# RUTGERS

OVERVIEW

This job aid details the process for scheduling a Business Intelligence (BI) Report.

NAVIGATING TO SCHEDULE A BI REPORT

If you are running a report in Business Intelligence (BI) Publisher (navigation path Tools> Reports and Analytics>Shared Folder>Custom>RU Custom>Reports) for one or more Projects or Project Organizations over multiple months, you should schedule the report. If you don't schedule the report it will time out as you are trying to pull in large amounts of data. Reports can be scheduled daily, weekly or monthly.

Navigate to the Business Intelligence (BI) report you would like to run and follow these steps to schedule a report:
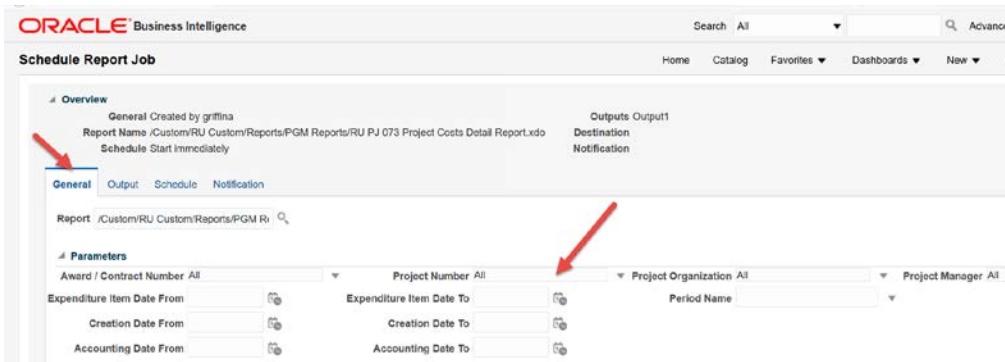
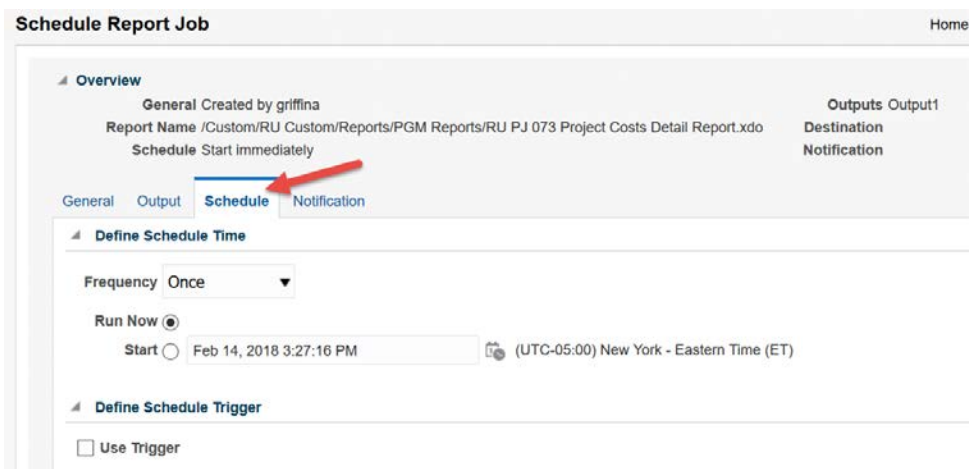1. Click the ⚙ at the top-right corner of the report.
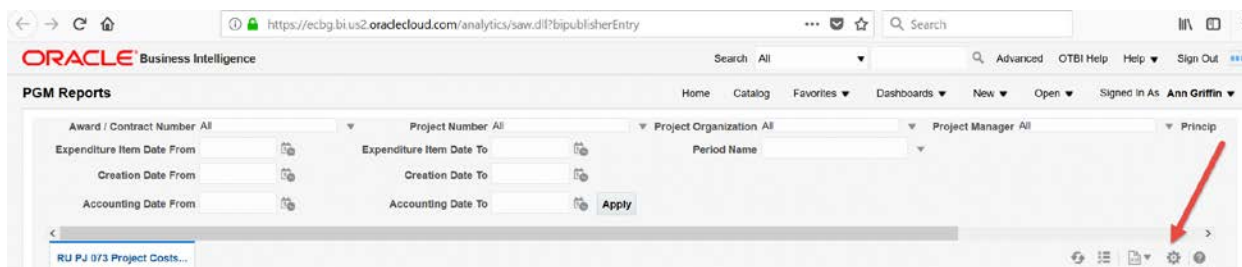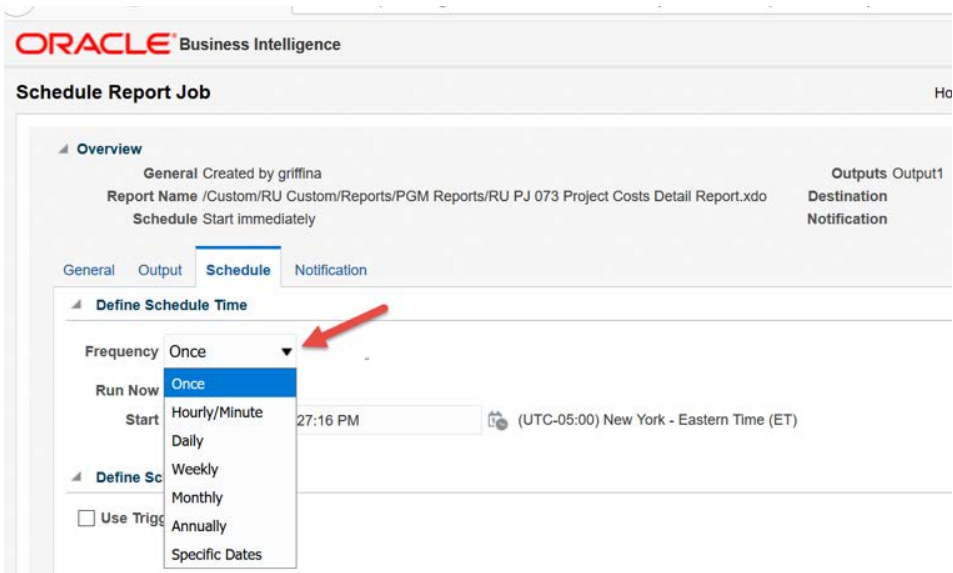

