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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”
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.

Caching and Scheduling Server Group are not used in ALDER.
Instance Title

Recurrence
Recurrence identifies how frequently the report should generate.

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.
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.

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.
Format
Choose a format for the output.

Caching
This section is not used.

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

Select “System Events”
All events available to the user (based on security rights) will populate under the title.

"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”.

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.**

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

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

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.
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**

   ![Recurrence](image)

   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.

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.
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.

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.

Paused - indicates that a scheduled report has been paused.

Recurring - the parameters of the recurring report.

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

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

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

<table>
<thead>
<tr>
<th>ns</th>
<th>Recurring</th>
<th>IRIS Financial Update</th>
<th>Microsoft</th>
</tr>
</thead>
<tbody>
<tr>
<td>History Status</td>
<td>Organize</td>
<td>Pause</td>
<td>Run Now</td>
</tr>
</tbody>
</table>

**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.

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**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.
• 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.**

**WARNING**

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