth Day of Month – The report is created regularly each month on the day that you enter at the start time that you specify. (This is ideal if you want the report only once a month)



When to schedule? Example for Nth of Day of Month option

Please note that the RM3 system is not available between Midnight and 7 am. The time you select should be outside this window.

Schedule
FIN_EXP_279A_CBMH

Instance title:

When
Run object:

Object will run on the Nth day of each month.

Day(N) =

Start Time: :

End Time: :

Destination

Format

Caching Options

Server Group

Events

Prompts

Pick the day of the month (1 – 31)

Pick Start Time (Between 7am – 11pm)

No date change required unless you want schedule to begin in a later month.

Pick a reasonable end date depending on your business need. The schedule will repeat until the end date occurs.

Format: Web Intelligence, Excel, or PDF

Schedule

FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_CBMH

Instance title:

- When
- Destination
- Format
 - Format:
 - Web Intelligence
 - Microsoft Excel
 - Adobe Acrobat
- Caching
- Server Group
- Events
- Prompts

Choose Web Intelligence, Microsoft Excel, or Adobe Acrobat (PDF)

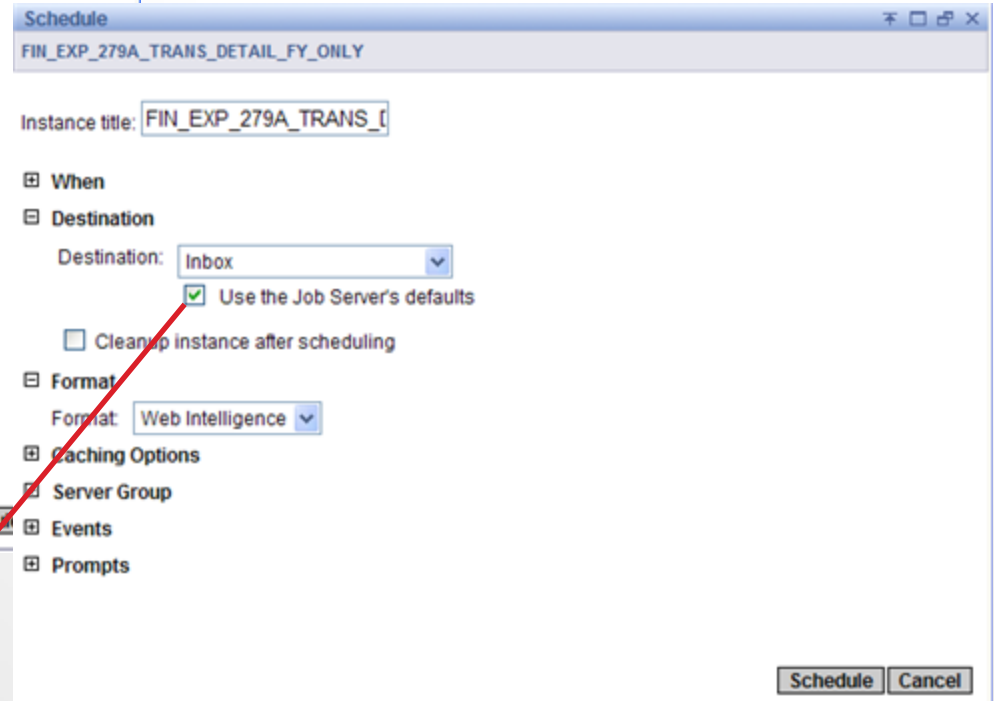
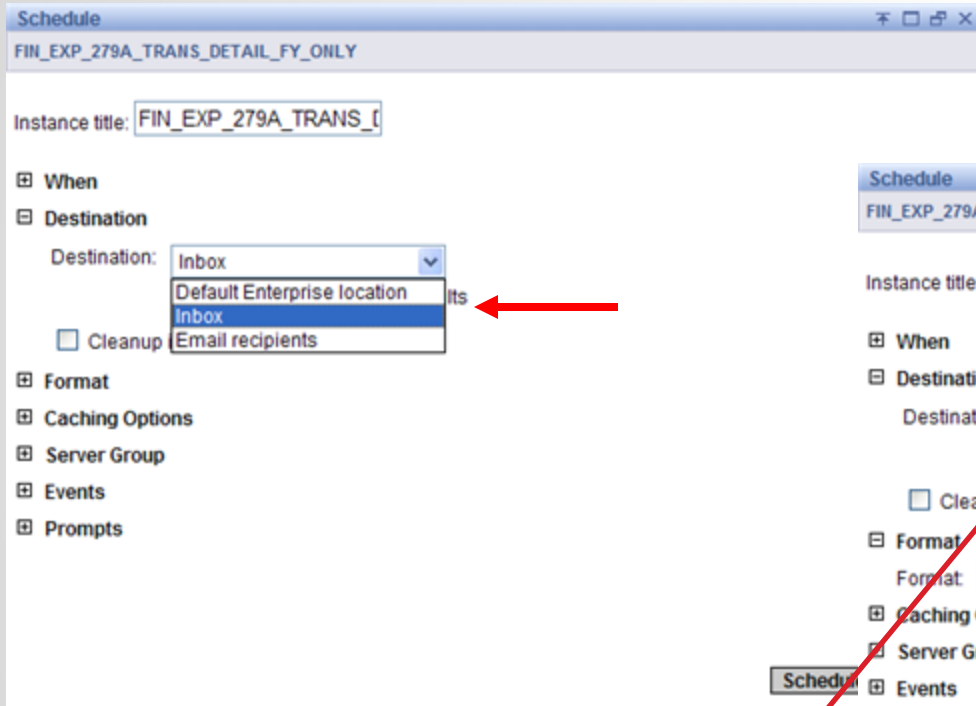
Excel and PDF formats can be attached to an email destination in the next step

