GEN-05 Schedule Reports and Manage Report Output

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to explain how to schedule reports to run automatically in the North Carolina Financial System (**NCFS**) Cash Management System.

Introduction

The purpose of this Quick Reference Guide is to explain how to schedule reports to run automatically in the North Carolina Financial System. This also covers how to schedule report output.

Scheduling is a very important feature for any reporting system. It enables you to schedule long-running reports to be run when the system load is lowest or to have frequently used reports delivered to your email daily, weekly, hourly, or monthly.

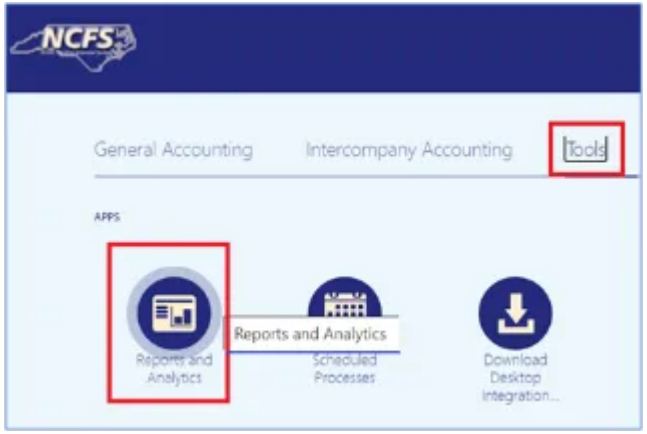
NCFS is configured with a Report Scheduler by default.

Schedule a Report: Overview

Reports can be scheduled to run from different work areas. However, the process remains the same. There are 2 steps to complete this process.

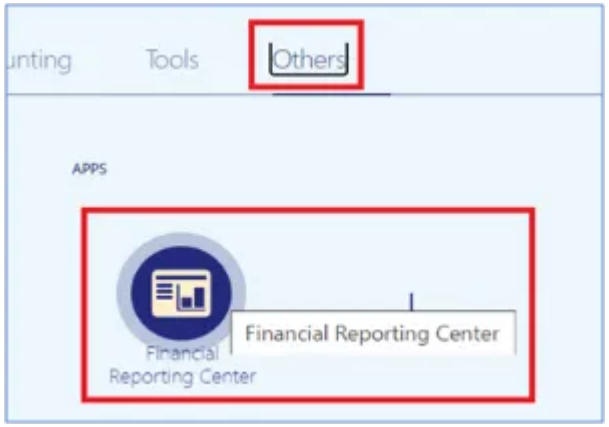
Step 1. From Home > Tools > Reports and Analytics

Image



Step 2. From Home > Financial Reporting Center

Image



Schedule a Report - Tasks

There are 3 steps to complete this process.

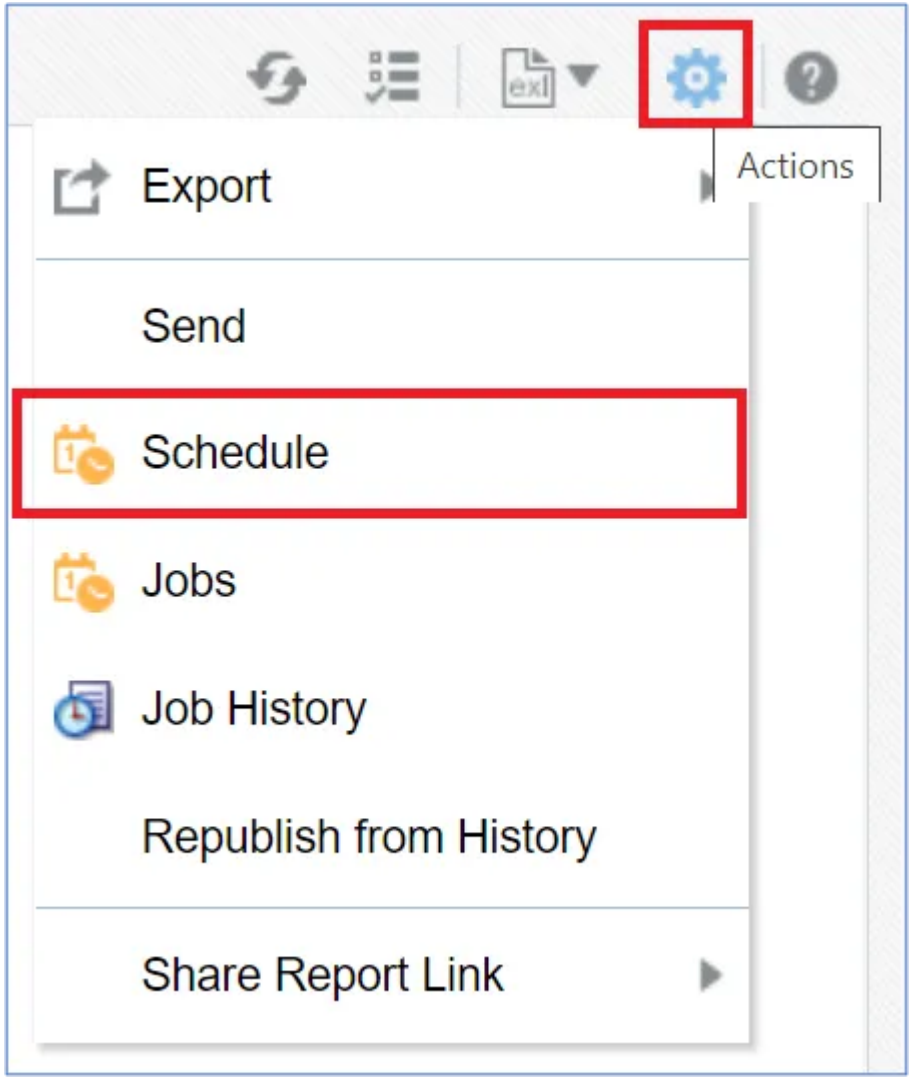
Step 1. Select a **Report**. Parameter choices appear.

Image



Step 2. From the toolbar on the right, click on the **Actions** icon. Then select **Schedule**.

Image

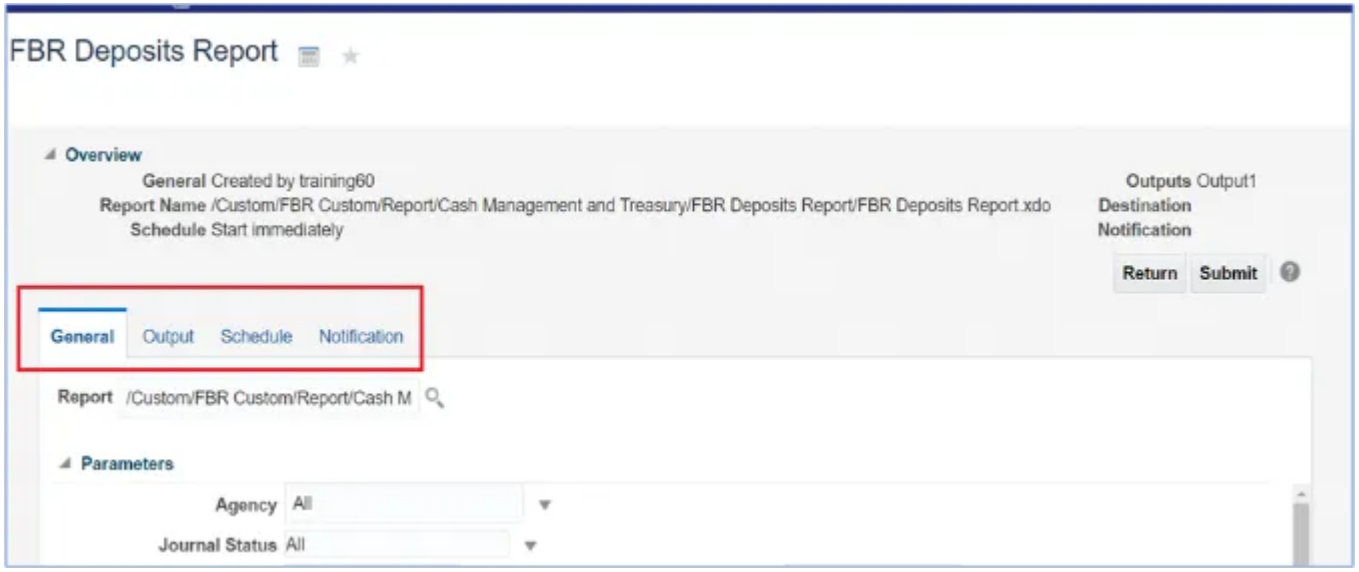


Step 3. The **Schedule Report Job** page contains four tabs to define the options for your report job:

- General
- Output
- Schedule

- Notification

Image



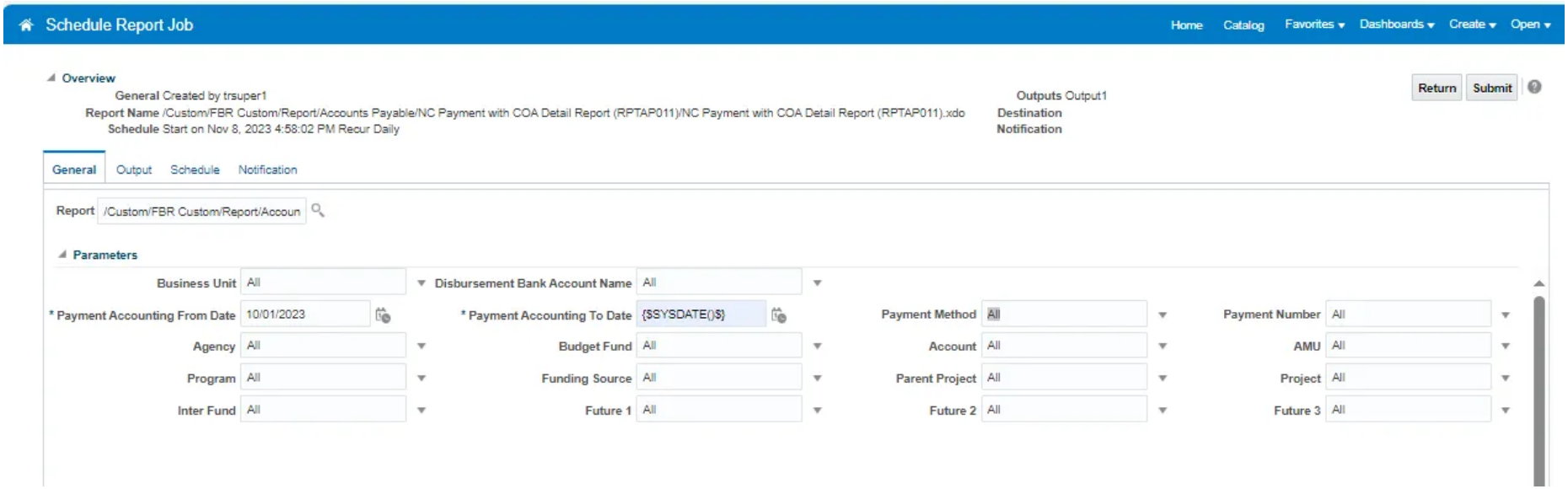
1. **General Tab**

The **Schedule Report Job** page activates the **General** tab by default.

Leave the default selected parameters as they are or change them to suit your requirement.

Note: Many FBR pre-built reports now have ‘Current’ and ‘Prior’ as valid parameter values for Accounting Period.

Image

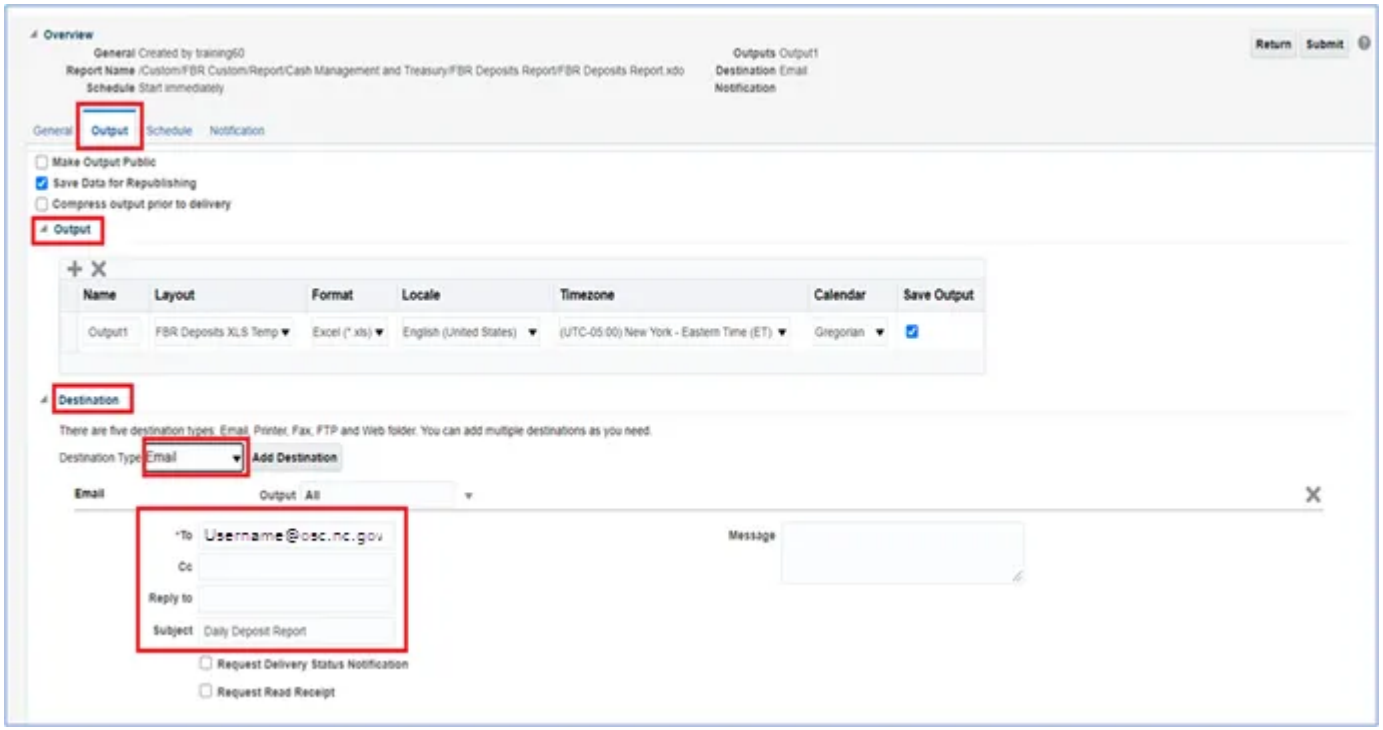


2. **Output Options Tab**

On the **Schedule Report Job** page, click the **Output** tab.

1. The tab has two sections: **Output and Destination**. You can accept the default values in each section or update them, based on your needs.
2. The Output Table creates multiple outputs for one or more layouts by using a combination of output format, locale, time zone, and calendar.
3. In the Destination section, you can enter an email address. To deliver a report to multiple destinations, click Add Destination and continue adding destinations as needed.

Image



- When running any report, always use the default Destination Type: Email.

- Please do not click on the dropdown and do not select ‘Printer’. If you select ‘Printer’ option, it MAY let you select one of the Check Printers, which will cause additional issues.

- After report completion, you can **download the report to laptop and print from your laptop to local printer**.

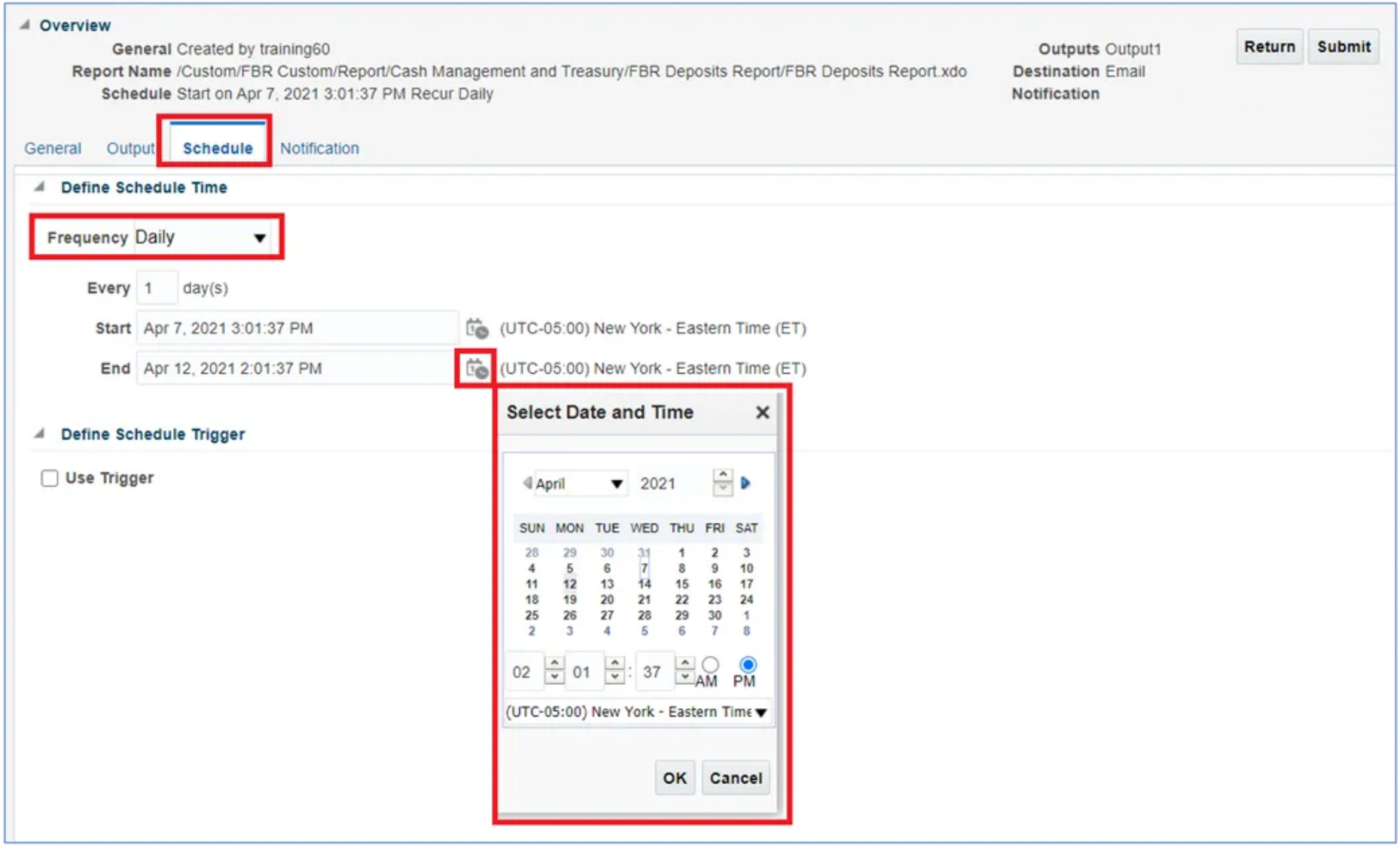
NOTE: If the output file is too big to send to the email destination, you will need to click on Output1 link and the report will be downloaded. From your Downloads folder, you may select this output for printing. Navigation steps are detailed in the Managing Report Output section of this QRG.

