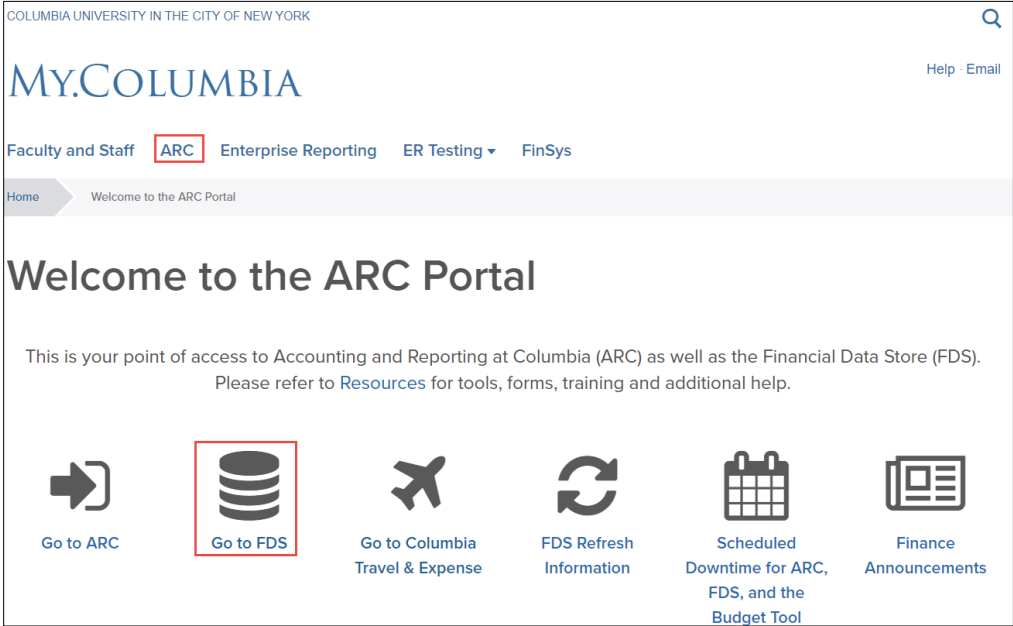


The FDS scheduling functionality enables users to schedule reports to run automatically at specified times. When a scheduled report runs successfully, an instance of the report is created and the report is delivered to a destination specified by you (e.g. deliver by email).

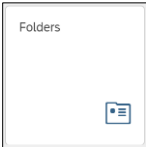
Accessing FDS

From the My Columbia page, click on the **ARC** link, then click on the **Go to FDS** icon:

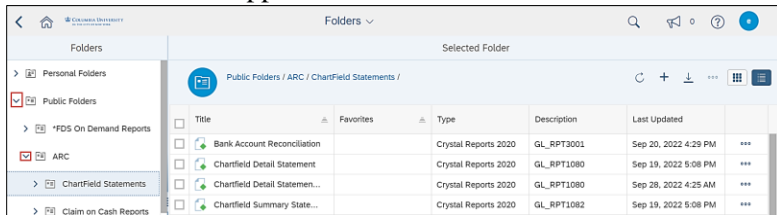


Navigating Report Folders

1. Click the **Folders** tile.



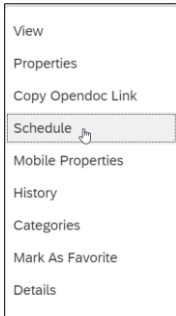
The Folders screen appears.



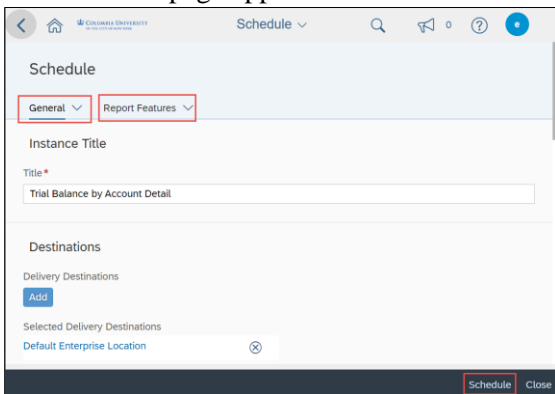
2. Navigate by expanding **Public Folders** and the **ARC** folder. Select the subfolder containing your desired report.