Web Intelligence can only be sent to RM3 Inboxes

More on Destination in the next two slides

Destination: Inbox or Email recipients:

Inbox relates to RM3 Inbox – Ideal if you picked Web Intelligence as the Format. Excel and Adobe options can also go to your RM3 Inbox.



Report is sent to your RM3 Inbox.
The box needs to be checked.

Click on Schedule
DONE!

Destination: Email recipients

Schedule

FIN_EXP_279A_TRANS_DETAIL_Alex

Instance title: FIN_EXP_279A_TRANS_

When

Destination

Destination: Email recipients

Use the Job Server's defaults

Cleanup instance after scheduling

Format

Caching Options

Server Group

Events

Prompts

Destination

Destination: Email recipients

Use the Job Server's defaults

From: abc@stanford.edu

To: abc@stanford.edu

Cc: xyz@stanford.edu

Subject: 279A Report

Add placeholder...

Message: Please find attached the 279A report for project 123456 for Last Closed Month (LCM)

Add placeholder...

Add attachment

Attachment:

Automatically generated

Specific name FIN_EXP_279A_123456

Add placeholder...

Add file extension

Cleanup instance after scheduling

Format

Format: Microsoft Excel

Schedule Cancel

Box should be unchecked

Report (using YOUR authority) is sent to email address you enter

Type in a relevant subject and message

Check the box to attach report (excel or PDF)

Click radio button and type in a specific meaningful name that will be attached to the email

Click on Schedule **DONE!**

Destination: Inbox

Schedule
FIN_EXP_279A_TRANS_DETAIL_FY_ONLY_CBMH

Instance title:

When

Destination

Destination:
Default Enterprise location
Inbox
Email recipients

Cleanup

Format

Caching Options

Server Group

Report (using YOUR authority) is sent to InBox(es) of recipient(s) you enter

Check Specific name and type in a meaningful title

Pull down Add placeholder... and choose DateTime. %SI_STARTTIME% will be appended to your title.

Schedule
FIN_EXP_279A_TRANS_DETAIL_Alex

Instance title:

When

Destination

Destination:
 Use the Job Server's defaults

Choose:

Look For:

Available Recipients:
alexs_adhoc

Selected Recipients:
alexs

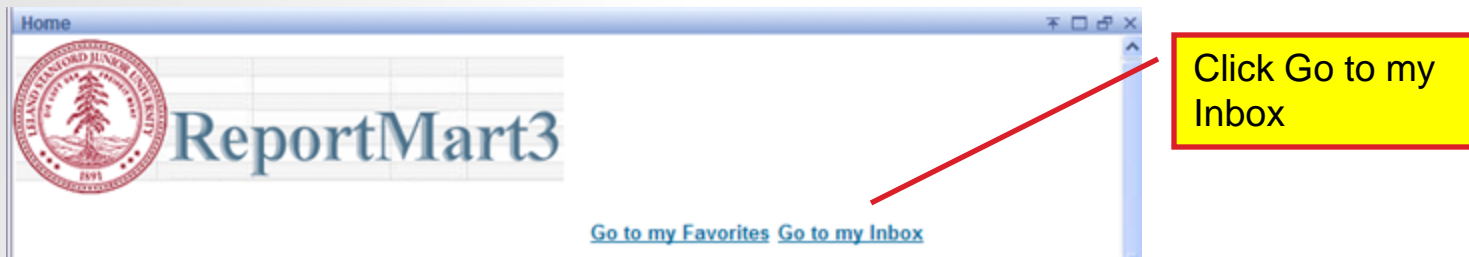
Target Name:
 Automatically generated
 Specific name

