Schedule a BI Publisher Report Based on Custom Fast Formula

Introduction

Many a times we may have a requirement that we would like to execute a BI Publisher Report on a custom schedule which does not falls into any of the daily, monthly, annual or any other delivered schedules available under the frequency option of a BI Publisher Report.

One most common requirement is “Running a Report on Last Day of Every Month”. Since the last day of every month will vary with possible values being 28 , 30th and 31st and don’t forget 29th for a leap year.

In such scenarios one would have to manually choose the dates and submit the ESS job using the specific dates.

Imagine you need to do the same for 100 BI Reports. Then this definitely is going to take a lot of time.

You can get through this problem by creating a Custom Payroll Flow Pattern to submit your report. This custom payroll flow pattern can make use of “Custom Flow Schedule” Fast Formula to automate the schedule run time of report.

In this example, we will demonstrate the same.

Pre-requisite

There are two major pre-requisites to accomplish this task namely:

1) A Ready to use BI-Publisher Report
2) A Custom Payroll Flow Pattern based on the BI-Publisher Report used above

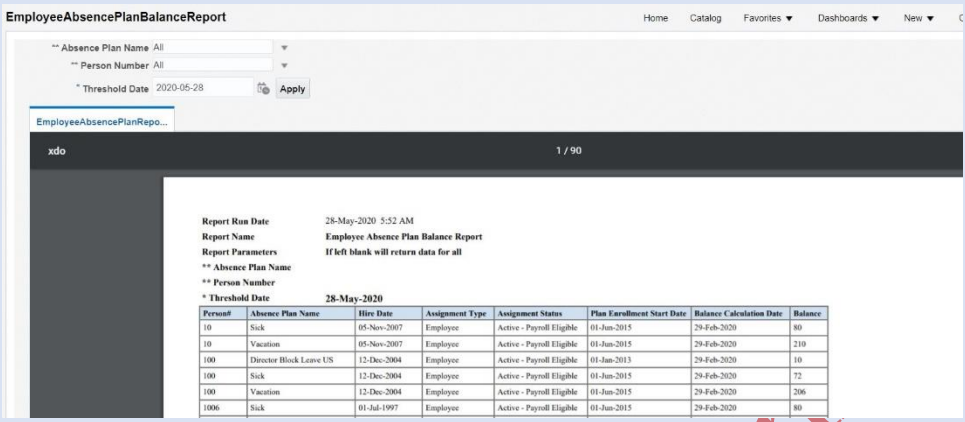
Ready to use BI-Publisher Report

For this example,we will use a BI Publisher Report which has following details:

Report Name: EmployeeAbsencePlanBalanceReport

Report Path: /Custom/Practice Samples/EmployeeAbsencePlanBalanceReport.xdo

We should run te report once to ensure it is working fine



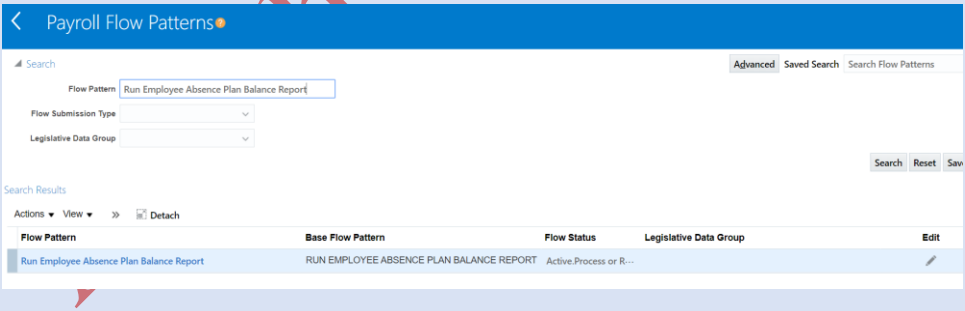
Custom Payroll Flow Pattern based on BI-Report

We should also make sure that there is a pre-existing flow pattern based on the BI-Report.

If you are not aware how to create a Payroll flow pattern for a BI Report please refer this link.

