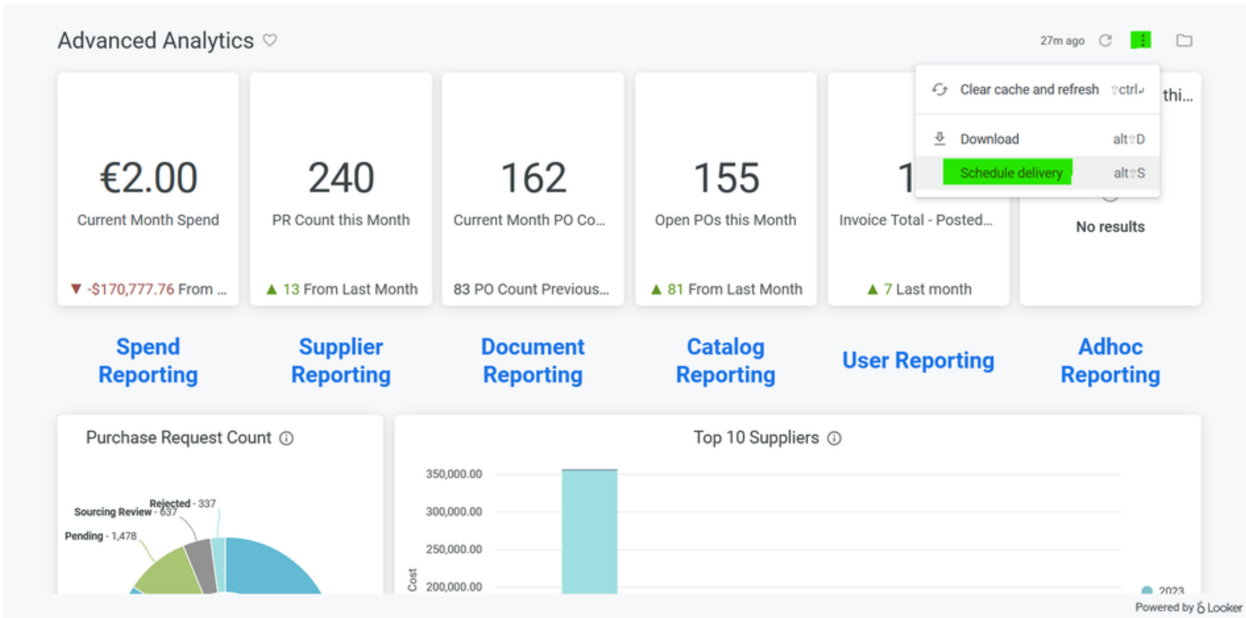
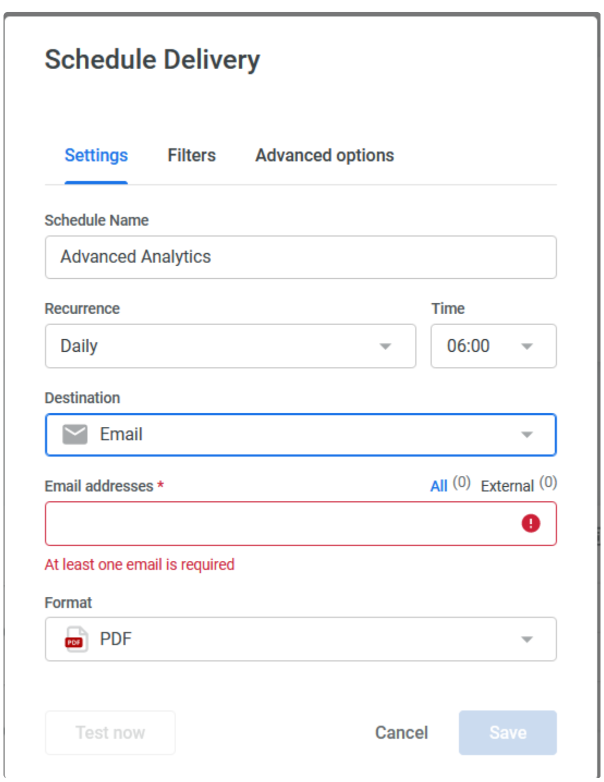
How to schedule Looker reports using PMAN/SmartOCI

There are two components that you can schedule

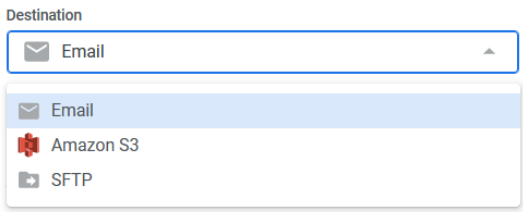
1. **Dashboard**
   a. To schedule, please follow the subsequent steps that are indicated in green.