Scheduling an FDS Report

1. Click the **Actions**  button for the report you want to schedule and click **Schedule**.



The Schedule page appears.



The **General** tab contains sections that define a schedule, like the schedule's Destinations, Recurrence, Events, and Notifications.

The **Report Features** tab contains sections for the report values Prompts, Formats, and Print Settings.

2. Complete the sections on General the tab.
 - Instance Title (Defaults to name of report)
 - Destinations (Specifying a report output destination, e.g., Business Objects Inbox)
 - Recurrence (Specifying a report recurrence)
 - Events (**Not in use**)
 - Scheduling Server Groups (**Not in use**)
 - Notification
3. Complete the sections on the Report Features tab.
 - Prompts (Parameters)
 - Formats (Specifying a report format - Excel, Crystal, PDF. etc)
 - Filters (**Not in use**)
 - Print Settings (**Do not change default settings**)
 - Languages (**Not in use**)

Note: For some scheduling options, the settings cannot be altered as they have been specified by the Business Objects Administrator.

General Settings

Setting an Instance Title

The Instance Title will default to the name of the report you are scheduling. You can rename the title or choose to leave it as the default. If you choose to rename, type the name in the **Instance Title** field. The title will appear when viewing instance schedules and retrieving report output.

Instance Title

Title*

Bank Account Reconciliation

Note: Renaming the Instance does NOT rename the report found in the Public ARC or HR folder.

Specifying Destinations

You can schedule a report to be sent to a specific destination like a default file location or email.

Destinations

Delivery Destinations

Add

Selected Delivery Destinations

Default Enterprise Location

1. Click the **Add** button. The Select Destinations window appears.

Select Destinations

Select a destination: Default Enterprise Location x

Default Enterprise Location

Default Enterprise Location

BI Inbox

Email

File System

SFTP Server

Confirm Cancel

2. Click the **Select a destination** dropdown.
3. Select the **checkbox(es)** for the destination(s) you want to include. Each selection appears in the left panel.

Select Destinations

Select a destination: Default Enterprise Location x BI Inbox x Email x

Default Enterprise Lo... BI Inbox Email

BI Inbox

Delivery Details

Keep instance in history

Use default settings

Recipients

Select Recipients

Select

Target Name

Use automatically generated name

Use specific name

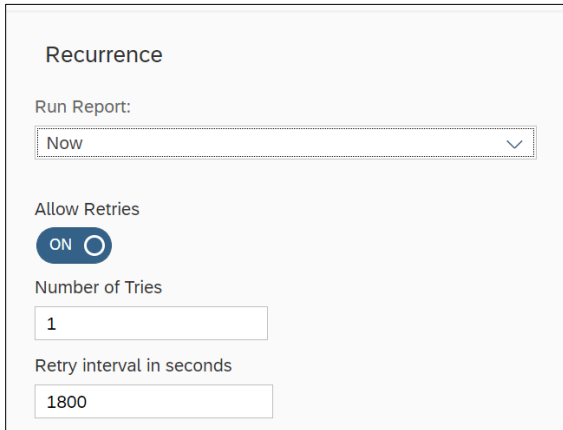
Confirm Cancel

4. Select the option from the left panel to set parameters for that destination.
5. Click **Confirm**.

Note: For the Default Enterprise Location option, the report is accessed by right clicking the report name and selecting History. For the BI Inbox option, new/unread reports will be displayed in the BI Inbox tile on the Home page.

Specifying a Scheduling Recurrence

Click the **Run Report** dropdown to select when the report is to be run and the frequency. The **Allow Retries** option allows you to specify how many times to retry running the report and the retry interval if the report fails to run for any reason.



The screenshot shows a form titled "Recurrence" with the following fields and controls:

- Run Report:** A dropdown menu with "Now" selected.
- Allow Retries:** A toggle switch set to "ON".
- Number of Tries:** A text input field containing the number "1".
- Retry interval in seconds:** A text input field containing the number "1800".

The following Run Report options are available:

Now: When you click Schedule, the report runs immediately. You may want to use this option to run report with large data sets.

Once: The report runs once at the time specified. This option requires a start and end time parameter. Use the 'Start Date/Time' parameter to specify when the report should run. The 'End Date/Time' parameter should be after the 'Start Date/Time' parameter. This option requires a start and end time parameter.