Send As:
 Shortcut
 Copy
 Cleanup instance after scheduling

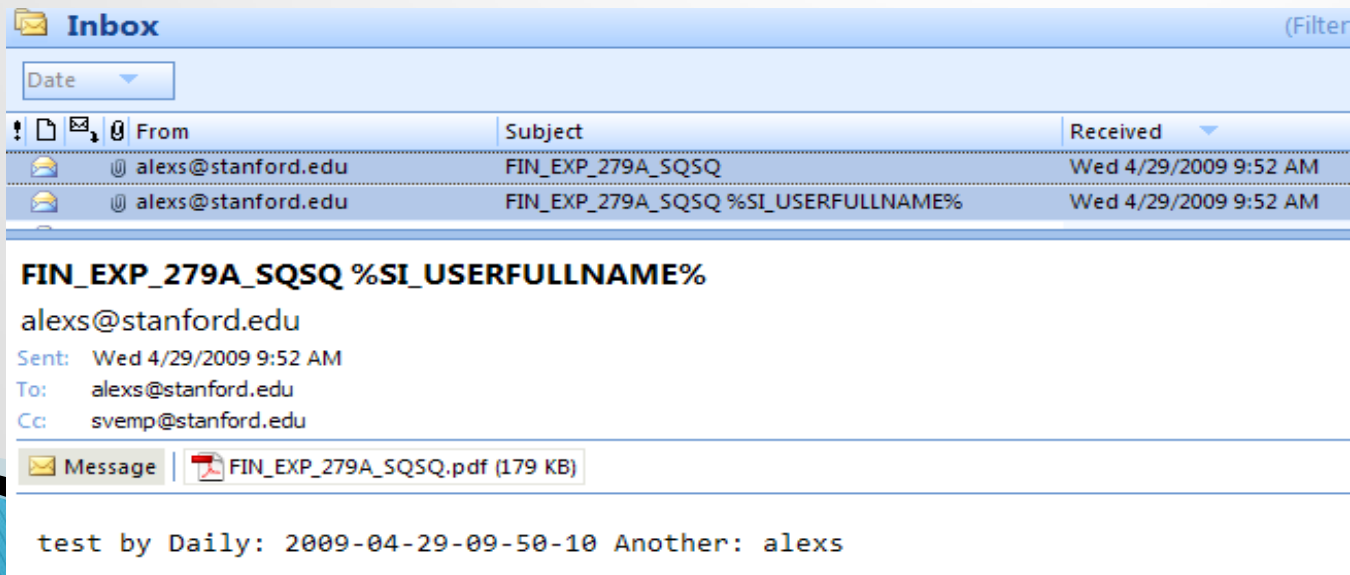
Box should be unchecked

Click on Schedule in lower right ...
DONE!

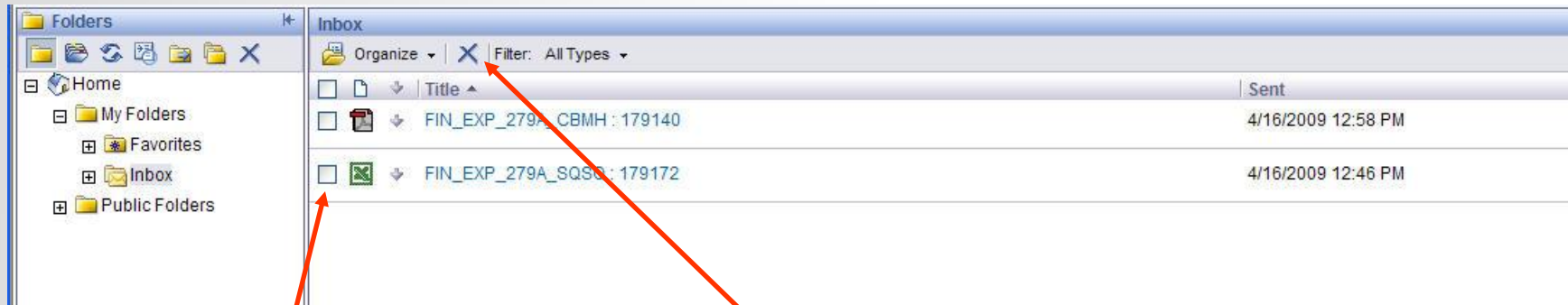
Retrieve a scheduled report from your RM3 Inbox by clicking on the report name.



