Intellicus Scheduler

Intellicus Web-based Reporting Suite **Version 4.5**

Enterprise

Professional

Smart Developer

Smart Viewer

intellicus Enterprise Reporting

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Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: http://www.intellicus.com/acknowledgements.htm .

Contents

Introduction

Scheduling of reports is very helpful for better utilization of server and printer resources. Reports that take longer to run can be scheduled to save your time. Report that needs processing of large volume of data and need server and printer resources for long time can be scheduled to be generated over the week-end when load on servers would be relatively low.

By scheduling a report, it can be sent to multiple deliverables at a time, which is otherwise not possible.

Scheduler component of Intellicus provides you the power to plan in advance:

- Date and time when a report should be generated
- Output format(s) and delivery option(s)
- How the report generation should take place

Note: It is possible to have history of reports generated through schedule.

Schedules can be created by:

- Administrator
- User having batch Report Scheduler system privileges
- All users (They can create private schedules)

How does it work

1. **Setup a Calendar:** Decide when should a report be generated and after what period it should be repeated. For example, every 2nd Monday between January 2007 and May 2008.
2. **Setup a task:** Decide reports to be generated, its output format (for example, PDF, MS Word, HTML, etc) and delivery method from amongst FTP, e-mail, printing and publishing and other required details like parameters.
3. **Setup a Job:** To set how a task will be implemented. For example, once, on a specific day and time or repeating based on a schedule.

Working with Schedules

A schedule includes details of **when** a report generation task should be implemented.

Getting a list of schedules

To view a list of schedules, click Schedule > Schedules.

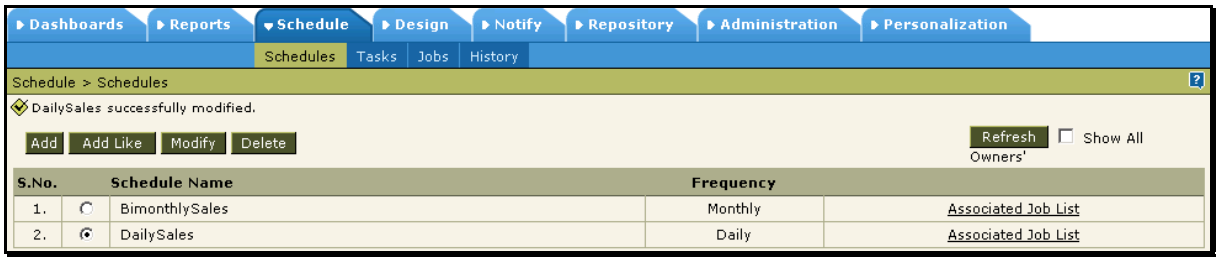

Figure 1: Schedules List

For each schedule the list includes **Schedule Name** and **Frequency**. Click the **Associated Job List** link in order to view jobs associated with that schedule.

Use this page to

- View schedule list.
- Create a new schedule.
- Create a new calendar based on an existing schedule.
- Select a schedule (by clicking the radio button) and modify or delete it.
- View jobs associated with a schedule.

If you are a super administrator

Select **Show All Owners'** and click the **Refresh** button to view private schedules created by all the users of all the organizations.

If you are an administrator

Select **Show All Owners'** and click the **Refresh** button to view private schedules created by all the users of your organization.

Creating a new schedule

You can create a schedule in any of the following ways:

- Based on pre-set (existing) schedule
- A totally new schedule

Based on a pre-set (existing) schedule

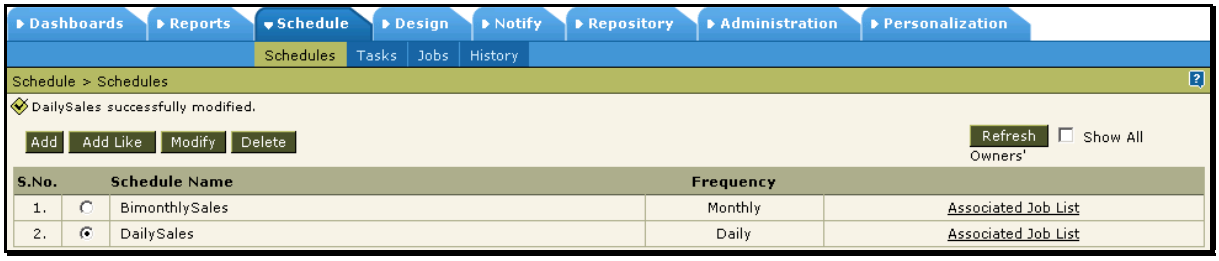

Figure 2: Adding a schedule based on existing one

1. On **Schedules** page, select the schedule based on which you want to create a new schedule. To select a schedule, click the option button appearing on the 1st column of respective schedule entry.
2. Click the **Add Like** button. The schedule details will open in a new page. Make changes where required, and click the **Save** button to save the work.

A new schedule

To create a whole new schedule,

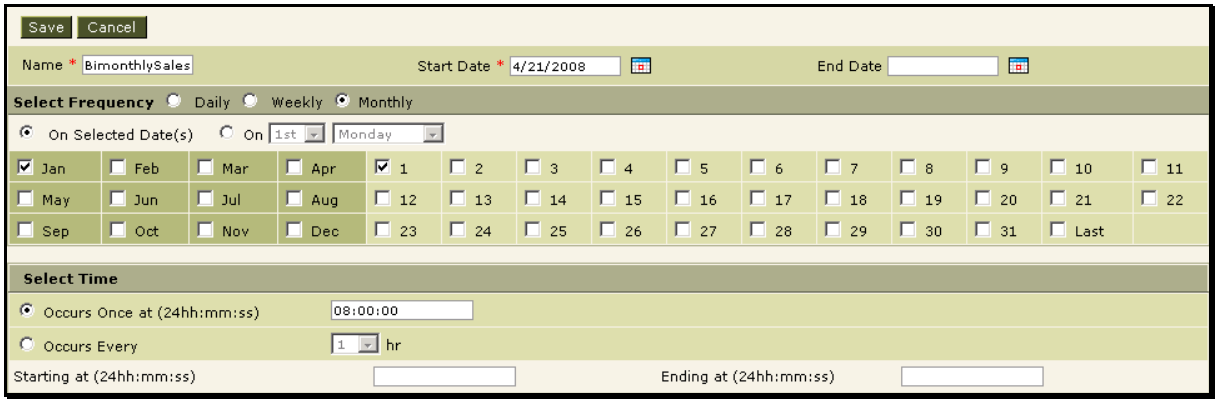

Figure 3: Creating a new schedule. Name entry box can't be left blank.

1. On **Schedules** page, click the **Add** button. A page with entry details opens.
2. In **Name**, specify a unique name for this entry. This name will be used to refer to this schedule. This can't be left blank.
3. In **Start Date** select the date from which schedule should be implemented. By default today's date will appear there.
4. In **End Date**, select the date from which the schedule would not be available. If this is kept blank, this schedule will never expire and will continue to be available for implementation.
5. In **Select Frequency**, select the frequency. Details are given after these steps. This sets day(s) on which this schedule will be implemented.
6. Specify information under **Select Time**. Details are given after these steps. This will have the time when the schedule should be implemented.
7. Click the **Save** button to save the schedule details.

To abandon the process, truncate the changes and return to **Schedules** page, click the **Cancel** button.

Frequency Details (daily, weekly, monthly)

The frequency is set in following ways:

- Daily (by days)
- Weekly (by weeks)
- Monthly (by months and dates / days within month)

To set frequency as Daily (by days)

1. While setting up schedule, under **Select Frequency**, select **Daily**. The page changes accordingly.
2. Under **Every**, specify the number of days after which the schedule should repeat itself.