3. **Schedule Options Tab**

On the **Schedule Report Job** page, click the **Schedule** tab.

1. Select **Frequency** options that meet your specific timing requirements. For example, you might want to generate reports every Friday, or every morning, or according to some other date pattern.
2. Once
3. Hourly
4. Minute
5. Daily
6. Weekly
7. Monthly
8. Annually
9. On specific dates (Use the date selectors to specify the start and end dates.)

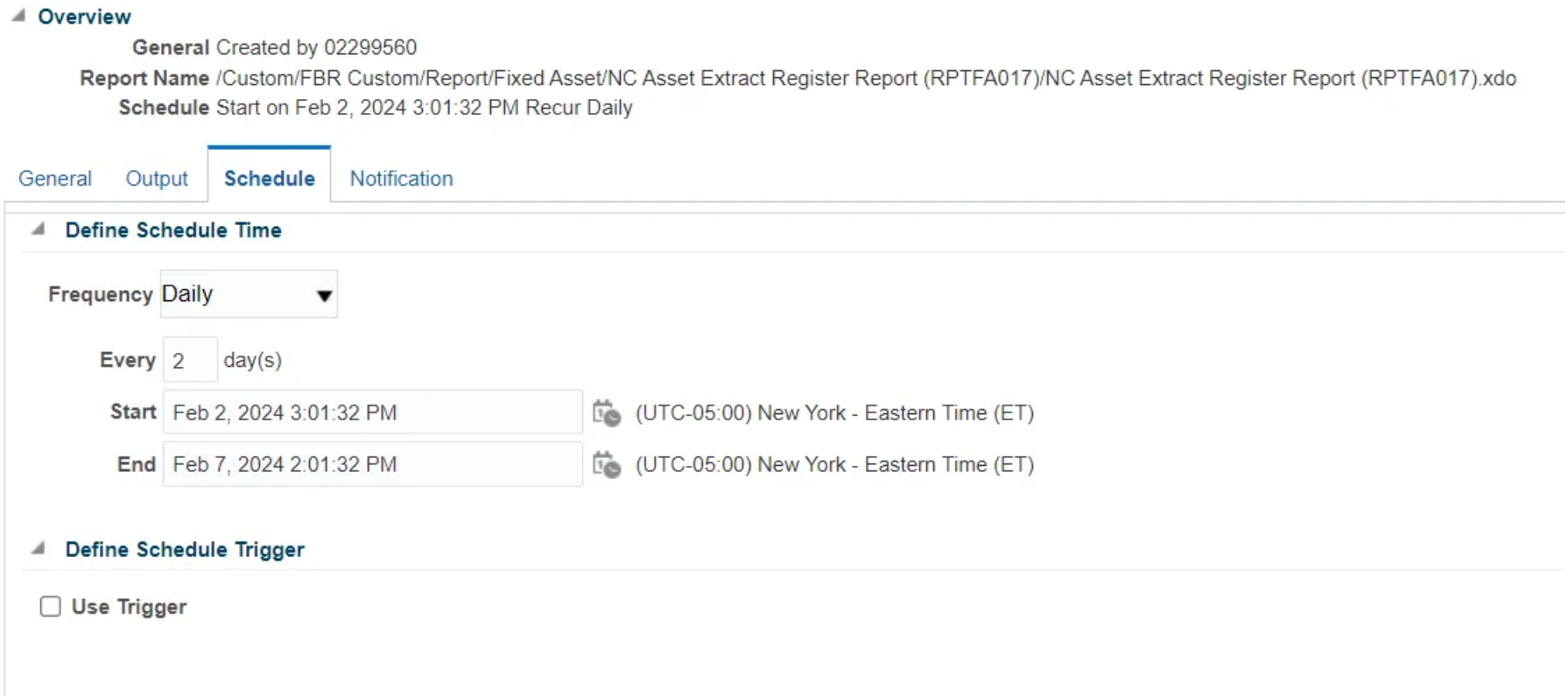
Image



Note: Scheduled process reports will run on weekends if set to daily.

For every other day, set the report daily frequency to 2.

Image



This will cause every other day, week 1 will run M/W/F, week 2 will run T/Th. If you need every M/W/F, run 3 scheduled reports set weekly for M, W, and F.

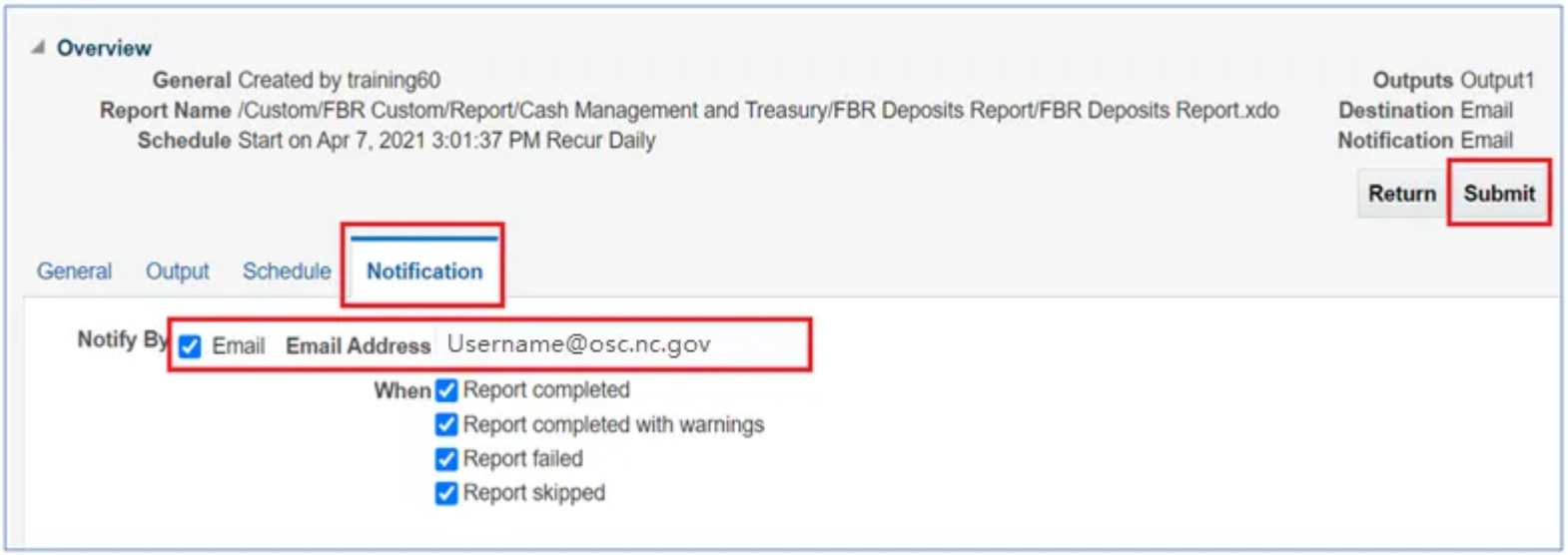
4. **Notification Tab**

On the **Schedule Report Job** page, click the **Notification** tab.

- A notification is a message that indicates that a job has finished processing. NCFS supports four notification statuses to which you can subscribe. They are all optional.

