Schedule 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.

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 Schedules page, the column **Next Scheduled Run** reflects the server time zone.

Schedules Actions

Action	Description
Toolbar Actions	
Search	Searches for a Schedule.

Action	Description
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

Note You cannot schedule Live Data reports.

Procedure

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.
- You can create only one Large Schedule with recurrence frequency of minimum 1 hour.

- **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.
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.

Field	Description
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.

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 Unified CCX Administration Console. Contact the administrator for assistance or for more information, 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.

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.
	
	    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.
Directory Path	Enter the location on the host to save your .csv file. Directory Path must be an absolute path.

Field	Description
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.