

Guideline for using Scheduling

Overview

Scheduling is one of the features available in Business Objects and there are a number of reasons that you might want to use it. Two of them are:

1. It allows you to run and send a report to a recipient email address of choice. You can choose to set the schedule to run at the same time each week or month. NOTE: **To ensure that the data is automatically refreshed and that the most current data is reported the User must schedule reports with the "latest Year and Month available". Not all reports have this option available. If it is available it will be stated in the title of the report i.e. Items paid, values and volumes (Latest Year and Month available).**
2. It allows you to run large queries so that you are not sitting around waiting for a report to run.

To schedule your report, you need to determine: when it will run, where it will go to, what format the output will be created in, and what prompt values you will use. (if any)

Worked Example

In this example, we are going to schedule the "CPUS report (user to choose year and month)".

1. Select Report

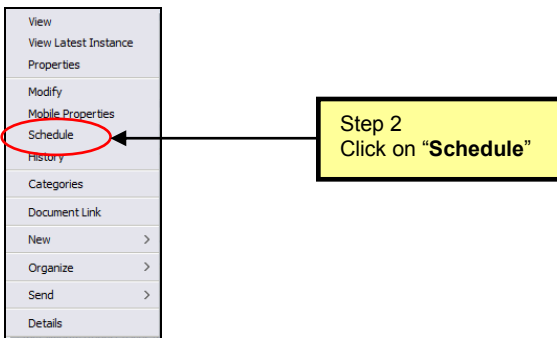
The first step in the process is to right click on icon to the left of the report title– i.e. the report you want to schedule. A list of options to choose from will then be displayed.

The screenshot shows the NHS Business Objects interface. The user is logged in as paulac01. The interface displays a list of reports under the 'Documents' tab. A yellow callout box with the text 'Step 1 RIGHT Click on icon to display list of options to choose from' points to the right-click icon of the 'CPUS Report (User to choose Year and month)' report. The report list includes:

Report Title	Type	Value
CPUS Report (Latest Year and Month available)	Web Intelligence	0
CPUS Report (User to choose Year and month)	Web Intelligence	0
Dummy Item Report (Items not held on file by Practitioner Se	Web Intelligence	1

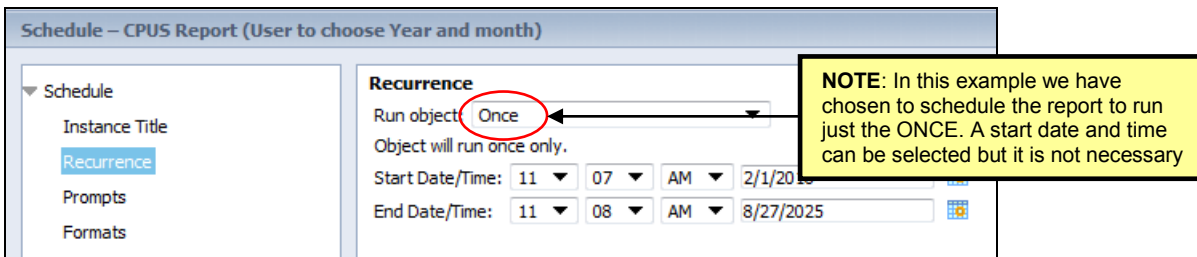
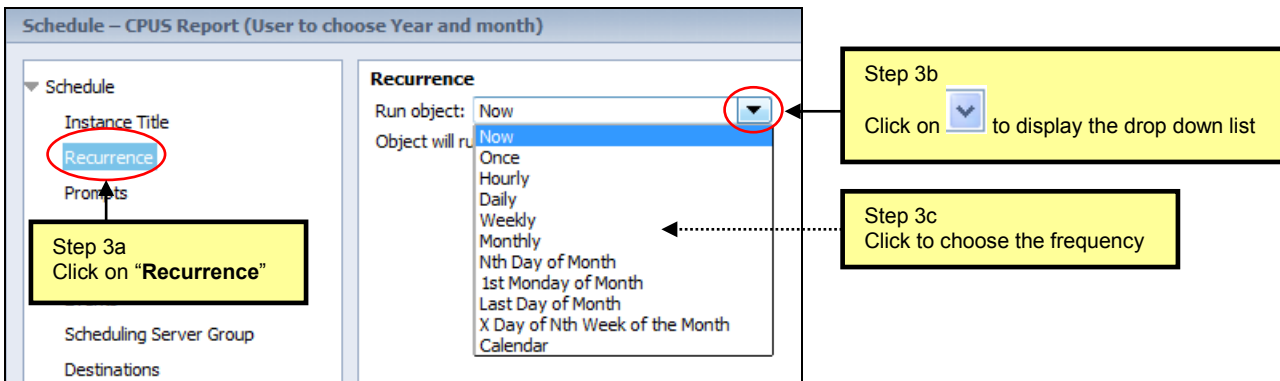
2. Schedule

Click to choose schedule.