- Report completed
- Report completed with warnings
- Report failed
- Report skipped

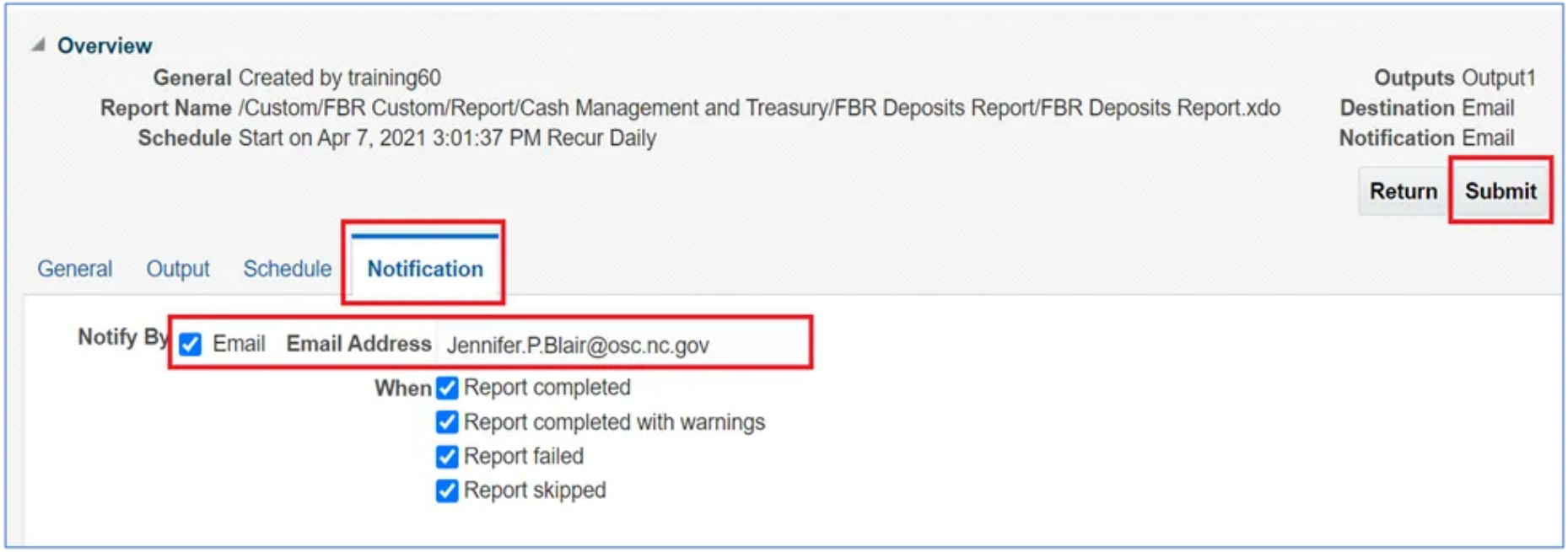
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Submitting the Job

After defining all Schedule Report options, click the **Submit** button.

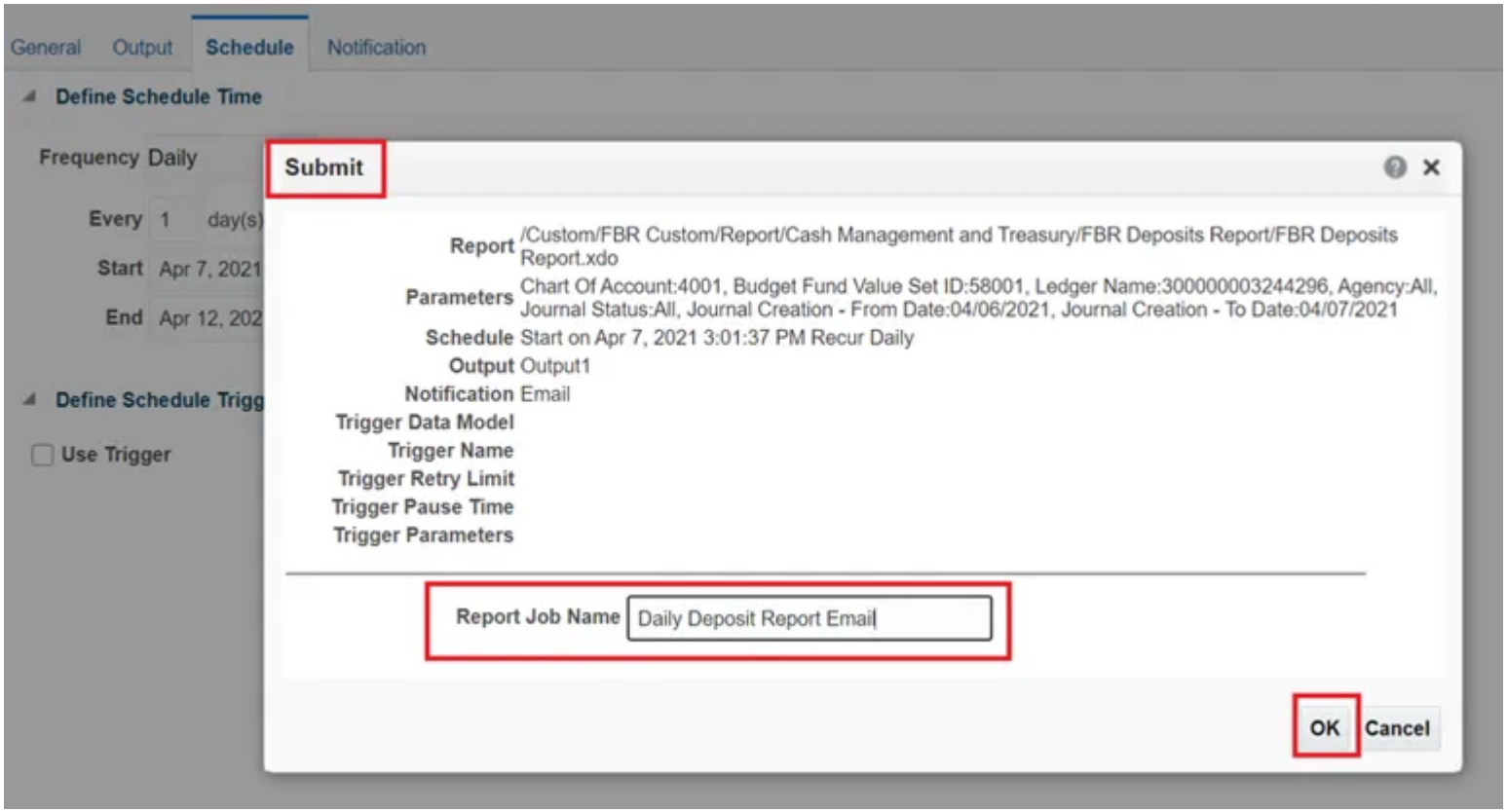
Image



This invokes the *Submit Job* dialog box with confirmation details for you to review. The confirmation details include a summary of the job, such as parameters, schedule, output, and notification.

Enter a name for this job and click **OK**. A confirmation message will appear.

Image



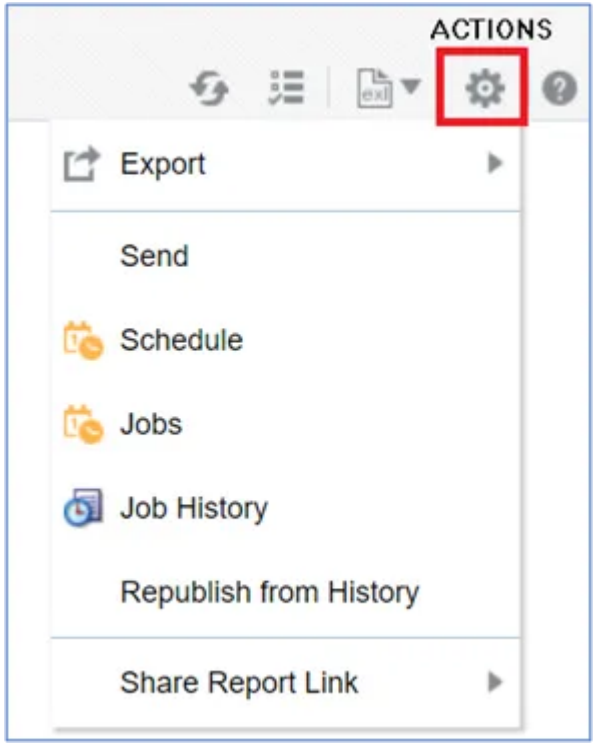
Congratulations! You have successfully scheduled a report!

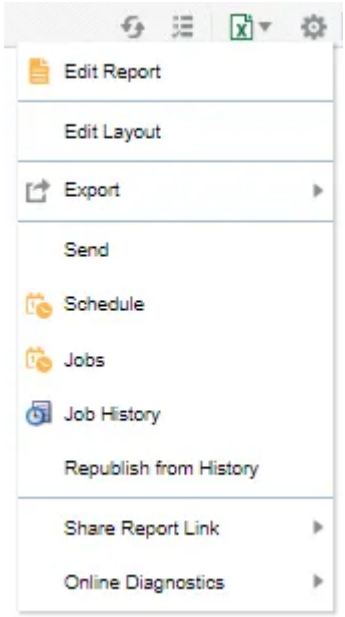
Using the Actions Menu

The Actions menu provides more actions that you can take on the report.

