

ALDER Report Scheduling

Table of Contents

Basics of Scheduling Reports	2
Instance Title.....	4
Recurrence.....	4
Prompts.....	5
Format.....	7
Caching.....	7
Events.....	7
Scheduling Server Group	9
Destinations	9
Scheduling Reports for the Same Day.....	12
Report History.....	12
Additional Information on the Report Scheduler	15
Using the WebIntelligence Folder.....	17

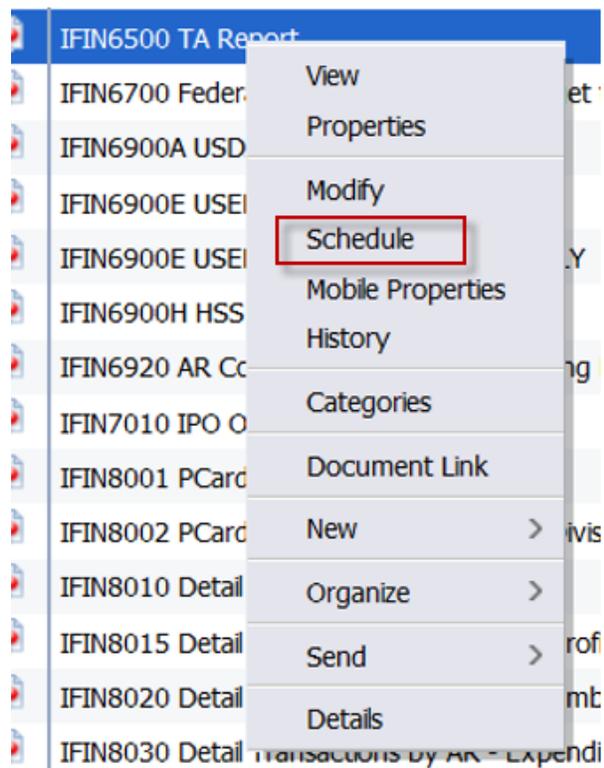
ALDER Report Scheduling

Often, a report is needed on a recurring basis, daily, weekly, monthly or annually. A scheduled report can be delivered to an ALDER (BI) inbox or as a document (PDF or Excel) through email.

Reports cannot be scheduled from the ALDER Enterprise folder; however, they can be scheduled from department folders. When reports are scheduled from department folders they are associated with that individual's ALDER security. If that individual changes departments, their ALDER security changes and the reports will need to be re-scheduled by another department employee.

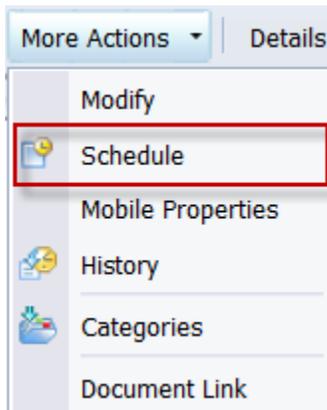
Basics of Scheduling Reports

While in the report list, highlight the report to be scheduled and right click. Select "Schedule"

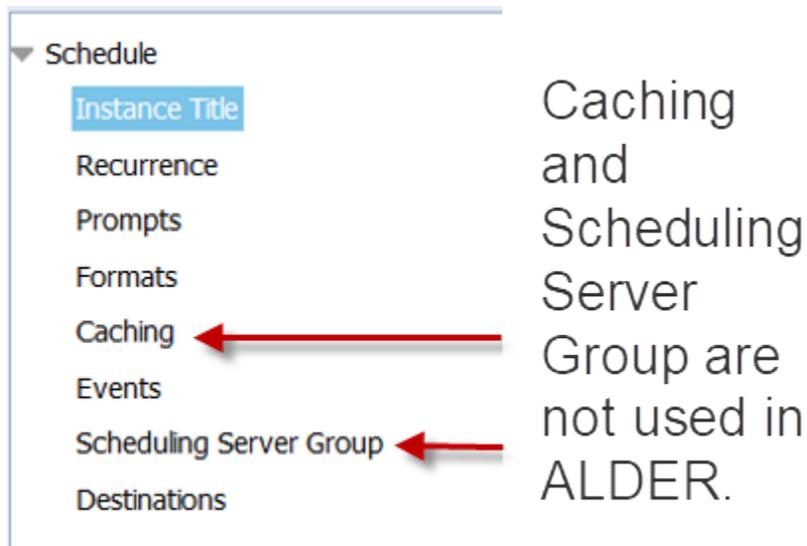


ALDER Report Scheduling

Alternatively, the “More Actions” button can be used. With the report to be scheduled highlighted, select the “More Actions” button and “Schedule”.