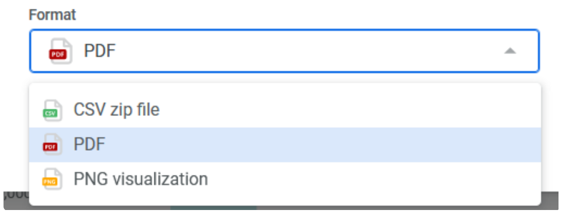
i. A pop-up window will open, allowing the client to fill in the corresponding fields based on their requirements.



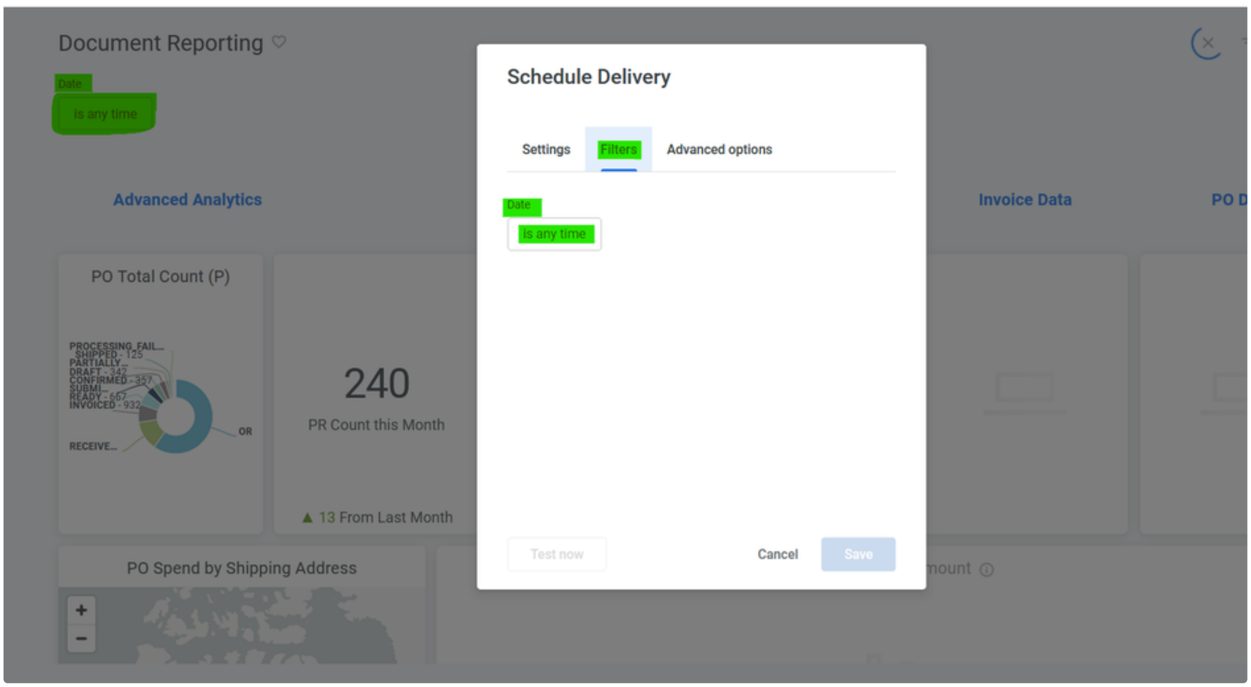
ii. List of supported destinations.