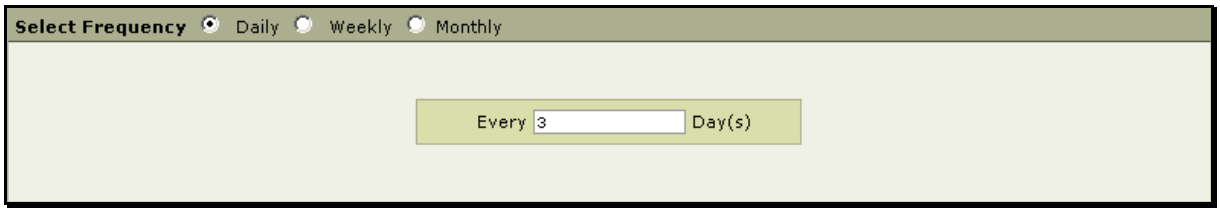

Figure 4: Setting up schedule to be repeated based on days

For example, if you want schedule to be repeated once in three days, (1st, 4th, 7th and so on), select 3 as number of days. To repeat the schedule every alternate day, select 2 as number of days. Once a week, select 7 as number of days.

To set frequency as Weekly

1. While setting up schedule, under **Select Frequency**, select **Weekly**. The page changes accordingly.
2. Under **Every**, select after how many weeks, the schedule should be repeated.
3. Select the check boxes of day when you want the schedule to repeat.

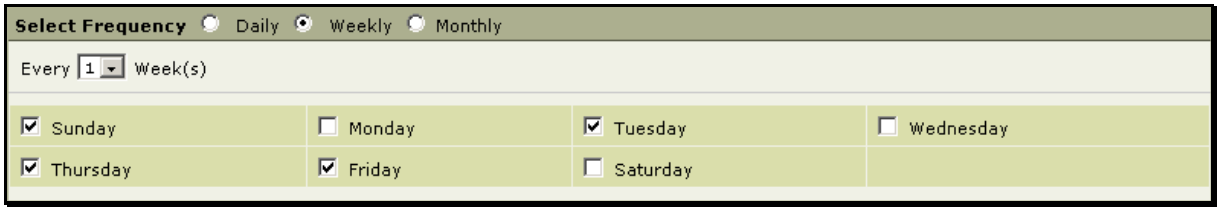

Figure 5: Setting up schedule to be repeated by week-days

For example, if you want schedule to be repeated every 3 weeks, and implemented on Tuesday and Friday, select 3 in **Every** and select check boxes of **Monday** and **Wednesday**.

To set frequency as Monthly (by dates)

In this case, a schedule is set to repeat on selected months and on specific dates.

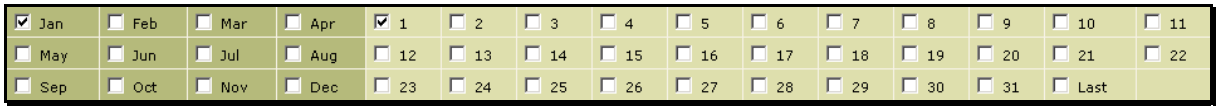

Figure 6: Setting up schedule to be repeated on monthly basis (dates)

1. While setting up schedule, under **Select Frequency**, select **Monthly**. The page changes accordingly.
2. Select the months in which the schedule will be implemented.
3. Select the option **On Selected Date(s)**.
4. Select the dates on which you want the schedule to repeat.

For example, if you want schedule to be repeated in April, July, Oct and December on dates 1, 3, 4, 6, 25, select months Apr, Jul, Oct and Dec. Select dates 1, 3, 4, 6 and 25.

To set frequency as Monthly (by days)

Here a schedule is set to repeat on selected months and on a specific day.

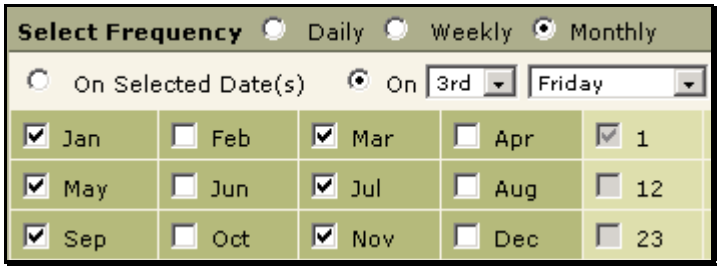

Figure 7: Setting up schedule to be repeated on monthly basis (dates)

1. While setting up schedule, under **Select Frequency**, select **Monthly**. The page changes accordingly.
2. Select the option **On**.
3. Select the required option among 1st, 2nd, 3rd, 4th and 5th, followed by selection of day.
4. Select one or more month.

For example, if you want schedule to be repeated every 3rd Friday of January, February and October, select the months Jan, Feb and Oct. Select 3rd and Friday as day.

Time for implementing the schedule

This is the time when on given day, the schedule should be implemented. It can be made to:

- Occur only once at a specific time on given day
- Occur more than once (at given interval) on given day

Occur once at

Select this if you want the schedule to occur only once at a specified time.

For example, once only at 20:00:00 hours.

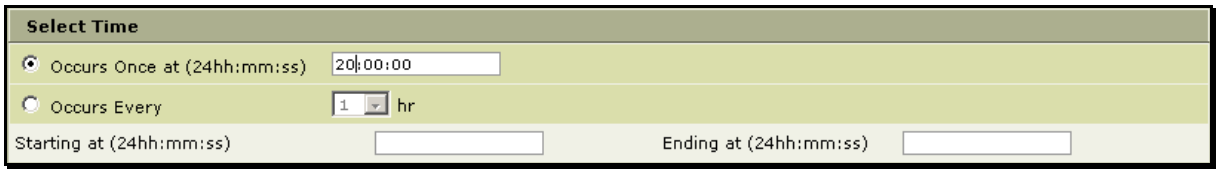

Figure 8: Specifying time for implementing the schedule

Click the option button on the left of **Occurs Once at** and specify the time in hh:mm:ss format in the entry box.

Occurs Every

Select this if you want the schedule to repeat at an interval of set number of hours.

Click the option button on the left of **Occurs Every** and select a number indicating the number of hours after which the schedule should repeat. Set time for **Starting at** and **Ending at** is the time between which this schedule will occur.

For example, Starting at 04:00:00 hour, every 2 hours up to 6:45:00 hours.

Modifying a schedule

1. On **Scheduler List** page, select the schedule that you want to modify. To select a schedule, click the option button appearing on the 1st column of respective schedule entry.
2. Click the **Modify** button. The schedule details open where you can modify the information.
3. Make the required changes and click **Submit**.

Deleting a schedule

1. On **Calendar List** page, select the schedule that you want to delete. To select a schedule, click the option button appearing on the 1st column of respective schedule entry.
2. Click the **Delete** button. A confirm delete dialog box appears.
3. Click **OK** to delete the schedule.

If you have clicked the **Delete** button by error, click **Cancel** on confirm delete dialog box to abandon the process of deletion.

Note: You cannot delete a schedule that is associated with a job.

Viewing jobs associated with a schedule

1. Click the link **Associated Job List** in the respective row of the schedule.

Job list appears having a list of Jobs associated with the selected schedule.

Working with Tasks

A report may be printed, mailed, published as well as uploaded using FTP. It can be generated in different output formats. A task is one or more activities that are done on a report.

As one task, you can instruct Intellicus that this report should be sent to the following email-ids, published up to this date and also placed on FTP site at this URL.

Getting a list of tasks

To view a list of calendars, from the **Schedule** menu pad, click **Tasks**.

