



BOBJ REPORT SCHEDULER

JOB AID BOBJ-2 | BOBJ500 REPORT SCHEDULER

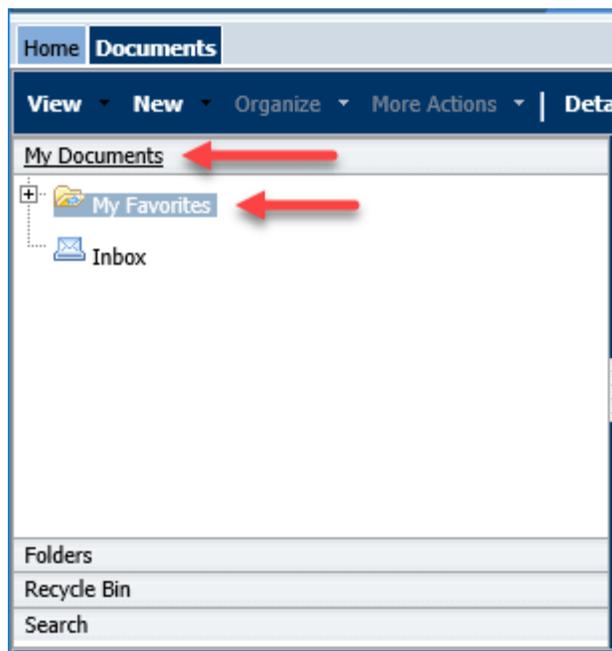


The purpose of this job aid is to explain how to schedule a BOBJ report in the Integrated HR-Payroll System.

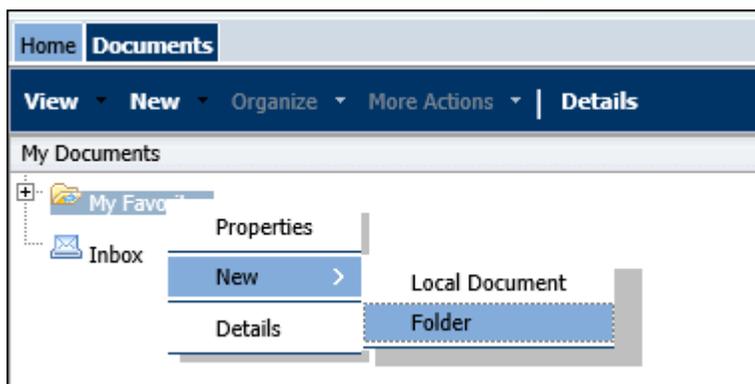
Report Scheduler

Reports cannot be scheduled directly from the Public Folders.

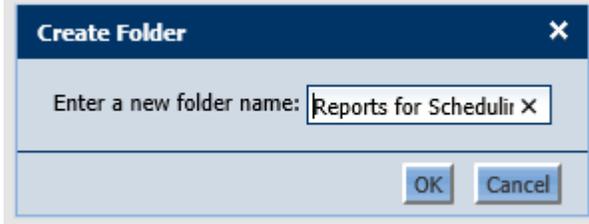
1. To schedule a report, the report must first be saved/copied to your personal folders under the **My Favorites** area of **My Documents**.



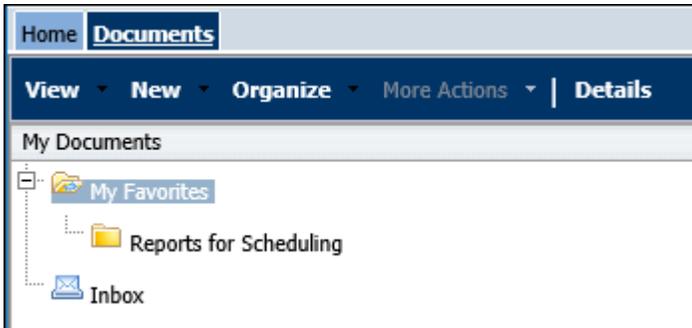
2. As a best practice, under **My Favorites**, create a folder named **“Reports for Scheduling”** so that you can easily find your scheduled reports.
 - a. Navigate to the **My Favorites** folder, right-mouse->New->Folder



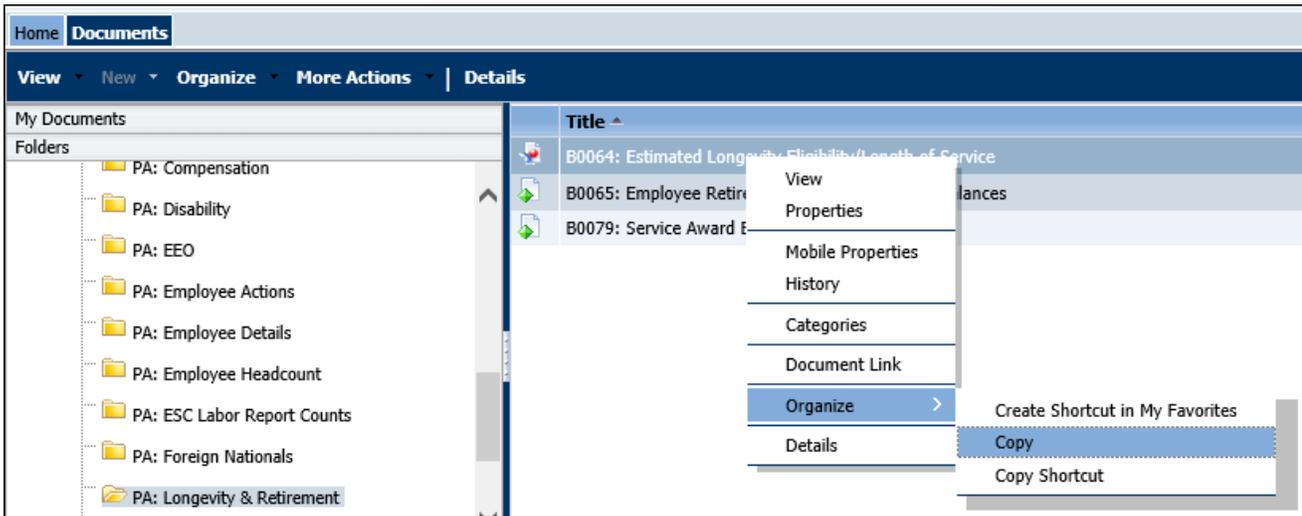
- b. Enter the folder name “**Reports for Scheduling**” then click ‘OK’.



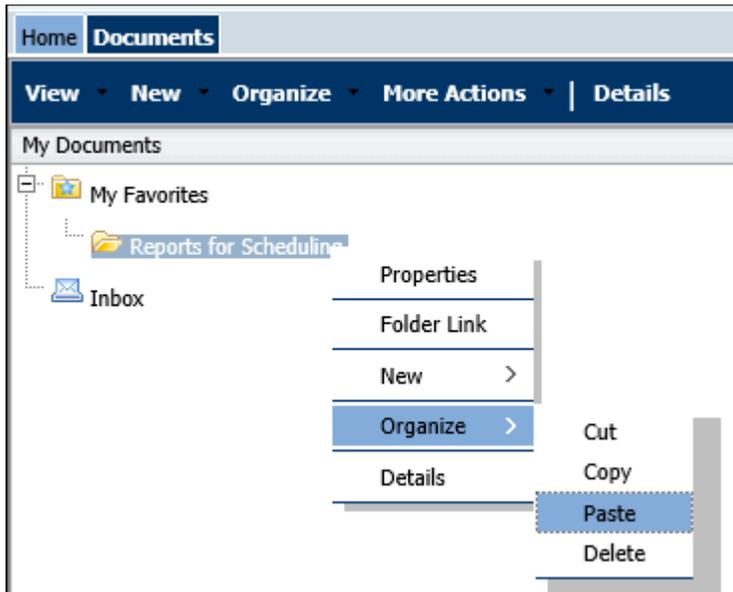
- c. You should see your new folder.



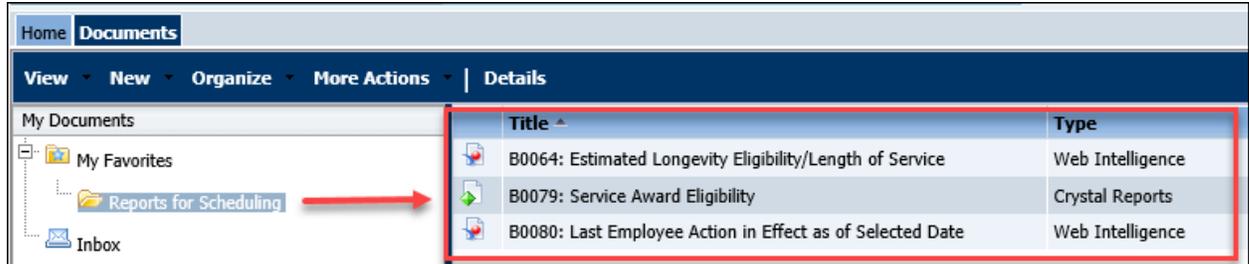
- 3. Copy any Webi or Crystal report you wish to schedule to this **Reports for Scheduling** folder. Only Webi or Crystal reports can be scheduled.
 - a. To copy a report, navigate to the **Public Folders** area and find your desired report under the available sub-folders.
 - b. For demonstration, we will copy the B0064 report. Highlight the report, right-mouse->Organize->Copy



- c. Navigate back to your **Reports for Scheduling** folder. Highlight folder name->right-mouse->Organize->Paste.

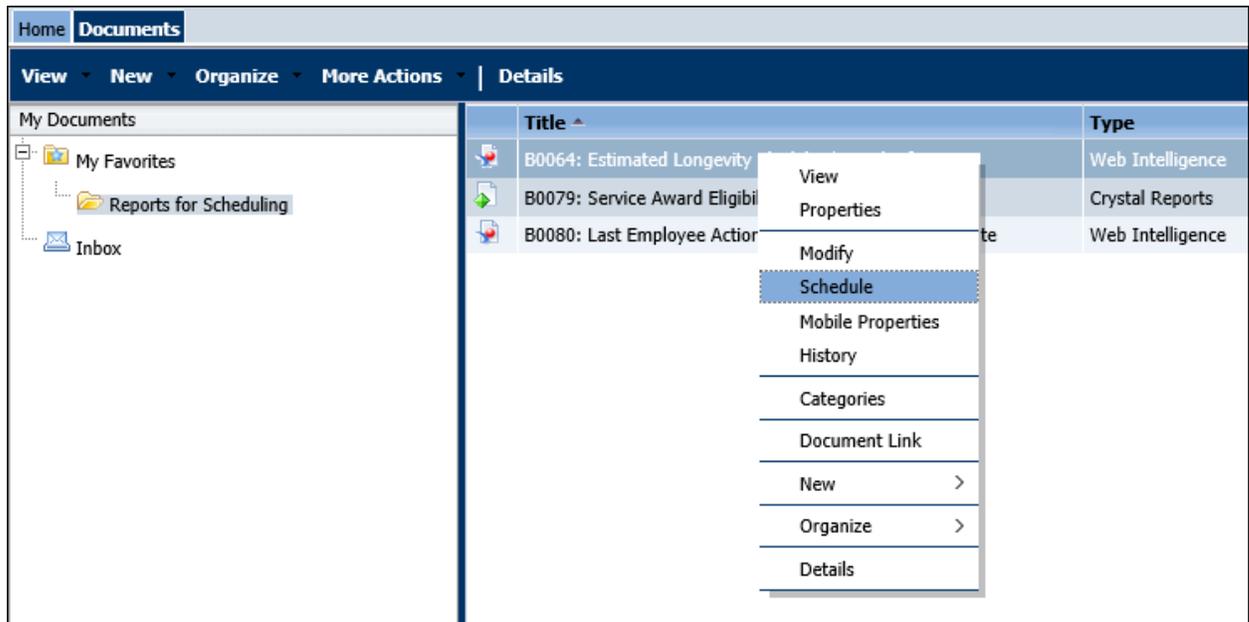


- 4. To schedule a report, navigate to **My Documents** and click on the **Reports for Scheduling** folder to see your previously copied reports.