Browse Catalog > Open (desired report) > Actions icon (gears)

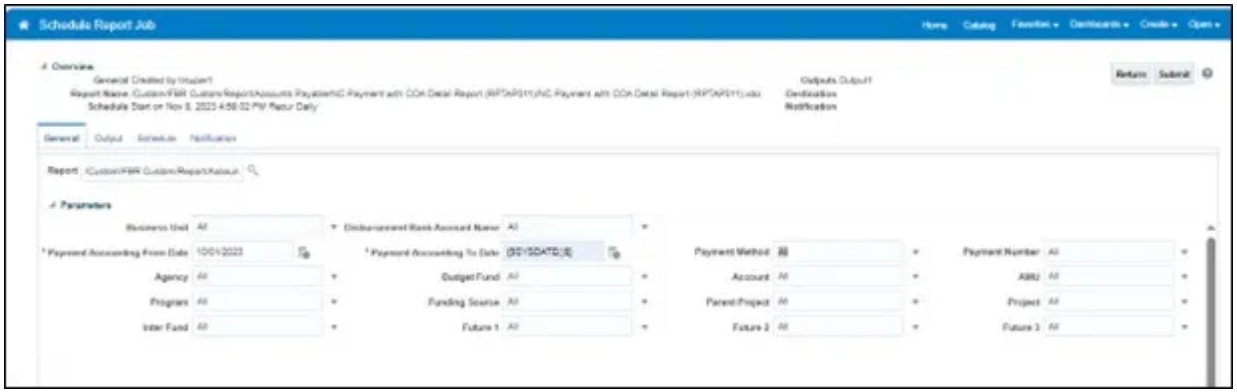
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ACTIONS
Export
Send
Schedule
Jobs
Job History
Republish from History
Share Report Link
Image



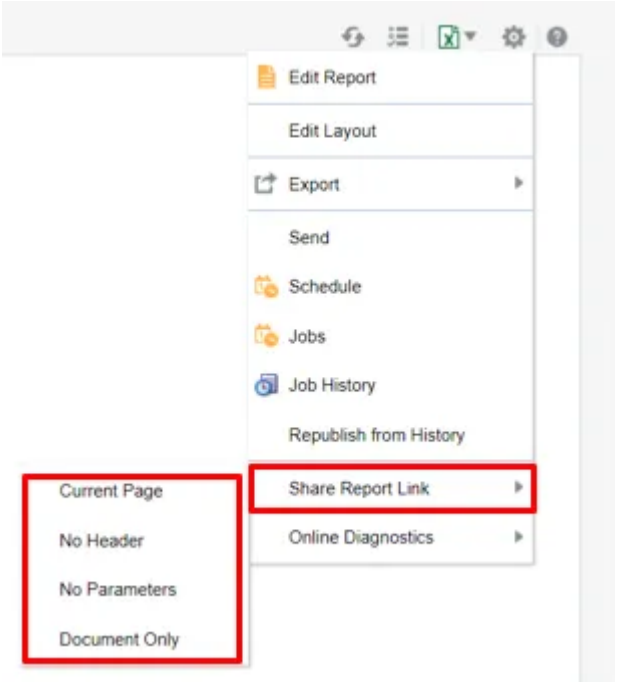
- **Export** exports the report to Microsoft Excel (NCFS default).
- **Send** launches a simplified version of the **Schedule Report Job** page - where you can select the output, destination, and notification options, but you cannot Schedule the Report. Basically, it allows you to immediately email the report.
- **Schedule** creates a job to run and distribute the report, as documented in the beginning of this job aid.

Image



- **Jobs** enables you to view and manage currently scheduled jobs for this report.
- **Job History** enables you to view completed and running report jobs.
- **Republish from History** enables you to select a previously scheduled, completed job and specific output for viewing in the report viewer.
- **Share Report Link** enables you to generate a link that you can copy and reuse, based on the report that you are currently viewing. When you select an option, a dialog displays the URL to the report.

Image



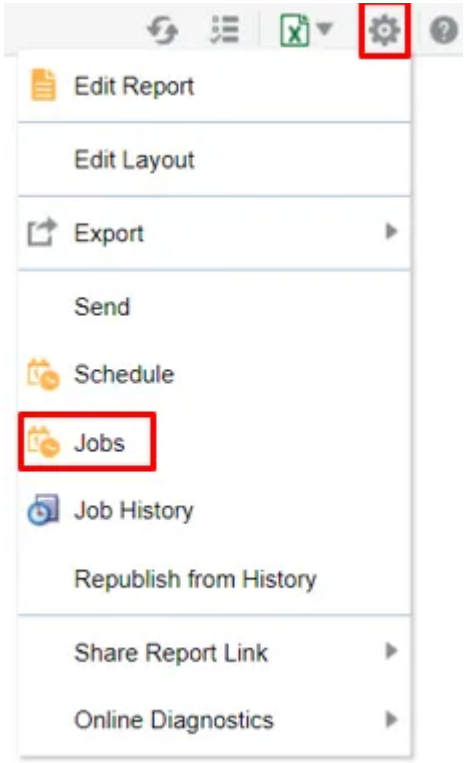
- Current Page displays the current page as shown.
- No Header displays the current report without the BI Publisher logo, tabs, or navigation path.
- No Parameters displays the current report without the header or any parameter selections. The Actions menu, Export, and View Report menus are still available.
- Document Only displays the URL to the current report document only. No other page information or options are displayed.

Jobs – Manage Report Jobs

The **Manage Report Jobs** page displays information about future scheduled/recurring report jobs and enables you to take actions on these jobs.

From the Actions menu, select Jobs.

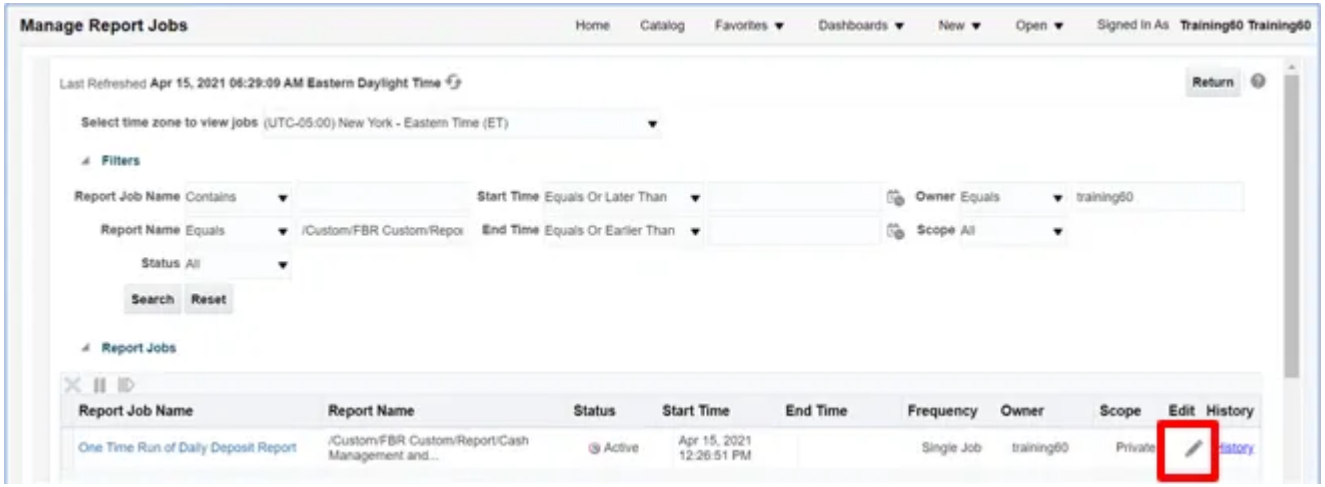
Image



Use the **Manage Report Jobs** page to:

- Edit a report job
- Delete a report job
- Suspend/Resume a report job
- View the job details

Image



Note: Use Oracle's online help to obtain more information on this page!

Image



A. **Edit a Job**

- Step 1: Click the **Edit** icon for the job in the results table.
- Step 2: Edit the job details using the **General, Output, Schedule, and Notification** tabs.
- Step 3: Click **Update Job** to save your changes to this job; or, to save the edited job as a new job, click **Submit as New** and enter a name for the new job.

B. **Delete a Job**

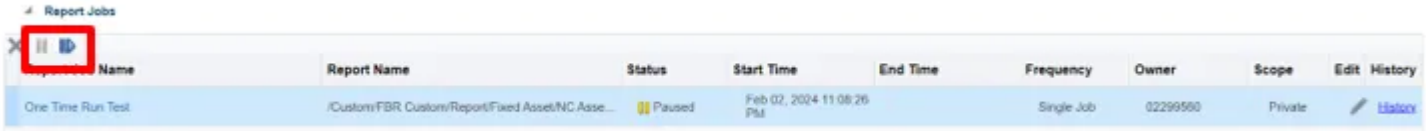
- Step 1: Select the job by clicking anywhere in the table row that lists the job information. You can select multiple jobs by clicking additional rows.
- Step 2: Click the **Delete** button.

C. Suspend/Resume a Report Job

- To pause a job:
  - Step 1: Select the job by clicking anywhere in the table row that lists the job information (do not click the job name link).
  - Step 2: Click the **Pause** button. The status of the job changes to Paused.

- To resume a job:
  - Step 1: Select the job by clicking anywhere in the table row of the paused job (do not click the job name link).
  - Step 2: Click the **Resume** button. The status of the job changes

Image



D. View the Job Details

- Step 1: Click the **Report Job Name** to view a detail page for the job.

