Schedule Report

Schedule a Report

You can automate the generation of reports on a regular and recurring basis by setting up a schedule. The Scheduler 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 Scheduler. System Configuration Administrators can perform all scheduler 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 in any of the following ways:

- Run at predetermined times

- Automatically email reports

- Save reports to remote location

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:

- **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**.

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.