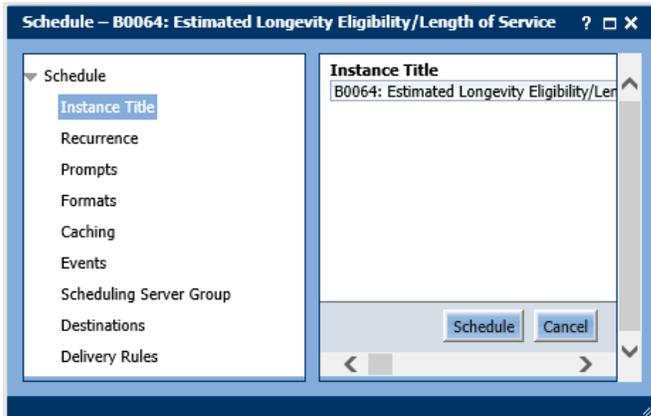


For demonstration, we have copied the above three reports from the public folder to our **Reports for Scheduling** folder.

- To schedule a report, highlight the report name, right-click and select **Schedule**.

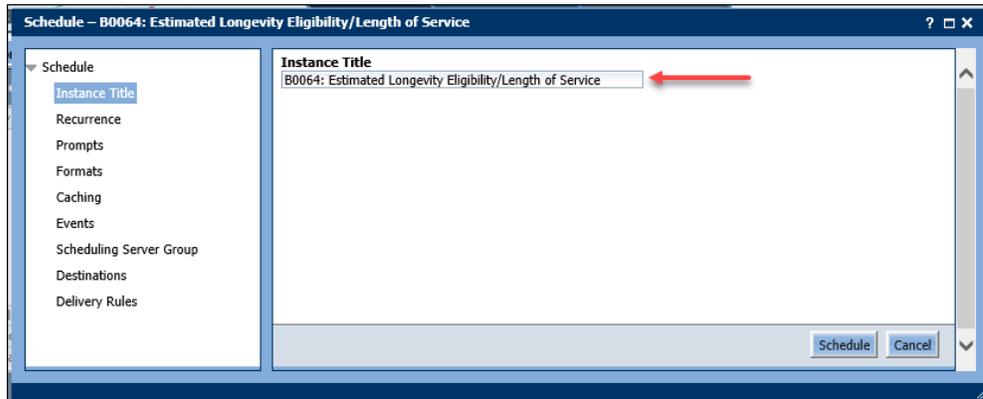


- The Schedule dialog box will appear. The listed items will be used to define scheduling parameters. **NOTE: Do not click on the Schedule button until all parameters have been filled out. Wait until you get to the Destinations parameter (step 11).**

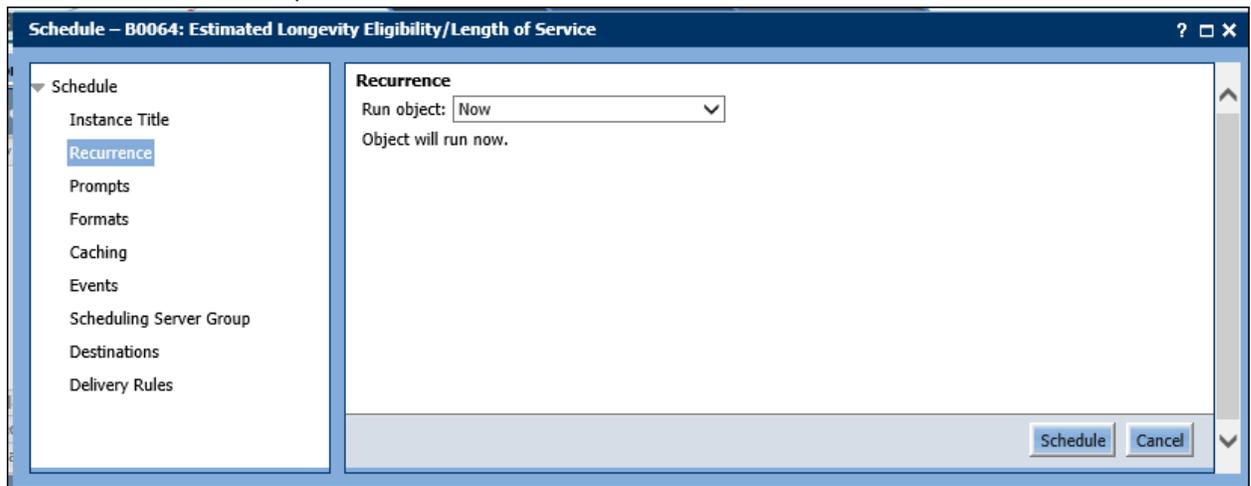


<p>Webi Scheduling Parameters</p> <ul style="list-style-type: none"> Schedule <ul style="list-style-type: none"> Instance Title Recurrence Prompts Formats Caching Events Scheduling Server Group Destinations Delivery Rules 	<ul style="list-style-type: none"> • Instance Title – This defaults to the Report Title and can be changed. • Recurrence – Type of scheduling, e.g., Daily, Weekly, Monthly, etc. • Prompts – Prompts related to the report to help you select specific data; mandatory prompts must be filled in for the report to execute. • Formats – Output format for your report, e.g., Webi, Excel, PDF, etc. • Caching/Events/Scheduling Server Group – These are not configured and should be ignored. • Destinations – Where the report output will go. • Delivery Rules – No interaction required with this parameter. Rule is configured to only output results if the report content is not partial. Incomplete content will render a failed status.
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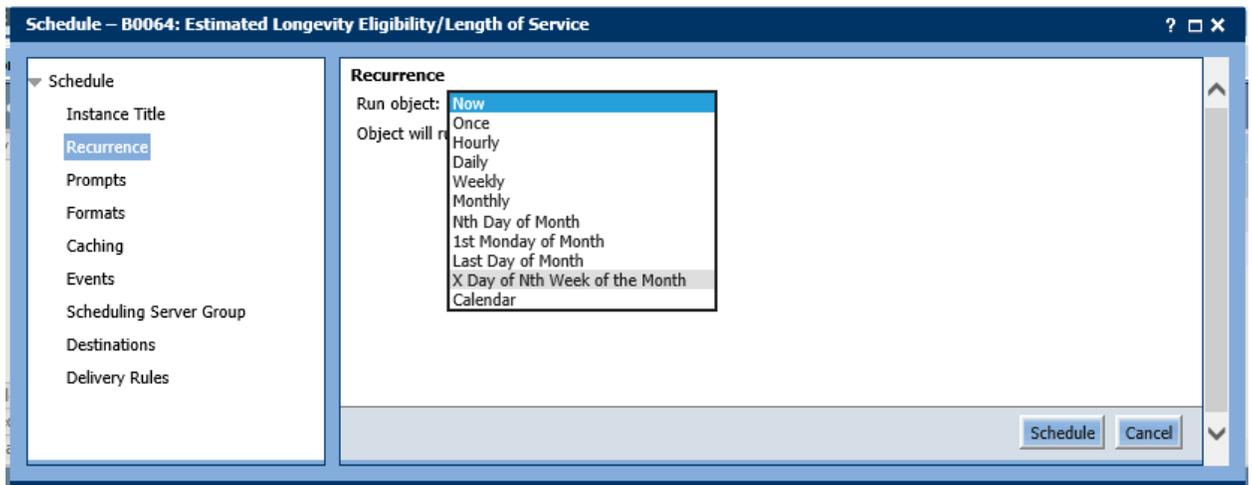
- The default **Instance Title** is your report name. You can modify this title if desired. Just highlight the text and type over it to change.



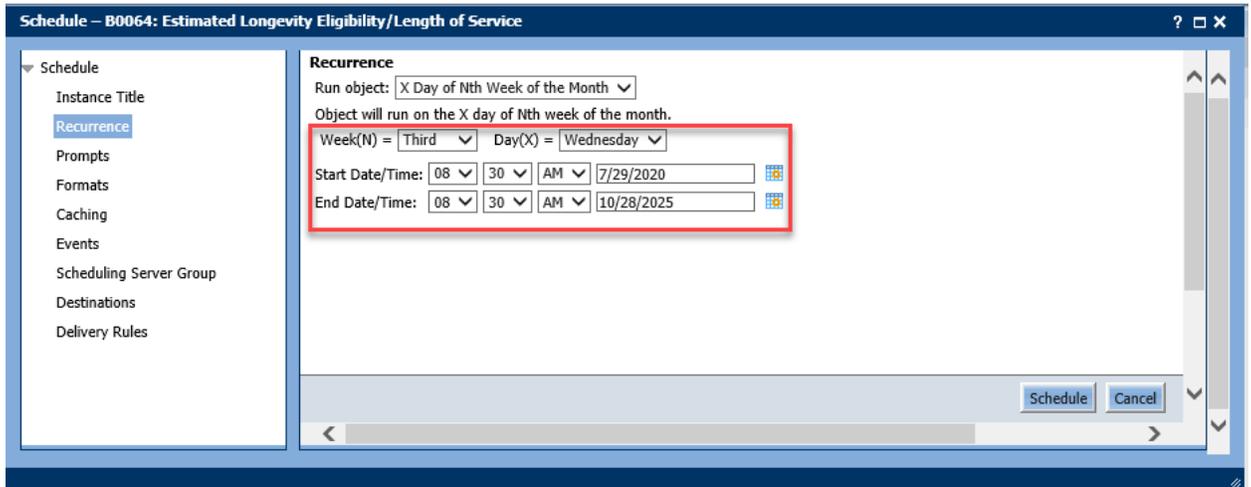
- Click on the **Recurrence** parameter.



- Click on the **Run object** drop-down to select a desired schedule type.

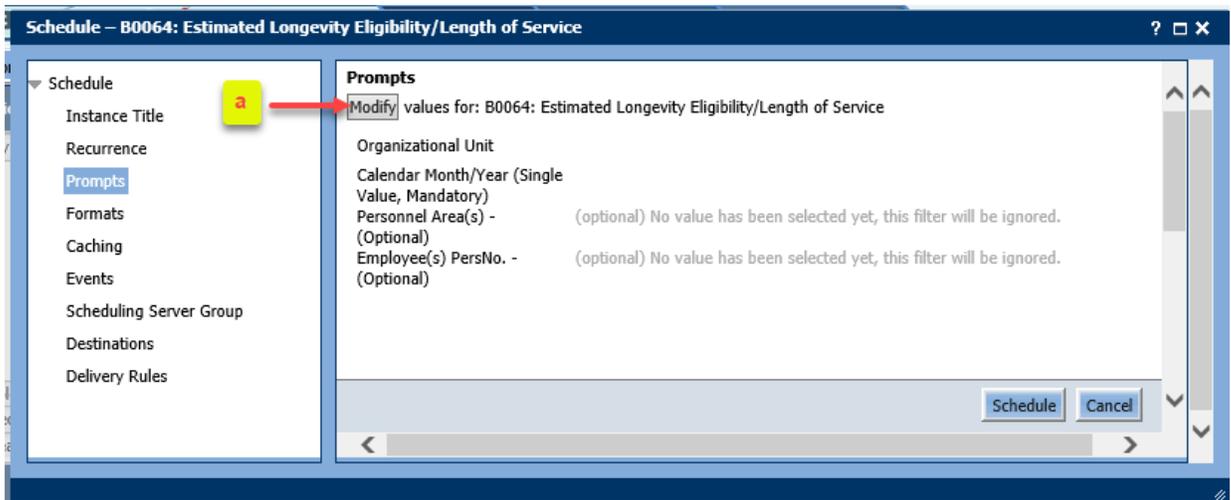


- The **Now** option will run the report immediately after you have selected all the required parameters. The **Once** option can be used for a one-time run for a specific date and time. The **Calendar** option is not configured in our system and can be ignored. All other options are various types of recurring schedules.
- For this example, we will create a recurring schedule using **X Day of Nth Week of the Month**.