The schedule generator will appear, depending on the report needs, not each area needs to be completed.



ALDER Report Scheduling

Instance Title

The screenshot shows a software interface for scheduling a report. The title bar reads "Reschedule – FY18 PCard Outstanding Transactions". On the left is a navigation pane with "Reschedule" expanded, showing options like "Instance Title", "Replace", "Recurrence", "Prompts", "Formats", "Caching", "Events", "Scheduling Server Group", and "Destinations". The "Instance Title" option is selected. The main area shows a text box containing "FY18 PCard Outstanding Transactions" and a larger text box below it with the following text: "The instance title defaults to the report name. If scheduling the same report multiple times with different parameters, the instance title should be changed to reflect each set of parameters. For example, if scheduling a department report for multiple divisions within the department, each instance should include the division title."

Recurrence

Recurrence identifies how frequently the report should generate.

The screenshot shows the "Recurrence" section of a scheduling interface. On the left, a navigation pane has "Schedule" expanded, with "Recurrence" selected. The main area is titled "Recurrence" and contains two dropdown menus. The first is labeled "Run object:" and is set to "Now". The second is labeled "Object will run" and is open, showing a list of options: "Now", "Once", "Hourly", "Daily", "Weekly", "Monthly", "Nth Day of Month", "1st Monday of Month", "Last Day of Month", "X Day of Nth Week of the Month", and "Calendar".

A report can be scheduled to run at various intervals, such as now, daily, monthly or on a certain day of the month. Although the option is available, it is not recommended to schedule reports hourly. ALDER is updated from IRIS each night, running a report hourly does not provide updated information throughout the day. In addition, an hourly report consumes the limited resources of the server.

If the report is to be generated only during the work week, select weekly and the Monday through Friday checkboxes.

ALDER Report Scheduling

The screenshot shows the 'Recurrence' tab selected in the left-hand navigation menu. The main content area is titled 'Recurrence' and contains the following settings:

- Run object: Weekly (dropdown menu)
- Object will run every week on the following days:
 - Monday Friday
 - Tuesday Saturday
 - Wednesday Sunday
 - Thursday
- Start Date/Time: 02 01 PM 4/10/2016 (with a gear icon)
- End Date/Time: 02 00 PM 4/10/2026 (with a gear icon)

When setting up a recurring report, the start date will automatically populate the current date. If the desire is to have the report available at the beginning of the business day (generally 8:00am), the start time should be set as 11:59pm. Leave the end time unchanged.

Prompts

Prompts provides the opportunity to change the query prompts. If the input prompts are acceptable without change, this step can be skipped. Be patient, it takes time for the “Modify” button to appear.

If scheduling the same base report multiple times with different queries, it is helpful to name each instance of the report in the Instance Title. For example, if scheduling a departmental report for each division, the instance title could include the name of each division.

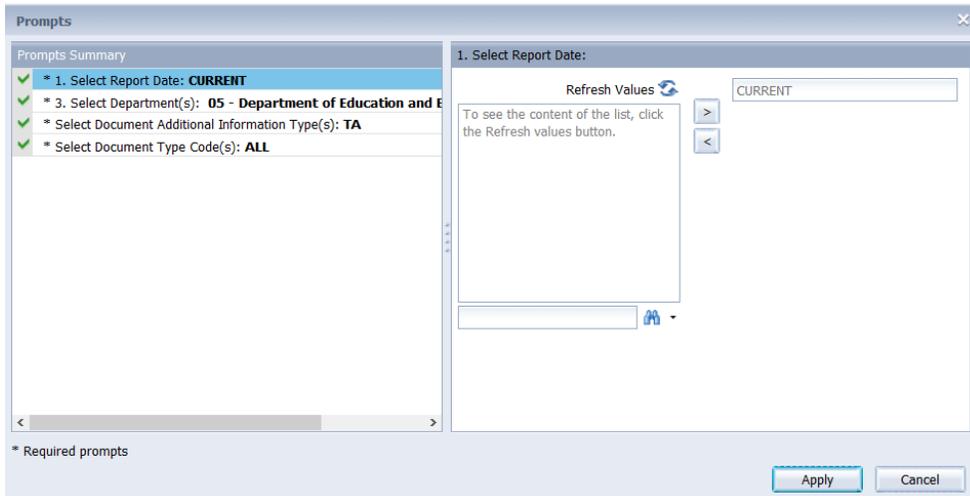
The screenshot shows the 'Prompts' tab selected in the left-hand navigation menu. The main content area is titled 'Prompts' and contains the following settings:

- Modify values for: IFIN6500 TA Report
- 1. Select Report Date: CURRENT
- 3. Select Department(s): 05 - Department of Education and Early Development
- Select Document Additional Information: TA
- Type(s):
- Select Document Type Code(s): ALL

Select “Modify” to get the query prompts.

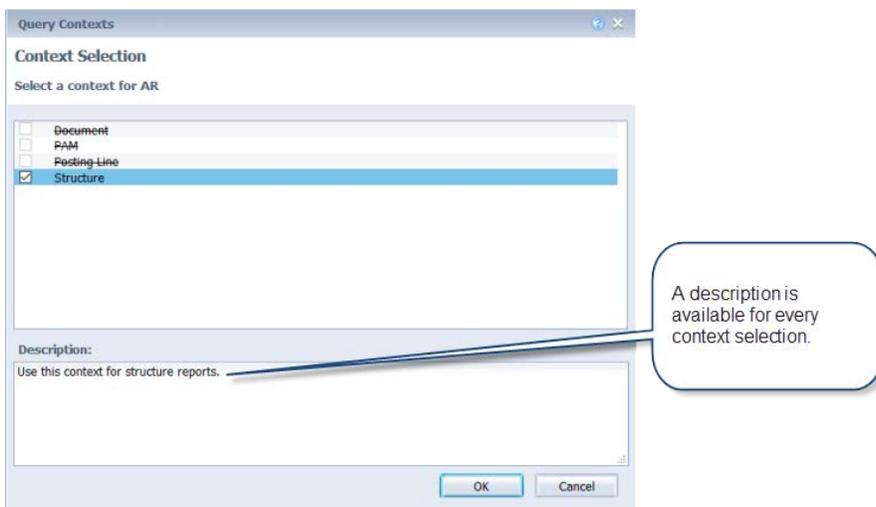
ALDER Report Scheduling

The normal query box will appear.



For a report that is scheduled to generate on a recurring basis, the scheduled instance stores a set of prompt values. Any saved changes to the visual appearance of the report will appear in the next scheduled run, but the prompts remain with the scheduled instance.

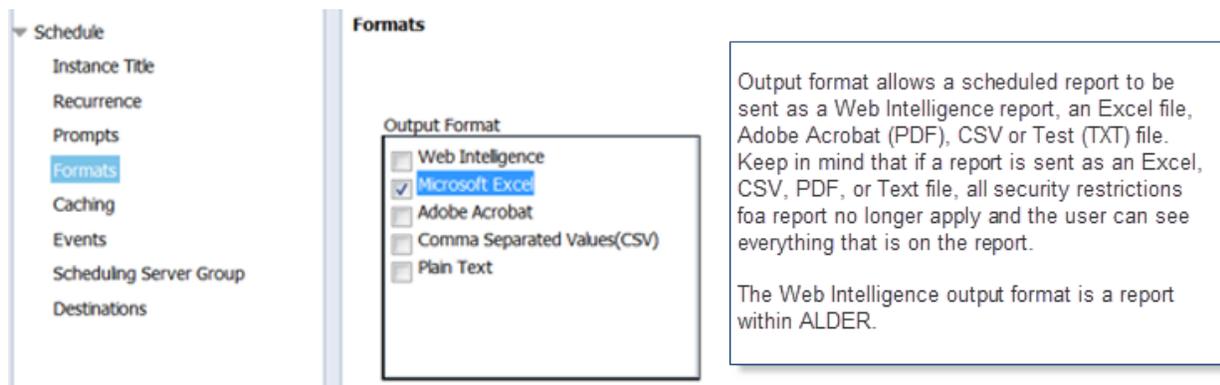
For example, if result objects have been added to the saved report, they will be included on the next version of the scheduled report. If a new query filter has been added to the saved report, the scheduled report prompts remain the same. If the new query filter has a default value, the scheduled report will generate with that value. If the new query filter has no default, the scheduled report will fail. If the report is a structure report and selecting the context is required, the scheduled report will fail.



