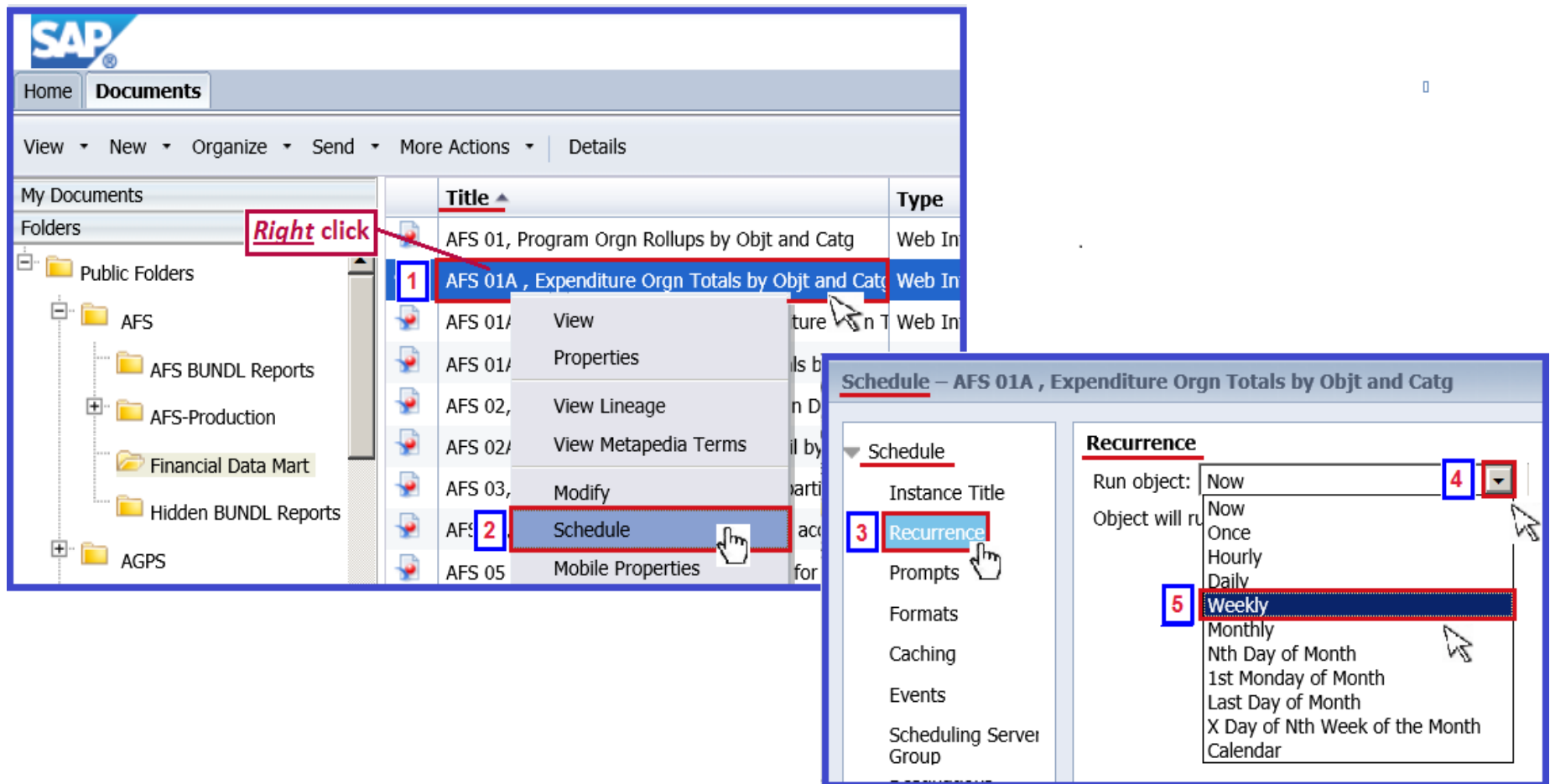


Basic Steps to Schedule a Webi Report

(Last Revised 2015-17-04)