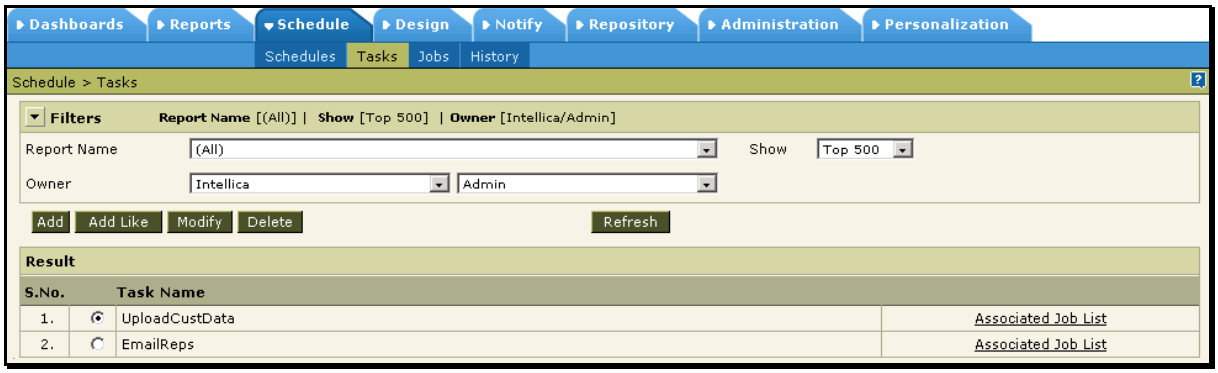

Figure 9: Task List

The Filters area

When the page opens up, Filters tab remains collapsed. Click the tab-header to open it up. The tab-header also displays current filter settings. By default it displays first 500 tasks (no filter for report name, Owner Intellica/Admin). List can be filtered by:

- **Report Name:** Name of the report.
- **Owner:** The user who has created the task(s).
- **Show (selecting the number):** Select TOP 100 to view first 100 tasks from the filtered list. Select TOP 500, TOP 1000 to first 500 and 1000 tasks respectively. Select ALL to view all the tasks from the filtered list.

Filtering the list

Select / specify filter criteria in Filters area and click **Refresh** button. List of tasks meeting filter criteria will appear.

List includes name of the task. Click the **Associated Job List** link in order to view jobs associated with their respective tasks. (More information on Job is provided in the next chapter.)

Buttons

- **Add:** To create a new task.
- **Add Like:** To create a new task based on a pre-set task.
- **Modify:** To modify a selected task.
- **Delete:** To delete a selected task.

Use this page to

- Create a new task
- Create a new task based on an existing task
- Select a task (by clicking the radio button) and modify or delete it
- View jobs associated with a task.

If you are a super administrator

Select **Show All Owners'** and click the **Refresh** button to view private tasks created by all the users of all the organizations.

If you are an administrator

Select **Show All Owners'** and click the **Refresh** button to view private tasks created by all the users of your organization.

The Result area

Tasks meeting the filter criteria are listed in **Result** area. **Show** dropdown box and **Next** / **Prev** link will appear if it is configured to appear and number of entries are more than the page size (this is set by application administrator).

If the entity you are looking for is not available in the list, use the drop-down box options to view another set of entities. To get next list, click **Next** link. To get previous list, click **Prev** link.

Creating a new task

You can create a new task in any of the following ways:

- Based on pre-set (existing) task
- A new task from scratch

Based on a pre-set (existing) task

1. On **Tasks** page, select the task based on which you want to create a new task. To select a task, click the option button appearing on the first column of respective task entry.

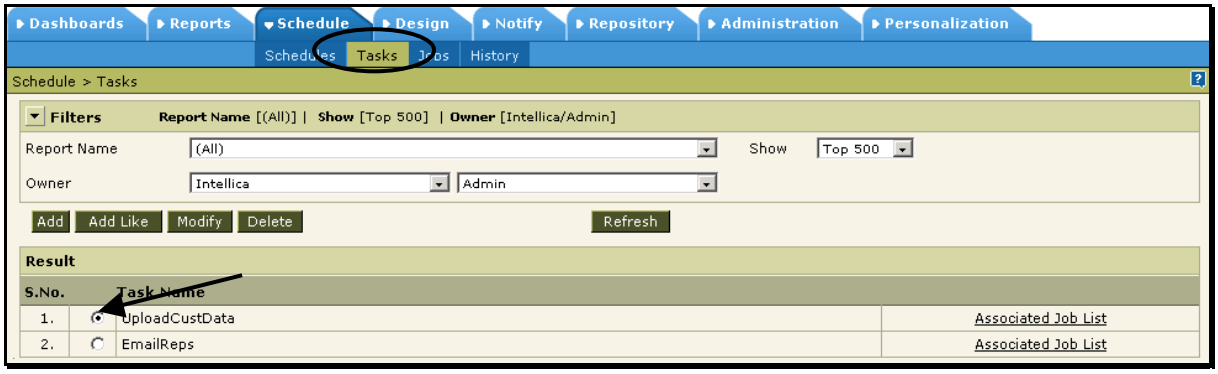

Figure 10: Creating a task based on a pre-set task

2. Click the **Add Like** button. Task details will open in new page. Make changes where required, and save the work by clicking the **Save** button.

A new task

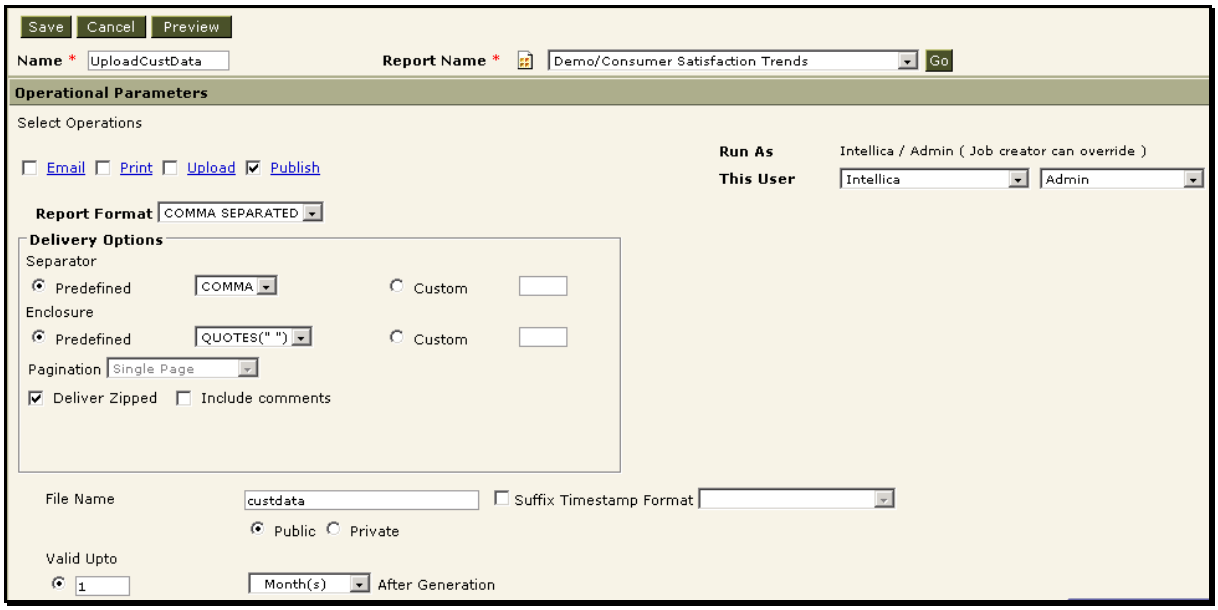

Figure 11: Setting up a task

1. On **Task List** page, click the **Add** button. A page with entry detail opens.
2. In **Name**, specify a unique name for this entry. This name will be used to refer to this task.
3. In **Report Name**, select a report to be taken up for the task and click the **Go** button. Information in **Operational Parameters** and **Report Parameters** will appear.
4. To run the task in a specific user's name, select organization and the user from dropdown boxes under **Run As**.

Note: Run As is available to Administrators and Super Administrators only. It is not available to end-users having Scheduler privileges.

5. Specify required information for **Operational Parameters** and **Report Parameters**. The details for these are explained after these steps.
6. If the report is going to have multiple set of parameters (operational parameters as well as report parameters), specify **MultiSet** parameters. Detail of MultiSet is provided later in the chapter.
7. Click the **Save** button after specifying all the required information.

Task detail is saved and its entry appears on the **Tasks** page.

Report Name dropdown box lists all the public reports and their links as well as private reports and linked reports setup by the user who has logged in.

Click the **Cancel** button to abandon this task details. Click the **Preview** button to preview the report in selected format.

Note: The preview will fail if the report being scheduled has hidden parameter and / or shadow parameters (display parameters) used in the report. However, the schedule task will run as per expectations.

Operational Parameters

These parameters deal with format and delivery of the report.

Selecting Report Format

When you select a report format, (after selecting any of the report delivery check boxes) **Properties** area just below **Report Format** dropdown box will list properties related to selected report format. Set the properties.

