



Scheduling: transcript

The scheduling functionality is a real time saver and a prime benefit of using Business Objects for reporting. In this tutorial, I'll show how to define a report schedule and distribution method – and a report could either be delivered by email or sent to an SFTP location - and some of our customers use this option to transfer data between Kallidus and 3rd party systems. Effectively enabling two-way integration

I'll show how to configure the email subject line, and body, and the name of the report to automatically populate with dynamic database fields such as report name, and date and time.

And I'll also show how to view, and edit the list of scheduled reports

Any report can be scheduled and sent with **any** regularity to any recipient - whether it's a default report, a customised report, or a report you have created from scratch.

Next to any report in this list, an LMS administrator will see the schedule button. Now that's not to say that the permission to schedule couldn't be **removed** from an administrators role, as I talked about earlier in this course, but the default LMS administrator role does permit report scheduling.

So instead of opening this report, I'll click schedule. And then click New

And now I can specify the schedule. So first I need to set the recurrence.

And from this drop-down menu I can choose anything from an instant send - that's the 'now' option, to a regular report, sent on a specific schedule. For example, I could choose last day of the month, or X day of the nth week of the month.

And with this option I can select the exact **week**, and **day** of the month on which the report will be sent. For this example, I'll choose 'Weekly'.

And now I can choose the day, or days of the week, on which the report will be delivered. I'll choose Mondays. Next I'll specify the date range within which this report will be sent. I want this report to start next week and be sent indefinitely. So I'll set an end date in 10 years time.

Next, choose the format, either Excel, pdf, or CSV. Obviously, pdf will produce a report that cannot be edited whereas an Excel or CSV file could.

For this example, I'll select pdf.

Now I can choose the destination - either email recipients, SFTP or FTP.

In a moment I'll configure the report to be sent by email, but first just a quick note about the other options, SFTP and FTP.





Through this method, a report can be generated and sent to a location of your choosing. Now this might be a way of publishing a report to a location at which colleagues across the business can access it whenever they choose.

It could also be used to enable two-way data integration between your own 3rd party systems and the LMS. For example, an Excel or CSV file containing training data could be sent every night to an SFTP location, from where your 3rd party application could collect it, and import it back into your HR system. And that you can effectively create a data loop.

And if I choose SFTP, I can configure the settings here. So for this example I'm setting up an email schedule, so I'll select the email option, and then I can specify the address, or addresses, to which it will be sent.

Now I'd always recommend entering your own, or a team email address into the CC field. That way, you can see when a scheduled report has been delivered. It also means that you can easily see a copy of the report if someone calls with a query about it.

So I'll enter an admin team address here.

Now we come to the email subject, message, and attachment. In each of these fields you can free type any text you like, and you can also include dynamic placeholders for report information.

So for example, if I place the cursor in the Subject field, I can then use the menu on the right to insert either the report title, or date and time of the schedule, or both. So I'll insert the report title first.

Then I'll add a colon, a space, and use the menu to insert the data and time placeholder.

As you see here, I've added punctuation in-between the placeholder to create logical sentences. I can add any text this way.

The same placeholders can be used in the message body, where the additional 'Username' field is available – that refers to the user who scheduled the report. And lastly the attachment name can be customised in the same way.

When you're ready to schedule, just click submit.

And that's it. All done. At the bottom of the list of reports, you'll see the schedule button. And through this, an administrator can view or make changes to a scheduled report. So I'll click Schedules.

Here we are. So I can see the name of each scheduled report, as well as the next scheduled run, and the name of the submitter.

And if I click edit I can reopen the schedule and make changes, or delete it if required.





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There is an important consideration here – only the submitter can edit a report schedule. I can view it, and I can delete it, but I cannot edit a schedule created by a colleague.



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