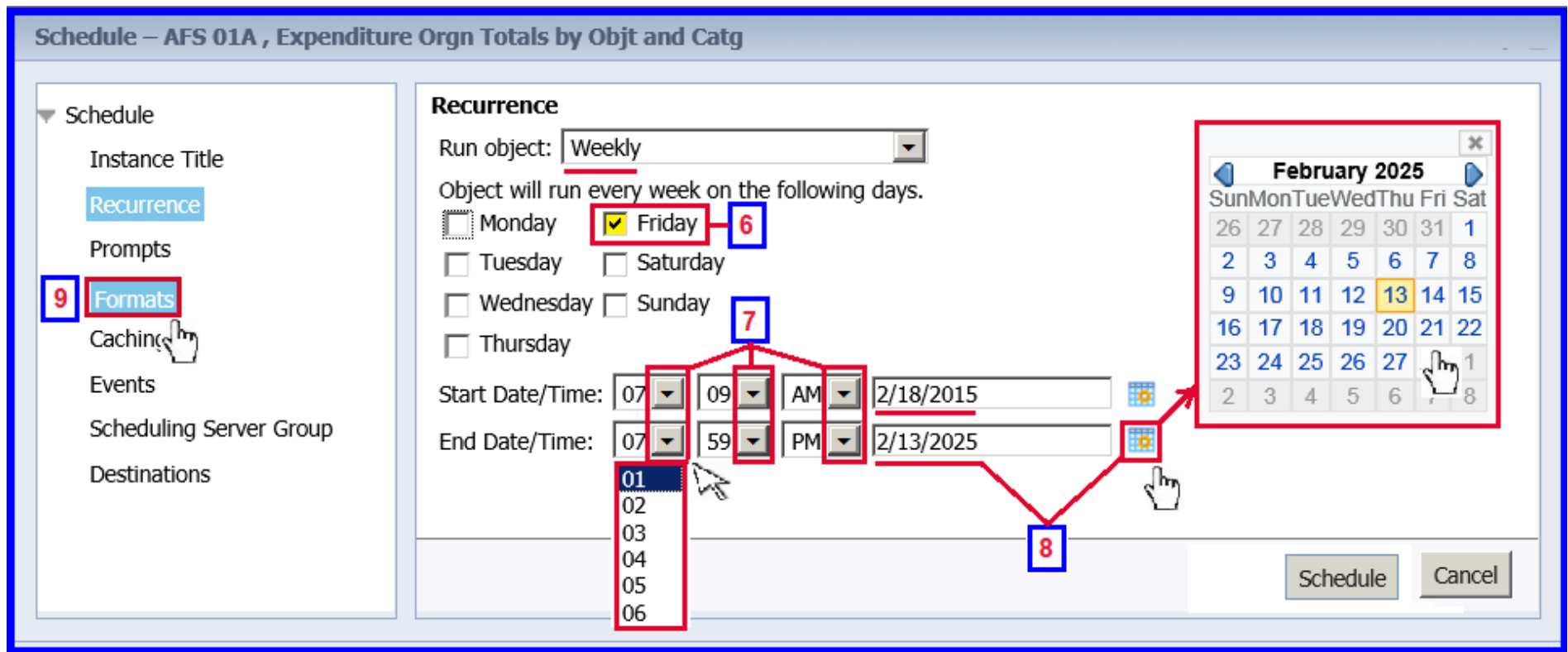
1 Right click on the report **Title**. From the drop down menu **2** click **Schedule**. The **Schedule** window is displayed. In the left panel, **3** click **Recurrence**. In the **Recurrence** panel on the right, **4** click the down pointing arrowhead **▼** at the right end of the **'Run object:'** prompt. A dropdown list of 'recurrence' options will be displayed. **5** Click one of the options. In this example **Weekly** is selected.



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Specific scheduling criteria for the recurrence option chosen ('Now', 'Daily', 'Weekly', etc.) will be displayed. In this example since the **Weekly Recurrence** option was chosen, the day(s) of the week the report will be scheduled to run must be selected. **6** Click on your selection(s). In this example **Friday** is selected. The **'Start Date/Time:'** and the **'End Date/Time:'** prompts specify the effective date/time range for this schedule. The default values make the schedule effective immediately and for a 10 year period. If you wish to change the default values, **7** click the down pointing arrowheads to change the times. To change the date range, **8** click the calendar icon or manually enter the start/end dates. Next, to set the **Output Format** for the scheduled report instances, **9** click **Formats** in the panel on the left.



