TRACELINK UNIVERSITY

Create and update scheduled reports

Users can create a scheduled report from an existing released synchronous report. In the edit state, users can configure the execution schedule, application networks, filter values, and column mappings. In the released state, users can configure only the execution schedule.

Scheduled Reports automatically generate report datasets at configured times.

This topic describes how to create and edit Scheduled Reports.

Create a company scheduled report

Create a scheduled report

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Reports in the side menu.
4. Select the Company catalog from the Reports drop-down.
5. Select the New button.
6. Fill in the following fields in the General section:

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- Report Name field – Enter a report name.
- Query Object Name drop-down – Select the relevant Query Object from the drop-down list.
- Description field – Enter a description (optional).
- Latest Query Object Version switch – Turn this option to Yes to use the latest Query Object version.
- Query Object Version drop-down – Select the specific Query Object from the drop-down list.
- Catalog Type drop-down – By default, Company catalog is selected.

7. Select the Save button.

   A new report and report version are created in the Company catalog with the workflow state set to Edit. The edit page for the report is displayed.

8. Move the report to Released state.

9. Click Save button.

10. Open the released report.

11. Click Into Scheduled Report button.

12. In the Into Scheduled Report push panel, fill in the details:

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- Scheduled Report Name field – The name of the scheduled report (required).
- Scheduled Report Description field - The description of the scheduled report (optional).

13. Select Apply.

    A scheduled report is created and user will automatically be navigated to Scheduled Reports Company section.

Update a company scheduled report

A Scheduled Report can be updated in either of the following modes:

- Edit : Allows users to modify the report configuration.
- Released : Allows users to modify only the schedule of the report.

Edit a scheduled report

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Scheduled Reports in the side menu.
4. Select the Company catalog from the Scheduled Reports drop-down.
5. Select the Report name link in the search results table.
6. In Networks and Partners drop-down, fill in the details:
   - Process Network drop-down - The name of process network (required).
   - Partner field - The name of the partner (optional).

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7. In Filters drop-down, there are two sections as follows: (Users can only change the values of filter inherited from the Synchronous Report)
    - Filter Column: The name of the filter column (Filter is carried over from synchronous report and cannot be removed).
    - Filter Column Value: Enter the filter column values (Values are editable).
8. In the Columns drop-down, add and configure the Column Mapper.
9. In the Schedule section, update the following fields:
    - Enable report runs switch – Turn On to schedule.
    - Report execution(required) – Select the relevant option.
        - Run now - Report runs once released and saved.
        - Run now and schedule - Run the report now and schedule for later as well.
        - Schedule only - Schedule the report for later.
    - Repeats every (days) field – Enter the days (required).
    - Starts on field – Enter the Date and Time to start.
    - End date field – Enter the End date.
10. Click Move To. The state is Released.
11. Select the Save button.

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Scheduled report details are saved. If the Report execution is in Run now, the Execution Active status of the report becomes ACTIVE . Once the report is generated the Execution Active status returns to INACTIVE.

 Filters applied to the source Synchronous Report also appear in the Scheduled Report. Users can change the filter values but cannot remove the filters.

Tips

- To run a Scheduled Report, release it.
- The report remains inactive in the Edit state.

Edit a released scheduled report

1. Select the Main Menu  icon.
2. Select Reports and Dashboards.
3. Select Scheduled Reports in the side menu.
4. Select the Company catalog from the Scheduled Reports drop-down.
5. Select the Report name link in the search results table.
6. In the Schedule section, update the following fields:
    - Enable report runs switch – Turn On to schedule.
    - Report execution – Select the relevant option.
        - Run now - Report runs once released and saved.

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- Run now and schedule - Run the report now and schedule for later as well.
- Schedule only - Schedule the report for later.

- Repeats every (days) field – Enter the days (required).
- Starts on field – Enter the Date and Time to start.
- End date field – Enter the End date.

7. Select the Update button.

   A scheduled report is updated.

Search for scheduled reports and view datasets

Users can view all company scheduled reports and navigate to datasets of a scheduled report.

Search for scheduled reports

1. Select the Main Menu  icon.
2. Select Reports and Dashboards.
3. Select Scheduled Reports in the side menu.
4. Select the Company from the Scheduled Reports drop-down.

   The screen refreshes and displays the Search Scheduled Reports table in the main content area.

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5. Select the Filters button to search for a scheduled reports.
6. In the Filters push panel, fill in one or more of the following fields to filter the results:
    - Name field – The name of the report.
    - Application Id field – The name of the application.
7. Select Apply.

    The Filters panel closes and the main content area displays the results according to filters applied by the user. The applied filters appear above the results table in chips.

View datasets for a scheduled report

A Scheduled Report can have multiple datasets. To view the datasets associated with a Scheduled Report:

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Scheduled Reports in the side menu.
4. Select the Company from the Scheduled Reports drop-down.

    The screen refreshes and displays the Search Scheduled Reports table in the main content area.

5. Select a released Scheduled Report.
6. Click Navigate to Datasets button.

    The Datasets page opens in a new tab and displays all datasets associated with the selected Scheduled Report.

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