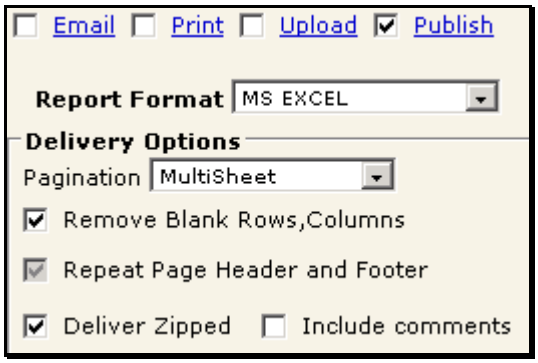

Figure 12: Selecting report format

Note: For more information on Delivery Options, refer to **Export Options** chapter of **IntellicusEnduserReference.pdf**.

Email

Use this option when a report is to be e-mailed. To get e-mail related operational parameters, click **Email** link.

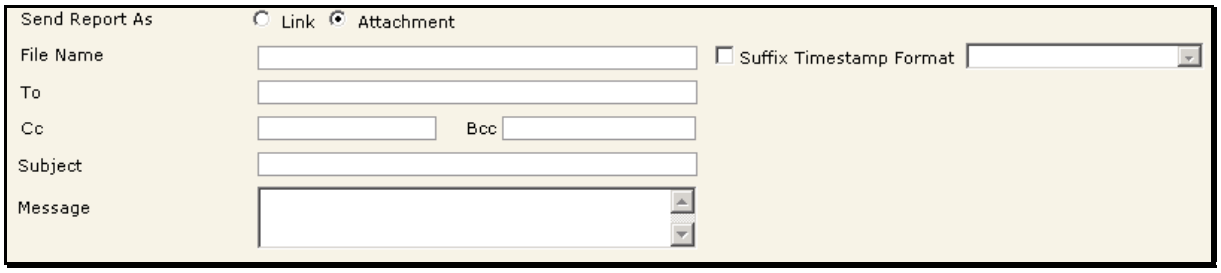

Figure 13: Setting up Email as delivery option

1. Check the **Email** checkbox.
2. In **Report Format**, select the required report format. Select **Delivery Options**.

Note: For more information on Delivery Options, refer to **Export Options** chapter of **IntellicusEnduserReference.pdf**.

3. In **Send Report As**, select *Link* to send link of the report, select *Attachment* to send entire report as an attachment of the mail.
4. In **File Name**, specify the name for the report that is being attached.
5. To include date and time of report generation, select **Suffix Timestamp Format** checkbox and select a date format.
6. Specify e-mail IDs for **To**, **Cc** and **Bcc**.
7. In **Subject**, specify a subject that the e-mail needs to carry.
8. In **Message**, specify message body of the e-mail.

Now you can proceed with other steps of setting up the task.

Print

Use this option when reports will be printed on paper. To get print related operational parameters, click **Print** link.

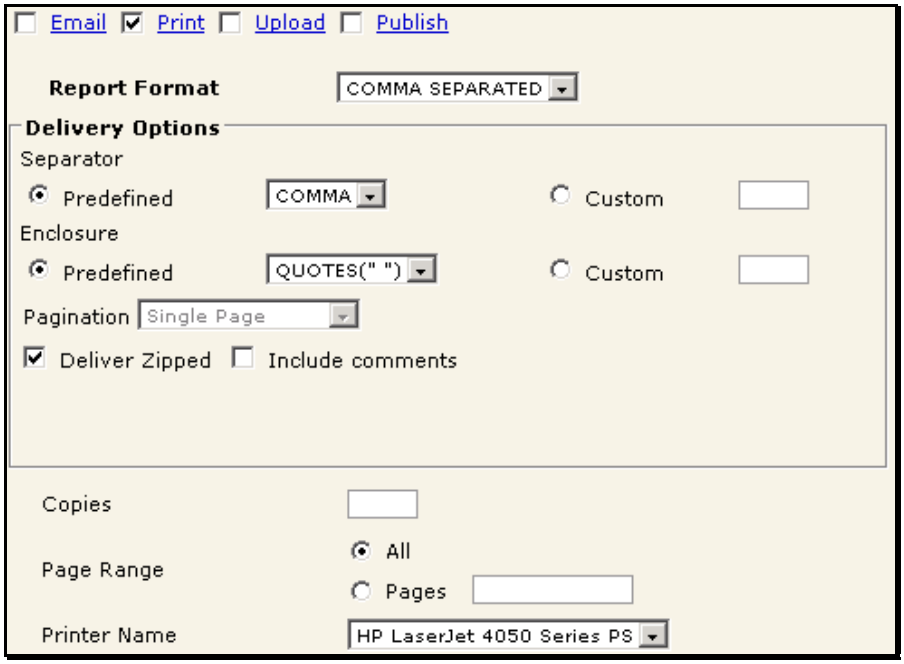

Figure 14: Setting up Print as delivery option

1. Check the **Print** checkbox.
2. In **Report Format**, select the required report format. Select **Delivery Options**.

Note: For more information on Delivery Options, refer to **Export Options** chapter of **IntellicusEnduserReference.pdf**.

3. In **Copies**, specify the number of copies to be printed.

4. In **Page Range**, select **All** to print all pages in the report, or specify the pages to be printed.
5. Select the **Printer Name** to be used to print the report. This dropdown box has all the printers installed on Report Server machine.

Note: If a print setting is associated with the report, the details will be displayed here when you select the report and click **Go** button.

Raw Text output format is not available for Print.

Important: For selected report if print setting **is forceful**, you would not be able to edit the print parameters.

Now you can proceed with other steps of setting up the task.

Upload

A report can be uploaded to an FTP server as well as stored at a shared location. To get print related operational parameters, click **Upload** link.

Uploading the report on FTP Server

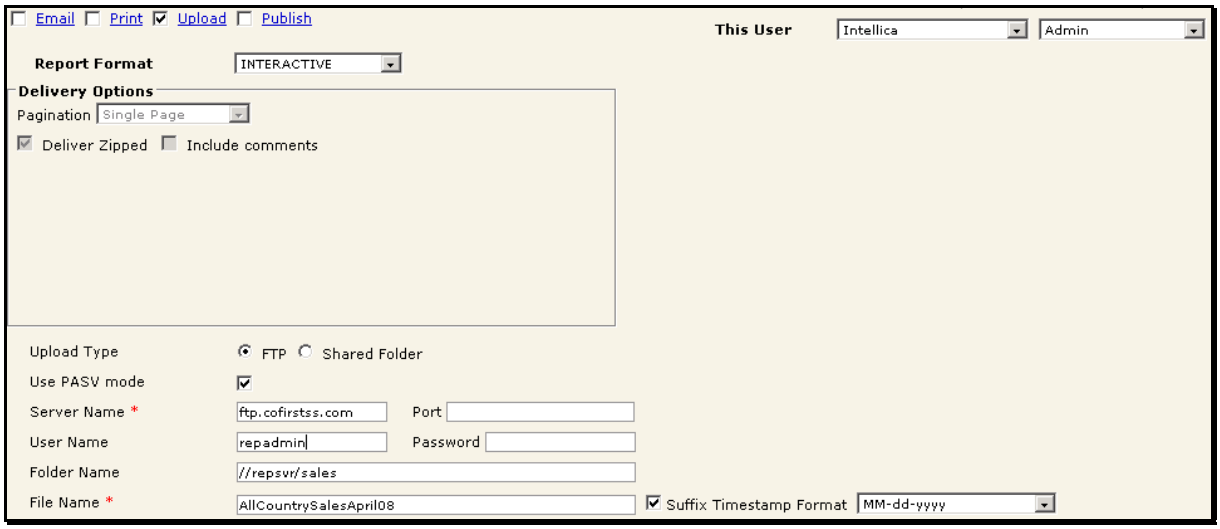

Figure 15: Setting FTP as report delivery

1. Check the **Upload** checkbox.
2. In **Report Format**, select the required report format. Select **Delivery Options**.