Image

Manage Report Jobs

Last Refreshed **Feb 05, 2024 02:47:50 PM Eastern Standard Time**

Select time zone to view jobs (UTC-05:00) New York - Eastern Time (ET)

Filters

Report Job Name Contains

Report Name Contains

Status All

Start Time Equals Or Later Than

End Time Equals Or Earlier Than

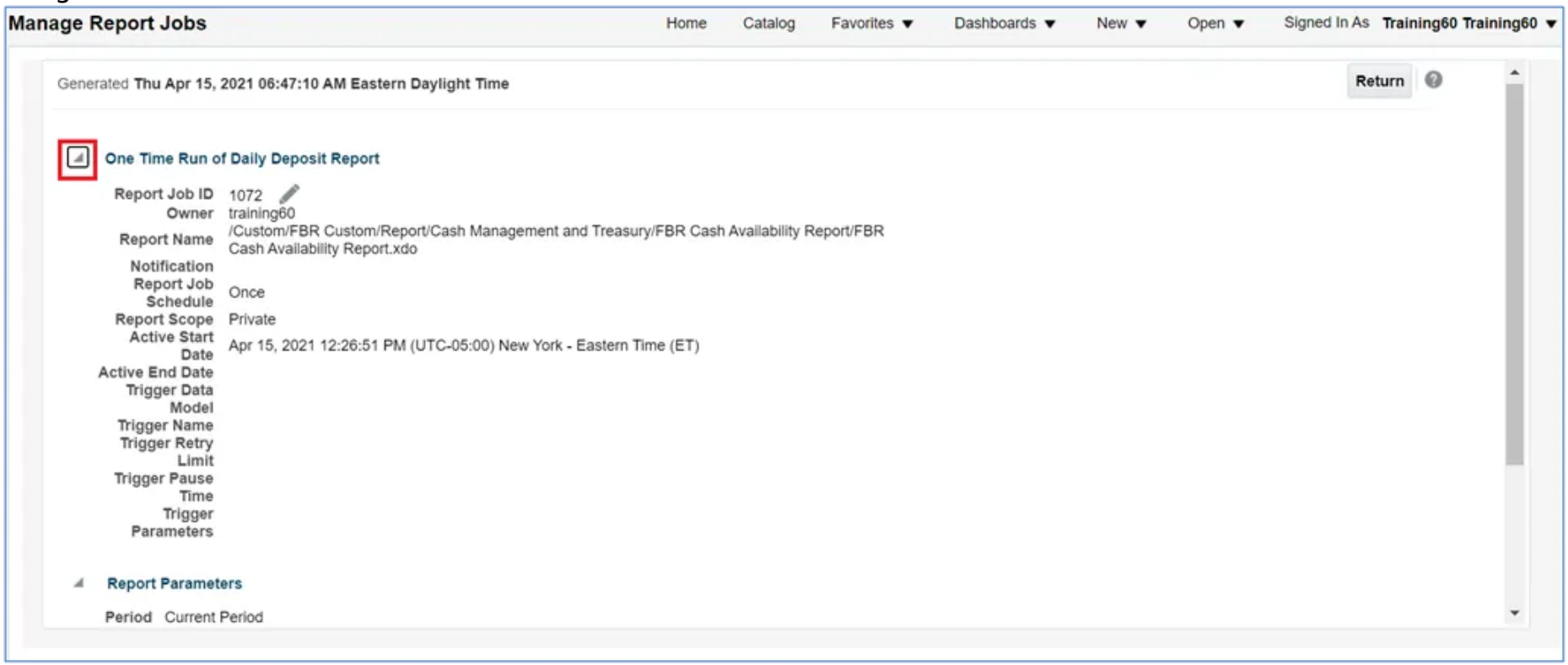
Search **Reset**

Report Jobs

Report Job Name	Report Name	Status
One Time Run Test	/Custom/FBR Custom/Report/Fixed Asset/NC Asse...	Active

- Step 2: To view delivery information for each output, click the **Expand** icon next to the output name.
- Step 3: Click **Return** to return to the **Manage Report Jobs** page.

Image



Managing Report Output

After defining the Schedule options, submit the job. Perform the following steps. There are 5 steps to complete this process.

Step 1. Click **Submit**. This invokes the Submit Job dialog box with confirmation details for you to review. The confirmation details include a summary of the job, such as parameters, schedule, output, and notification. Enter a name for this job and click **OK**. A message confirms that the job has been successfully submitted.

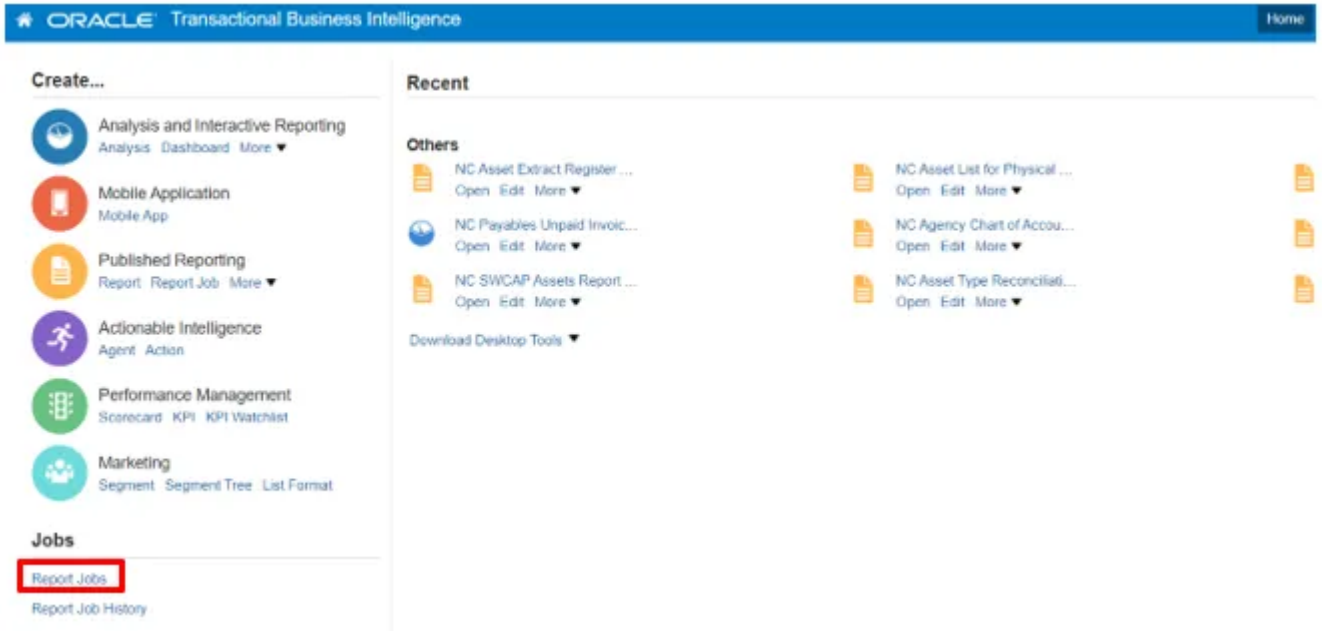
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Submitting the Job and Reviewing the Confirmation Details



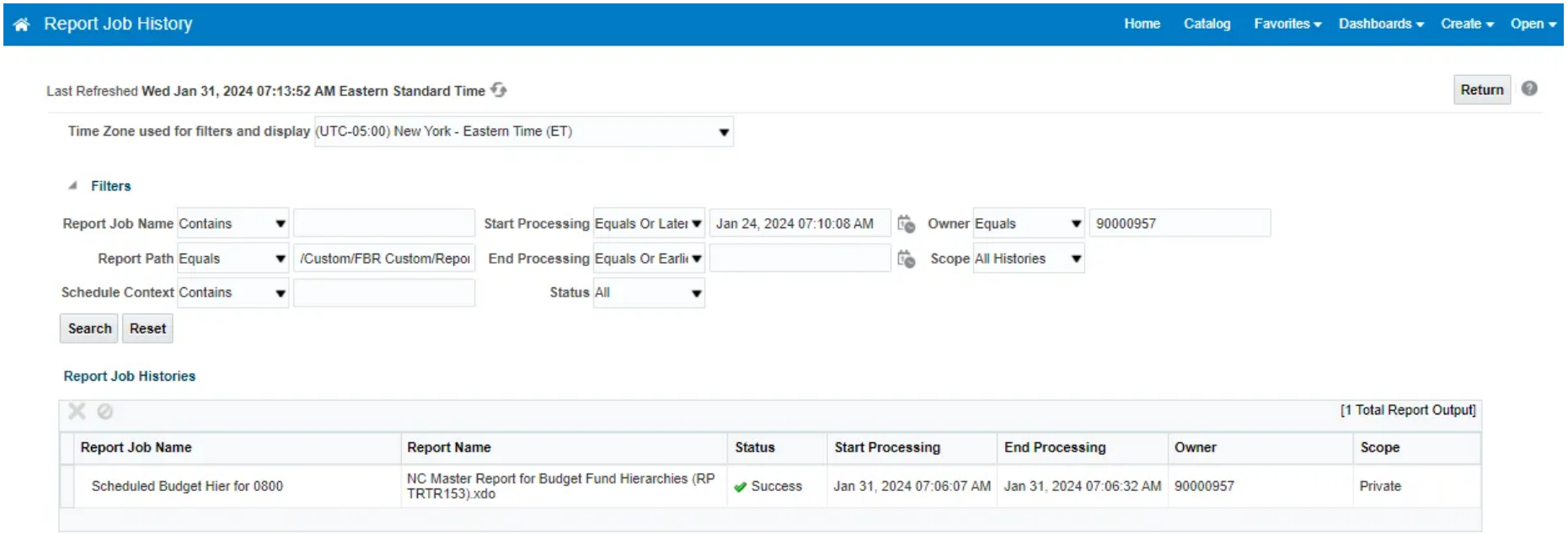
Step 2. To monitor or edit your job, navigate to the **Manage Report Jobs** page. You access the **Manage Report Jobs** page by clicking Home > Report Jobs on the global header. You will check this report job in the next section.