Retrieve a scheduled report from your Email Inbox by opening the attachment



Please cleanup your inbox by deleting old reports.
To do so...



1. Click in the box next to its title
2. Then click Delete (the stylized "X") in the tool bar

Modifying Prompts for Rescheduling Reports

Can be used for rescheduling reports that don't have "Virtual Dates"

From Favorites, find the report you would like to reschedule

Ensure that the description is visible by clicking on the arrow

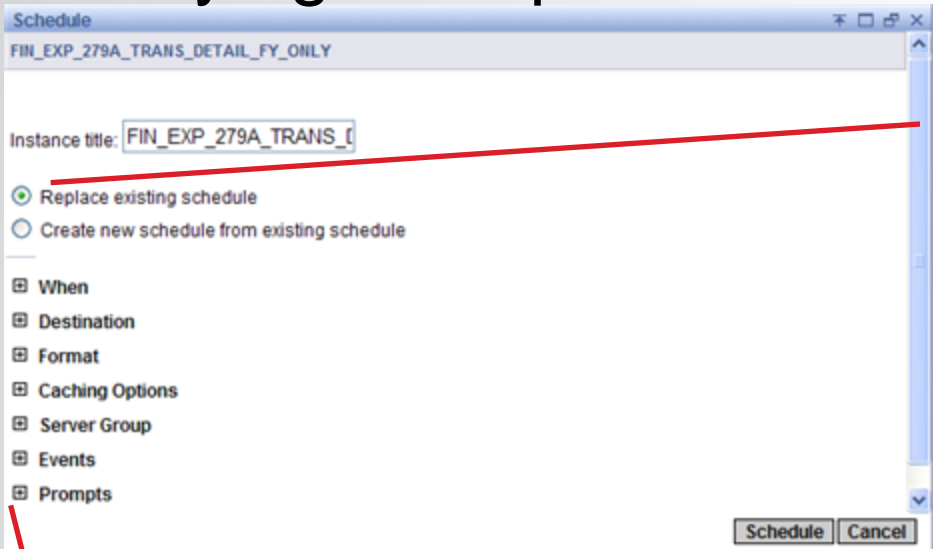
Click on History – Screen below appears

Instance Time	Title	Run By Parameters	Format	Status	Reschedule
5/19/2009 8:32 PM	FIN_EXP_279A_TRANS_DETAIL_FY_ONLY	svemp %;%;%MAY-2009;LCM;LCM;1026067;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;	Web Intelligence	Pending	Reschedule
5/19/2009 8:32 PM	FIN_EXP_279A_TRANS_DETAIL_FY_ONLY	svemp %;%;%MAY-2009;LCM;LCM;1026067;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;;	Web Intelligence	Recurring	Reschedule
5/19/2009 8:32 PM	FIN_EXP_279A_TRANS_DETAIL_FY_ONLY	svemp 1026067;%;;	Web Intelligence	Recurring	Reschedule
5/19/2009 8:29 PM	FIN_EXP_279A_TRANS_DETAIL_FY_ONLY	svemp %;%;%MAY-2009;LCM;LCM;1026067;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;%;;	Web Intelligence	Recurring	Reschedule
5/19/2009 7:52 PM	FIN_EXP_279A_TRANS_DETAIL_FY_ONLY	svemp 1026067;%;;	Web Intelligence	Success	Reschedule