Recurring:

Hourly: This option requires information in hours and/or minutes for how frequently the report is run. Reports are created regularly to match the parameters that you enter. The first instance of the report is created at the start time that you specify, and the object will cease to run on its hourly schedule at the end time that you specify. This option requires a start and end time parameter.

Daily: The report runs once every day at the time specified. The report will not run after the end time that you specify. This option requires a start and end time parameter.

Business Hours: You can specify specific hour intervals during a specified business day period within specified dates to run the report.

Weekly: Each week, the report runs on the selected days at the time specified. The report will not run after the end time that you specify. This option requires a start and end time parameter.

Monthly: The report runs on the specified date and time every month. The report will not run after the end time that you specify. This option requires a start/end date and time, along with a recurrence interval in months.

Specific day of Month: Report are created regularly each month on the day that you enter at the start time that you specify. The report will not run after the end time that you specify. This option requires a start/end date and time, along with a day of the month on which the object is run.

Calendar: This option is not used at this time. This option allows you to select a calendar of dates. (Calendars are customized lists of schedule dates that are created by the Business Objects Enterprise administrator.) A report is created on each day that is indicated in the calendar, beginning at the start time that you specify and continuing until the end time that you specify.

Setting Notifications

You can turn on and set up email notifications if the report has run successfully or if the report failed to run. You can set values to send to any email address to inform interested stakeholders.

Notification

When scheduling an object, you can also enable email notification.

Email when job ran successfully: ON OFF

Email when job failed to run: ON OFF

Configure notification message

Use the Job Server's defaults

Set the values to be used here:

Report Feature Settings

Specifying Prompts

If the scheduled report requires parameter input, then these must be provided via the Prompts option. All required values are marked by an asterisk (*).

General ▾ Report Features ▾

Prompts

Bank Account Reconciliation Edit Values...

| Name | Value |
|---------------------|------------|
| Fiscal Year * | 2021 |
| Accounting Period * | [No Value] |
| Account * | [No Value] |

1. Click the **Value** to enter or edit the value in the field. The field will indicate “No Value” if the value has not yet been selected. The Prompts window appears.

Prompts

| Prompt Summary | Select values for prompts | Actions |
|---|---|---------|
| *Accounting Period<i>*Required</i> | ▾ *Accounting Period<i>*Required</i> <input type="text" value="Enter a value"/> | |

OK Cancel

2. Enter a value or click the **Selection** icon, if available, to select from a list of values.

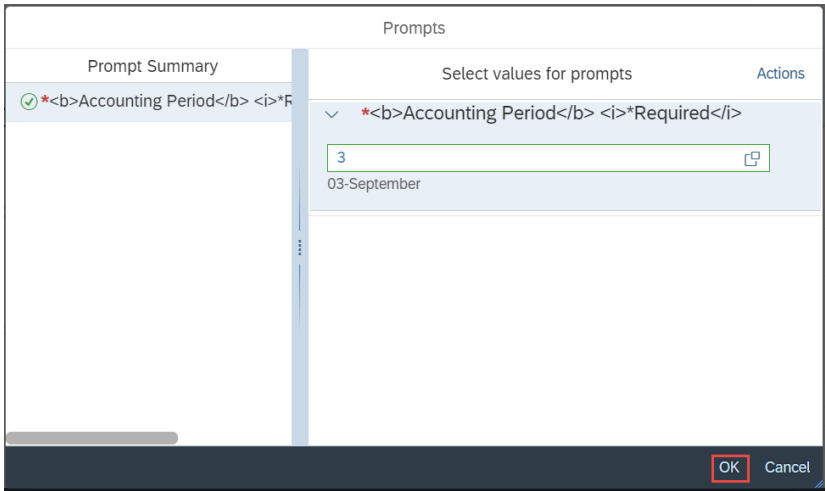
Accounting Period<i>*Required</i>

Search 0

| Description |
|--------------|
| 01-July |
| 02-August |
| 03-September |
| 04-October |
| 05-November |
| 06-December |