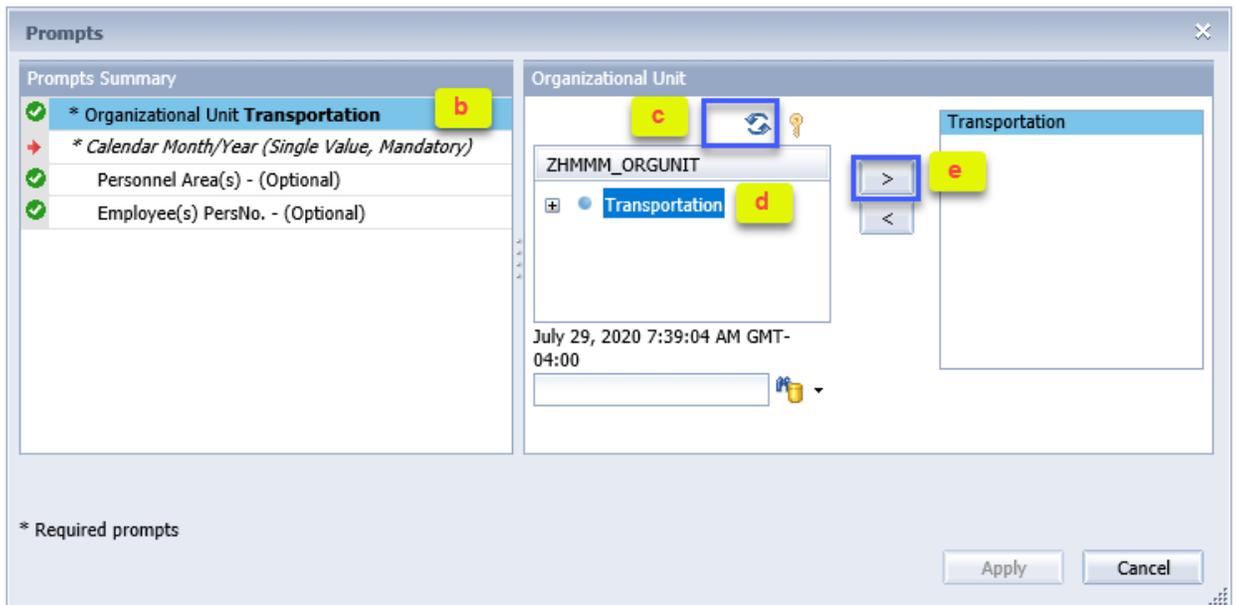


Change the options on this screen to reflect your desired schedule.

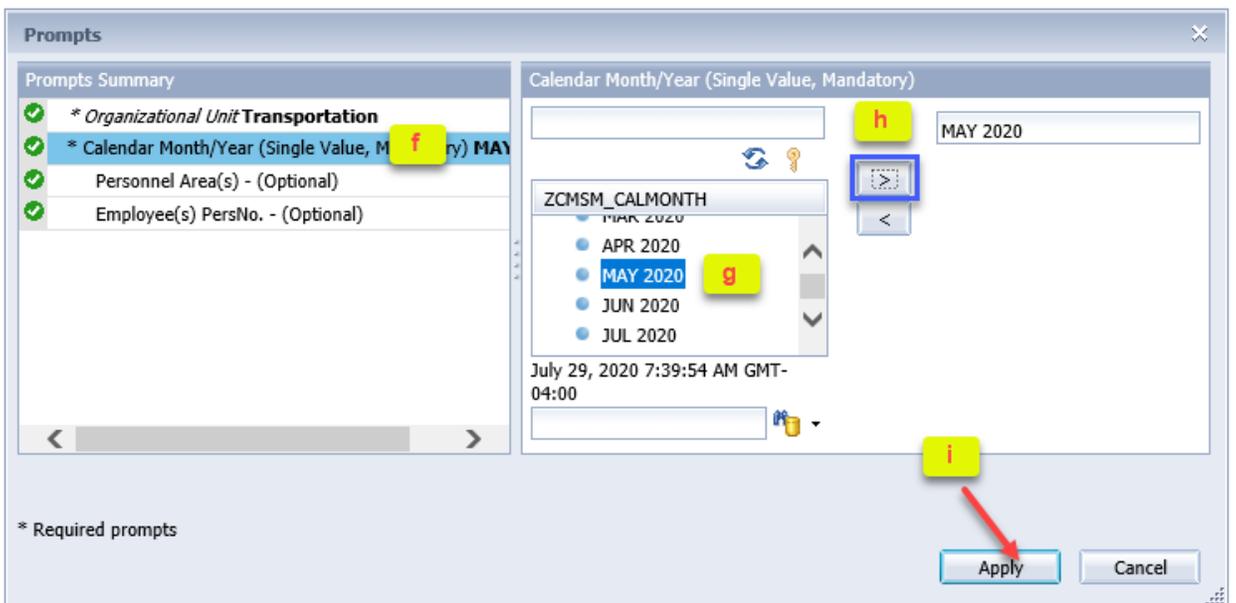
9. Click on the **Prompt** parameter.



- a. Click on the **Modify** button. The Prompts selection screen will appear.
NOTE: These are the same prompts that you see when running the BOBJ report live.



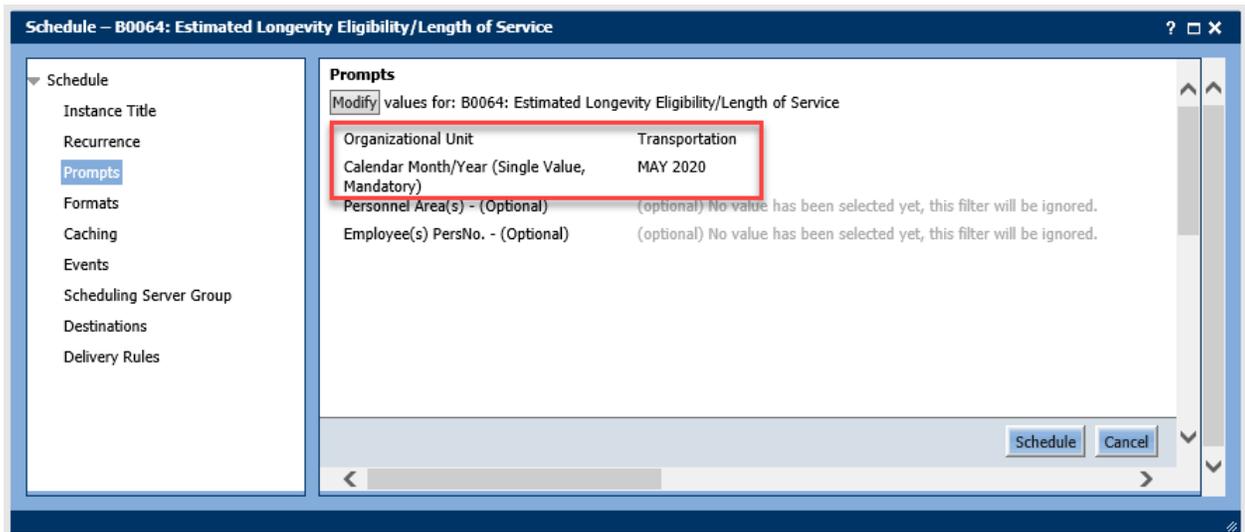
- b. Click on Organizational Unit to fill in this mandatory prompt.
- c. Click on the Refresh Values icon. You will see Orgs only for which you have security access.
- d. Select the desired OrgUnit.
- e. Click on the right arrow to move it to the selection box.



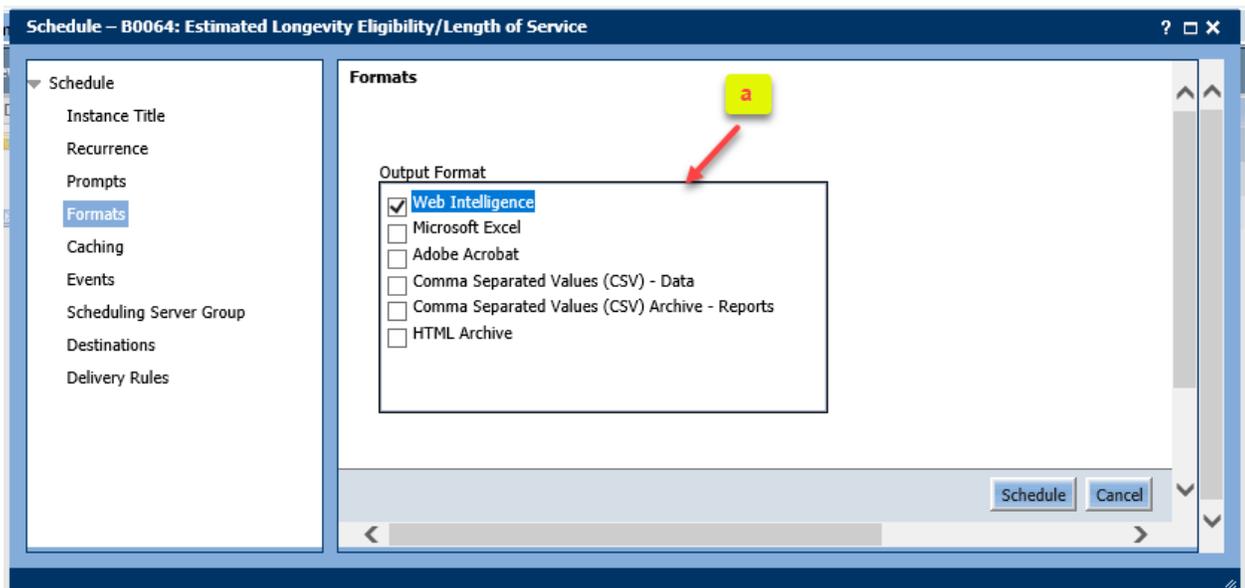
- f. Click on the **Calendar Month/Year** prompt.
- g. Scroll down to select the desired value.
- h. Click on the right arrow to add the value to your selection box.
- i. Once all mandatory prompts have been selected, the Apply button will be active. Click **Apply** to save your prompt selections.

NOTE: You must click **Apply** or your prompt selections will not be saved!