Basic Steps to Schedule a Webi Report

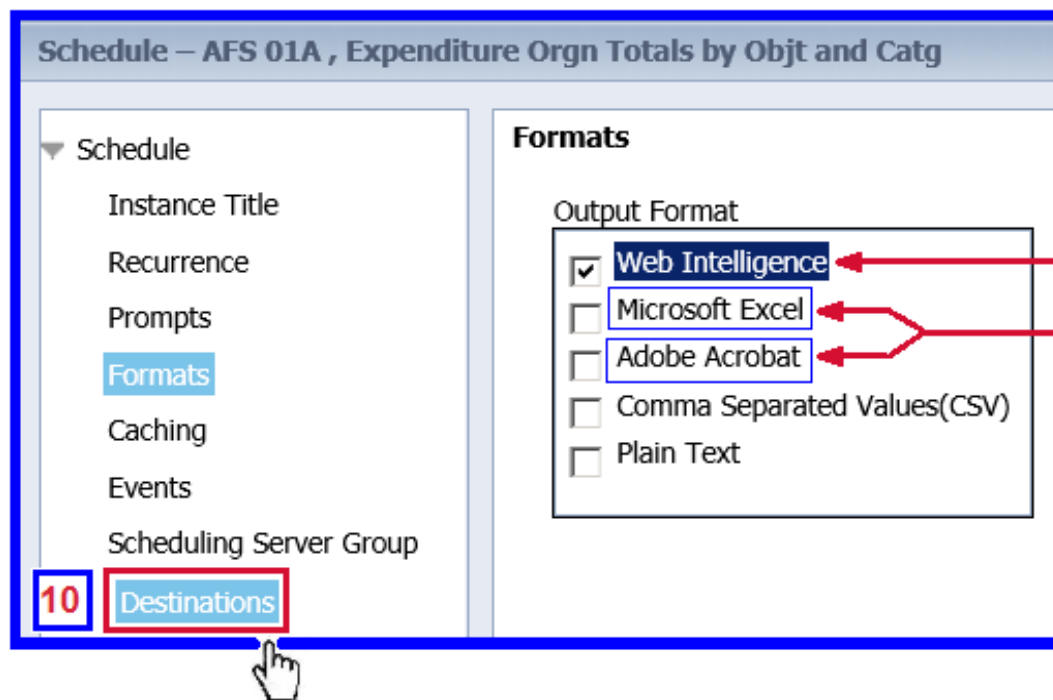
(Last Revised 2015-17-04)

Web Intelligence is the default Output Format and it will be used unless you click another option on this screen.

If the report instance is going to a **BI Inbox** destination the **Web Intelligence** format is probably the best choice since that option will send it in the Business Objects report format.

If the report instance is going to an **Email** destination the **Microsoft Excel** or the **Adobe Acrobat** format would probably work best. The **Microsoft Excel** format sends the report as an **Excel spreadsheet**. The **Adobe Acrobat** format sends the report as a **PDF**.

To define where the scheduled report instances will be sent, **10** click **Destinations**.



*Usually the best format for **BI Inbox** destinations*

*Usually the best formats for **Email** destinations*




We will demonstrate setting the most commonly used destinations, '**BI Inbox**' and '**Email**'.

Note: If the destination is not set, then by default the report will run as scheduled, but it will only be viewable as an instance on the report's **History** page.

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Setting the Destination to '**BI Inbox**' **NOTE:** You must know the Personnel ID of the recipient to use this destination.

- 11 Click the down pointing arrowhead  to the right of the 'Destinations:' prompt. From the dropdown list of options,
- 12 click **BI Inbox**. The '**Available Recipients:**' and the '**Selected Recipients:**' panels will be displayed. In the **Find Title** prompt,
- 13 enter the Personnel ID of the recipient and 14 click the search icon . When it has been found,
- 15 click/highlight the recipient's Personnel ID under the **Title** column. 16 Click the right pointing arrow  to move the recipient to the '**Selected Recipients:**' panel. 17 Confirm that 'Send As:' is set to **Copy**. 18 Click **Schedule**.

Schedule - AFS 01A , Expenditure Orgn Totals by Objt and Catg

Destinations

Destination:

- Default Enterprise
- Default Enterprise Location
- BI Inbox**
- Email
- FTP Server
- File System

Available Recipients:

Find Title: P00184463

Title	Full Name
Administrator	

Selected Recipients:

Title	Full Name
No Items	

Available Recipients:

Find result for "p00184463" in "User List"

Title	Full Name
PB1~300/P00184463	Brett Gautreaux

Selected Recipients:

Title	Full Name
PB1~300/P00184463	Brett Gautreaux

Send As:

- Copy**
- Shortcut

Schedule **Cancel**

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The report's **History** screen will be displayed. **19** Click **Recurring**. The report's **Status** window will be displayed. Confirm that the scheduling selections you made are listed here.


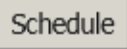

Instance Time	Title	Status	Created By	Type	Pa
Feb 18, 2015 8:52 AM	AFS 01A , Expenditure Orgn Totals by C	Recurring	PB1~300/P00184463	Web Intelligence	