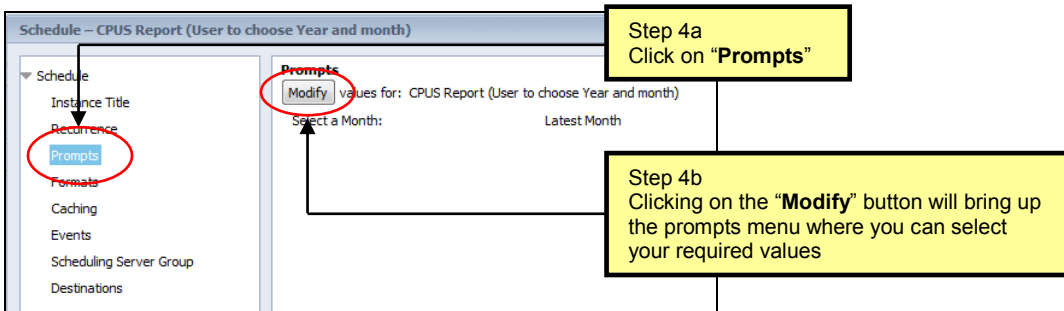
3. Recurrence

The Schedules page will open and you will choose the recurrence – i.e. select the frequency and the timing option you wish to use.

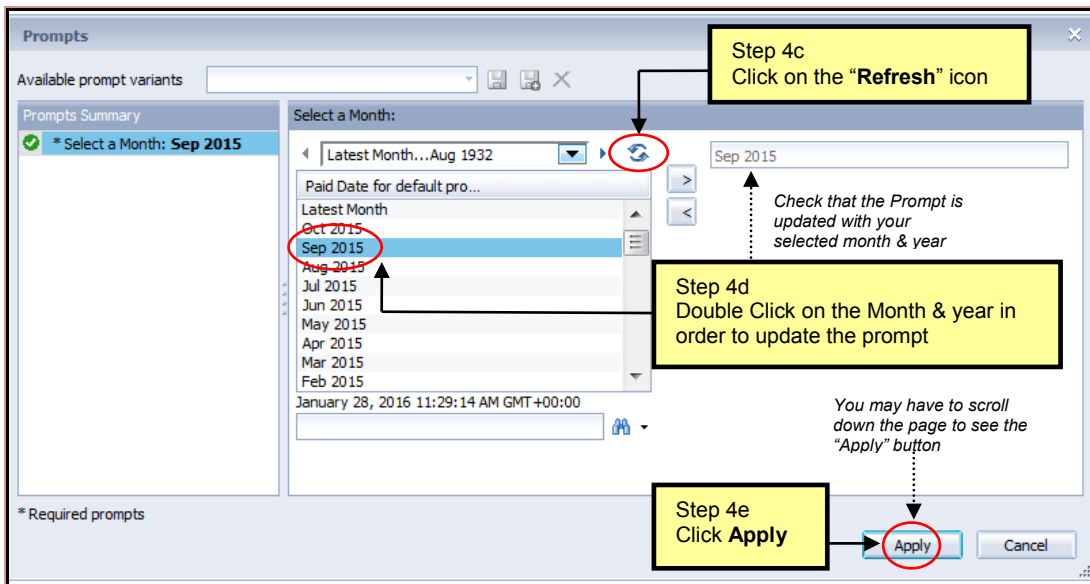


4. Prompts

The next step is to set prompts for your report.
(Note: not every report will have prompts)



The Prompts window will be displayed for you to choose the month & year. First refresh the values.



It is important to note that each time the report runs, as per the schedule you have set, it will run with the prompt values you selected when scheduling it. This is likely to limit the value of scheduling in some situations. Our Business Objects Developer recommends the use of Pre-defined Filter Objects such as Latest Year & Month, (Go to the Overview section & read point 1)

5. Formats

Set prompts for your report

Schedule – CPUS Report (User to choose Year and month)

Formats

Step 5a
Click on **formats**

Step 5b
Click to select output format

Output Format

- Web Intelligence
- Microsoft Excel
- Adobe Acrobat
- Comma Separated Values(CSV)
- Plain Text

6. Destinations

Enter the destination.