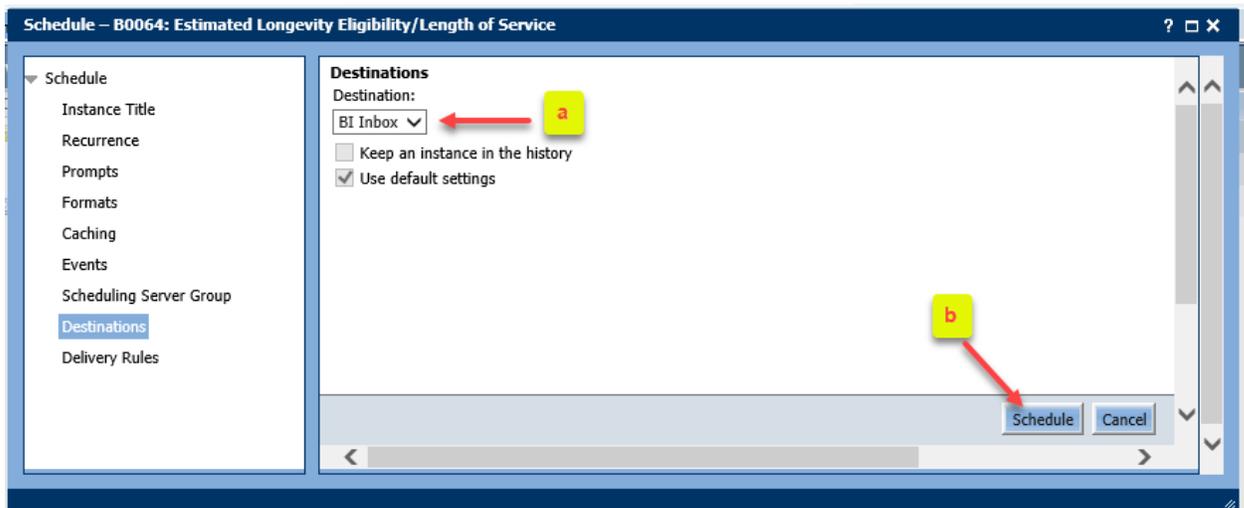
- j. You should see your prompt selections for **Organizational Unit** and **Calendar Month/Year** appear in the following screen. If you do not see both these values, then your selections have not been saved. Go back to the **Modify** button to re-select the prompt values.



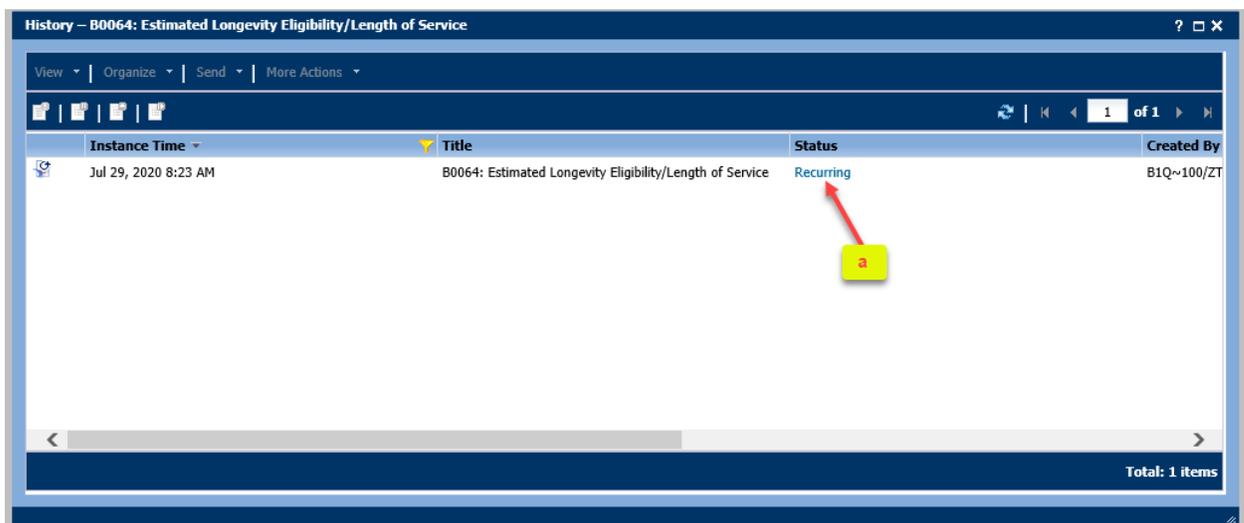
- 10. Click on the **Formats** parameter.
 - a. Select your desired **Output Format**.



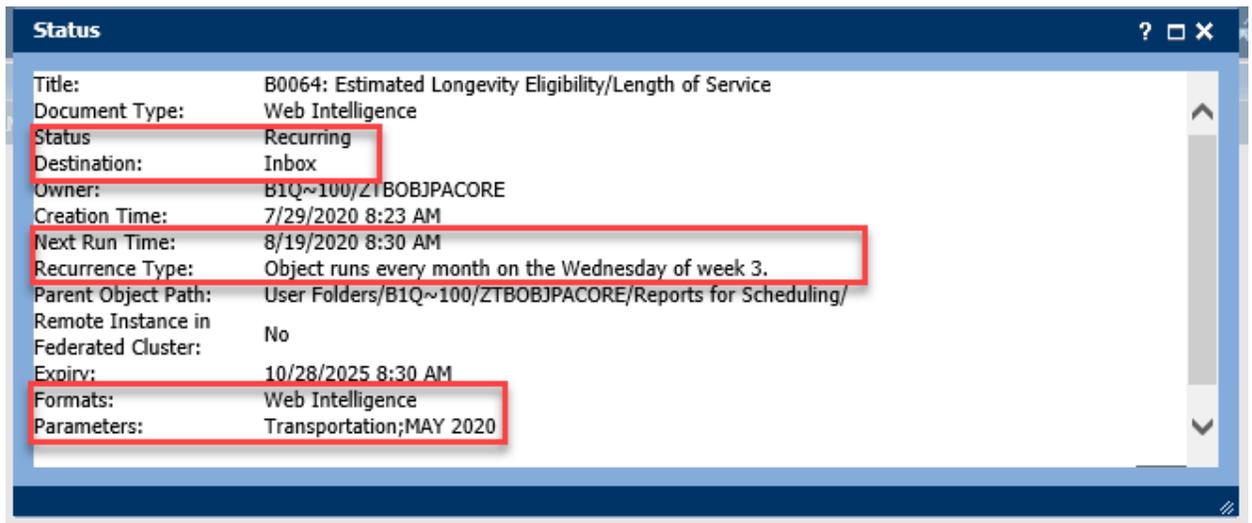
11. Caching, Events, and Scheduling Server Group are not configured. Ignore these parameters.
12. Click on the **Destinations** parameter.



- a. Confirm that **BI Inbox** appears in the drop-down box.
NOTE: Ignore the ‘Keep an instance...’ and ‘Use default settings’ checkbox. These cannot be changed.
 - b. Now finally click on **Schedule** to complete your setup.
13. The **History** screen for this report will show. Only reports that have been scheduled as **Recurring** will be retained in the report **History**. Reports that have been scheduled as “Run Now” or “Run Once” will not appear in History after the report has successfully executed but will appear in your Inbox after execution.



- a. Click on Recurring to see the parameters that you have selected during the scheduling for this report.



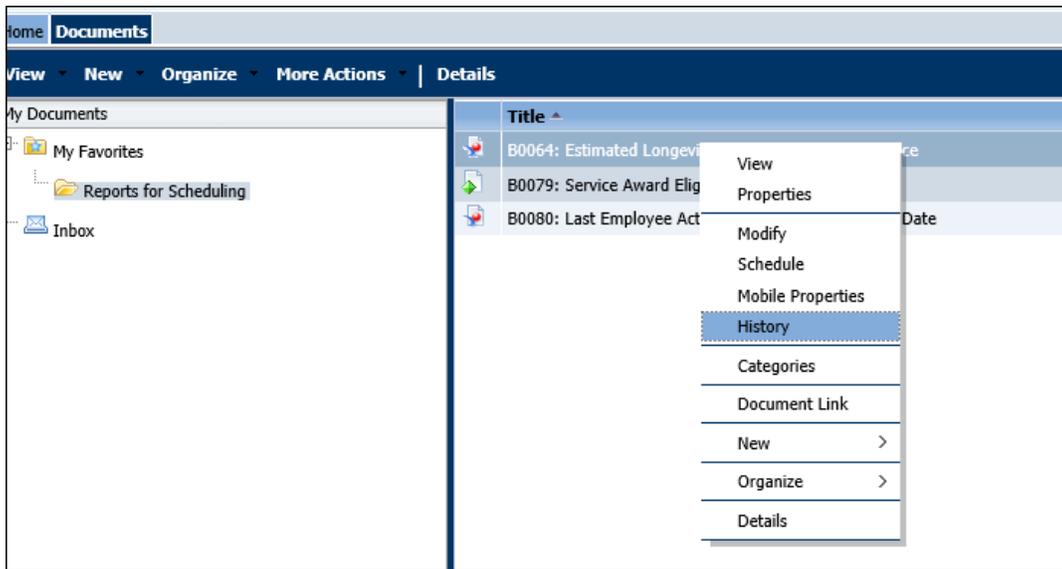
- Notice the Status, Destination, Recurrence Type, Formats, and Parameters (prompt values selected) should all reflect how you have setup this recurring schedule.

14. Successful execution of scheduled reports will appear in your **Inbox**. This also includes reports scheduled as 'Run Now' or 'Run Once'.

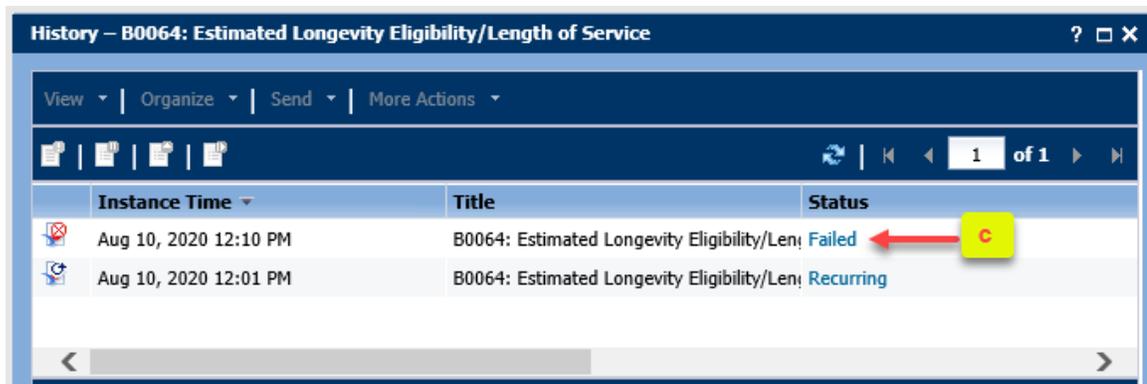


- a. If you do not see results in your inbox, go back to your scheduling folder and check the **History** status to determine if there was a failure.

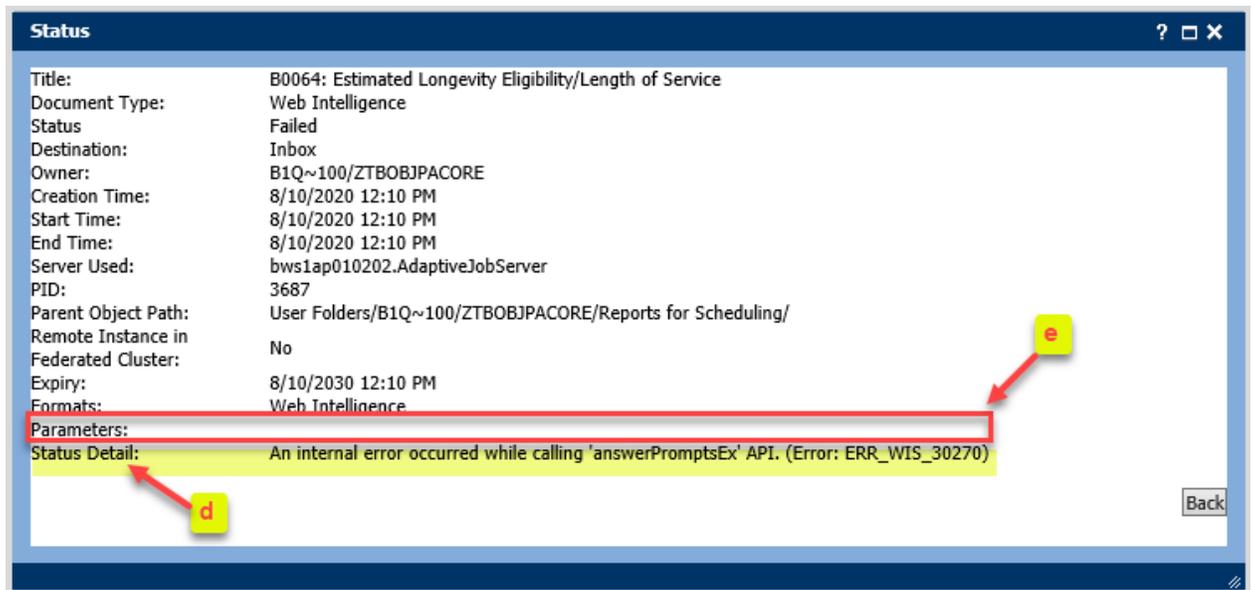
- b. Navigate back to your scheduling folder, highlight your report, right-mouse->History.