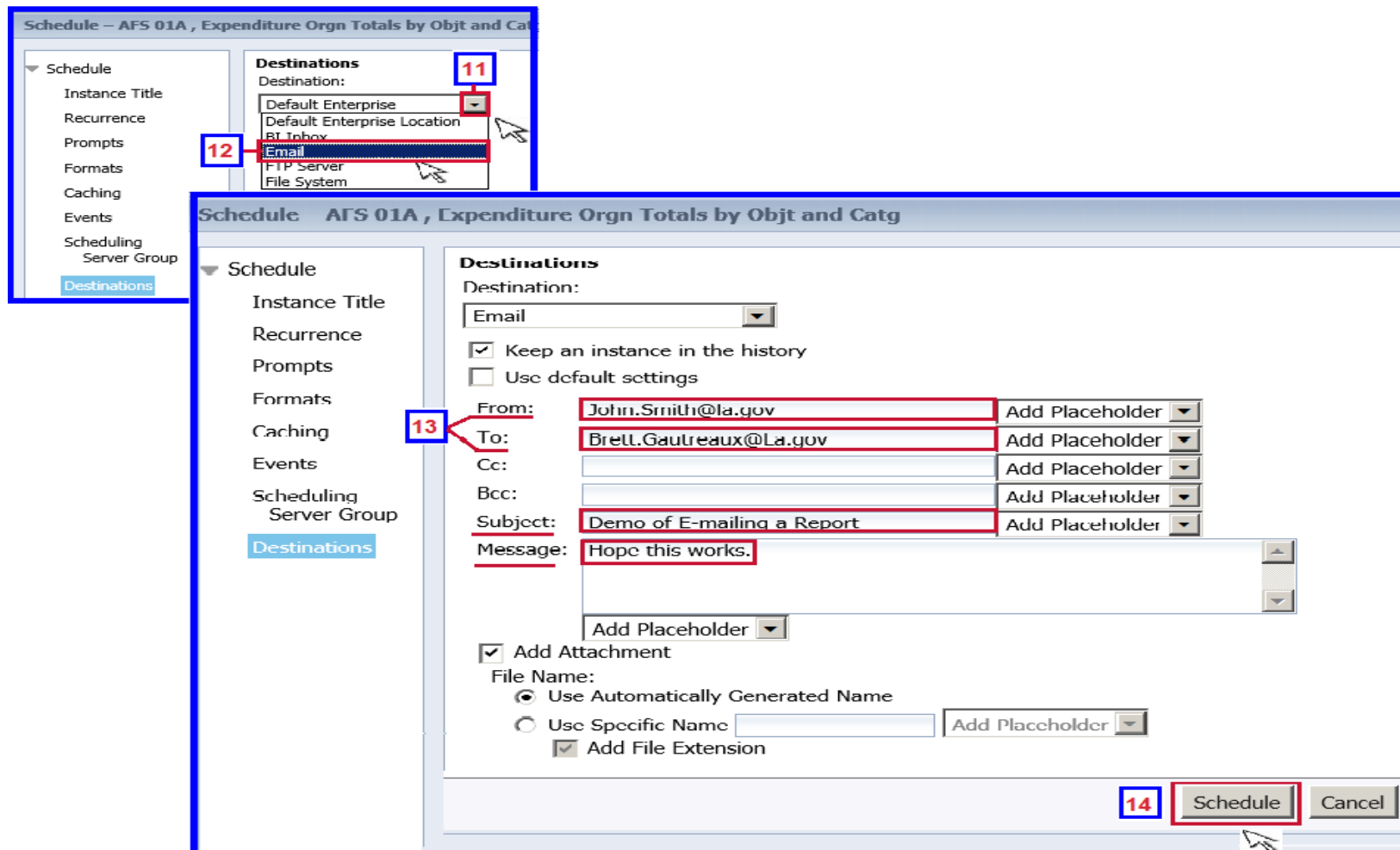
Status	
Title:	AFS 01A , Expenditure Orgn Totals by Objt and Catg
Document Type:	Web Intelligence
Status	Recurring
Destination:	Inbox
Owner:	PB1~300/P00184463
Creation Time:	2/19/2015 2:28 PM
Next Run Time:	2/20/2015 2:27 PM
Recurrence Type:	Object will run every week on the following days:Friday
Parent Object Path:	AFS/Financial Data Mart/
Remote Instance in Federated Cluster:	No
Expiry:	2/13/2025 7:59 PM
Formats:	Web Intelligence
Parameters:	100;2008;1001

Basic Steps to Schedule a Webi Report

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Setting the Destination to 'Email': Repeat steps **1** through **10** as described above.

11 Click the down pointing arrowhead  to the right of the 'Destinations:' prompt. From the dropdown list of options, **12** click **Email**. **13** Enter your e-mail address on the '**From:**' prompt and the recipient's e-mail address in the '**To:**' prompt. The other prompts (like '**Subject:**' and '**Message:**') are optional. **14** Click . The report's  screen will be displayed.



Basic Steps to Schedule a Webi Report

(Last Revised 2015-17-04)

To **delete** a report's schedule: **1** open the **History** window, **2** **right** click on the report Instance with **Recurring Status**. **3** Move the mouse over **Organize** in dropdown list. **4** Click the **Delete** option that will pop-up on the right. The **Delete** confirmation window will display. **5** Click **OK**.

