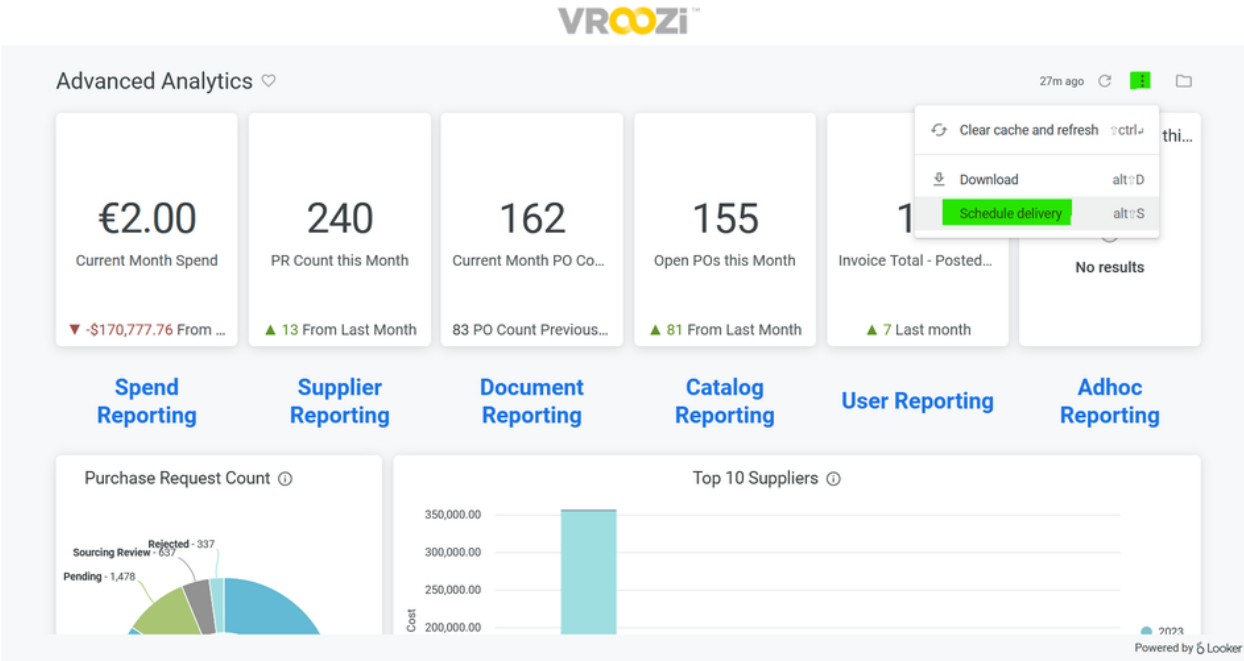


# How to schedule Looker reports using PMAN/SmartOCI

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.

### Schedule Delivery

[Settings](#)[Filters](#)[Advanced options](#)

Schedule Name

Advanced Analytics

Recurrence

Daily

Time

06:00

Destination

Email

Email addresses \*

All (0) External (0)

At least one email is required

Format

PDF


Test now


Cancel


Save


- ii. List of supported destinations.

Destination

 Email


 Email


 Amazon S3


 SFTP


iii. List of supported destinations files

Format

 PDF

 CSV zip file

 PDF

 PNG visualization

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

Document Reporting

Date

is any time

Advanced Analytics

PO Total Count (P)

PROCESSING\_FAIL... SHIPPED - 125  
PARTIALLY...  
DRAFT - 147  
CONFIRMED - 357  
SUBMIT...  
READY - 657  
INVOICED - 932

OR

240

PR Count this Month

▲ 13 From Last Month

PO Spend by Shipping Address

+

-

Schedule Delivery

Settings Filters Advanced options

Date

is any time

Test now Cancel Save

Invoice Data

PO D

amount

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.

### Schedule Delivery

[Settings](#)
[Filters](#)
[Advanced options](#)

Custom Message 0/1500  

Add a message to be included in the body of the email.

☒ Include links  
☐ Expand tables to show all rows ⓘ  
☐ Arrange dashboard tiles in a single column

Paper size  

Fit Page To Dashboard ▼

Delivery timezone  

America - Los Angeles ▼

Test now

Cancel

Save

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

### Schedules

**Document Reporting**  
Daily • 06:00 • Email 1 recipient • CSV

⋮

Send now

New

Done

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

b. Limitation:

- The email destination does not support sending CSV/PDF files larger than 25 MB in size.
- By default, the CSV table data will only be sent with a limited number of rows, typically set to 500 rows.

## 2. Look (Report)

- Open **Look** from the dashboard that you wish to schedule
  - At both the dashboard level and the Look (report) level, you will find three dots that provide additional options and functionality.
  - We have covered the first component, which is how to schedule a dashboard. (Highlighted in red in the screenshot below)
  - To schedule a "Look," click on the three dots that are highlighted in Green below

**VROOZI™**

**PO Data** ▼

PO Number

Submitted Date

Supplier Name

Company Code

Location

G/L Account

Goods Receipt Status

Order Type

Order Status

Payment Terms

Cost Center

Profit Center Code

Profit Center Label

Customer Code with Name

Class Code and Label

Project Code

Project Label

Location Type Code

Location Type Label

Cost Center with Description

GI Account with Description

Internal Order

Location Code

Location Label

Plant Code

Plant Code Label

Purchasing Organization

Clear cache and refresh ctrl+R

Download alt+D

**Schedule delivery** alt+S

Reset filters ctrl+R

**Document Reporting** **PO Canceled Data**

PO EXPORT

Explore from here

Download data

**View Look**

Autosize all columns

Reset all column widths

- 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.