- If there was a failure, you will see a 'Failed' status in the History screen.

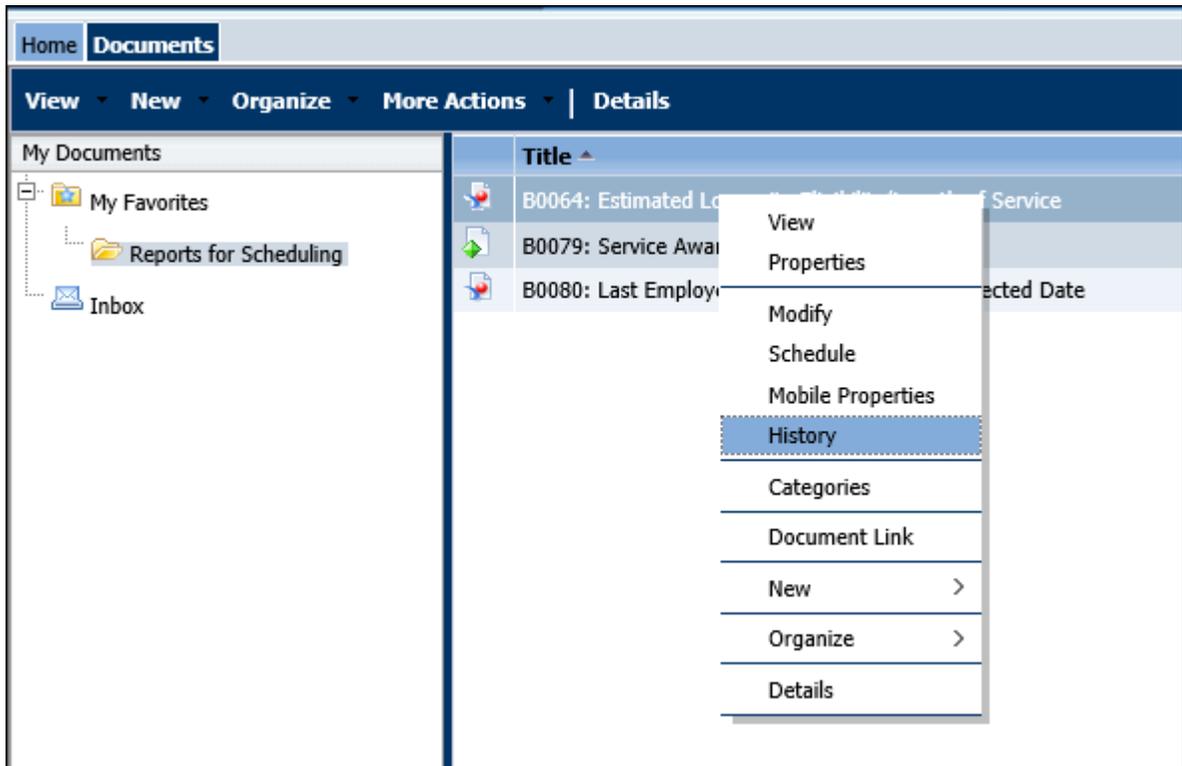


- c. Click on the 'Failed' status to see details of the failure.



- d. The **Status Detail** indicates that there was some sort of a problem related to 'answerPrompts.'
- e. We see that the **Parameters** section is completely blank. This means that during the scheduling process, the values for mandatory prompts were not properly saved. Either the **Apply** button was not clicked during the **Modify** Prompts section of the scheduling process (see step 8) or perhaps the **Schedule** button was clicked prematurely before all scheduling parameters had been selected (see note on step 6).
- f. Just like when you are executing the report live, there are various reasons why a report execution can fail.
 - o System resource issues.
 - o Manually typing in an incorrect prompt value that does not exist, e.g., misspellings.
 - o Incomplete data-results are partial.

15. In the previous B0064 example, we used a recurring monthly schedule of 3rd Wednesday of every month.
 - a. For the mandatory **Calendar Month/Year** prompt, we had selected MAY 2020. This means that every report execution on this schedule will continue to select MAY 2020 data. It will not execute for a new month unless you modify the **Calendar Month/Year** prompt value when a new month becomes available.
 - b. To modify an existing schedule, navigate back to your **Reports for Scheduler** folder, highlight the report name, right-mouse->History.



- c. Once the **History** screen appears, hover the mouse over the **Recurring** status, right-mouse to see the different options available for the previously defined schedule.

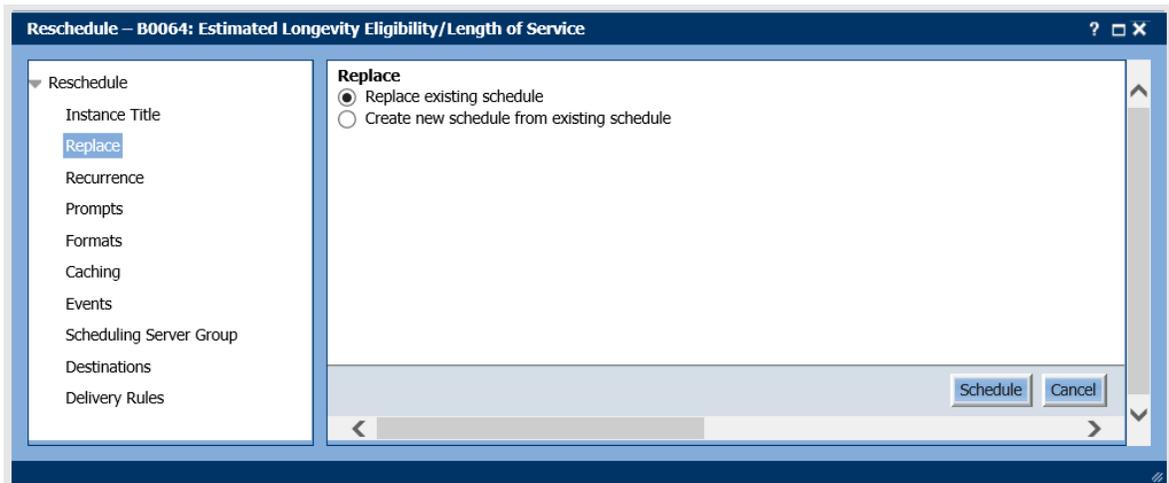


- The **Organize** option allows you to delete the entire schedule.
- The **Pause** option allows you to suspend the recurring schedule so that it will not trigger. If you choose this option, the status will change to **Paused** and you can **Resume** your schedule later.

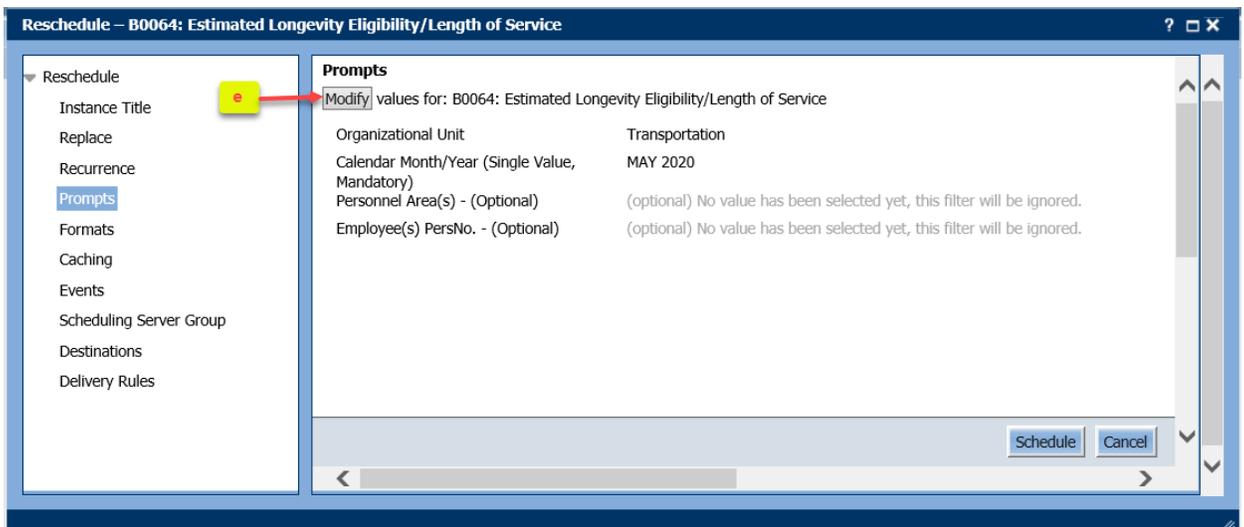


- If you do not wish to wait for the next occurrence on the schedule, the **Run Now** option allows you to execute the report immediately using all the parameters defined when you previously configured the schedule.
- For our example, we will use the right-mouse->**Reschedule** option.

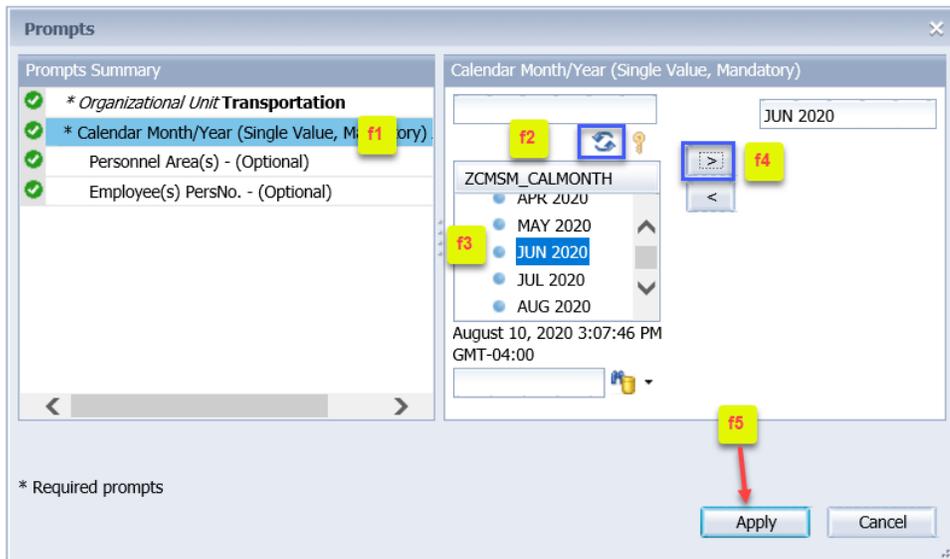
- d. This will bring up the Reschedule dialog box. Click on the **Replace** parameter. Select **Replace existing schedule**.