Note: For more information on Delivery Options, refer to **Export Options** chapter of **IntellicusEnduserReference.pdf**.

3. In Upload Type, select *FTP*.
4. To upload in passive mode, check **Use PASV** mode checkbox.
5. In **Server Name** specify the server name.

6. In **Port**, specify the port that should be used for upload.
7. In **User Name**, specify the user name by which application to login into server.
8. In **Password**, specify the password to be used at the time of login.
9. In **Folder name**, specify the folder where the report should be placed. Specify "/" if you want to place the report at root.
10. In **File Name**, specify name by which the report will be stored on server.

Saving on a shared folder on the Network

A report can be saved on a network location.

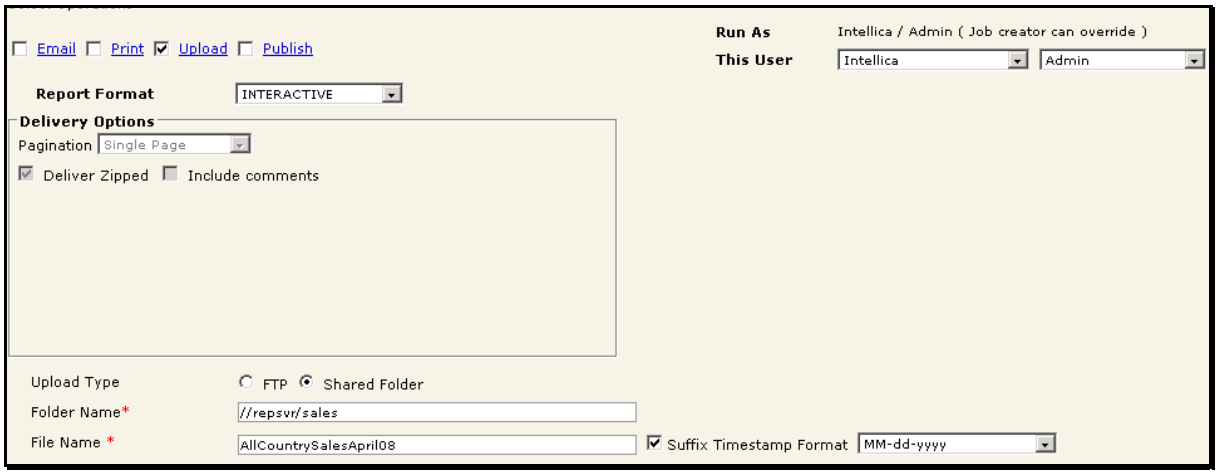

Figure 16: Saving on shared folder

1. Check the **Upload** checkbox.
2. In **Report Format**, select the required report format. Select **Delivery Options**.

> **Note:** For more information on Delivery Options, refer to **Export Options** chapter of **IntellicusEnduserReference.pdf**.

3. In **Upload Type**, select *Shared Folder*.
4. In **Folder Name**, specify the network path in UNC format(\\computername\folder) where the report should be placed.
5. In **File Name**, specify the name by which the report will be stored.

Now you can proceed with other steps of setting up the task.

Publish

A report can be published with a pre-set validity period.

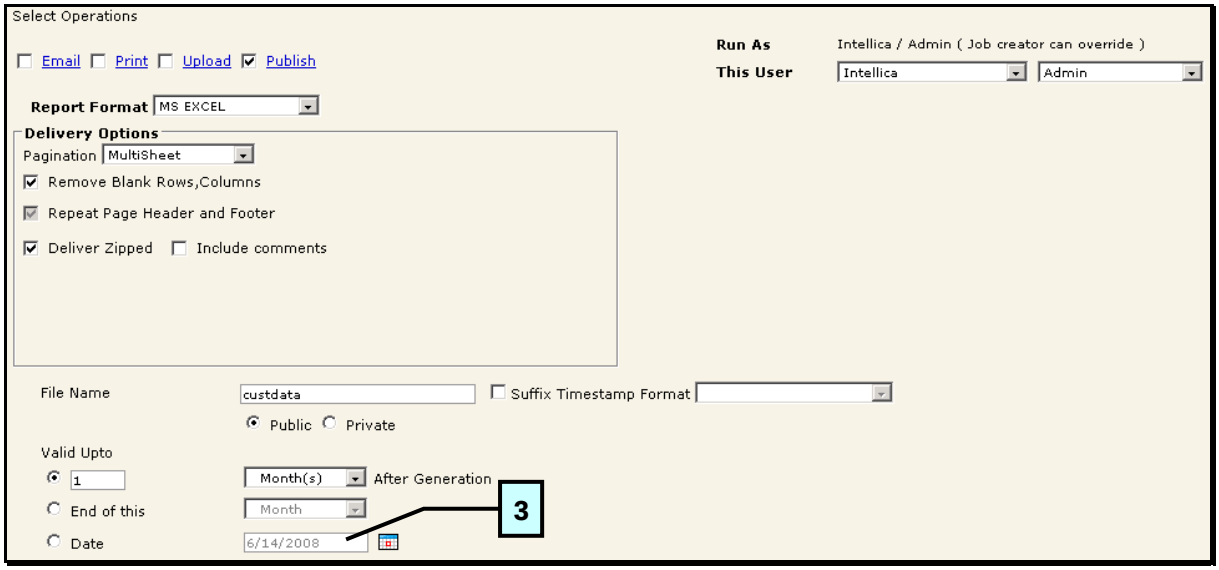

Figure 17: Setting Publish as Operational Parameters

1. Check the **Publish** checkbox.
2. In **Report Format**, select the required report format. Select **Delivery Options**.

Note: For more information on Delivery Options, refer to **Export Options** chapter of **IntellicusEnduserReference.pdf**.

3. In **File Name**, specify the name for the published report.
4. To include date and time of report generation, select the **Suffix Timestamp Format** checkbox and select date format.
5. For **Valid Upto**, select the right option and provide details accordingly. Explanation is provided after these steps. It means Reports will then be expired / will never be published after the specified period.

Validity Options

You get following options for report publishing

1. For a specific time period after generation

For example, for 2 months, 3 weeks, 6 hours, etc.

Select this option button and specify the number followed by selecting unit (Hours, Days, Weeks, Months and Years).

2. Up to end of a duration from generation

Select this option button to keep the report published up to end of and select the duration (hours, days, weeks, months and years).

For example, at the end of this **week**, at the end of this **year**, etc.

3. Up to end of a specific time period

Select this option button to keep report published up to a specific date.

For example, July 30, 2008.

Note: Report will not be available after the period / time duration is over.

Getting parameter value in fields (on E-mail, Publish and Upload)

You can set parameter value as part of free form entry boxes.

To include a parameter in a field, enclose the parameter name in <% and %> and specify in respective entry box.

For example, Sales<%CountryCode%>Jan2006. Here, CountryCode is a parameter name that will be replaced by its actual value when the report is executed.

Report Parameters

These are the values that are specified at run time. However, a report may or may not have report parameters.

MultiSet parameters

This is used to provide more than one set of operational parameters and report parameters. This is one of the very powerful features of Intellicus. Using Multiset parameters, you can at run time dynamically select the parameter values to run a report.

To do this, click **MultiSet**. The Multiset parameters area will open up to specify required information about operational parameters and report parameters.

Multiset Parameter values can be:

- **Static:** Fix values will be specified for the parameters. These values can be specified on this page.
- **SQL:** SQL query will be used to fetch parameter values from database.
- **XML:** An XML file will provide values to be used as parameters.

Providing Multiset Parameters

Click the **MultiSet** Button. Multiset Parameters area opens up. Select one among Static, SQL and XML.