Pick the report you want to change the prompts for

Click on Reschedule

Modifying Prompts for Rescheduling Reports

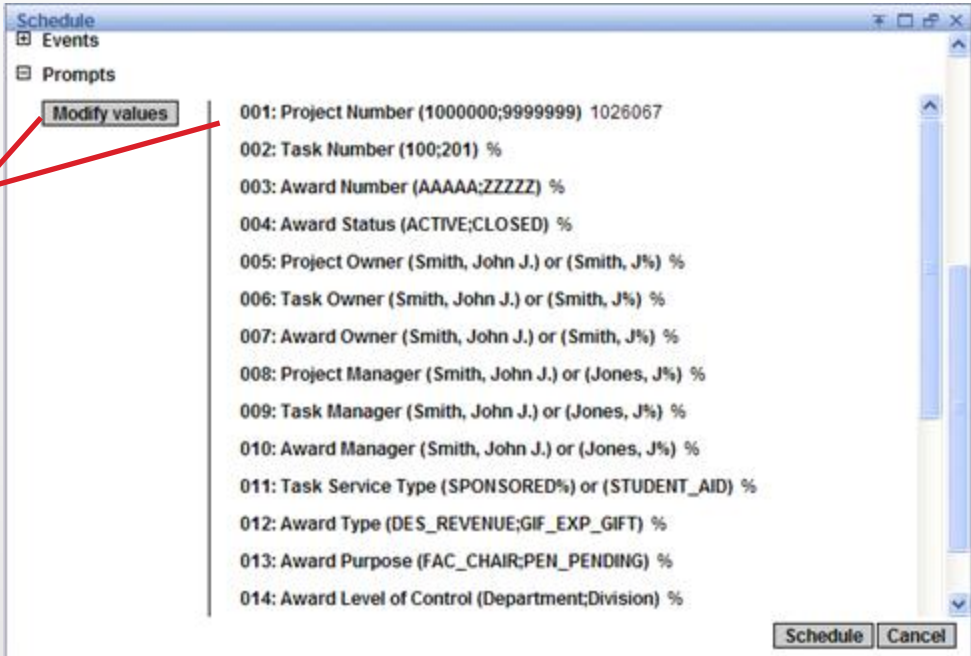


Click button if not the default option

Click on +

Opens existing prompts

Click on Modify Values which brings up the "Advanced Prompts panel (next slide)



Modifying Prompts for Rescheduling Reports

Advanced Prompts

Enter Prompt values

- 001: Project Number (1000000;9999999) : 1234567
- 002: Task Number (100;201) : %
- 003: Award Number (AAAAA;ZZZZZ) : %
- 004: Award Status (ACTIVE;CLOSED) : %
- 005: Project Owner (Smith, John J.) or (Smith, J%) : %

Buttons: Apply, Cancel

Enter NEW prompts

Click Apply

Prompts

Modify values

- 001: Project Number (1000000;9999999) 1234567
- 002: Task Number (100;201) %
- 003: Award Number (AAAAA;ZZZZZ) %
- 004: Award Status (ACTIVE;CLOSED) %
- 005: Project Owner (Smith, John J.) or (Smith, J%) %
- 006: Task Owner (Smith, John J.) or (Smith, J%) %
- 007: Award Owner (Smith, John J.) or (Smith, J%) %
- 008: Project Manager (Smith, John J.) or (Jones, J%) %
- 009: Task Manager (Smith, John J.) or (Jones, J%) %
- 010: Award Manager (Smith, John J.) or (Jones, J%) %
- 011: Task Service Type (SPONSORED%) or (STUDENT_AID) %
- 012: Award Type (DES_REVENUE;GIF_EXP_GIFT) %
- 013: Award Purpose (FAC_CHAIR;PEN_PENDING) %
- 014: Award Level of Control (Department;Division) %

Buttons: Schedule, Cancel

**Click on Schedule
DONE!**

Event Based Scheduling

A scheduled report starts running as soon as the data is available
Allows available time to be optimally used

Schedule
FIN_EXP_279A_TRANS_DETAIL_Alex

Instance title: FIN_EXP_279A_TRANS_I

When
Run object: Daily
Object will run once every N days.
Days(N) = 1
Start Time: 12 : 01 AM 8/13/2009
End Time: 12 : 01 AM 8/27/2009

Destination
Format
Caching Options
Server Group
Events
Prompts

Pick 12:01 AM for start time (this is the time the system will start looking to see if the "event" has occurred)

Expand Events

Choose appropriate event:
DATA AVAILABLE - Daily Database Build Completed
MONTH AVAILABLE - Monthly Close Database Build Completed