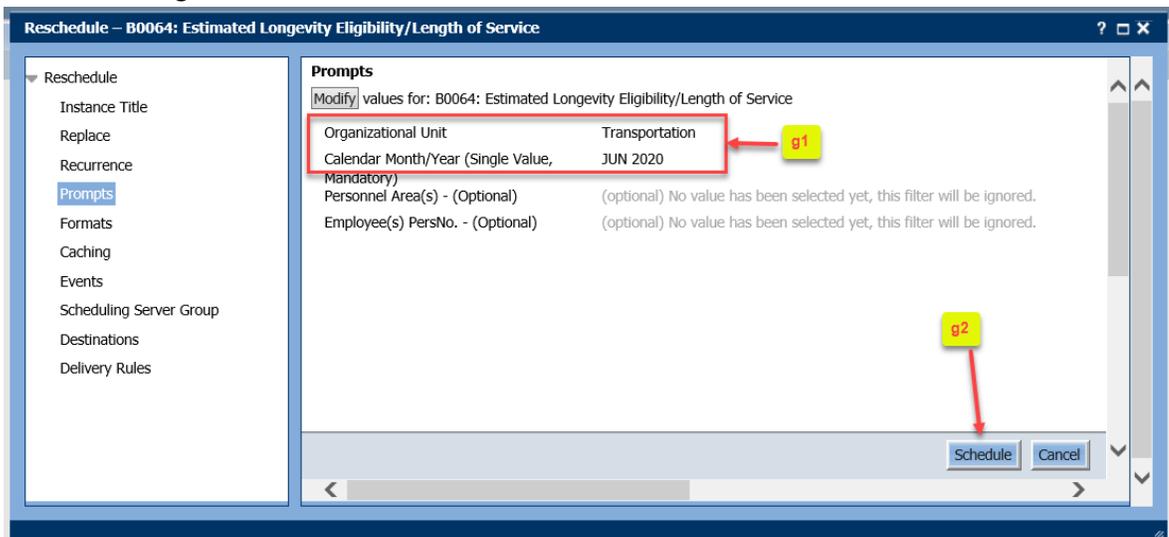
- e. Click on the **Prompts** parameter. Click on the **Modify** button.



- f. The Prompt selection screen will be displayed.



- f1. Click on the **Calendar Month/Year** prompt.
- f2. Click on the Refresh Values icon.
- f3. Navigate to the desired month.
- f4. Click the right arrow to add it to your selection box.
- f5. Click **Apply** to save your new prompt values.
- g. You should see your prompt selections for **Organizational Unit** and **Calendar Month/Year** appear in the following screen.

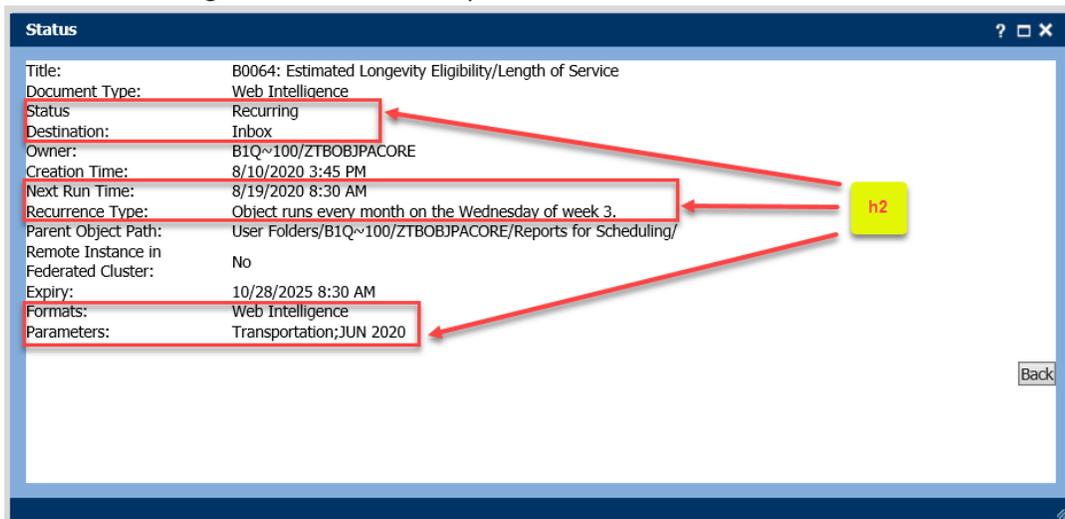


- g1. If you do not see both the **Organizational Unit** and **Calendar Month/Year** values, then your selections have not been saved. Go back to the **Modify** button to re-select the prompt values
- g2. Since this is a Rescheduling action, all your previous settings on the other scheduling parameters will remain the same unless you want to change them. Once your prompt selections from the previous step (g1) are confirmed, click on **Schedule**.

h. The History screen for this report will display.

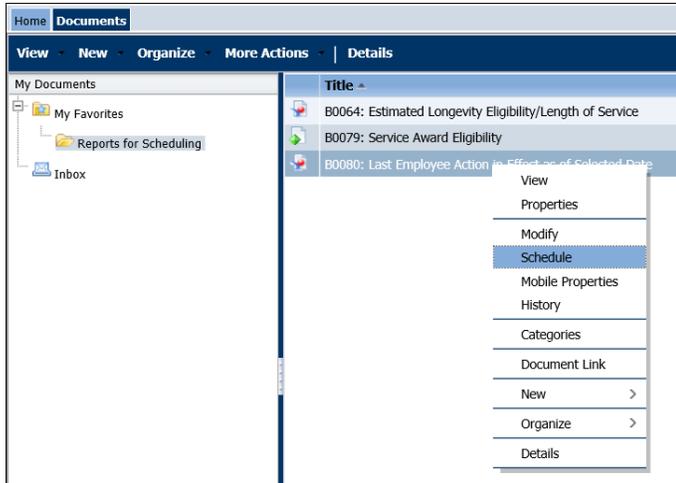


h1. Click on Recurring to see the details of your new schedule.

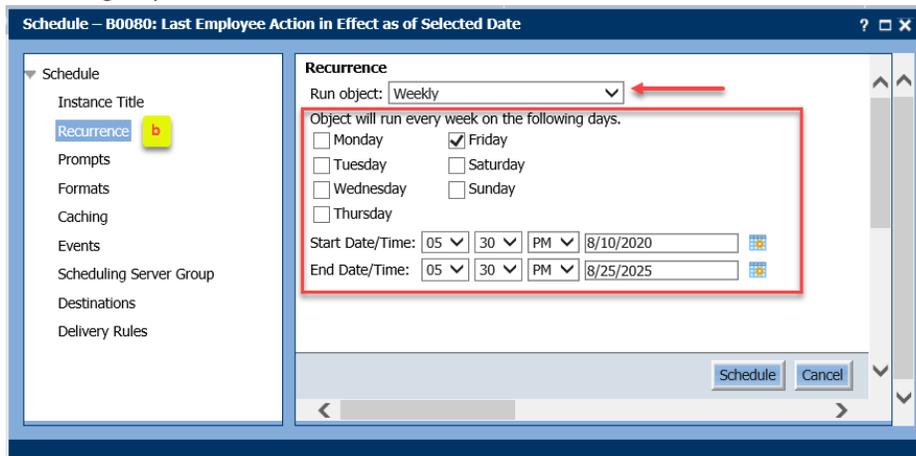


h2. Notice the Status, Destination, Recurrence Type, Formats, and Parameters (prompt values selected) should all reflect how you have setup this recurring schedule.

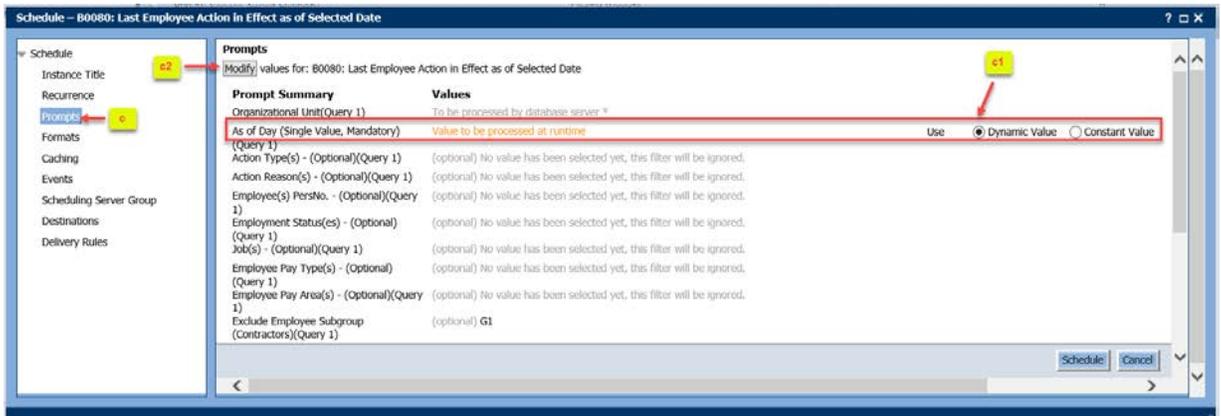
16. Some reports are designed where the date prompt is auto-filled with a default date selection. Below is an example of how to schedule this type of report. For demonstration, we will use report B0080. This report has an **As of Day** prompt that is auto-filled with the current date.
 - a. Navigate to the Reports for Scheduling folder. Highlight the B0080 report->right-mouse->Schedule.



- b. The Schedule dialog box will appear. Select the **Recurrence** parameter. For this demonstration, we will select a Weekly recurring schedule. Fill in the other parameters with your desired recurring day, Start Date/Time, etc.



- c. Select the **Prompts** parameter.



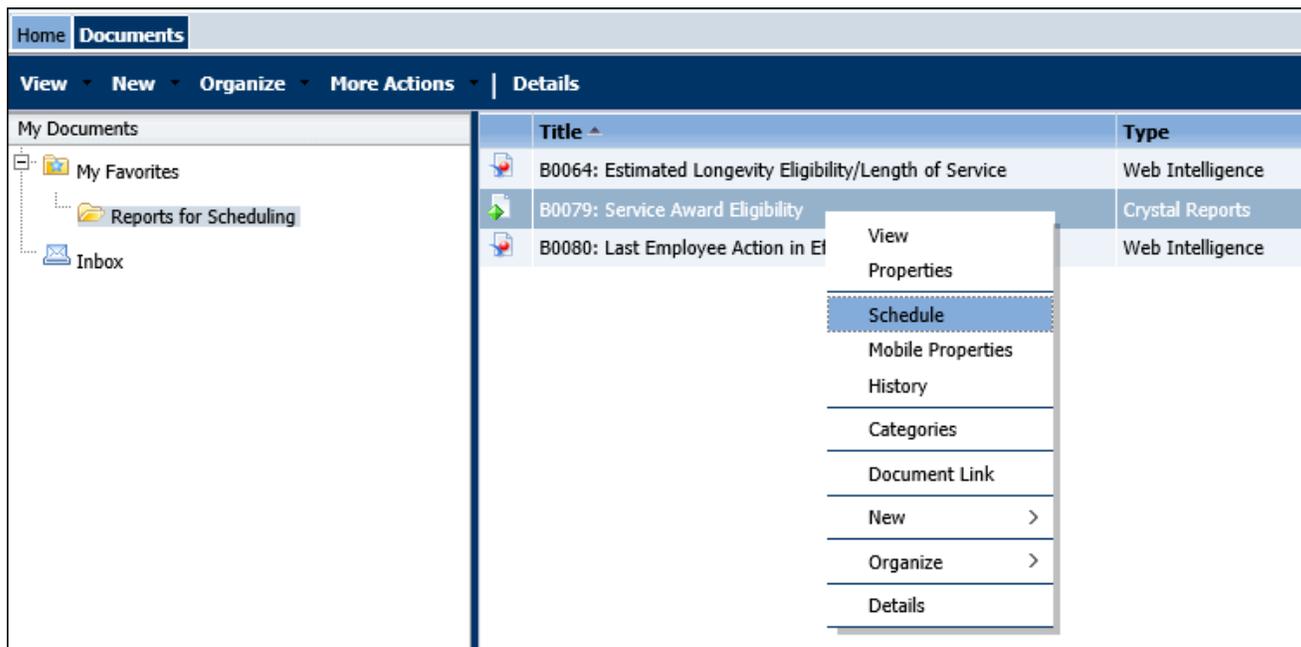
- c1. Notice the **As of Day** in the Prompts Summary shows a radio button with **Dynamic Value** designation.