Schedule – CPUS Report (User to choose Year and month)

Destinations

Step 5a
Click on **Destination**

Step 5b
Click on [arrow] to display the drop down list

Step 5c
Click Email

Destination:

- Default Enterprise Location
- Default Enterprise Location BI Inbox
- Email
- FTP Server
- File System
- SFTP Server

Schedule – CPUS Report (User to choose Year and month)

▼ Schedule

- Instance Title
- Recurrence
- Prompts
- Formats
- Caching
- Events
- Scheduling Server Group
- Destinations**

Destinations

Destination:

Email:

Keep an instance in the history

Use default settings

From: Add Placeholder ▼

To: Add Placeholder ▼

Cc: Add Placeholder ▼

Bcc: Add Placeholder ▼

Subject: Add Placeholder ▼

Message:

PSD strongly recommends that reports are only e-mailed to nhs.net addresses. Sending reports from Business Objects Online to non-nhs.net addresses is not secure

Add Placeholder ▼

Add Attachment

File Name:

Use Automatically Generated Name

Use Specific Name Add Placeholder ▼

Add File Extension

Enable SSL

Important – in the “From” field Do **NOT use an “nhs.net” email address**

Step 5d –
From field- enter your **name** or noreply.bo@nhsnss.scot.nhs.uk
To and **Cc** fields- enter the recipient(s) e-mail address
Subject box type in the name of the report

Schedule

Step 5e
 click on the “Schedule” button at the bottom right of your screen

History

The history page will now be displayed which indicates the status of the scheduled report i.e. pending, running, success or failed. The user can continue scheduling other reports or exit the programme

History – CPUS Report (User to choose Year and Month)

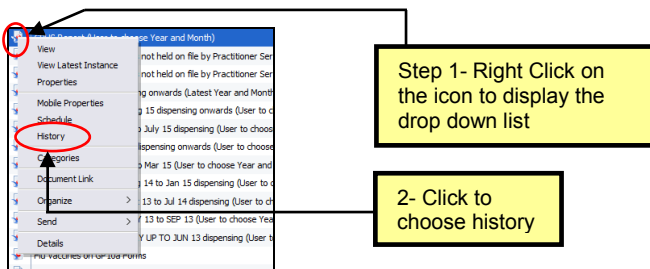
View ▾ | Organize ▾ | Send ▾ | More Actions ▾

Instance Time	Title	Status	Created By	Type	Parameters
Jan 28, 2016 6:17 PM	CPUS Report (User to choose Year and	Running	test_PS_NSS_1	Microsoft Excel	2013;4;2457

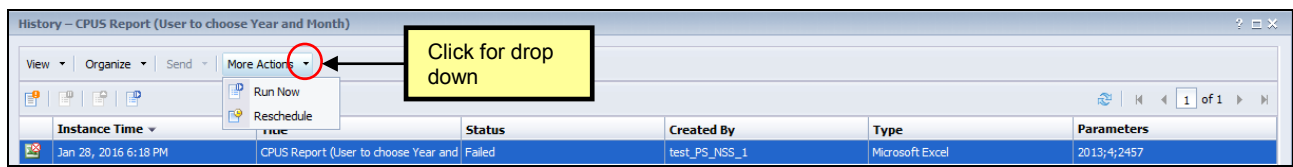
To Exit click on “X”

Scheduling History

If you want to look at the scheduling instances of your reports go to the main page that displays the list of reports and right click on the icon to the left of the report title and select "History" from the list of options.

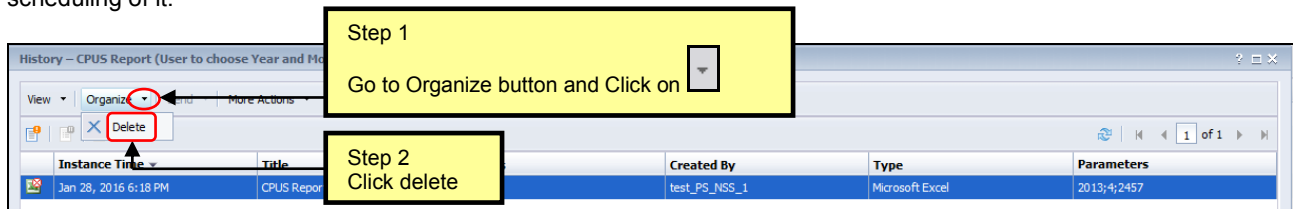


You will see the following screen. This will show the various instances of the report created and each time it has run as per the schedule you set. You can also choose more actions. If you wish to reschedule the report, but with a different month & year, then choose Reschedule and update the prompt. The destination and format will remain as set and will not require updating.



Deleting Scheduling

It is possible that there will come a point where you no longer need a particular report and therefore want to cancel the scheduling of it.



Further Help

We hope that you have found this guide helpful.

If you require any further assistance, or have any questions, please contact the ePharmacy Helpdesk on **0131 275 6600**, or by email at nss.psdhelp@nhs.net

For more information about online reporting please visit www.communitypharmacy.scot.nhs.uk