Schedule

Destination
Format
Caching Options
Server Group
Events

Available Events:
DATA AVAILABLE
MONTH AVAILABLE

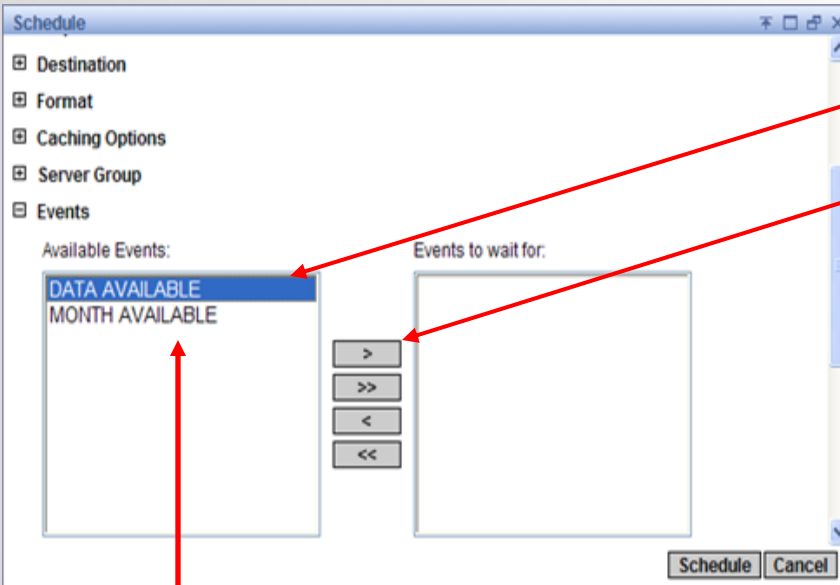
Events to wait for:

>
>>
<
<<

Schedule Cancel

Event Based Scheduling

The report starts running as soon as data becomes available after the database build (Daily or after Month End Close)

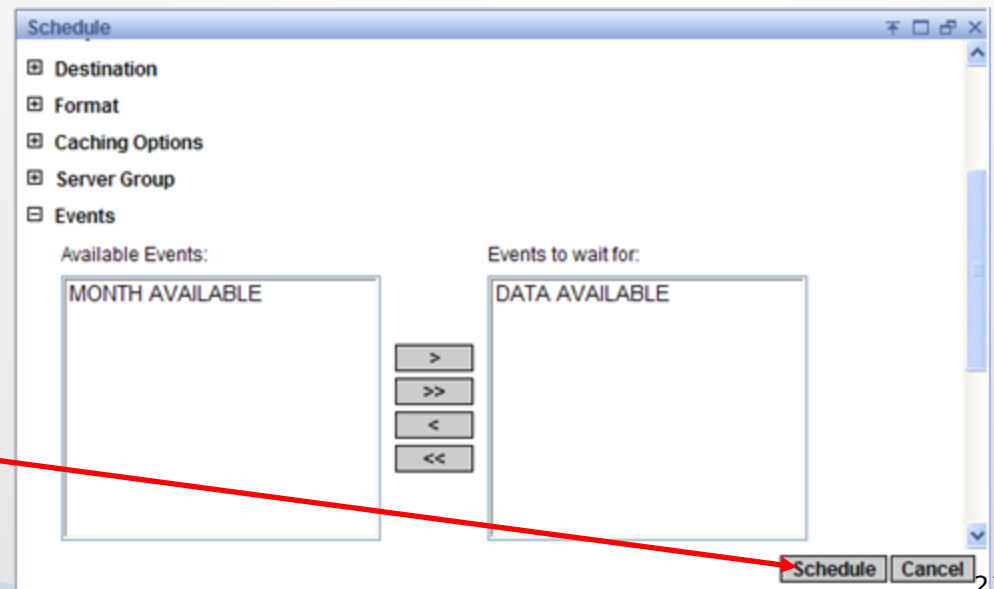


Pick an Event to wait for

Click the > button

Tip: Please pick the first day (Nth day of Month) in the "When" section as start day for MONTH AVAILABLE event

Click on Schedule



Being a Good Scheduling Citizen

- ▶ Schedule reports to run outside of “primetime” (10am–noon, 2pm–4pm)
- ▶ When results can wait until the next day, use evening hours (6pm–11pm)
- ▶ Periodically delete Excel and PDF files from your RM3 Inbox
- ▶ Keep the first 3 parts of a report’s name when saving a version to schedule (e.g. **FIN_EXP_279A_PT1234567-1**)

For any questions or clarifications, please contact the following RM3 team members:

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