This is because B0080 is designed where this prompt is auto filled with current date. Choosing the **Dynamic Value** designation will allow this prompt to dynamically auto-fill with current date when the report executes via the scheduler. This means that in our example for a Weekly (every Friday) recurring schedule, the **As of Day** prompt will dynamically fill in with a new date when the report executes the following week.

The **Constant Value** button allows you to select an explicit date. If you choose this option, you can enter an explicit date for the **As of Day** prompt when you click on **Modify**. Entering an explicit date for this prompt means that the report will execute for the same **As of Day** value every time the schedule is triggered.

- c2. Like other Webi reports, you must click the **Modify** button to fill in all required prompt entries before scheduling the report.

17. Scheduling a Crystal report. Navigate to the **Reports for Scheduling** folder. Highlight the B0079 report name, right-mouse->Schedule.

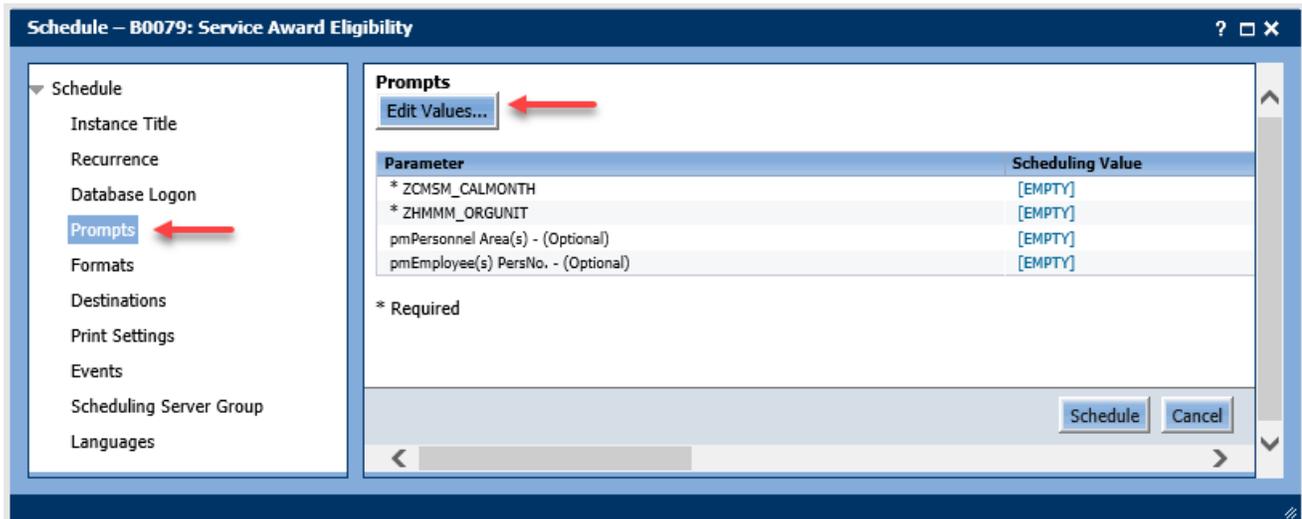


The Schedule dialog box appears.

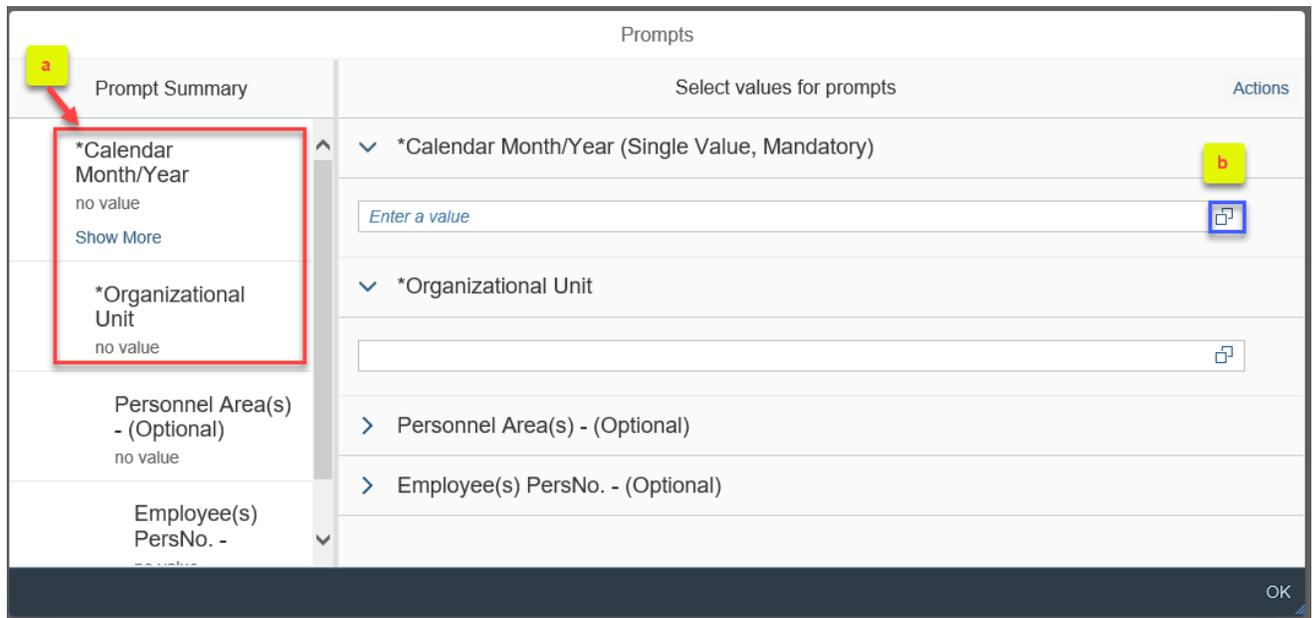
Crystal Scheduling Parameters

- Instance Title – This defaults to the Report Title and can be changed.
- Recurrence – Type of scheduling, e.g., Daily, Weekly, Monthly, etc.
- Database Logon – This is already configured in the system and should be ignored.
- Prompts – Prompts related to the report to help you select specific data; mandatory prompts must be filled in for the report to execute.
- Formats – Output format for your report, e.g., Crystal, Excel, PDF, etc.
- Destinations – Where the report output will go.
- Print Settings – Do not change anything on this parameter. Report data can be sensitive. Printing should be handled manually after the results render so that you can monitor your print queue.
- Events/Scheduling Server Group – These are not configured and should be ignored.
- Languages – The system is not configured for multiple languages. Do not change anything on this parameter.

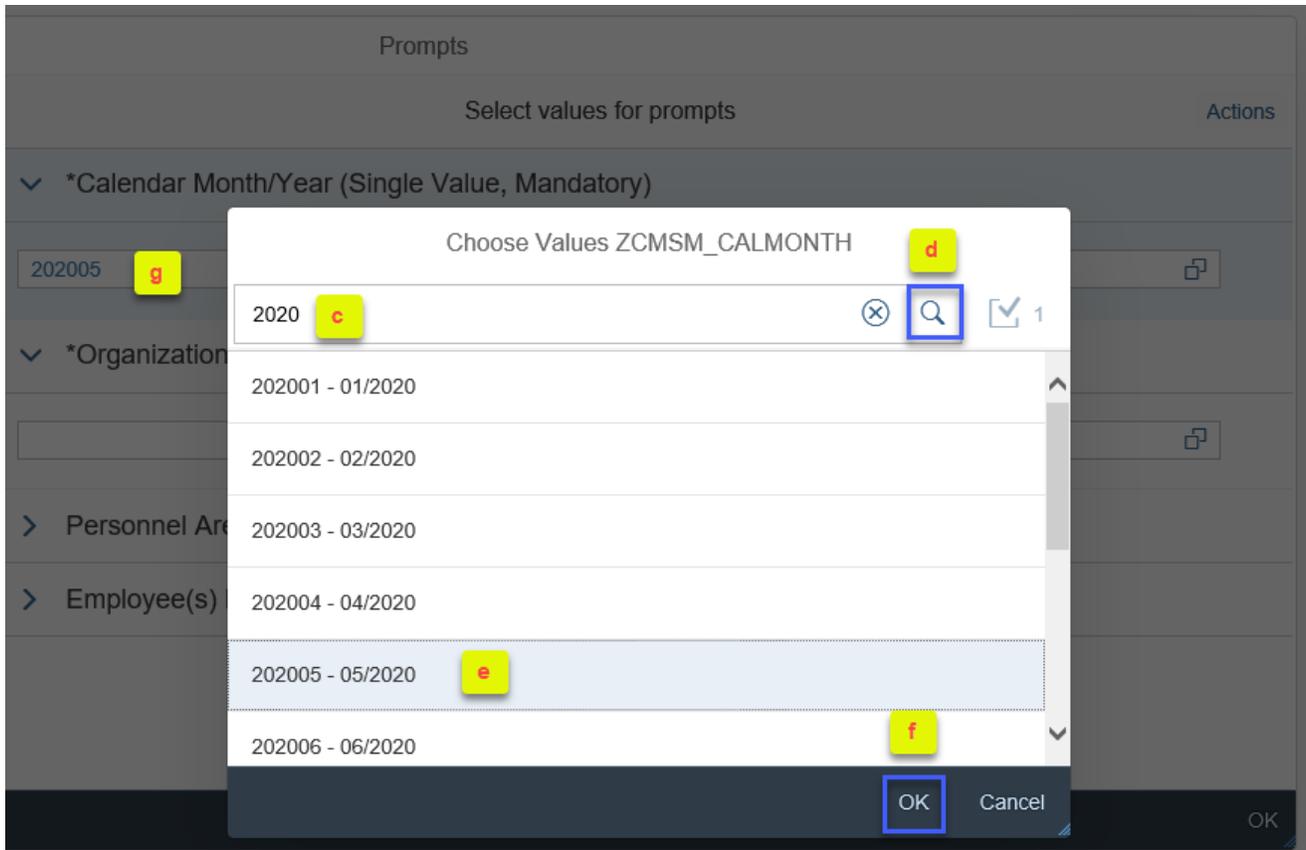
- Crystal reports have a different interface for selecting prompt values so we will demonstrate the interaction with the **Prompts** parameter only. All other Schedule parameters are like the above examples for scheduling a Webi report.



