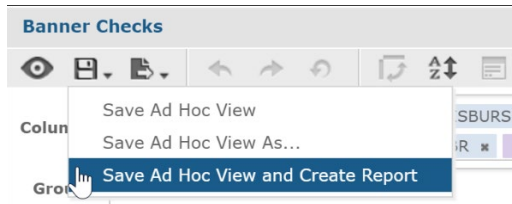


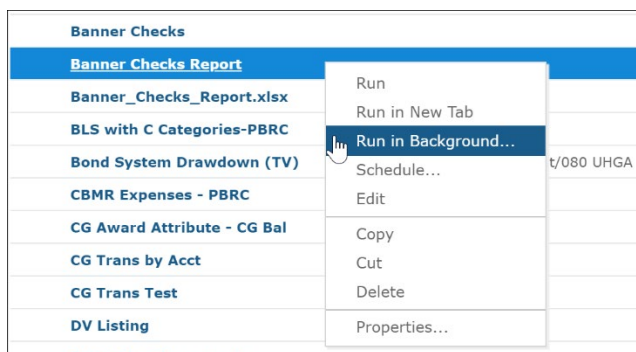
JRS Reports Scheduler

The Jasper Reports Server (JRS) scheduler allows you to run Ad Hoc View reports in the background so you can keep working in the server while the job runs or you can schedule a date and time you want the report to run.

To run a report in the background or schedule it, the report must be created from the Ad Hoc View. To create the report, select the “Save Ad Hoc View and Create Report” option in the Save menu. Make sure your ad hoc view/report runs successfully and provides the desired data.



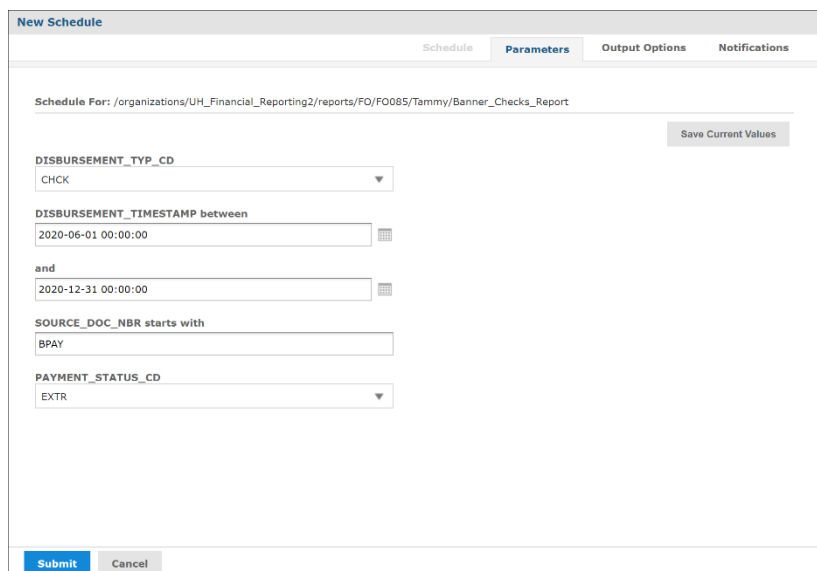
After creating the report from the Ad Hoc View, highlight and right click on the report title in the listing to display the report pop-up menu. Note: If you are accessing the report from the Library listing, you may not have the Run in Background option. Go to the View | Repository menu to select your report; or you can choose to schedule it and set it to run immediately.



Select “Run in Background...”. JRS will present tabs to define the Parameters, Output and Notifications.

The **Parameters** tab displays the filters defined for the report. There may be a delay as the parameters load.

Specify the values you require. If you want to Save the values for use later, click on the “Save Current Values”. Note: If a calculated field and/or calculated measure was created for data selection because a filter could not be defined, those fields should be updated accordingly in the Ad Hoc View before creating the report.

A screenshot of a "New Schedule" dialog box. The dialog has four tabs: "Schedule", "Parameters", "Output Options", and "Notifications". The "Parameters" tab is active. It shows a "Schedule For:" field with the path "/organizations/UH_Financial_Reporting2/reports/FO/FO085/Tammy/Banner_Checks_Report". Below this are several filter fields: "DISBURSEMENT_TYP_CD" with a dropdown menu showing "CHKC"; "DISBURSEMENT_TIMESTAMP between" with two date-time input fields showing "2020-06-01 00:00:00" and "2020-12-31 00:00:00"; "SOURCE_DOC_NBR starts with" with a text input field showing "BPAY"; and "PAYMENT_STATUS_CD" with a dropdown menu showing "EXTR". There is a "Save Current Values" button on the right and "Submit" and "Cancel" buttons at the bottom.

The **Output Options** tab displays the format options for your resulting report.