Static Parameters

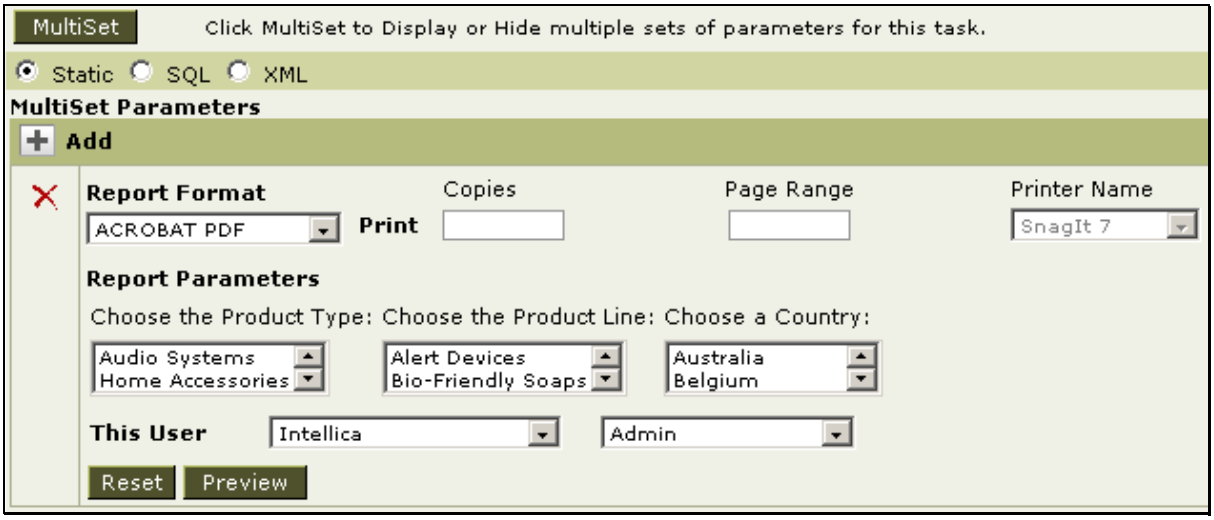

Figure 18: Specifying MultiSet Parameters

1. Select option **Static**. A check box would appear on the left side of each of the **Operational parameter** and **Report parameter**.
2. Select the parameters (by checking respective checkboxes on **Report Parameters** area) for which you want to provide multiple set of values. Entry boxes (under **MultiSet Parameters**) for selected parameters will become available.
3. Click the **Add** button. A row opens up.
4. Specify values in respective entry boxes.
5. After providing all the values, click the **Save** button.

Click the **Add** button to get more number of rows. Click ✕ button to remove the respective row.

Click **Reset** to reset the values similar to the ones set under operational parameters.

Click **Preview** to have a look at the report based on the parameters set here.

Getting Parameter values through an SQL

Use this when parameter values needs to come directly from database using an SQL. This way you can dynamically select parameter values at run time.

Figure 19: Specifying multiset parameter values through SQL

1. Select the option **SQL**. Select the connection name to be used to get the parameters.
2. Specify the **SQL**.
3. Click **Verify SQL** to check if the SQL you specified is valid.

Getting Parameters through XML

Figure 20: Specify multiset parameter values through XML file

1. Select the option **XML**.
2. Specify URL where the XML is placed.

Working with task information without Intellicus web interface

Task information that you specify and submit is stored on the server as an XML file. This file can be downloaded, opened using an editor to modify the task information without using Intellicus Web Interface. After modification, you can upload it to the server.

Downloading task information

1. On **Task List** page, select the task that you want to download.
2. Click the **Modify** button. **Task** page opens up.
3. Click the **Download XML** button. Click **Save** on the dialog box; specify the location where you want to save the file.

The file is downloaded. For modification, the file can be opened using any text-editor.

Uploading task information

The file having task information can be uploaded after modification. (You need not upload if it is not changed).

1. Click **Browse** button and select the file that you want to upload.
2. Once the file is selected, click **Upload XML** button.

The file is uploaded to the server.

Modify a task

1. On **Task List** page, select the task that you want to modify. To select a task, click the option button on the left of the task.
2. Click the **Modify** button. The task details opens up where you can modify the information.

Delete a task

You can delete a task if it is not associated with any job.

1. On **Task List** page, select the task that you want to delete. To select a task, click the option button on the left of the task.
2. Click the **Delete** button. **Confirm Delete** dialog box appears.
3. Click **OK** to delete the task.

If you have clicked the **Delete** button by error, click **Cancel** on confirm delete dialog box to abandon the process of deletion.

Viewing jobs associated with a task

Click the link **Associated Job List** in the respective row of the task.

Working with Jobs

Schedule takes care of date and time details of a scheduled report generation. Task takes care of report output and delivery.

Job implements a task (optionally, based on a schedule).

Getting a list of jobs

This page lists all the jobs that are associated with a schedule for execution.

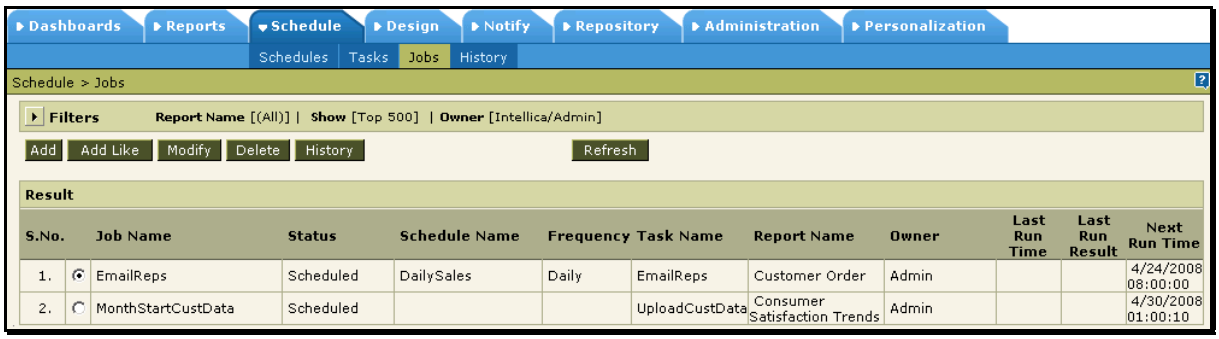

Figure 21: Jobs page

The Filters area

When the page opens up, Filters tab remains collapsed. Click the tab-header to open it up. The tab-header also displays current filter settings. By default it displays first 500 jobs (no filter for report name, Owner Intellica/Admin).

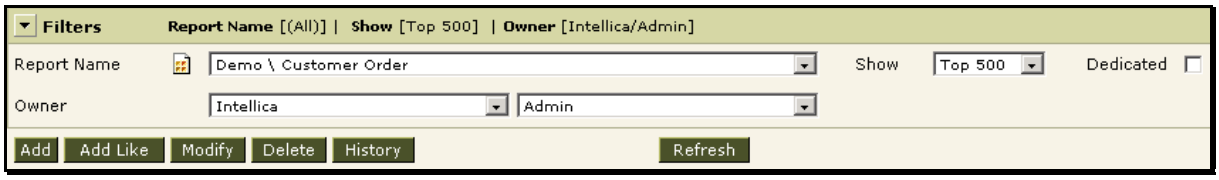

Figure 22: Filters area of Job page

List of jobs can be filtered by:

- **Report Name:** Name of the report.
- **Owner:** The user who has created the job(s).
- **Show (selecting the number):** Select TOP 100 to view first 100 jobs from the filtered list, select TOP 500, TOP 1000 to view first 500 and 1000 jobs respectively. Select ALL to view all the jobs from the filtered list.
- **Dedicated:** These are the jobs having one to one relationships between schedule and task. Select this checkbox to include only dedicated jobs in the list.

Note: Jobs are listed in the ascending order of the time of next execution.

Filtering the list

Select / specify filter criteria and click **Refresh** button. List of tasks having entries that meet the filter criteria will appear.

Buttons

- **Add:** To setup a new job.
- **Add Like:** To setup a new job based on a pre-set job. Name will have Copy Of prefixed to the job being copied.
- **Modify:** To make changes in a selected Job.
- **Delete:** To delete a selected job.
- **History:** To get history of selected job executions.
- **Refresh:** To refresh the list based on filter criteria.

If you are a super administrator

Select **Show All Owners'** and click the **Refresh** button to view private Jobs created by all the users of all the organizations.

If you are an administrator

Select **Show All Owners'** and click the **Refresh** button to view private Jobs created by all the users of your organization.

