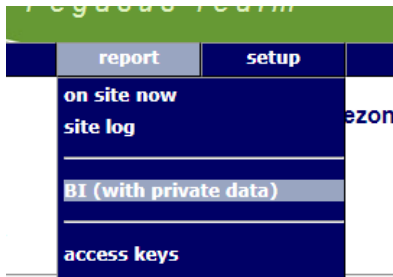


User Guide

Reports | Scheduling a BI Report

STEP ONE | Scheduling BI reports

At the site or realm level, click the report tab – BI (it will only show/say with private data if you have that user right)

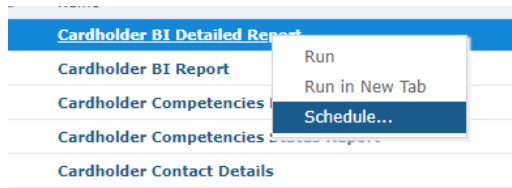


The BI Reports will load.

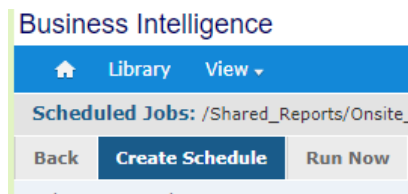
Business Intelligence

Library		
Name	Description	Type
Cardholder BI Detailed Report	Person Report - List of cardholders Personal, Company and Contact Details	Report
Cardholder BI Report	Person Report - List of Personal and Contractor details	Report
Cardholder Competencies Report	Competency Report - List of cardholders and their competencies	Report
Cardholder Competencies Status Report		Report
Cardholder Contact Details	Person Reports - List of cardholder contact details displayed by site selected	Report
Cardholder Contact Details By Site	Person Reports - List of Cardholders for the selected site along with their contact details	Report
Expiring Card Subscriptions	Cardholder Reports - Expiring Cards	Report
Expiring Competencies Report	Competency Report - List all cardholders whose competencies expire within the given period.	Report
Expiring Compliance Certifications Report	List of expiring certifications related to their compliance status, by company and date range	Report
Expiring RIW Card Subscriptions	Person Report - allows a Pegasus person to extract data from Onsite on expired and/ or expi...	Report
Onsite Hours Report	Hours Report - Provide the total hours for each Person with a calculation of total hours for ea...	Report
Onsite Mobile App User Access Report	User Report - List access rights for mobile app users by Site/Realm	Report
Person Role Status Report	Person Report - List the current status of each Person for each selected Role	Report

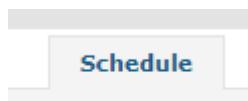
Right click on the report you would like to schedule and click 'schedule'



Click 'Create Schedule'



The first tab is 'schedule' – in this tab you will chose the recurrence and schedule. Ensure you click save once selection have been made.



Recurrence:

Recurrence Type:

Simple

Repeat every (required):

1 days

Schedule End

End Date:

Run a set number of times

Number of runs:

Run until a specified date:

Run indefinitely

Holidays

Calendar of dates to exclude:

None

Recurrence:

Recurrence Type:

Calendar

Months:

Every Month

Selected Months:

Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

Days:

Every Day

Selected Days:

Sun
Mon
Tue
Wed
Thu
Fri
Sat

Dates in Month:

Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

Times:

Hours (required):

0
Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17

Minutes (required):

0
Enter 0, 15, 30, 45 to run every 1/4 hour

Schedule End

End Date:

Parameters tab is the parameters for the report, ensure you click save after you have made your selection

Parameters

Schedule For: /Shared_Reports/Onsite_Reports/Cardholder_BI_Detailed_Rep

Person Types

Available: 3	Selected: 0
Search list... <input type="text"/>	
Contractors	
Employees	
Visitors	
<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> Deselect All
<input checked="" type="checkbox"/> Invert	

* Site

Castlereagh Street

Output Options tab is where you will select what format you would like the report delivered in. In the Output options tab ensure you UNSELECT 'Output to Repository' under the Output Destination heading. Ensure you click save once you select your options.

Output Options

Output File Options

File name (required):

Description:

Time Zone:

Output Locale:

- Formats:
- | | | |
|--|---|---|
| <input type="checkbox"/> CSV | <input type="checkbox"/> HTML | <input type="checkbox"/> RTF |
| <input type="checkbox"/> DOCX | <input type="checkbox"/> ODS | <input type="checkbox"/> XLSX |
| <input type="checkbox"/> Excel (Paginated) | <input type="checkbox"/> ODT | <input type="checkbox"/> XLSX (Paginated) |
| <input type="checkbox"/> Excel | <input checked="" type="checkbox"/> PDF | <input type="checkbox"/> PPTX |

Output Destination

Output To Repository

/Shared_Reports/Onsite_Reports/Cardholder_BI_I

Browse...

Notifications tab, this is where you will enter the email addresses of the recipients of this scheduled report. Ensure you click save once you finish entering your data.

Notifications

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

Send job status notifications

To:

Use commas to separate addresses

Subject:

Send success notification
Success Message:

Send failure notification
Failure Message:

N.B. BI reports can be scheduled as many times as you like to different participants with different parameters, under the same user account.