



Schedule a Report

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Schedule a Report

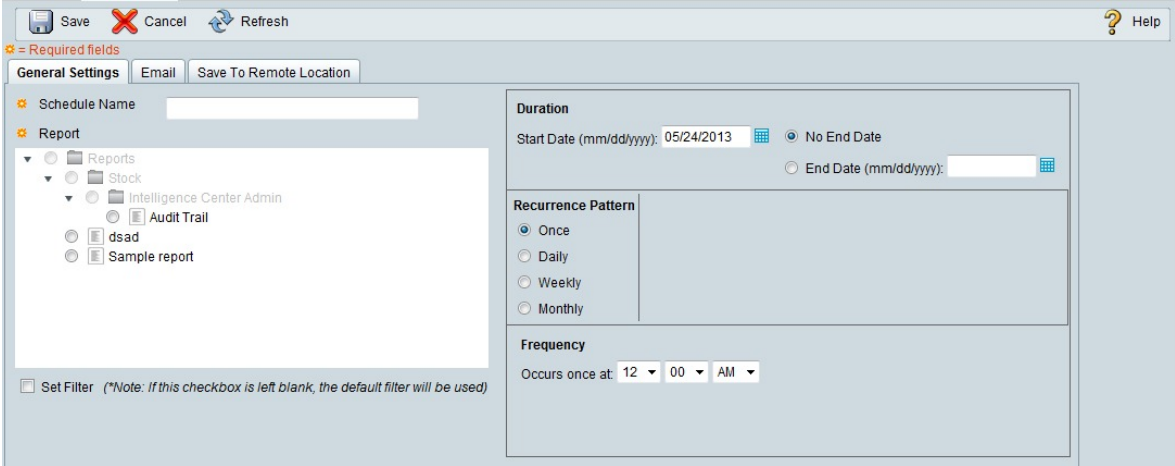
You can automate the generation of reports on a regular and recurring basis by setting up a schedule. The Schedules entity lets you run large dataset reports once to be sent to, and viewed by, many users.

Only users with Report Designer and System Configuration Administrator roles can access the Schedules entity. System Configuration Administrators can perform all schedule related functions on any reports. They can read, edit, and run any scheduled report and can create a schedule for any report. Report designers can create a schedule only for those reports that they created or for which they have Execute permissions.



Note To perform any action on **Configure > Scheduler**, you will be redirected to legacy interface.

Figure 1: The Report Scheduler



- You can schedule reports to:
- Run at predetermined times
 - Automatically email reports
 - Save reports to remote location



Note The schedules run based on the server time zone and hence on the Schedule List page, the column **Next Scheduled Run** reflects the server time zone.

Daylight Saving Time and Scheduled Reports

Daylight saving time affects the scheduled reports in the following ways:

1. Reports that are scheduled to run daily during a particular time of the day are skipped for the day when the clock advances (for example, due to daylight saving). For example, for a report that is scheduled to run at 10:30 p.m. daily, if the clock advances by 1 hour then the report that is scheduled to run at 10:30 p.m. will be skipped for that day.
2. Reports that are scheduled to run only once, are updated with a new schedule time with some offset if it falls in the period that advances. For example, if the clock advances by one hour for a report scheduled to run once at 10:30 p.m., then the schedule report run time updates to 11:30 p.m.

Create a Schedule for a Report

You can schedule reports to run automatically within a dashboard. For example, an interval report can be run every 30 minutes to capture a day's activity up to the prior interval.



Note You cannot schedule Live Data reports.

Procedure

- Step 1** In the Scheduler, click **Create**.
- Step 2** In the **General Settings** tab, enter a **Schedule Name** for the scheduled report.
- Step 3** In the **Report** area, select **Reports** and then select a report.
- Step 4** Check the **Set Filter** check box to configure the filters. To use the default filter, do not check the check box.
You cannot schedule a report that does not have a filter.
- Step 5** Click the **Set filtering criteria** link to go to the filter configuration page.
- Note** See *Types of Report* for more information.
- Step 6** In the **Duration** section, click the calendar icon to select the **Start Date** and check **No End Date**, or use the calendar icon to **End Date**.
- Step 7** In the **Recurrence Pattern** section, specify the frequency of the scheduled report. Choose from one of the following options:
- Note** Schedules that reach the end date are purged after a 24-hour retention period.
- **Once**—Specify the time of day for the single occurrence.
 - **Daily**—Specify a number for recurrence of days; for example, every four days.
 - **Weekly**—Specify the number of weeks and the days of the week that you want the scheduled report to be run.
 - **Monthly**—Select a day of the month and specify the number of months that you want the scheduled report to run.
- Note** Use **Last** to specify the last day of the month.
- In the **Frequency** section, specify the number of times the report should run on the scheduled days.
- Note** The maximum frequency with which you can schedule a report is once every five minutes.
- Step 8** Click **Save**.
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Note Scheduler relies on Refresh Rate parameter in Report Definition. The user can configure Refresh Rate parameter lower than Scheduler Frequency.