The Result area

Jobs meeting the filter criteria are listed in Result area. **Show** dropdown box and **Next** / **Prev** link will appear if

- It is configured to appear and
- The number of entries is more than the page size (this is set by application administrator).

If the entity you are looking for is not available in the list, use the drop-down box options to view another set of entities.

To get next list, click **Next** link. To get previous list, click **Prev** link.

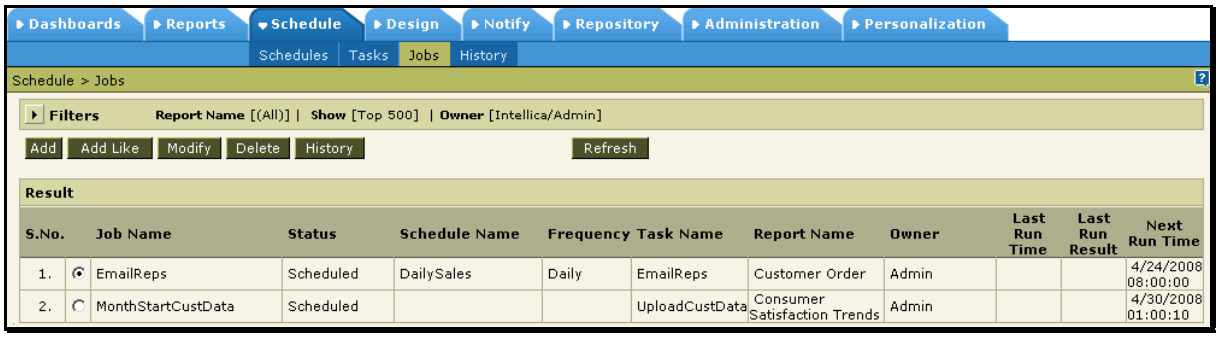

Figure 23: List of Jobs

List includes name of jobs and other details:

- **Job Name:** The name given to a job.
- **Status:** *Running* if the time span of the job is not over. *Completed* if the time span of the task is completed. *Error* if the job started but could not be completed successfully. *Suspended* if the job is marked as suspended.
- **Schedule Name:** The name of the schedule (calendar) with which the task is associated.
- **Frequency:** Frequency of repetition of the calendar.
- **Task Name:** The name of the task that is going to be implemented under this job.
- **Report Name**: The name of the report that is going to be generated under this job.
- **Owner**: The user in whose name the job was run.
- **Last Run time**: The time when the report was run last time.
- **Last Run Result**: The outcome of last run of the job.
- **Next Run Time**: The time when the job will be run next.

Note: If you want to list dedicated jobs also, select **Dedicated** check box and click **Refresh** button. To remove dedicated jobs from list, clear **Dedicated** check box and click **Refresh** button.

A job is known as a dedicated job when only one task (and so report) is associated with one calendar. You can create a dedicated job using API calls.

Use this page to

- Add a new job
- Add a new job based on a pre-set job
- Select a job (by clicking the radio button) and modify or delete it
- View history

Adding a new job

You can create a new job in any of the following ways:

- Based on pre-set (existing) job
- A totally new job

Based on a pre-set (existing) job

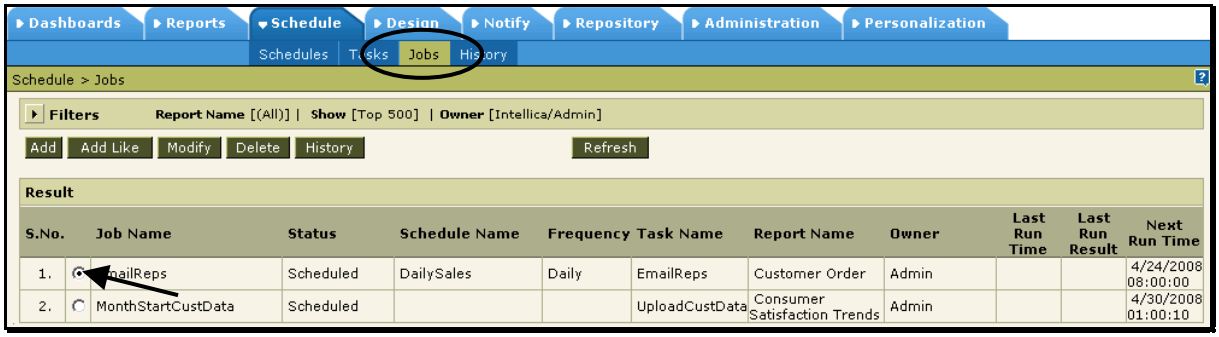

Figure 24: Adding a job based on an existing job

1. On **Jobs** page, select the job based on which you want to create a new job. To select a job, click the option button appearing on the 1st column of respective job entry.
2. Click the **Add Like** button. Job details will open in a new page. Make changes where required, and save the work.

A new job

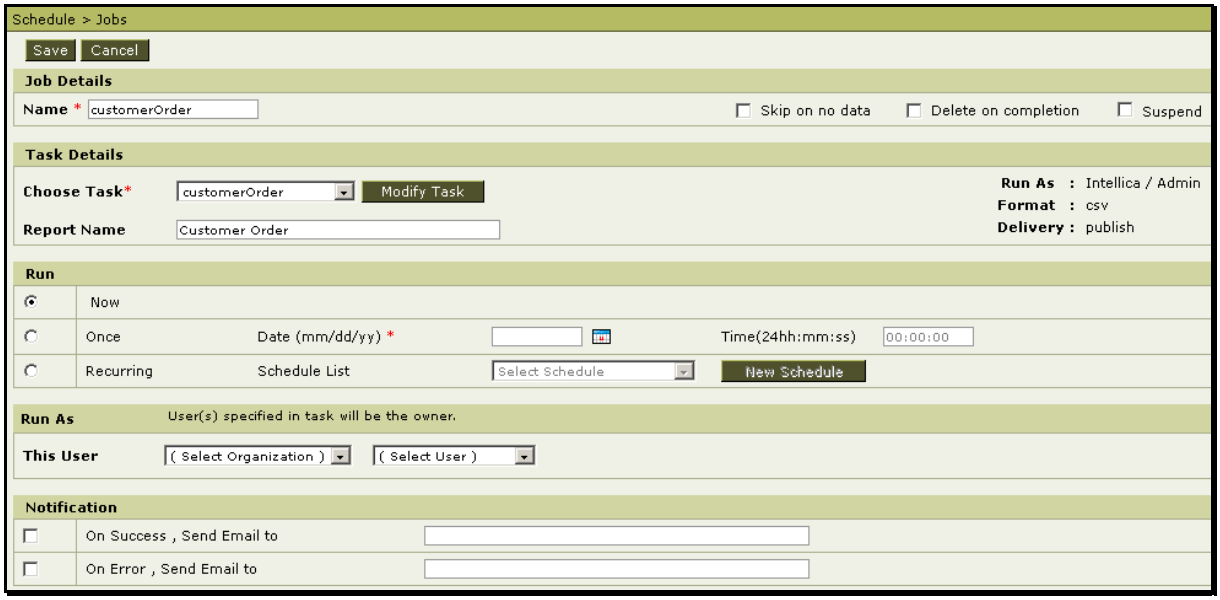

Figure 25: Adding a new job

1. On **Job List** page, click the **Add** button. A page with entry details opens.
2. In **Name**, specify a unique name for this entry. This name will be used to refer to this Job.
3. In **Choose Task**, select a task to be associated with this job. Click the **Modify Task** button if you want to modify the selected task. If the task to use is not listed, click the **New Task** button to create a whole new task to be associated with this Job.

Note:

To create a new task, Intellicus will take you to the new task page, and after creating the new task, it will bring you to this page, but **you will have to select newly created task** from **Choose Task** drop down box.

If you choose to modify task, Intellicus will bring you to this page after having modified the task.

When you choose a task, the report name associated with selected task automatically appears in **Report Name**.

4. Specify details under **Run**, **Notification** and **Advanced Options**. The details are provided after these steps.
5. Click the **Save** button to save the work.

Intellicus will now start serving the report based on job. If you do not want the job to be implemented, check the **Suspend** checkbox. This job will remain suspended until **Suspend** checkbox is cleared.