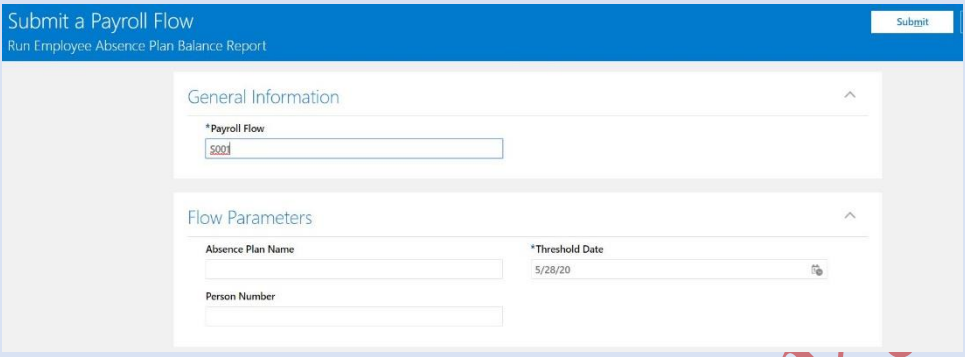
We have “Run Employee Absence Plan Balance Report”

Navigation: ***My Client Groups->Payroll->Administration->Payroll Flow Patterns(Search for Run Employee Absence Plan Balance Report)***

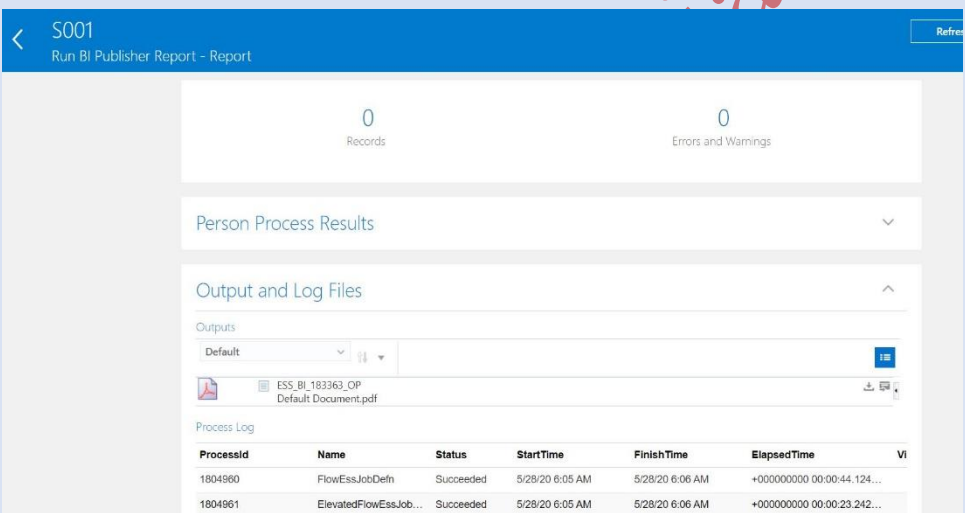


We will quickly run this payroll flow pattern once to check its working fine.

Navigation: ***My Client Groups->Payroll->Flow Submission and Results->Submit a Flow-> Search for Run Employee Absence Plan Balance Report***



Once we submit, we should be able to see that the Report output is generated.



Now all the pre-requisite steps are complete.

We will now create a Custom Fast Formula of “Flow Schedule” Type

[Creating Custom Fast Formula]

In this step we will create a custom Fast Formula of “Flow Schedule” type.