Configure a Scheduled Report to Be Sent by Email

In the Scheduler, click the **Email** tab to set up a schedule to email a scheduled report.

Before you begin

Configure the email server in the Administration Console. Contact the administrator for assistance or see the *Cisco Unified Intelligence Center Administration Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-maintenance-guides-list.html>.

Procedure

Step 1 In the **Email Distribution** field, click **Add**, and enter the recipient email address.

Tip Repeat Step 1 to add multiple recipients.

Note Email page validation occurs when the email address is entered in the **Email Distribution** field. No validation is performed if there is no email ID entered in the **Email Distribution** field.

Step 2 Using the **Email View** drop-down menu, select the view of the report that you want to email.

Note Only grid views can be scheduled.

Step 3 In the **Email Subject** field, enter text for the subject line.

Step 4 Using the **File Type** drop-down menu, select the type of file. Choose one of the following:

- **INLINE HTML**—Sends the report in HTML format.
 - The historical report has an upper limit of 8000 rows.
 - The real-time report has an upper limit of 3000 rows.
- **XLS**—Sends the report as a Microsoft Excel file attachment.
 - The historical report has an upper limit of 8000 rows.
 - The real-time report has an upper limit of 3000 rows.
- **PDF**—Sends the report as a PDF file attachment.

PDF attachments have the following limitations:

- The generated PDF has either landscape or portrait orientation. Landscape orientation is the default setting.
- The generated PDF uses standard font sizes: 10 pixels for landscape orientation and 8 pixels for portrait orientation. The PDF bypasses the font size that is set in grid view editor to keep the font output printer-friendly.

Note PDF supports images only in the HTTP format.

- The generated PDF retains rows that fit within the page for the selected orientation. Columns that do not fit within the page are truncated.
- Only 1000 rows are supported for a PDF file attachment. An email message is sent if the scheduled report exceeds 1000 rows.
- The generated PDF does not support word-wrap for columns. In case of larger text, you can customize the column width in the grid editor to avoid overlaps. However, note that this might reduce the number of columns shown in the PDF.

Step 5 Click **Save**.



Note Every time you edit a scheduled report and click **Save**, scheduler runs and sends the scheduled report by email to all the recipients that are configured in the **Email Distribution** field.

Configure a Report To Save to Remote Location

In the scheduler, click the **Save to Remote Location** tab, to save report in CSV format.

Procedure

Step 1 In the **Protocol** drop-down list, select **SFTP** to establish secure connection to the remote location.

Step 2 In the **Report View** drop-down list, select the view of the report to be posted.

Step 3 In the **Host** field, enter the IP address of the remote location.

Step 4 Enter a **Port** number for the SFTP.

Note The default port number is 22.

Step 5 Enter a **Username** for the host.

Step 6 Enter a **Password** for the host.

Step 7 In the **Directory Path** field, enter the location on the host to save your **.csv** file.

Note Directory Path should be an absolute path.

Step 8 Click **Save**.



Note

- Date Time format in a scheduled report of type CSV is: Day_of_week Month Date_of_Month HH:MM:SS SERVER_TIMEZONE YYYY. For Example, Fri Oct 24 01:00:00 EDT 2014.
- The time field in a scheduled report of type CSV is displayed in seconds only.

Reports and Time Zones

You can configure four time zones in Unified Intelligence Center: Server, Data Source, Report and User.

Server

The server time zone is defined during installation while running the installation wizard and it does not affect reports. The server administrator can view and change the server time zone using these CLI commands: `show timezone config` and `set timezone zone`. For more information, see *Administration Console User Guide for Cisco Unified Intelligence Center* at: <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-intelligence-center/products-maintenance-guides-list.html>

Data Source

The data source time zone is defined when the data source is configured. It is the time zone of the database.

Report

The report time zone is defined in the report filter.

If your call center spans several time zones and you intend to compare reports, run historical reports using the absolute date range and a specific time period.

User

The user's time zone is set on the User Profile.

For example, when a user in New York is asked to review a report that was run by a colleague in the China office, the user accesses the User Profile page to change the time zone to match the colleague's, and then runs the report using the same absolute date range.

Time Zone Considerations

The system treats the time-specific data that the user enters as local to the user's time zone and then converts this time to the data source time zone when the filter query is formed.

The system treats the time-specific data that it fetches from a data source as local to the data source and then converts this time to the user time zone before displaying the date and time in the report data.