Cancel

3. Click **OK**.

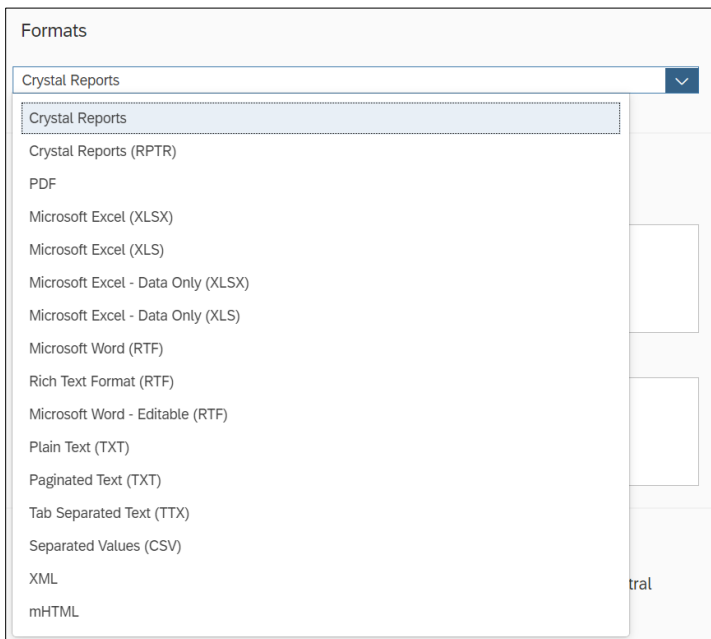


Repeat the steps until all required values are populated.



Selecting a Format

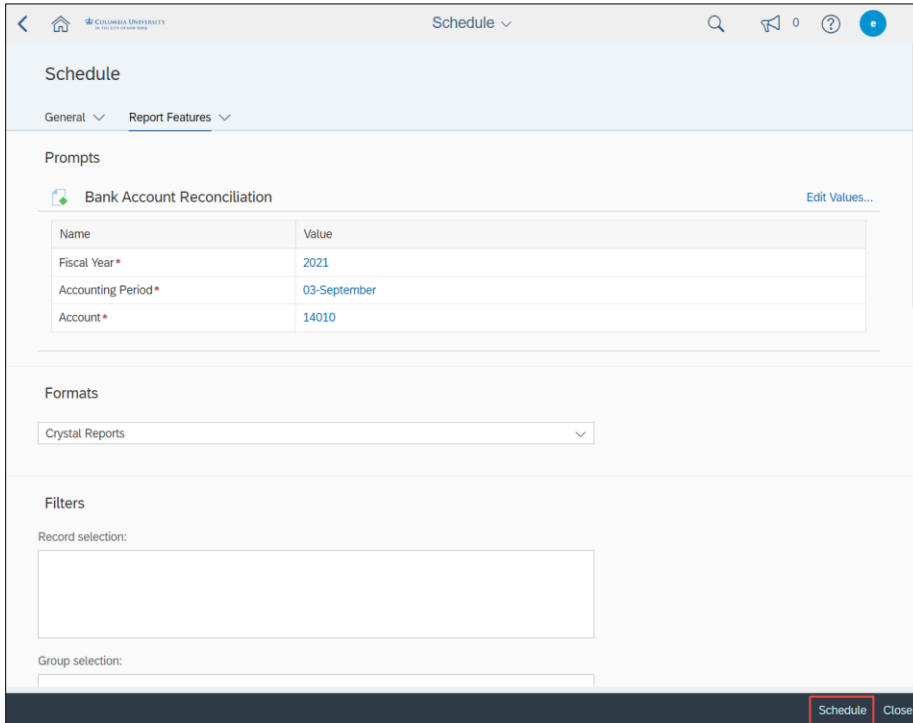
The report can be run using a number of file formats. The most commonly used formats are Crystal Reports, PDF, and Microsoft Excel. Click the dropdown to select the desired **Format**.



Note: The Microsoft Excel (XLS) format supports a maximum of 65,536 rows on a single worksheet. If your report contains more than 65,536 rows of data, it will be spread out over multiple worksheets. The Microsoft Excel (XLSX) supports up to 1 million rows of data per worksheet, however, the report will not be formatted and may be missing header information.