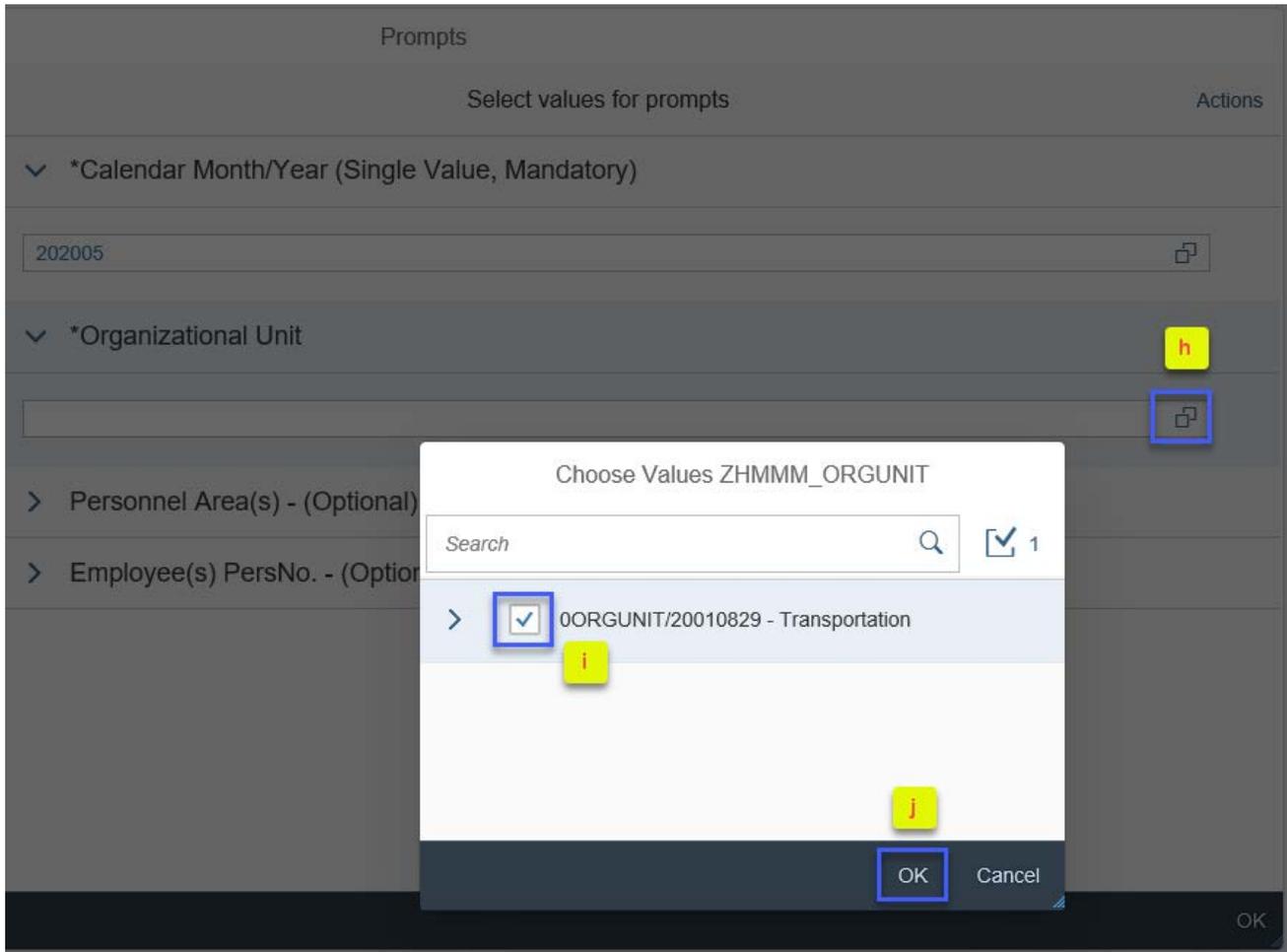
- Select the **Prompts** parameter, click **Edit Values**.
 - The Crystal Prompts dialog appears. Notice that there are two required prompts designated by the asterisk.
 - Click on the **Calendar Month/Year** “Matchbox” icon to see the list of months.



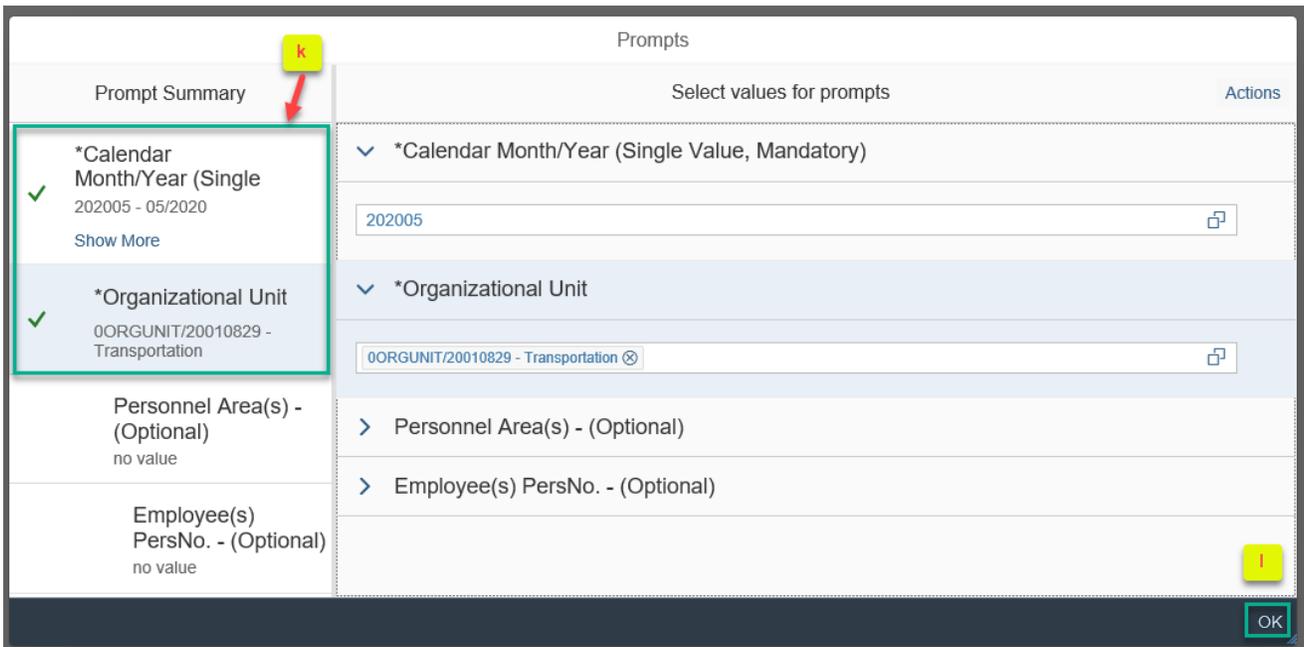
- c. Type in 2020 to search for 2020 dates.
- d. Click on the magnifying glass to search.
- e. Navigate to the desired month, click to select.
- f. Click OK to accept your selection.
- g. You should see your month selected here.



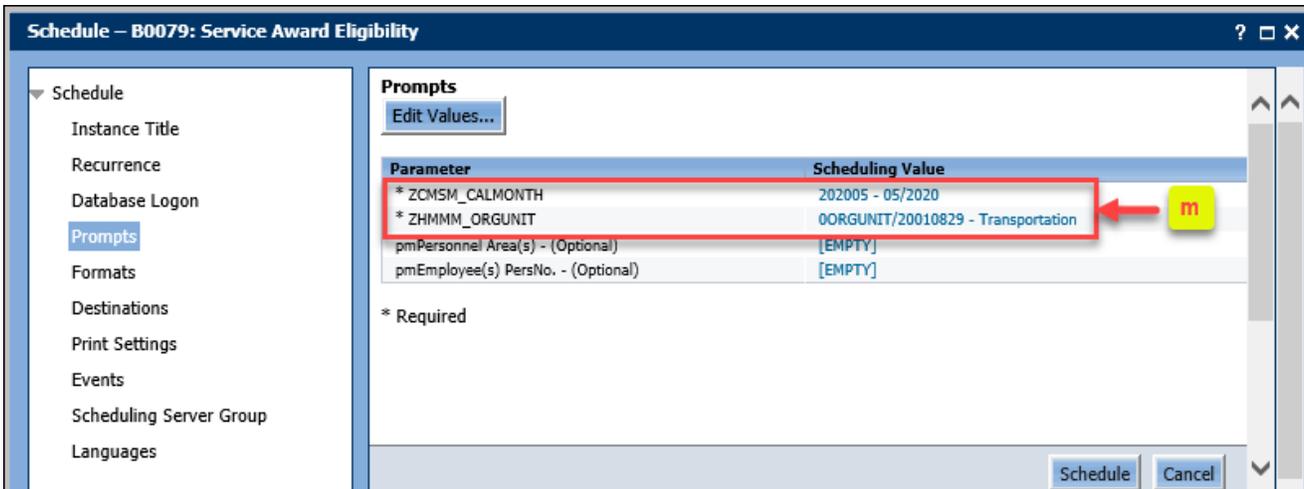
- h. Click on **Organizational Unit** “Matchbox” icon.
- i. Click the checkbox to select your desired Org Unit.
- j. Click OK to accept your Org Unit selection.



- k. Notice that green checkmarks indicating the two required prompts are now satisfied.
- l. Click OK to accept the values you selected for the two required prompts.

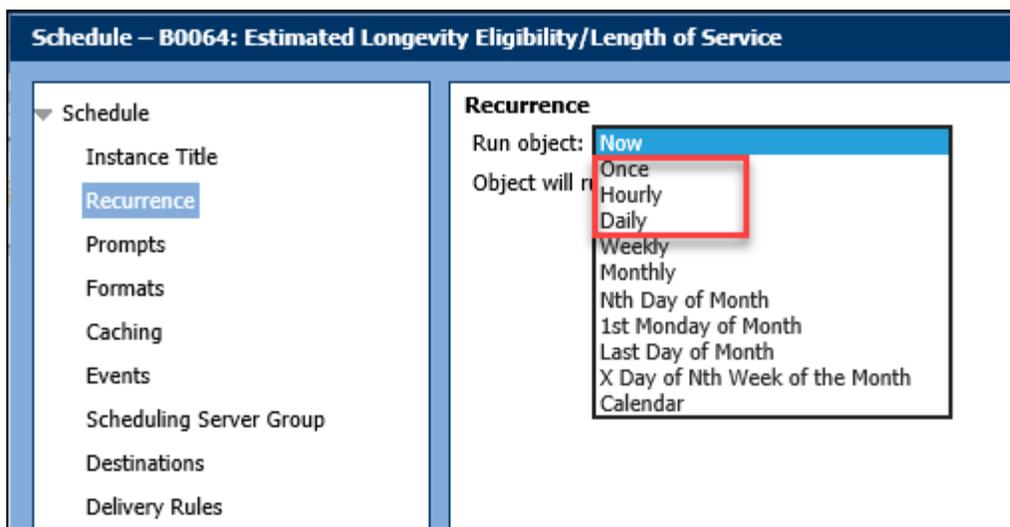


- m. You should see your prompt selections for Calmonth and OrgUnit appear in the following screen. If you do not see both these values, then your selections have not been saved. Go back to the **Edit Values** button to re-select the prompt values.



Special Considerations

- Each user is limited to 50 report entries for the Inbox. The system is configured so that the Inbox is self-cleaning to maintain this limit. If there are more than 50 entries generated to the Inbox, the system will auto-delete starting with the oldest entries.
- BI data is loaded daily between the hours of midnight and 8 am. It is best to avoid scheduling reports during the BI load window (midnight – 8 am) to steer clear of incomplete data.
- The BI system has scheduled downtimes for maintenance. If your report happens to be scheduled during a maintenance window, the report will run automatically when the system becomes available again.
- For the Recurrence parameter



If you select Once, Hourly, or Daily and then accidentally select a past date & past time as your start date/time, the system will run your report immediately once you complete the scheduling process.

Change Record

- 9/21/2020 – Updated for new Crystal Reports
- 10/22/2020 – Updated Alt Text - L. Lee