2. Select *Schedule* from the menu.
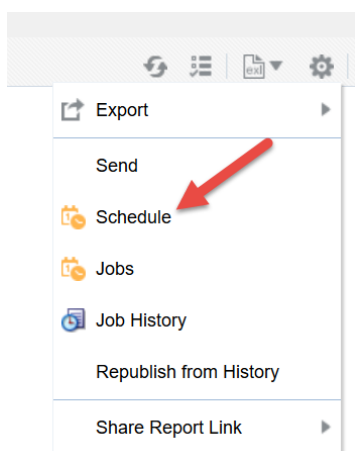
3. Select the *General tab* and fill in your *parameters* for your report.

4. The select the *Schedule tab*.

5. Choose the *frequency* for your report.

6. Choose whether you want the report to *start now or on a specific date*.

7. Select the *Output* **tab** and **Add Destination**.

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8. Type the **email address** you would like to send the report to in the ***To field***. You can also compose an email and cc others in your department if you want to send them a report.
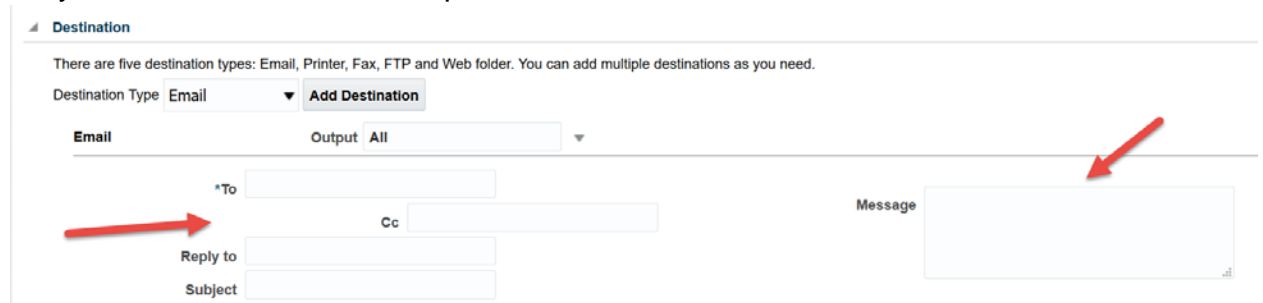
9. Click **Submit** in the upper right hand corner.