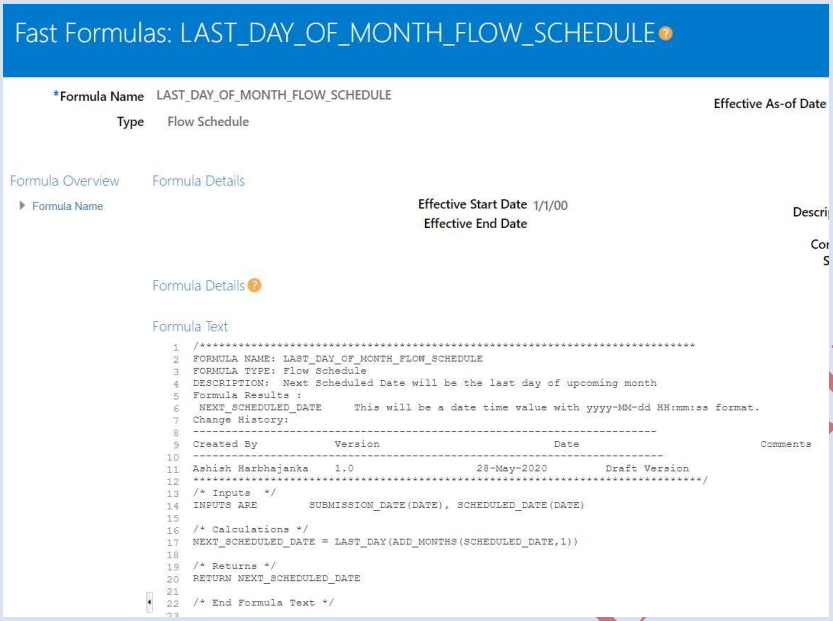
Formula Text
/********** ********** FORMULA NAME: LAST_DAY_OF_MONTH_FLOW_SCHEDULE

```
FORMULA TYPE: Flow Schedule
DESCRIPTION:  Next Scheduled Date will be the last day of upcoming month
Formula Results :
 NEXT_SCHEDULED_DATE     This will be a date time value with yyyy-MM-dd HH:mm:ss format.
Change History:
-----------------------------------------------------------------------
Created By          Version                                  Date
                                    Comments
-----------------------------------------------------------------------
Ashish Harbhajanka    1.0                28-May-2020        Draft Version
**************************************************
*****************************/
/* Inputs  */
INPUTS ARE       SUBMISSION_DATE(DATE),
SCHEDULED_DATE(DATE)

/* Calculations */
NEXT_SCHEDULED_DATE =
LAST_DAY(ADD_MONTHS(SCHEDULED_DATE,1))

/* Returns */
RETURN NEXT_SCHEDULED_DATE

/* End Formula Text */
```

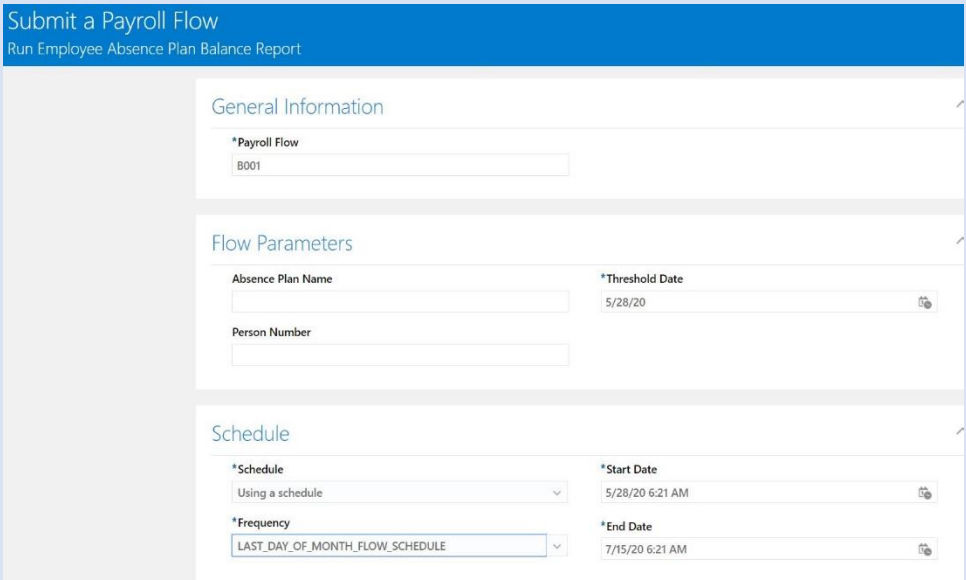


Running the Custom Payroll Flow Pattern using Flow Schedule Formula

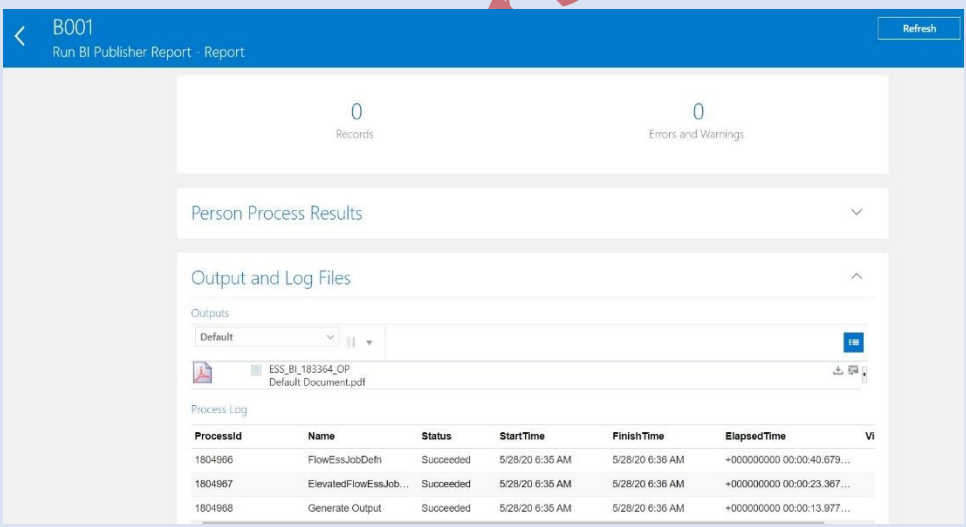
We would now run the Custom payroll flow pattern using the Flow Schedule Formula we just created.