Scheduling the Report

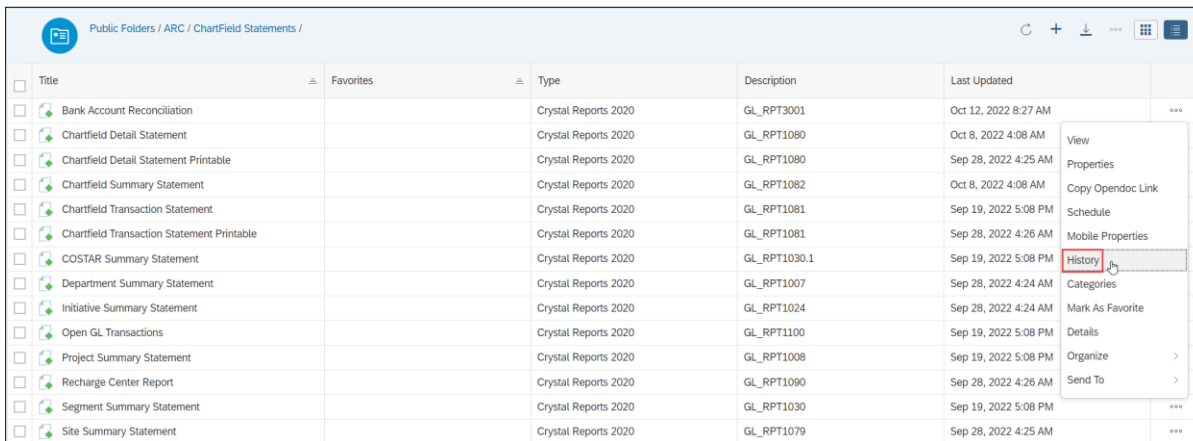
After you have entered the Report Features fields, click the **Schedule** button.



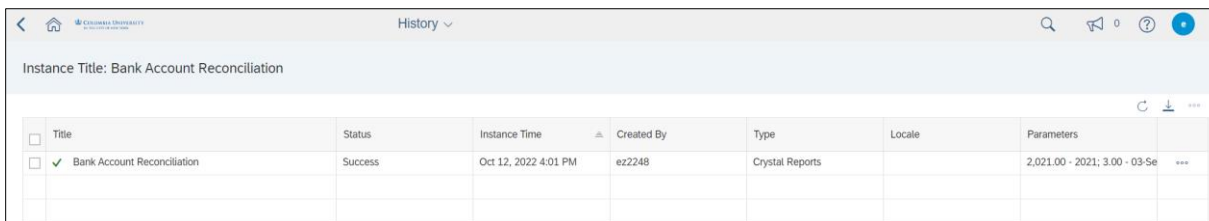
Viewing the Schedule Report

Viewing the Scheduled Report via History

Navigate to the Folder and the Report you scheduled. Click the **Actions**  button on the scheduled report and select **History**.



The selected report's **History** screen is displayed with all the previously run reports as well as reports scheduled for the future.

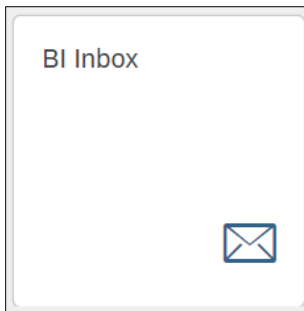


You can click the **Actions** button and select the **Reschedule** option for rerunning the selected report. All scheduling values are inherited from the original report schedule, which can then be modified, if needed.

| <input type="checkbox"/> | Title | Status | Instance Time | Created By | Type | Locale | Parameters | |
|-------------------------------------|-----------------------------|---------|----------------------|------------|-----------------|--------|-------------------------------|--|
| <input checked="" type="checkbox"/> | Bank Account Reconciliation | Success | Oct 12, 2022 4:01 PM | ez2248 | Crystal Reports | | 2,021.00 - 2021; 3:00 - 03-Se | ... |
| | | | | | | | | <ul style="list-style-type: none"> View Copy Opendoc Link Run Now Reschedule Details Send To > Delete |

Viewing the Scheduled Report via BI Inbox

From the Home page, click the **BI Inbox** tile. In order for the report to appear in the BI Inbox, it must be specified as the Destination on the General tab when setting up the Schedule.



The My Inbox screen appears with scheduled documents.

Columbia University
My Inbox
Search, Alerts, Documents, Document

Showing 1 Items

Bank Account Reconciliation : 5641097
Oct 12, 2022 4:48 PM

Bank Account Reconciliation : 5641097
Oct 12, 2022 4:48 PM

General Info

Description : GL_RPT3001
 Created On : Oct 12, 2022 4:48 PM
 Document Type : Crystal Reports 2020
 Owner : ez2248
 Keyword : None
 Sender : ez2248

Getting Help

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>