iii. List of supported destinations files

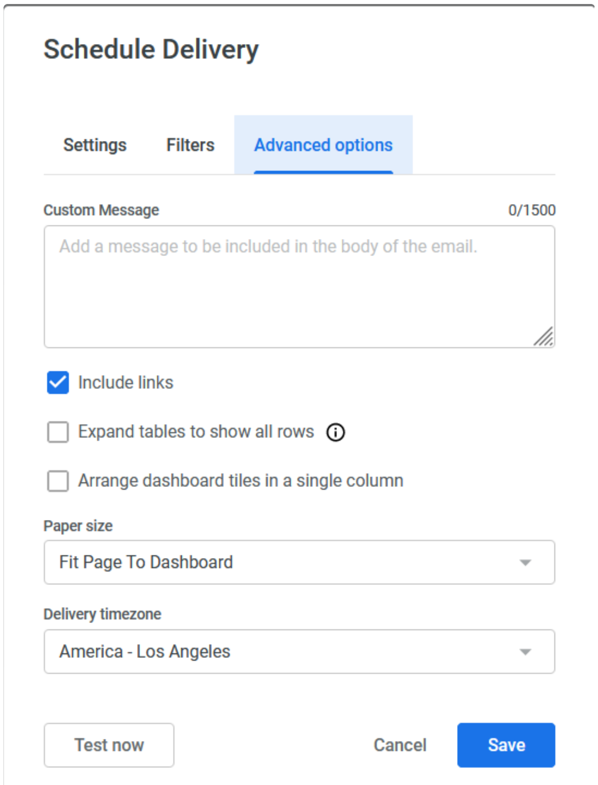


iv. In case a dashboard includes any filters, you can apply them during the scheduling process.

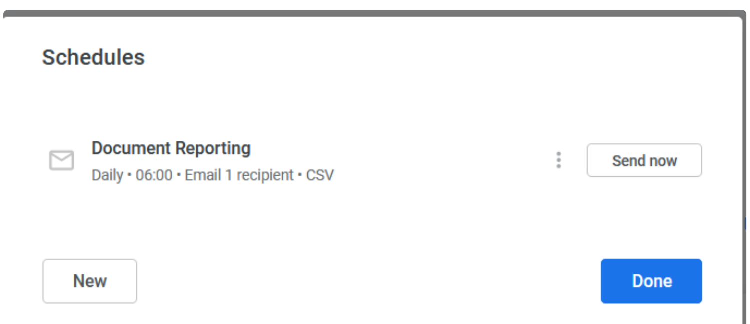


v. Advance Option

The client has the ability to configure schedule settings such as Custom Message, Page Size (if the destination is PDF), Delivery Timezone, and more.



vi. Please click the "**Save**" button to save the schedule. The next popup will resemble the screen shown below.



1. To test and verify if the file is sending the correct data, you should click on the **"Send Now"** button.
2. Finally, simply click on "Done" to close this window.

b. Limitation:

i. The email destination does not support sending CSV/PDF files larger than 25 MB in size.

ii. By default, the CSV table data will only be sent with a limited number of rows, typically set to 500 rows.

2. **Look (Report)**

a. Open **Look** from the dashboard that you wish to schedule

i. At both the dashboard level and the Look (report) level, you will find three dots that provide additional options and functionality.

ii. We have covered the first component, which is how to schedule a dashboard. (Highlighted in red in the screenshot below)

iii. To schedule a "Look," click on the three dots that are highlighted in Green below