Information for **Run As**, **Format** and **Delivery** appears from **Tasks** page.

Skip on no data: If selected, report will be delivered to selected delivery options only if the report has any data. Otherwise schedule will be skipped.

Delete on Completion: If selected, job will be deleted after execution for **Run Now** and **Once**. For **Recurring**, it will be deleted if further execution is not scheduled after last execution.

Run

Select if you want to run this job, now, only once on given date and time, or repeat based on a schedule (calendar).

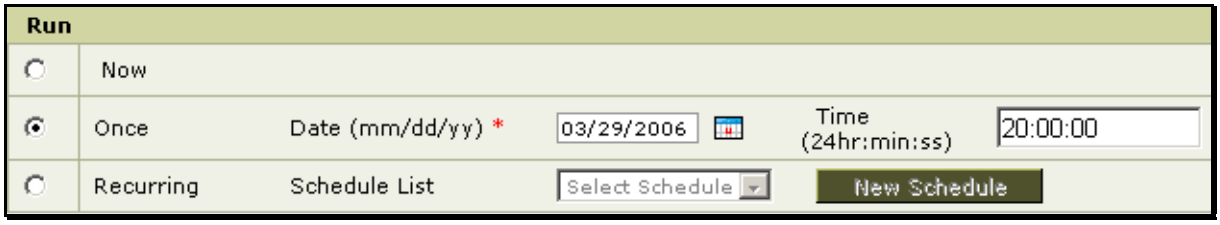

Figure 26: Setting preferences for **Run**

- **Now:** To execute the job now.
- **Once:** To execute the job once (at the specified date and time). Select a Date. Specify time in terms of 24 hours format.
- **Recurring:** To execute the task as per one of the pre-set calendars. Select the calendar from Schedule (Calendar) List. Click the **New Schedule** button to create a new calendar.

Run As

To run the job in the name of a specific user, select organization ID and User ID.

Figure 27: Run As a user

Important: Run As set in Job overrides **Run As** set in task.

Notification

You can send a notification informing about success or failure of a job.

Figure 28: Specifying Notification details

- **On Success**: To send a notification on success of the job. Check the checkbox **On Success**, send ... and specify the e-mail ID.
- **On Failure**: To send a notification on failure of the job. Check the checkbox **On Error**, send ... and specify the e-mail ID.

Advanced Options

This takes care of action to be taken when a job could not be completed.

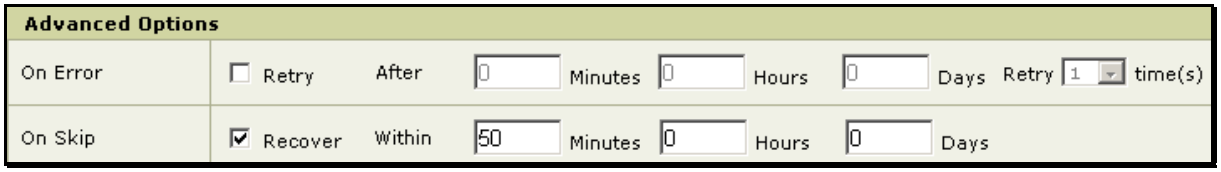

Figure 29: Specifying Advanced Options

On Error

Once implementation of a schedule starts and due to any reason, (such as unexpected network failure) it does not get completed, it is considered to be an error.

In this case, to retry the report generation, check the **Retry** checkbox and specify the time when this should be retried. Values can be given in terms of

- **Minutes:** The number of minutes after which it should be retried.
- **Hours:** The number of hours after which it should be retried.
- **Days:** The number of days after which it should be retried.
- **Retry times:** The number of times it should be retried.

If more than one value is specified, they would be added. For example, retry after 2 days, 4 hours and 10 minutes.

On Skip

If the report generation could not start as per schedule (calendar), such as report server was down at the time of executing the schedule, it is considered as skipped. In this case, to recover (try once again) the schedule (calendar), check

the **Recover** checkbox and specify the time when it should retry the task. Values can be given in terms of

- **Minutes:** The number of minutes after which it should be recovered.
- **Hours:** The number of hours after which it should be recovered.
- **Days:** The number of days after which it should be retried.

Modifying a job

1. On **Job List** page, select the job that you want to modify. To select a job, click the option button on the left of the job name.
2. Click the **Modify** button. The job details opens where you can modify the information.
3. Make changes and click the **Submit** button.

Deleting a job

1. On **Job List** page, select the job that you want to delete. To select a job, click the option button on the left of the job name.
2. Click the **Delete** button. Confirm delete dialog box appears.
3. Click **OK** to delete the job.

If you have clicked the delete button by error, click **Cancel** on confirm delete dialog box to abandon the process of deletion.

History of scheduled jobs

As the name suggests, Intellicus maintains history of scheduled jobs. It is possible to get following information about scheduled jobs:

- Report Name
- Job Name
- Run Time
- Job Type
- Status
- Detail

History of jobs can be listed on **History** page. To get this page, click Schedule > History.

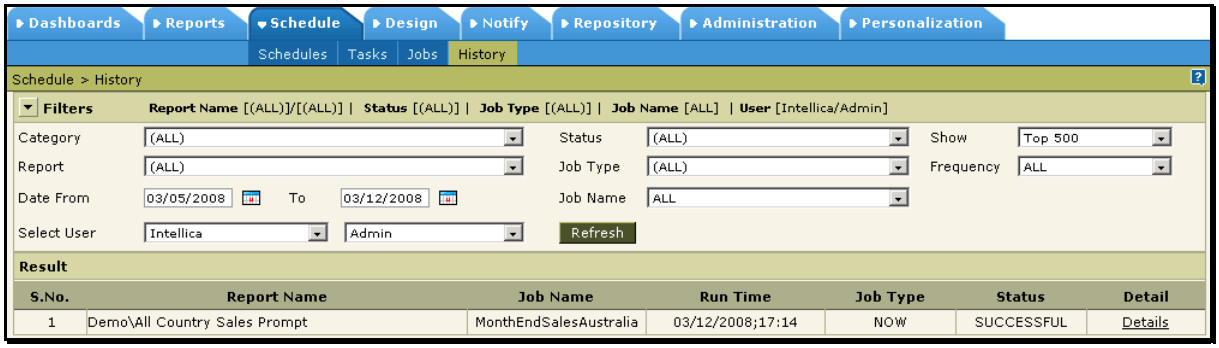

Figure 30: History page

The Filters area

When the page opens up, Filters tab remains collapsed. Click the tab-header to open it up. The tab-header also displays current filter settings. By default it displays first 500 jobs (no filter for report name, Owner Intellica/Admin).

List of jobs can be filtered by:

- **Category:** Category (folder) where reports are deployed.
- **Report:** Name of the report.
- **Executed Between:** Dates between which the jobs were executed.
- **User:** Organization and User of the person who is owner of the job.
- **Status:** Select *Success*, *Failure* or *All* to include only successful jobs, failed jobs or all jobs respectively.
- **Job Type:** Select the job type. *All*, to include all type of jobs; *Now*, *Once*, *Recurring* to include respective types, *Background* to include jobs run in

background, *Post Approval* to include the jobs that executed reports supposed to undergo approval process.

- **Job Name:** Name of job.
- **Show (selecting the number):** Select TOP 100 to view first 100 jobs from the filtered list, select TOP 500, TOP 1000 to view first 500 and 1000 jobs respectively. Select ALL to view all the jobs from the filtered list.
- **Frequency:** Select among *Daily*, *Weekly*, *Monthly* or *All*.

Figure 31: Filters area of History page

Note: Jobs are listed in the ascending order of the time of execution.

Filtering the list

Select / specify filter criteria and click **Refresh** button. List of jobs having entries that meet the filter criteria will appear.

The Result area

Jobs meeting the filter criteria are listed in **Result** area. Show dropdown box and **Next** / **Prev** link will appear if it is configured to appear and number of entries are more than the page size (this is set by application administrator).

If the entity you are looking for is not available in the list, use the drop-down box options to view another set of entities. To get next list, click **Next** link. To get previous list, click **Prev** link.