Screenshot of the JRS Reports Scheduler interface, specifically the **Output Options** tab. The interface shows the following configuration:

- Schedule For:** /organizations/UH_Financial_Reporting2/reports/FO/FO085/Tammy/Banner_Checks_Report
- Output File Options:**
 - File name (required): Banner_Checks_Report
 - Description: (Empty)
 - Time Zone: Pacific/Honolulu - Hawaii Standard Time
 - Output Locale: (Default)
 - Formats:
 - CSV
 - DOCX
 - Excel (Paginated)
 - Excel
 - HTML
 - ODS
 - ODT
 - PDF
 - RTF
 - XLSX
 - XLSX (Paginated)
 - PPTX
 - Overwrite Files
 - Sequential File Names by Timestamp
 - Timestamp Pattern: yyyyMMddHHmm
- Output Destination:**
 - Output To Repository
 - Path: /organizations/UH_Financial_Reporting2/reports/F
 - Button: Browse...
 - Output To Host File System
 - Path: (Empty)
 - Output To FTP Server
 - Server Address: (Empty)
 - Port: 21
 - Transfer Protocol: FTP
 - Directory: (Empty)
 - Username: (Empty)
 - Password: (Empty)
 - Button: Test Connection

Specify the filename, output format(s) and whether you want it to overwrite existing files or not.

Note:

- The filename cannot contain spaces or special characters. JRS will return an error if you include an invalid character.
- For Crosstab Ad Hoc reports, do not select the CSV format as it is not operational at this time.
- Currently the only working option for the Output Destination is “Output to Repository” which saves the report output to the specified location in the Repository. You may select the folder that you want to store the report in.
- If more than one format is selected, JRS will try to generate each format at the same time. This may cause performance issues on the server, especially for large reports. We recommend selecting only one format at a time.

The **Notifications** tab provides options to send email notifications about the report output or the job status (successful or failed) after the job has run.

Schedule Parameters Output Options **Notifications**

Schedule For: /organizations/UH_Financial_Reporting2/reports/FO/FO085/Tammy/Banner_Checks_Report

Email Notification

Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:

Include reports as repository links in email body

Include report files as attachments

Include report files as ZIP attachment

Include HTML report in email body

Do not send emails for empty reports

Send job status notifications

To:

Use commas to separate addresses

Subject:

Send success notification

Success Message:

Send failure notification

Failure Message:

Include report job information

Include stack trace

On the **left half of the page** there are fields for the email notification for your **report output**.

- Enter the email address(es) in the To:, CC: and/or BCC: fields, Subject and Message text.
- We recommend selecting the option to “Include reports as repository links in email body”.
- The email applications have size limits on attachments and depending on the report, it may exceed the email attachment limit.
- When your report completes, you will receive an email from jrsmail@hawaii.edu with a link(s) to your export(s).
- Clicking on the link will download your export (you may need to log in to JRS).

On the **right half of the page** there are fields if you want to be notified if your report was successful or not (**job status**).


- Enter the email address(es) and Subject and select the desired option(s).
- When your report completes, you will receive an email from jrsmail@hawaii.edu.

JRS Reports Scheduler

When all the values are set in the various tabs, click on the “Submit” button to run the report. If the “Submit” button is grayed out, the report details may still be loading.

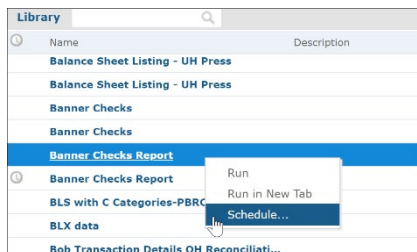
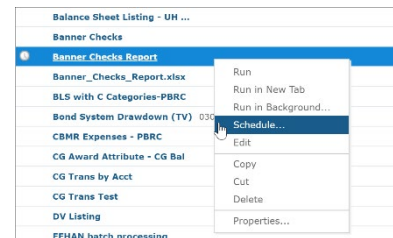
A clock icon will temporarily appear to the left of the report name, if not already there from a prior Run in Background or Scheduled Report, the temporary icon will disappear once the Run in Background or Scheduled Report job is completed.


When the report completes, it will be listed with type “Content Resource” in the specified destination folder.

Balance Sheet Listing - UH Press		Ad Hoc View	12/16/2020	12/17/2020
Banner Checks		Ad Hoc View	Today	Today
 Banner Checks Report		Report	Today	Today
Banner_Checks_Report.xlsx		Content Resource	Today	Today
BLS with C Categories-PBRC		Ad Hoc View	12/31/2020	12/31/2020
Bond System Drawdown (TV)	030 Advance Deposit/080 UHGA	Ad Hoc View	11/6/2020	11/6/2020
CBMR Expenses - PBRC		Ad Hoc View	12/31/2020	12/31/2020
CG Award Attribute - CG Bal		Ad Hoc View	12/23/2020	January 19

Scheduling Reports


To schedule a report to run at a specific date and time, right click on the report name and select “Schedule...”.

A screenshot of the 'Library' view showing a list of reports. The 'Banner Checks Report' row is highlighted in blue. A context menu is open over this row, showing options: Run, Run in New Tab, and Schedule... The 'Schedule...' option is highlighted in the menu.

Name	Description
Balance Sheet Listing - UH Press	
Balance Sheet Listing - UH Press	
Banner Checks	
Banner Checks	
 Banner Checks Report	
BLS with C Categories-PBRC	
BLX data	
Bob Transaction Details OH Reconciliati...	

