Schedule a Report

Overview

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 view, 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 View permissions.

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Attention You cannot schedule Live Data reports.

You can schedule reports to:

- Run at predetermined times

- Automatically email reports

- Save reports to remote location

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

Schedules Actions

Action	Description
Toolbar Actions	
Search	Searches for a Schedule.
All	Lists all the schedules (Large, Disabled, Email, and SFTP).
Large Schedules	Lists all large schedules.
Disabled	Lists all disabled schedules.
Email	Lists all the schedules configured for email distribution.
SFTP	Lists all the schedules configured to be saved in a remote location.
Refresh	Refreshes the **Schedules** page.
New	Creates a new schedule. For more information, see *Create a Schedule for a Report*.
Ellipsis (…) Actions	
Edit	Edits a schedule.
	You can also click on the Schedule Name to edit the schedule details.
	In the edit mode, you can click the icon next to the Schedule name to edit the Schedule properties; Name and Schedule Type.
Enable or Disable	Enables or disables a schedule.
Delete	Deletes a schedule.

Related Topics

Create a Schedule for a Report

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Note   You cannot schedule Live Data reports.

Step 1   In the left navigation page, click **Schedules**.

Step 2   Click **New**.

Step 3   In the **Create New Schedule** dialog box, enter a name for the Scheduler, and select the **Scheduler Type**. The available Scheduler Types are:

- **Large Schedule**

  - Visible only for System Configuration Administrator.

  - Use Large Schedules for large reports with over 8000 rows.

    Note   Large Schedules have an upper limit of 25000 rows.

  - Large Schedules support only the CSV file formats.

  - System Config Administrators can create a maximum of six Large Schedules. You can contact your administrator to increase or decrease the number of Large Schedules.

  - You can limit Large Schedules to a frequency of once a day.

  Important   When there are multiple Large Schedules, ensure not to schedule them simultaneously.

- **Regular Schedule**

Step 4   Click **Next**.

Step 5   In the **Report Scheduling** tab, select the report to be scheduled, set the filter data, and configure the schedule details.

Field	Description
Report	
Report	Select the report to be scheduled.
Set Filter	Select this check box to enable the **Filter Criteria** button. Click the **Filter Criteria** button to set the filter criteria for the report.
	For more information on setting filters for a report, see *Report Filters*.
	Note If unchecked, the default filter is used.
Schedule	
Start Date	Click the calendar icon to select the **Start Date**.
	Note The Start Date uses the user's time zone settings. If no time zone is set for the user, the reporting server time zone is applied.
End Date	Select an option for the **End Date**:
	• **None**—indicates no end date.
	• **By**—click the calendar icon to select the end date.

Field	Description
Recurrence	Specify the recurrence pattern for the scheduled report. **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.
Frequency	Specify the number of times the report must run on the scheduled days. **Note** The maximum frequency with which you can schedule a report is once in every five minutes. The maximum frequency with which you can run Large Schedule is once per day.

Step 6   Click **Next**.

Step 7   In the **Destination Setting** tab, set up a schedule to email the scheduled report and save the report CSV format in a remote location.

You can configure the email server in the Administration Console. Contact the administrator for assistance or for more information, see the *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.

Field	Description
Email	
Email Distribution	Enable the switch and enter the recipient email addresses. **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.
Email View	Select the view of the report that you want to email. **Note** Only grid views can be scheduled.
Email Subject	Enter text for the subject line.

Field	Description

Email File Type	Select the type of file.
	
	• **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.
	
	   Note The custom formatting of DECIMAL data type is not applied for reports exported in excel.
	
	   • 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 in either landscape or portrait orientation.
	
	   Note The maximum number of PDF reports that you can schedule to be sent by email at a given time is 10.
	
	  The generated PDF attachments have the following limitations:
	
	   • Uses standard font sizes. 10 pixels for the landscape orientation and 8 pixels for the portrait orientation. The PDF bypasses the font size that is set in the grid view editor to keep the font output printer-friendly.
	
	      Note PDF supports images only in the HTTP format.
	
	   • Retains rows that fit on the page for the selected orientation. Columns that do not fit on 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.
	
	   • 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. As a result, the customization may reduce the number of columns that are shown in the PDF.

Remote Location	
Protocol	Enable the switch and select SFTP to establish secure connection to the remote location.
Report View	Select the view of the report to be posted.
Host	Enter the IP address of the remote location.
Port	Enter a Port number for the SFTP. The default port number is 22.

Field	Description
Directory Path	Enter the location on the host to save your .csv file. Directory Path must be an absolute path.
User Name, Password	Enter a username and the corresponding password for the host. Maximum Password Length: 50 characters.
Test Connection	Click to test the connection.

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.

Note Scheduled Reports generated using **Remote Location** option does not support formatted reports. To get formatted reports, use **Email** as the **Destination Setting**.

Note When you edit a scheduled report and click **Save**, the scheduler runs and emails the scheduled report to all the recipients that are configured in the **Email Distribution** field.

Step 8 Click **Save**.

Note Scheduler relies on the Refresh Rate parameter in the Report Definition. You can configure the Refresh Rate parameter lower than the Scheduler Frequency.

Related Topics

Types of Filters
Report Filters

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.

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
When set (+11 GMT)	*When not set (Subtract Cisco Unified Intelligence Center server time zone)*	*When set (+2 GMT)*	*When not set (Add Cisco Unified Intelligence Center server time zone)*
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 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 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 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 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
When set (+11 GMT)	*When not set (Subtract Unified Intelligence Center server time zone)*	*When set (+2 GMT)*	*When not set (Add Unified Intelligence Center server time zone)*
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

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