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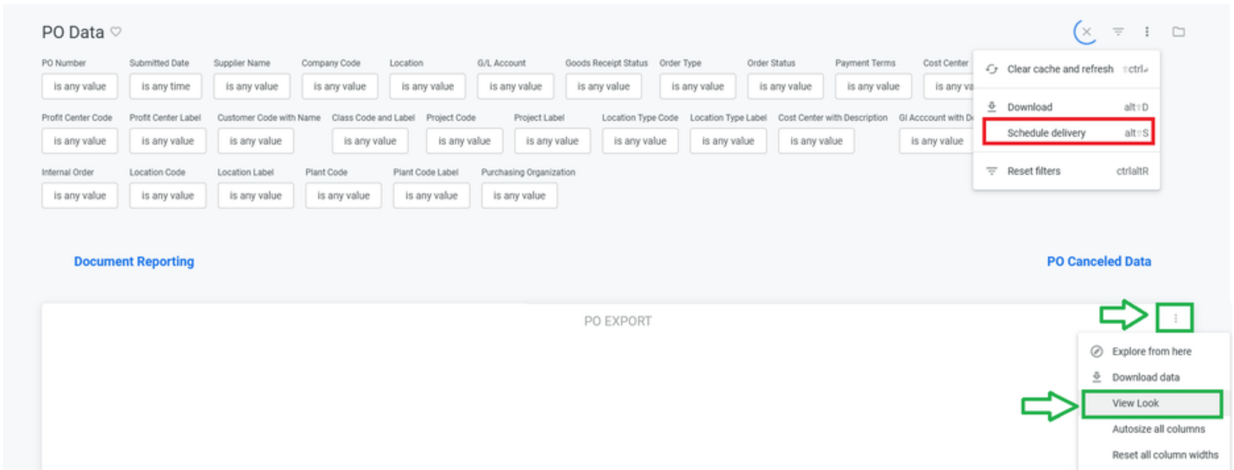

b. Once the Look is opened/loaded, apply the desired filter on the report (e.g., "Cost Center with Description = 021 - test"). Then, click on the gear icon ⚙ and select the "Schedule" option.

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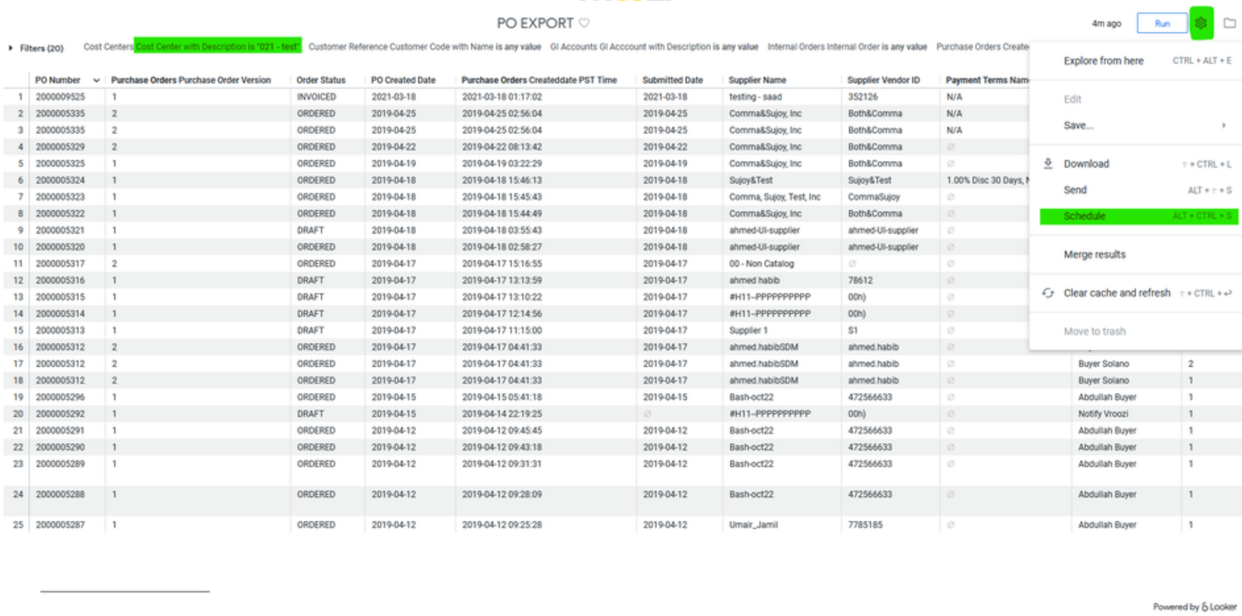


i. Give your Scheduler Name

ii. Select destination (Email/Amazon S3/SFTP)