ALDER Report Scheduling

Format

Choose a format for the output.



The screenshot shows the 'Format' configuration pane. On the left, a sidebar lists options: Instance Title, Recurrence, Prompts, **Formats**, Caching, Events, Scheduling Server Group, and Destinations. The main area is titled 'Formats' and contains an 'Output Format' section with a list of options: Web Intelligence, **Microsoft Excel** (checked), Adobe Acrobat, Comma Separated Values(CSV), and Plain Text. To the right of this list is a text box with the following text: 'Output format allows a scheduled report to be sent as a Web Intelligence report, an Excel file, Adobe Acrobat (PDF), CSV or Text (TXT) file. Keep in mind that if a report is sent as an Excel, CSV, PDF, or Text file, all security restrictions for a report no longer apply and the user can see everything that is on the report. The Web Intelligence output format is a report within ALDER.'

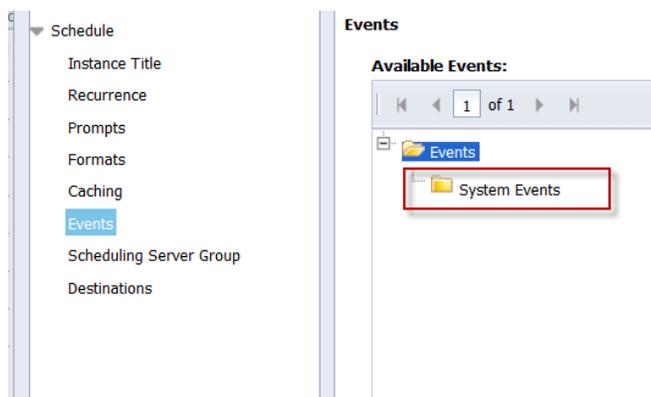
Caching

This section is not used.

Events

If scheduling a report to generate on a recurring basis (daily, weekly, monthly, ect), it is **critical** to add “IRIS Financial Update Complete” as an event to wait for.

Select “System Events”



The screenshot shows the 'Events' configuration pane. On the left, a sidebar lists options: Instance Title, Recurrence, Prompts, Formats, Caching, **Events**, Scheduling Server Group, and Destinations. The main area is titled 'Events' and contains an 'Available Events:' section with a navigation bar showing '1 of 1'. Below the navigation bar is a list of events: **Events** (highlighted) and **System Events** (highlighted with a red box).

ALDER Report Scheduling

All events available to the user (based on security rights) will populate under the title.

Title ^
AKSAS Update Complete
IRIS Financial Update Complete
IRIS Financial Update Complete - PRIORIT

"AKSAS Update Complete" is not needed for AKSAS reports, as AKSAS has been decommissioned and will no longer have updates.

"IRIS Financial Update Complete" is the refresh of financial information from IRIS.

"IRIS Financial Update Complete - Priority" is only available to Agency Advocates to schedule priority reports. Reports with this event begin 10 minutes before other reports.

Alternatively, in the "find title" field, enter "IRIS". The title field should populate with "IRIS Financial Update Complete".

When scheduling an ALDER report,
1. Select the "Events" folder
2. Search for "IRIS" in the Find Title field
3. Move the "IRIS Financial Update Complete" field from available events to events to wait for.

Move the resulting object to the "events to wait for" table. This will prevent the report from generating, no matter what time selected, until after the IRIS financial update is complete. ***Without this event, a single report can delay or even crash the nightly refresh of data from IRIS to ALDER. Without this event, the validity of the data returned is questionable.***



Recurring reports that do not include the "IRIS Financial Update Complete" event are subject to being paused by the ALDER team WITHOUT WARNING.