If the user time zone or data source time zone is not configured, the system uses the time zone of the Unified Intelligence Center server. The system performs these conversions only after the time zone normalization at data source level has occurred.



Note The schedule for Weekly and Monthly reports is based on the data source time zone, not the server time zone. That is, the week and month boundaries are midnight, in the time zone of the database, of the week or month beginning and end days.

Consider the following example, in which the user enters the date and time value in the filter. Depending on the time zone setting, the system converts the time zones in the filter query as shown below:

filter value = **1/1/2010 12:00:00 AM**

User Time Zone	User Time Zone	Data Source Time Zone	Data Source Time Zone
<i>When set (+11 GMT)</i>	<i>When not set (Subtract Cisco Unified Intelligence Center server time zone)</i>	<i>When set (+2 GMT)</i>	<i>When not set (Add Cisco Unified Intelligence Center server time zone)</i>
Thursday, December 31, 2009 3:00:00 PM EET Original Time – User time zone offset (+11 GMT) + Data source time zone (+2 GMT) To Original Time, -9 (-11 +2) hours added	Thursday, December 31, 2009 8:30:00 PM EET Original Time – Cisco Unified Intelligence Center server time zone (+5.30 GMT) + Data source time zone offset (+2 GMT) From Original Time, 3.30 (- 5.30 +2) hours subtracted	Thursday, December 31, 2009 3:00:00 PM EET Original Time – User time zone offset (+11 GMT) + Data source time zone (+2 GMT) To Original Time, -9 (-11 +2) hours added	Thursday, December 31, 2009 6:30:00 PM IST Original Time – User time zone offset (+11 GMT) + Cisco Unified Intelligence Center server time zone (+5.30 GMT) From Original Time, 5.30 (-11 +5.30) hours subtracted
Thursday, December 31, 2009 6:30:00 PM IST Original Time – User time zone offset (+11 GMT) + Cisco Unified Intelligence Center server time zone (+5.30 GMT) From Original Time, 5.30 (-11 +5.30) hours subtracted	Friday, January 1, 2010 12:00:00 AM IST To Original Time, 0 (- 5.30 +5.30) hours added	Thursday, December 31, 2009 8:30:00 PM EET Original Time – Cisco Unified Intelligence Center server time zone (+5.30 GMT) + Data source time zone offset (+2 GMT) From Original Time, 3.30 (-5.30 +2) hours subtracted	Friday, January 1, 2010 12:00:00 AM IST To Original Time, 0 (- 5.30 +5.30) hours added

The following example shows a database with date and time values. Depending on your time zone setting, the system converts and displays the time zones in the report data as shown below:

Database value = 1/1/2010 12:00:00 AM

Data Source Time Zone	Data Source Time Zone	User Time Zone	User Time Zone
<i>When set (+11 GMT)</i>	<i>When not set (Subtract Unified Intelligence Center server time zone)</i>	<i>When set (+2 GMT)</i>	<i>When not set (Add Unified Intelligence Center server time zone)</i>
Thursday, December 31, 2009 3:00:00 PM EET Original Time – Data source time zone offset (+11 GMT) + User time zone (+2 GMT) To Original Time, -9 (-11 +2) hours added	Thursday, December 31, 2009 8:30:00 PM EET Original Time – Unified Intelligence Center server time zone (+5.30 GMT) + User time zone offset (+2 GMT) From Original Time, 3.30 (- 5.30 +2) hours subtracted	Thursday, December 31, 2009 3:00:00 PM EET Original Time – Data source time zone offset (+11 GMT) + User time zone (+2 GMT) To Original Time, -9 (-11 +2) hours added	Thursday, December 31, 2009 6:30:00 PM IST Original Time – Data source time zone offset (+11 GMT) + Unified Intelligence Center server time zone (+5.30 GMT) From Original Time, 5.30 (-11 +5.30) hours subtracted

<p>Thursday, December 31, 2009 6:30:00 PM IST</p> <p>Original Time – Data source time zone offset (+11 GMT) + Unified Intelligence Center server time zone (+5.30 GMT)</p> <p>From Original Time, 5.30 (–11 +5.30) hours subtracted</p>	<p>Friday, January 1, 2010 12:00:00 AM IST</p> <p>To Original Time, 0 (–5.30 +5.30) hours added</p>	<p>Thursday, December 31, 2009 8:30:00 PM EET</p> <p>Original Time – Unified Intelligence Center server time zone(+5.30 GMT) + User time zone offset (+2 GMT)</p> <p>From Original Time, 3.30 (–5.30 +2) hours subtracted</p>	<p>Friday, January 1, 2010 12:00:00 AM IST</p> <p>To Original Time, 0 (–5.30 +5.30) hours added</p>
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