Image



Step 3. To see the results of your job, navigate to the **Report Job History** page. Click Open > Report Job History on the global header. You can see the job on the **Report History** page if it is running or completed. If the job is still active, the job will be listed under Report Jobs.

Image

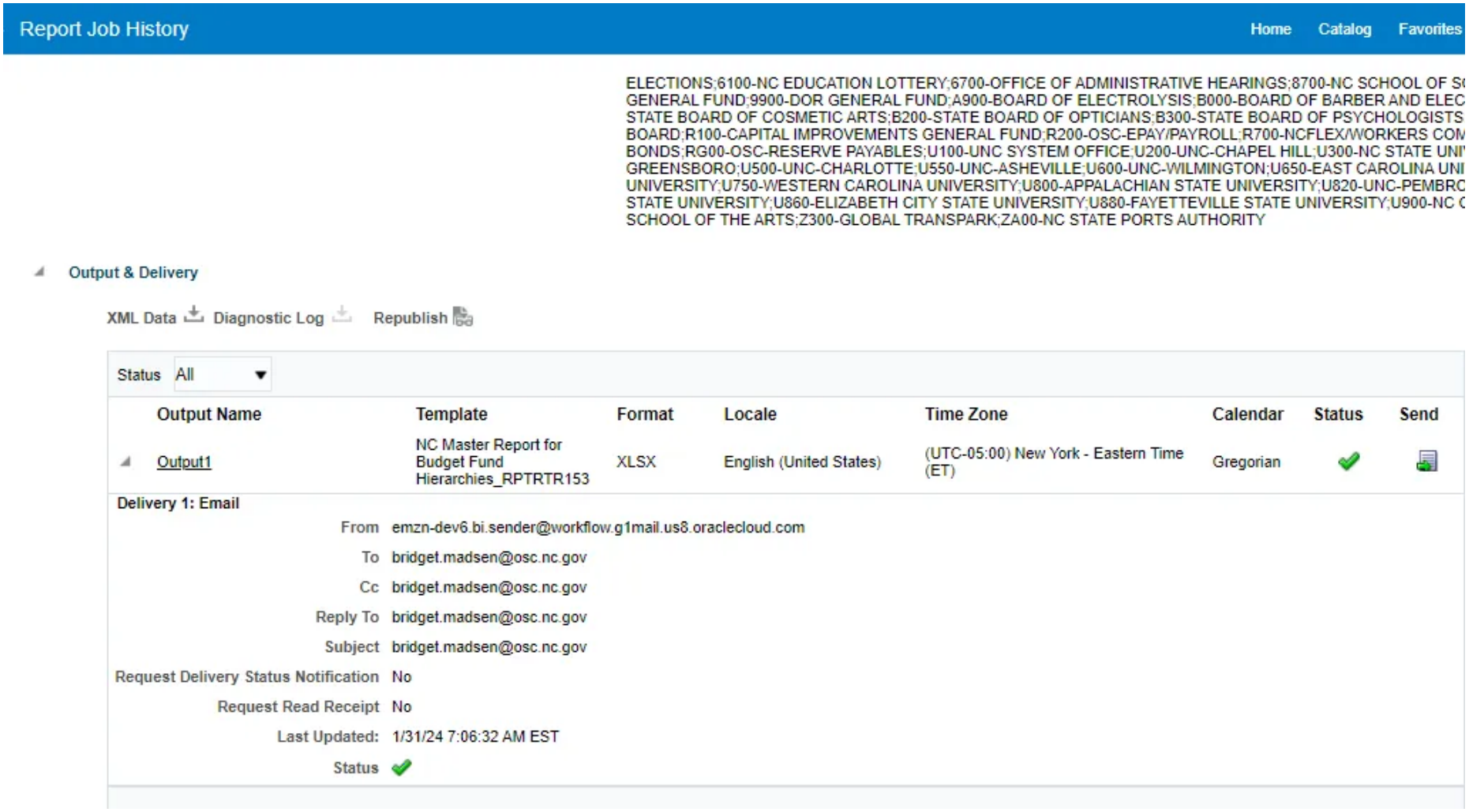


Step 4. Click the **Report Job Name** hyperlink.