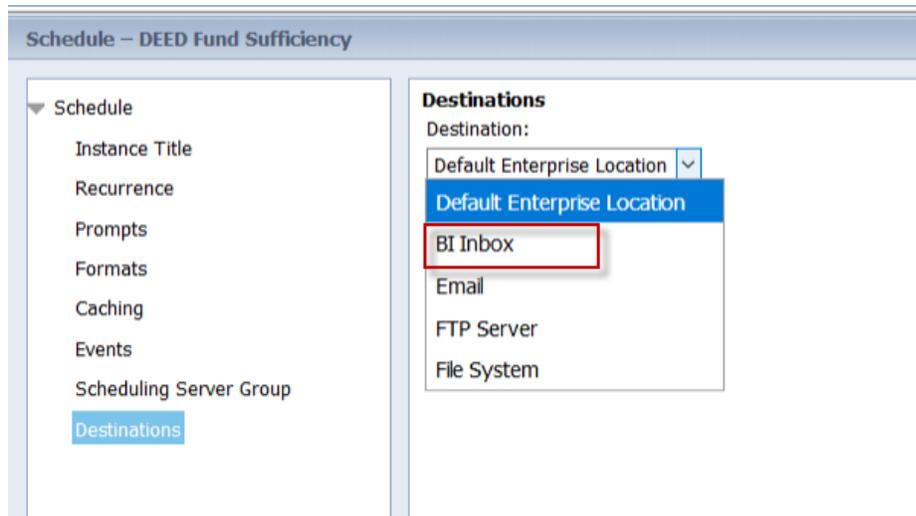
ALDER Report Scheduling

Scheduling Server Group

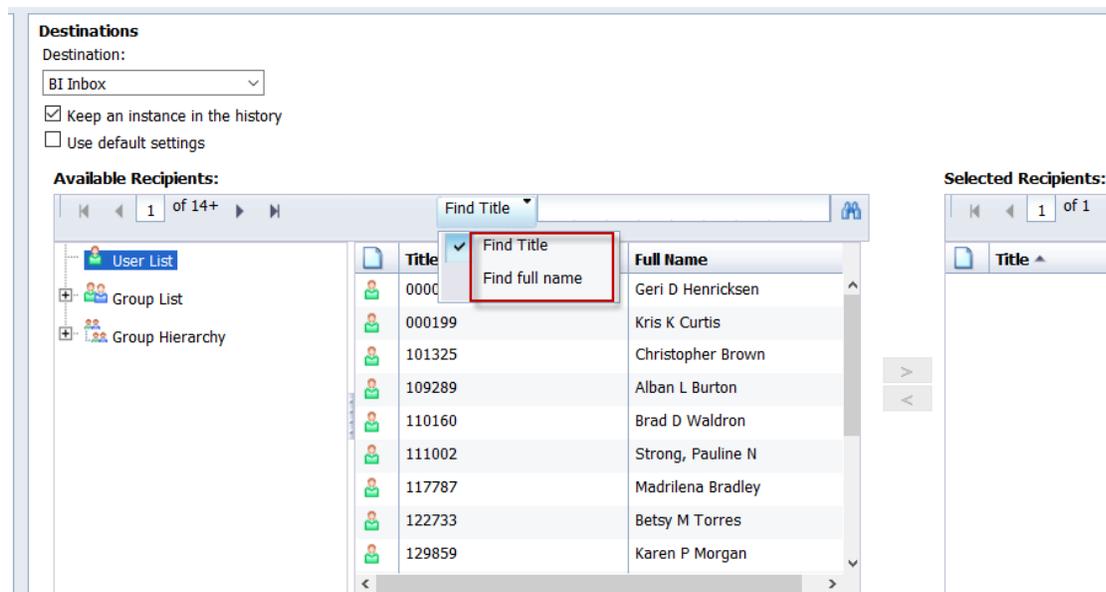
This section is not used.

Destinations

If sending the document to another users ALDER inbox, select the BI Inbox destination.



A search can be performed on the employee ID (Title) or the employee name. Using “Find Title” is a search for six digit employee ID. Select “Find Full Name” and enter search criteria.



ALDER Report Scheduling

Select the binocular symbol be patient.

Available Recipients:

Find full name 

Title	Full Name
255538_new	Stephanie L Allison
259314	Allison, Patricia
ADWCSLA	Stephanie Allison

Find result for "allison" in "User List"
Find refinement "allison"
User List
Group List

If there is a need to search for a second name, the User List on the left must be selected first.

Available Recipients:

Find full name 

Find result for "allison" in "User List"
Find refinement "allison"
User List
Group List
Group Hierarchy

Find full name 

Title	Full Name
255538_new	Stephanie L Allison
259314	Allison, Patricia
336262	Allison P Lihou
ADWCSLA	Stephanie Allison

When the user has been identified, select the arrow to move the individual(s) to the "Selected Recipients" box.