You can also schedule a report from the Library view by highlighting the report and right clicking to get the menu.

The same tabs as “Run in Background...” will be displayed in addition to a Schedule tab used to set the date, time and recurrence for the report. Reports that are scheduled will display a clock icon on the left of the report name in the listing. After the scheduled report is run, the clock icon is removed and the report is listed with type “Content Resource” in the destination folder that was specified (unless the report is scheduled as a recurring report).

Balance Sheet Listing - UH Press		Ad Hoc View	12/16/2020	12/17/2020
Banner Checks		Ad Hoc View	Today	Today
 Banner Checks Report		Report	Today	Today
Banner_Checks_Report.xlsx		Content Resource	Today	Today
BLS with C Categories-PBRC		Ad Hoc View	12/31/2020	12/31/2020
Bond System Drawdown (TV)	030 Advance Deposit/080 UHGA	Ad Hoc View	11/6/2020	11/6/2020
CBMR Expenses - PBRC		Ad Hoc View	12/31/2020	12/31/2020

Example 1: Scheduled report to run on specific day and time (2/25/2021 10:00 am)

Schedule For: /organizations/UH_Financial_Reporting2/reports/FO/FO085/Tammy/Banner_Checks_Report

Schedule Start

Start Date:

Immediately

On Specific Date:

2021-02-25 10:00

Time Zone:

Pacific/Honolulu - Hawaii Standard Time

Recurrence:

Recurrence Type:

None

Example 2: Recurring scheduled report to run weekly (every 7 days) with an end date (6/30/2021)

Schedule For: /organizations/UH_Financial_Reporting2/reports/FO/FO085/Tammy/Banner_Checks_Report

Schedule Start

Start Date:

Immediately

On Specific Date:

2021-02-25 10:00

Time Zone:

Pacific/Honolulu - Hawaii Standard Time

Recurrence:

Recurrence Type:

Simple

Repeat every (required):

7 days

Schedule End

End Date:

Run a set number of times

Number of runs:

1

Run until a specified date:

2021-06-30 00:00

Run indefinitely

Holidays

Calendar of dates to exclude:

None

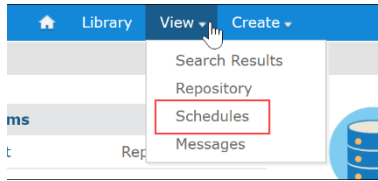
Example 3: Recurring scheduled report to run on the 1st of each month at 10:00 am

The screenshot displays the 'Schedule For' configuration for a report. The 'Schedule Start' section is set to 'On Specific Date' with a date of '2021-03-01 10:00' and a time zone of 'Pacific/Honolulu - Hawaii Standard Time'. The 'Recurrence' section is set to 'Calendar' with 'Every Month' selected. The 'Months' list includes all months from Jan to Dec. The 'Days' section has 'Dates in Month' selected with the value '1'. The 'Times' section is set to 'Hours (required): 10' and 'Minutes (required): 0'. The 'Schedule End' section is set to 'End Date: 2021-06-30 00:00'. The 'Holidays' section is set to 'Calendar of dates to exclude: None'.

Scheduling tips:




1. Scheduled reports will run with the parameters that have been set in the schedule. If you specify a recurring schedule you may have to update the parameters to select the correct data for a given period.
 - In addition, if a calculated field and/or calculated measure was created for data selection because a filter could not be defined, those fields should be updated in the Ad Hoc View prior to the scheduled run dates.
2. Some tables in JRS are re-created nightly. These jobs may not complete before 8:00 am. Scheduling reports prior to that time may not yield correct results or may have errors.
3. Do not schedule multiple reports to run at the same time. We recommend separating start times by 10 minutes or longer (if the report takes a long time to run).
4. If possible, try to avoid days and times which may be busier (e.g., the 1st of the month and mornings). Typically weekends and between 5-7 PM have less activity.

JRS Reports Scheduler



You can view and edit your list of Scheduled Reports from the View | Schedules drop down menu.

The list will display the scheduled reports. To edit a scheduled report, click on the pencil icon. To delete a scheduled report, click on the trash can icon. You can also disable a scheduled report by unchecking the Enabled checkbox.

Schedules						
Resource	Job Name	Job ID	Owner	Last Run	Next Run	Enabled
Athletics - Payroll by Name Report /organizations/UH_Financial_Reportin...	TV - Athletics - Payr... Monthly Payroll by Name report for Athl...	67	tammy or...		3/1/2021 09:...	<input checked="" type="checkbox"/>  
Athletics - Payroll with Non Imposed /organizations/UH_Financial_Reportin...	TV - Athletics - Payr... Monthly Payroll with NI Fringe report for...	68	tammy or...		3/1/2021 10:...	<input checked="" type="checkbox"/>  
Banner Checks Report /organizations/UH_Financial_Reportin...	TV - Banner Check R...	215	tammy or...		2/25/2021 10:...	<input checked="" type="checkbox"/> 