Image

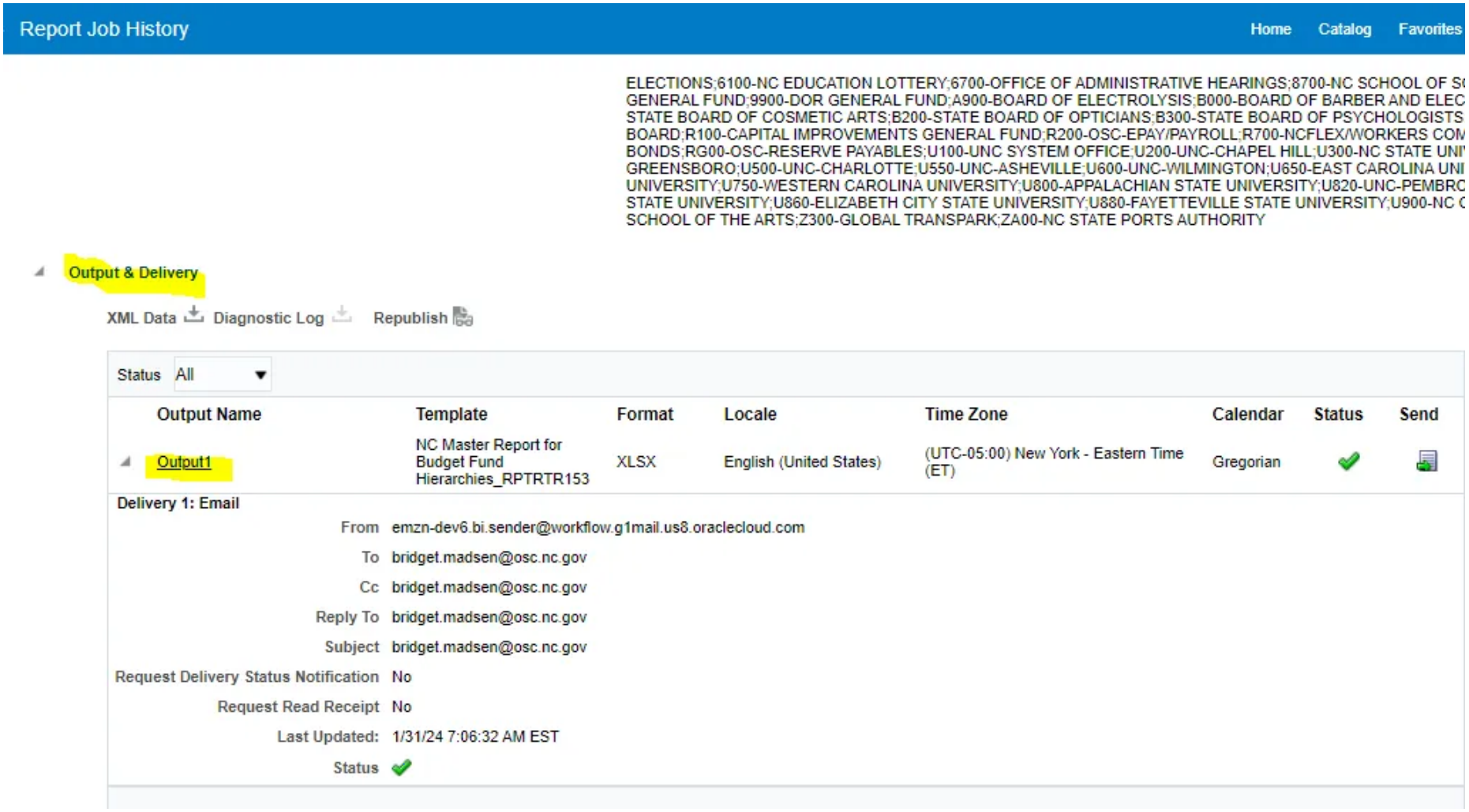

Report Job History
Home
Catalog
Favorites
Dashboards
Create
Last Refreshed Wed Jan 31, 2024 07:10:08 AM Eastern Standard Time
Return
General Information
General Information
Report Job ID 140450
Report Job Name Scheduled Budget Hier for 0800
Owner 90000957
Report Name NC Master Report for Budget Fund Hierarchies (RPTRTR153)
Report Scope Private
Report Job Schedule 1/31/24 7:05:56 AM EST
Active Start Date
Active End Date
Trigger Data Model
Trigger Name
Trigger Retry Limit
Trigger Pause Time
Trigger Parameters
Report Job Execution Information
Report Job Status Success
Start Processing Time 1/31/24 7:06:07 AM EST
End Processing Time 1/31/24 7:06:32 AM EST
Time Elapsed 24.729 seconds
Report Parameters
Chart of Accounts NC CASH
Fiscal Year 2024
Agency 0100-NC GENERAL ASSEMBLY;0200-ADMINISTRATIVE OFFICE OF THE COURTS;0300-OFFICE OF THE GOVERNOR;0400-OFFICE OF THE LT. GOVERNOR;0500-DEPARTMENT OF THE SECRETARY OF STATE;0600-OFFICE OF THE STATE AUDITOR;0700-DEPARTMENT OF THE STATE TREASURER;0900-DEPARTMENT OF JUSTICE;0A00-NC HOUSING FINANCE AGENCY;1000-DEPARTMENT OF AGRICULTURE;1100-DEPARTMENT OF LABOR;1200-DEPARTMENT OF INSURANCE;1300-DEPARTMENT OF ADMINISTRATION;1400-OFFICE OF THE STATE CONTROLLER;1500-DEPARTMENT OF TRANSPORTATION;1600-DEPARTMENT OF ENVIRONMENTAL QUALITY;1700-WILDLIFE RESOURCES COMMISSION;1900-DEPARTMENT OF PUBLIC SAFETY;2000-DHHS CENTRAL ADMINISTRATION;2100-DHHS AGING & ADULT SERVICES;2200-DHHS CHILD DEVELOPMENT AND EARLY EDUCATION;2300-DHHS SERVICES FOR THE DEAF;2400-DHHS SOCIAL SERVICES;2500-DHHS HEALTH BENEFITS;2600-DHHS SERVICES FOR THE BLIND & DEAF & HARD OF HEARING;2700-DHHS HEALTH SERVICES REGULATION;2800-DHHS VOCATIONAL REHABILITIATION;2A00-DHHS DISABILITY DETERMINATION SERVICES;2B00-DHHS PUBLIC HEALTH;2D00-DHHS CHILD AND FAMILY WELL-BEING;3000-DHHS MENTAL HEALTH;3100-DHHS BLACK MOUNTAIN CENTER;3200-DHHS J. IVERSON RIDDLE DEVELOPMENT CENTER;3300-DHHS O'BERRY CENTER;3400-DHHS MURDOCH CENTER;3500-DHHS CASWELL CENTER;3600-DHHS DOROTHEA DIX;3700-DHHS BROUGHTON HOSPITAL;3800-DHHS CHERRY HOSPITAL;3900-DHHS CENTRAL REGIONAL HOSPITAL;3A00-DHHS JULIAN F KEITH - ADATC;3B00-DHHS RJ BLACKLEY - ADATC;3C00-DHHS WALTER B JONES - ADATC;3D00-DHHS LONGLEAF NEURO-MEDICAL TREATMENT CENTER;4000-DEPARTMENT OF MILITARY AND VETERAN'S AFFAIRS;4100-DEPARTMENT OF INFORMATION TECHNOLOGY;4300-DEPARTMENT OF COMMERCE;4500-DEPARTMENT OF REVENUE;4600-DEPARTMENT OF NATURAL AND CULTURAL RESOURCES;4800-UNC HOSPITALS;4900-STATE BUREAU OF INVESTIGATION;5000-NC COMMUNITY COLLEGE SYSTEM OFFICE;5200-DEPARTMENT OF ADULT CORRECTION;6000-STATE BOARD OF

Image



Step 5. To print (or simply view) output…click on **Output1** link and the report will be downloaded. From your Downloads folder, you may select this output for printing.

Image



Increment Date Parameters

You can provide expressions in the report's date parameter fields.

If the scheduled report includes date parameters, when you enter values for the schedule dates, you can't change the date values. Every time a scheduled instance of the report is run, the same date parameters are used. If changing the date parameters is required for each run, you can enter an expression in the date parameter field of the scheduler to calculate the date each time the report job runs.

For example, if you create a schedule for a report that runs every Monday to capture data from the previous week, you need to update the date parameters for the report to increment to the first and last days of the previous week.

Enter one of the following functions using the syntax shown to calculate the appropriate date at the scheduled runtime for the report:

- {$SYSDATE()$} - Current date, the system date of the server on which Publisher is running.
- {$FIRST_DAY_OF_MONTH()$} - First day of the current month
- {$LAST_DAY_OF_MONTH()$} - Last day of the current month
- {$FIRST_DAY_OF_YEAR()$} - First day of the current year
- {$LAST_DAY_OF_YEAR()$} - Last day of the current year

The date function calls in the parameter values aren't evaluated until the report job is processed by the Scheduler.

You can also enter expressions using the plus sign (+) and minus sign (-) to add or subtract days as follows:

- {$SYSDATE()+1$}
- {$SYSDATE()-7$}

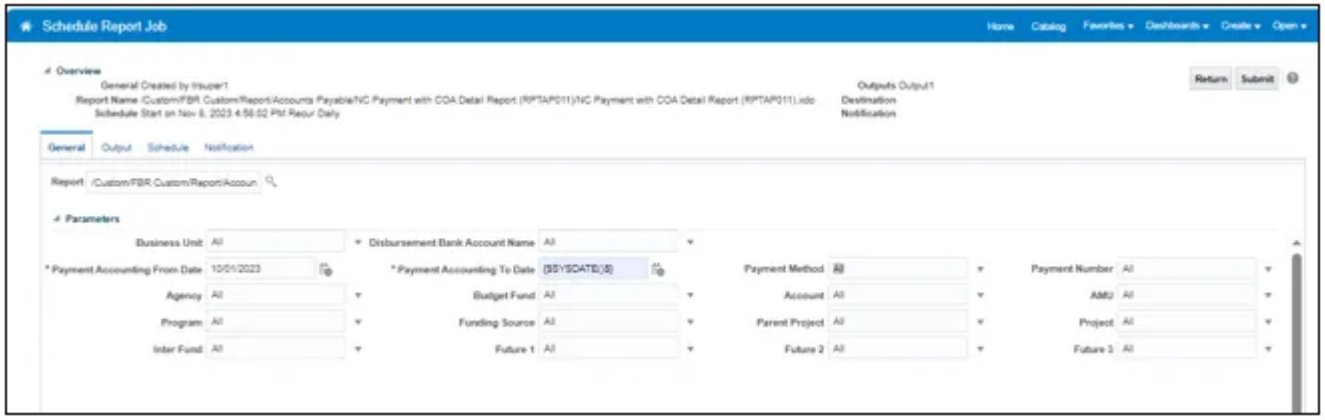
For this example, to capture data from the previous week, each time the schedule runs, enter the following in the report's date parameter fields:

- Date From: {$SYSDATE()-7$}
- Date To: {$SYSDATE()-1$}

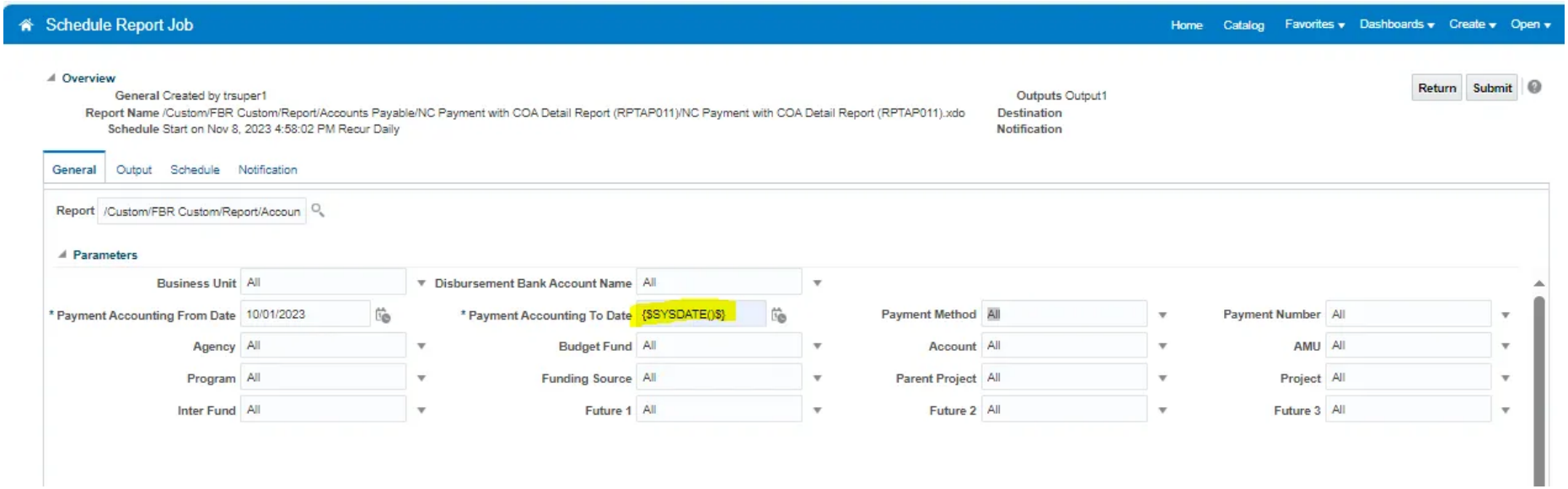
You can set up the date functions as default parameter values in the data model. In this case, every time a user views the report from the report viewer, the date parameter is calculated according to the expression supplied for the default value.

Note: Numerous FBR pre-built reports now have ‘Current’ and ‘Prior’ as valid parameter values for **Accounting Period**.

Image



Image



Wrap Up

This example of scheduling reports uses the FBR Deposit Report and the FBR Cash Availability Reports.

Additional Resources

- **WBT Courses**
  - GEN106

- **Quick Reference Guides (QRGs)**
  - CM-36 NCFS Transaction Category Value

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