Find full name 

Title	Full Name
259314	Allison, Patricia
ADWCSLA	Stephanie Allison

Selected Recipients:

Title	Full Name
255538_new	Stephanie L Allison

ALDER Report Scheduling

If the report will be sent via email, fill in the information on this screen. If sending to yourself, use your email address in both the “From” and “To” fields.

Destinations

Destination:

Email

Keep an instance in the history

Use default settings

From: Add Placeholder

To: Add Placeholder

Cc: Add Placeholder

Bcc: Add Placeholder

Subject: Add Placeholder

Message:

Add Placeholder

Add Attachment

File Name:

Use Automatically Generated Name

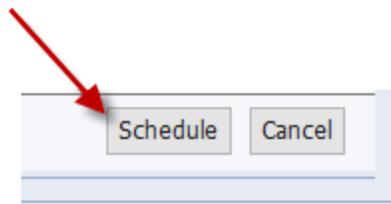
Use Specific Name Add Placeholder

Add File Extension

Destinations
Destination:
BI Inbox
 Keep an instance in the history
 Use default settings

The scheduler defaults to "Keep an instance in the history". If an instance does not need to be kept, the box should be unchecked.

When all of the scheduling criteria has been completed, select “Schedule” in the lower right-hand corner.



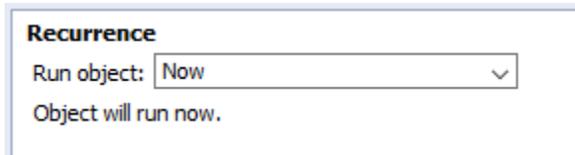
ALDER Report Scheduling

Scheduling Reports for the Same Day

There are many reasons to schedule a report to generate the same day, rather than simply running a report while in the system. By scheduling a report, users can remain productive and not have to monitor ALDER report execution.

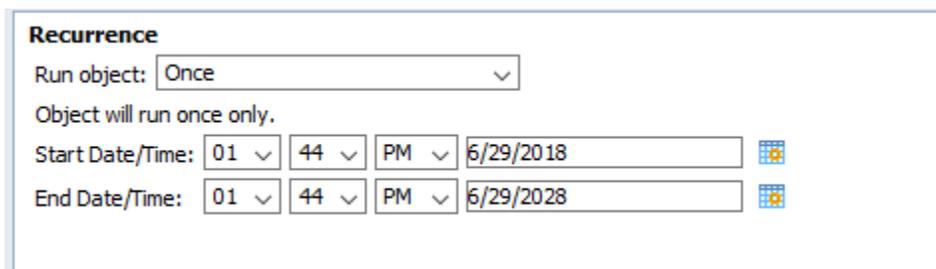
A report scheduled to run on the same day, should have:

1. Recurrence = Now, or Once



The screenshot shows a 'Recurrence' section with a dropdown menu set to 'Now'. Below the dropdown, it states 'Object will run now.'

If using “Once”, the date and time should be set as the current date **and a time prior to 8:00pm**. A recurrence of “Now” will not necessarily execute immediately, it depends on the volume of reports already in the que.



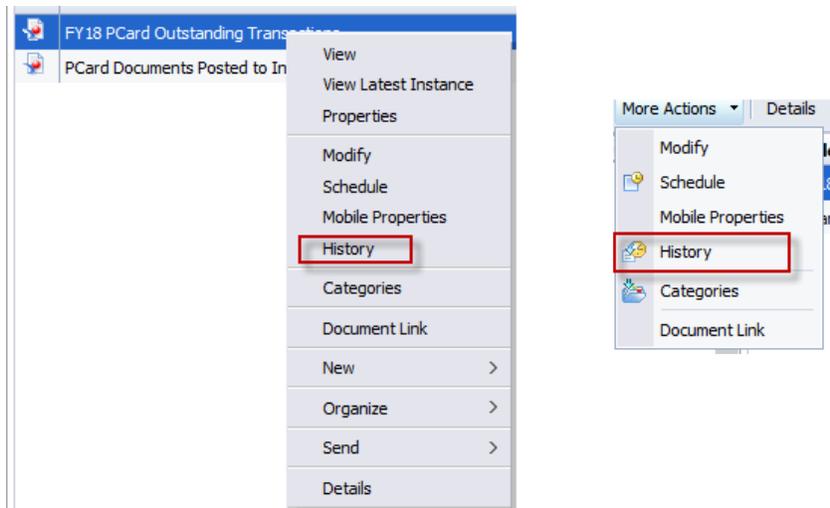
The screenshot shows a 'Recurrence' section with a dropdown menu set to 'Once'. Below the dropdown, it states 'Object will run once only.' There are two rows for date and time selection. The first row is for the 'Start Date/Time' and the second row is for the 'End Date/Time'. Each row has dropdowns for hour (01), minute (44), and period (PM), followed by a date field (6/29/2018 and 6/29/2028 respectively) and a calendar icon.