Details are:

Flow Pattern Name: Run Employee Absence Plan Balance Report
Flow Instance Name: B001
Absence Plan Name: <BLANK>
Person Number: <BLANK>
Threshold Date: 5/28/2020
Schedule: Using a Schedule
Frequency: LAST_DAY_OF_MONTH_FLOW_SCHEDULE
Start Date: 5/28/20 6:21 AM
End Date: 7/15/20 6:21 AM



We can verify the result

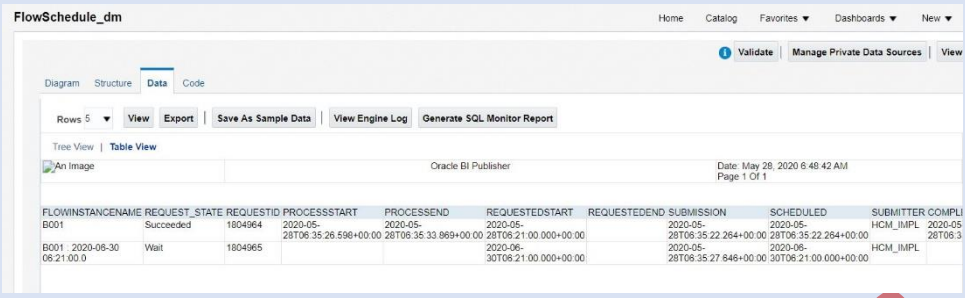


Verification

We can verify the details of all job schedule which was created based on Payroll Flow: B001

SQL

```
SELECT  (select req_property2.value
                    from   fusion.ess_request_property req_property2
                    where  req_property2.requestid =
req_property.requestid
                    and    req_property2.name =
'FlowParam_flowInstanceName') flowinstancename,
                    (CASE
          WHEN state = 1 THEN 'Wait'
          WHEN state = 2 THEN 'Ready'
          WHEN state = 3 THEN 'Running'
          WHEN state = 4 THEN 'Completed'
          WHEN state = 9 THEN 'Cancelled'
          WHEN state = 10 THEN 'Error'
          WHEN state = 12 THEN 'Succeeded'
          WHEN state = 13 THEN 'Paused'
          ELSE TO_CHAR (state)
       END) REQUEST_STATE,
       req_history.requestid,
       req_history.processstart,
       req_history.processend,
       req_history.requestedstart,
       req_history.requestedend,
       req_history.submission,
       req_history.scheduled,
       req_history.submitter,
       req_history.completedtime,
       req_history.preprocess_status,
       req_history.postprocess_status,
       req_history.executable_status
  FROM fusion.ess_request_history req_history,
       fusion.ess_request_property req_property
 WHERE 1 = 1
   AND req_history.requestid = req_property.requestid
   AND req_property.name = 'FlowParam_actionType'
   AND req_property.value = 'START_FLOW'
   AND req_history.requestid IN (select req_property1.requestid
                        from   fusion.ess_request_property
req_property1
                        where  req_property1.value LIKE 'B001%')
ORDER BY req_history.requestid asc
```



From the above screenshot that there are two occurrences of Payroll Flow one of which has been schedule to run on current date and its status is Succeeded while the other which is scheduled on 2020-06-30 is in wait state.

One thing to note is that while submitting the flow schedule we chose start date as 5/28/2020 and end date as 7/15/2020 so the last schedule will be 30st June 2020.

Summary

So, this is an example of using a custom flow schedule fast formula to run a BI Report. Hope this was a good read and it was helpful.

Thanks all for your time and have a nice day.