iii. Fill in the Email Address if you choose the destination as Email

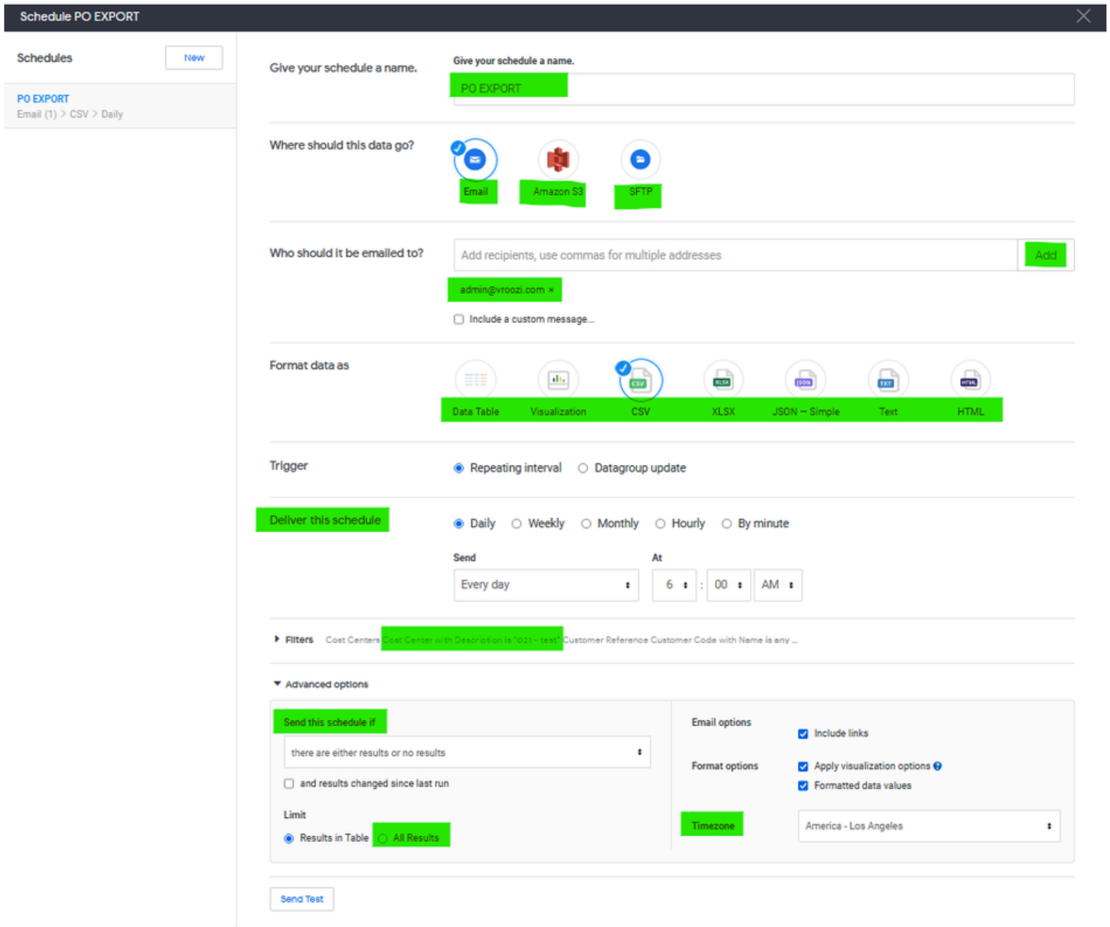
iv. Choose destination Format (DataTable, Visualization, CSV or Excel, etc.)

v. Select schedule frequency (Daily, Weekly, Monthly, Hourly, or By Minute)

vi. Verify the filter applied on the report reflected in the schedule (If not expand the filter section and apply the filter on it.)

vii. Under the Advanced Option section

1. There are key aspects that are important and recommended to consider, including:
   a. Send this schedule if (there are results)
   b. Limit (All Results)
   c. Check all boxes
   d. Timezone (Select your respective region to get the file on time)



c. Limitation:

i. Sending a CSV / Excel or any type of file larger than 25 MB using the email destination is not supported.

1. In this scenario, it is recommended to use the SFTP (Secure File Transfer Protocol) destination.

ii. By default, when scheduling a "Look" with "Results in Table," only a limited number of rows will be included in the sent results, typically set to 500 rows.