2. Events = this does not need to be populated ***only for non-recurring reports set to generate on the same day.***

Report History

By default, a scheduled report is only visible by viewing the history of the report. With the scheduled report highlighted, right click on the report and select History, or use the More Actions drop down menu.

ALDER Report Scheduling



From the history list, each version of the scheduled report is listed. The status column indicates the status of the specific version of the scheduled report.

Status	
Success	Success - indicates the scheduled report was executed, not that it reached completion. A report could reach the timeout limit, not contain any results, and still have a status of success.
Success	
Success	
Paused	Paused - indicates that a scheduled report has been paused.
Recurring	Recurring - the parameters of the recurring report.
Failed	Failed - indicates that the report did not execute.
	Pending - indicates the report is in a queue waiting for processing.
	Running - indicates report actively being processed.

ALDER Report Scheduling

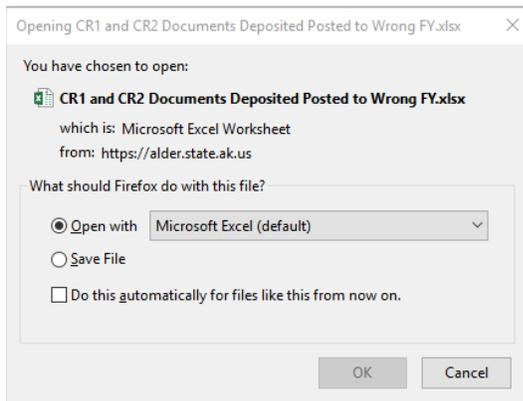
To determine why a specific report failed, select the blue status for specifics. By selecting the status of recurring, the schedule parameters are viewable.

Status	
Title:	FY18 PCard Outstanding Transactions
Document Type:	Microsoft Excel
Status:	Recurring
Destination:	Mail the instance to: "[stephanie.allison@alaska.gov]" with a
Owner:	255538_new
Creation Time:	4/19/2018 11:55 AM
Next Run Time:	7/6/2018 8:00 AM
Waiting for event(s):	IRIS Financial Update Complete
Recurrence Type:	Object will run every week on the following days:Friday
Parent Object Path:	User Folders/255538_new/DOF Final/Monitoring/PCard/
Remote Instance in Federated Cluster:	No
Expiry:	4/19/2028 11:54 AM
Formats:	Microsoft Excel
Parameters:	

Each instance of the report is listed with the date, time and status of the report.

Instance Time	Title	Status	Created By	Type	Parameters
Jul 11, 2018 9:05 AM	CR1 and CR2 Documents Deposited Posted to Wro	Success	255538_new	Microsoft Excel	CURRENT;CURRENT;PRIOR;ALL
Jul 10, 2018 9:24 AM	CR1 and CR2 Documents Deposited Posted to Wro	Success	255538_new	Microsoft Excel	CURRENT;CURRENT;PRIOR;ALL
Jul 10, 2018 9:22 AM	CR1 and CR2 Documents Deposited Posted to Wro	Success	255538_new	Web Intelligence	CURRENT;CURRENT;PRIOR;ALL
Jul 10, 2018 8:58 AM	CR1 and CR2 Documents Deposited Posted to Wro	Paused	255538_new	Web Intelligence	
Jul 9, 2018 7:35 AM	CR1 and CR2 Documents Deposited Posted to Wro	Recurring	255538_new	Microsoft Excel	
Jul 7, 2018 9:42 AM	CR1 and CR2 Documents Deposited Posted to Wro	Success	255538_new	Web Intelligence	CURRENT;CURRENT;PRIOR;ALL
Jul 6, 2018 9:53 AM	CR1 and CR2 Documents Deposited Posted to Wro	Success	255538_new	Web Intelligence	CURRENT;CURRENT;PRIOR;ALL

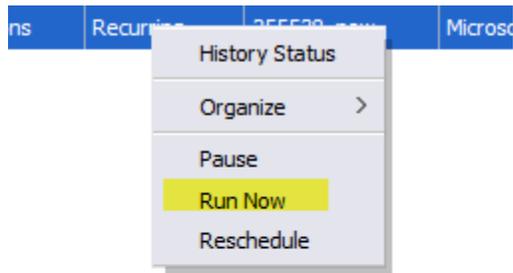
Each successful instance can be viewed by selecting the blue instance time or report title. If the report format is Excel, selecting the report instance will generate an option to open the report in excel or save the file.



If the report format is Web Intelligence, selecting the report instance will generate the report in a new tab for the instance selected.

ALDER Report Scheduling

With status line of recurring highlighted, right clicking provides a menu of options.



Organize - Provides the option to delete the scheduled report entirely.

Pause - Pauses the scheduled report
Run Now - Runs the report after the IRIS Financial Update event.

Reschedule - Provides the entire menu for report scheduling, any element can be changed and will adjust the entire schedule.

Additional Information on the Report Scheduler

The report scheduler triggers a report based on two factors:

1. The IRIS Financial Update event being completed
2. The scheduled start time for the report being reached

The IRIS Financial Update event activates once a day, any scheduled report that exists when it is activated are flagged for execution. If a report is scheduled after the IRIS Financial Update event has been activated and includes the update event, the report will be flagged the next time the IRIS Financial Update event activates. Once the scheduled report has been flagged and the scheduled start time criteria has been reached, the scheduler executes the report and resets the execution flag. This process operates the same no matter what the specific time the report is scheduled.

Consider the following scenarios:

- If on 7/1 at 11:00am (after the IRIS Financial Update event has been activated) a report is scheduled for 11:59pm, the report will run on 7/2 AFTER the completion of the IRIS Financial Update event.
- If on 7/1 at 11:00am (after the IRIS Financial Update event has been activated) a report is scheduled for 10:00am, the report will run on 7/2 AFTER the completion of the IRIS Financial Update event and not before 10:00am.

ALDER Report Scheduling

- If on 7/1 at 11:00am (after the IRIS Financial Update event has been activated) a report is scheduled for 3:00pm. The report will run on 7/2 AFTER the completion of the IRIS Financial Update event and not before 3:00pm.
- If on 7/1 at 11:00am (after the IRIS Financial Update event has been activated) a report is scheduled for 10:00am **but fails to include the IRIS Financial update event**. The report will run on 7/2 at 10:00am. *However, the validity of the data is questionable and if the IRIS Financial Update event has not occurred by 10:00am, the report could both slow the entire system or completely crash the system.*

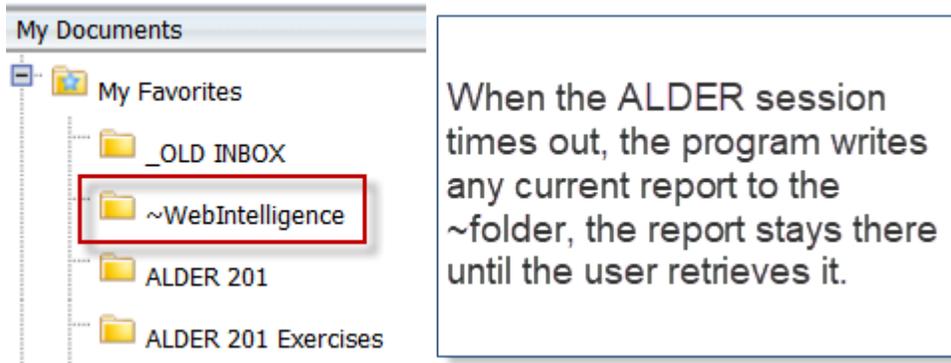


Recurring reports that do not include the “IRIS Financial Update Complete” event are subject to being paused by the ALDER team **WITHOUT WARNING.**

ALDER Report Scheduling

Using the WebIntelligence Folder

Each user has a ~WebIntelligence folder in their personal ALDER folder.



To open items in the WebIntelligence folder, go to the folder and select the report.