**VROOZI™**

**PO EXPORT** ▼

Filters (20)

Cost Center **Cost Center with Description = 021 - test**

Customer Reference Customer Code with Name is any value

GI Accounts GI Account with Description is any value

Internal Orders Internal Order is any value

Purchase Orders Create

4m ago Run ⚙️

PO Number	Purchase Orders	Purchase Order Version	Order Status	PO Created Date	Purchase Orders Createddate PST Time	Submitted Date	Supplier Name	Supplier Vendor ID	Payment Terms Nam
1	2000009625	1	INVOICED	2021-03-18	2021-03-18 01:17:02	2021-03-18	testing - saad	352126	N/A
2	2000005335	2	ORDERED	2019-04-25	2019-04-25 02:56:04	2019-04-25	Comma&Sujoy, Inc	Both&Comma	N/A
3	2000005335	2	ORDERED	2019-04-25	2019-04-25 02:56:04	2019-04-25	Comma&Sujoy, Inc	Both&Comma	N/A
4	2000005329	2	ORDERED	2019-04-22	2019-04-22 08:13:42	2019-04-22	Comma&Sujoy, Inc	Both&Comma	
5	2000005325	1	ORDERED	2019-04-19	2019-04-19 03:22:29	2019-04-19	Comma&Sujoy, Inc	Both&Comma	
6	2000005324	1	ORDERED	2019-04-18	2019-04-18 15:46:13	2019-04-18	Sujoy&Test	Comma&Sujoy	1.00% Disc 30 Days
7	2000005323	1	ORDERED	2019-04-18	2019-04-18 15:45:43	2019-04-18	Comma, Sujoy, Test, Inc	Comma&Sujoy	
8	2000005322	1	ORDERED	2019-04-18	2019-04-18 15:44:49	2019-04-18	Comma&Sujoy, Inc	Both&Comma	
9	2000005321	1	DRAFT	2019-04-18	2019-04-18 03:55:43	2019-04-18	ahmed-Ui-supplier	ahmed-Ui-supplier	
10	2000005320	1	ORDERED	2019-04-18	2019-04-18 02:58:27	2019-04-18	ahmed-Ui-supplier	ahmed-Ui-supplier	
11	2000005317	2	ORDERED	2019-04-17	2019-04-17 15:16:55	2019-04-17	00 - Non Catalog		
12	2000005316	1	DRAFT	2019-04-17	2019-04-17 13:13:59	2019-04-17	ahmed habib	78612	
13	2000005315	1	DRAFT	2019-04-17	2019-04-17 13:10:22	2019-04-17	#H11-PPPPPPPPPP	00n	
14	2000005314	1	DRAFT	2019-04-17	2019-04-17 12:14:56	2019-04-17	#H11-PPPPPPPPPP	00n	
15	2000005313	1	DRAFT	2019-04-17	2019-04-17 11:15:00	2019-04-17	Supplier 1	S1	
16	2000005312	2	ORDERED	2019-04-17	2019-04-17 04:41:33	2019-04-17	ahmed habibSDM	ahmed habib	
17	2000005312	2	ORDERED	2019-04-17	2019-04-17 04:41:33	2019-04-17	ahmed habibSDM	ahmed habib	
18	2000005312	2	ORDERED	2019-04-17	2019-04-17 04:41:33	2019-04-17	ahmed habibSDM	ahmed habib	
19	2000005296	1	ORDERED	2019-04-15	2019-04-15 05:41:18	2019-04-15	Bash-oct22	472566633	
20	2000005292	1	DRAFT	2019-04-15	2019-04-15 05:41:18		#H11-PPPPPPPPPP	00n	
21	2000005291	1	ORDERED	2019-04-12	2019-04-12 09:45:45	2019-04-12	Bash-oct22	472566633	
22	2000005290	1	ORDERED	2019-04-12	2019-04-12 09:43:18	2019-04-12	Bash-oct22	472566633	
23	2000005289	1	ORDERED	2019-04-12	2019-04-12 09:31:31	2019-04-12	Bash-oct22	472566633	
24	2000005288	1	ORDERED	2019-04-12	2019-04-12 09:28:09	2019-04-12	Bash-oct22	472566633	
25	2000005287	1	ORDERED	2019-04-12	2019-04-12 09:25:28	2019-04-12	Umair_Jamil	7785185	

Explore from here CTRL + ALT + E

Edit

Save...

Download ++ CTRL + L

Send ALT + ++ S

**Schedule** ALT + CTRL + S

Merge results

Clear cache and refresh ++ CTRL + ++

Move to trash

Powered by Locker

- 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)

Schedule PO EXPORT

Schedules

PO EXPORT

Email (1) > CSV > Daily

Give your schedule a name.

PO EXPORT

Where should this data go?

Email

Amazon S3

SFTP

Who should it be emailed to?

Add recipients, use commas for multiple addresses

admin@vmsi.com

Include a custom message...

Format data as

Data Table

Visualization

CSV

XLSX

JSON - Simple

Text

HTML

Trigger

Repeating interval

Datagroup update

Deliver this schedule

Daily

Weekly

Monthly

Hourly

By minute

Send

At

Every day

6

:

00

AM

Filters

Cost Centers

Cost Centers with Description

Customer Reference

Customer Code with Name is any ...

Advanced options

Send this schedule if

there are either results or no results

and results changed since last run

Limit

Results in Table

All Results

Email options

Include links

Format options

Apply visualization options

Formatted data values

Timezone

America - Los Angeles

Send Test

c. Limitation:

- Sending a CSV / Excel or any type of file larger than 25 MB using the email destination is not supported.
  - In this scenario, it is recommended to use the SFTP (Secure File Transfer Protocol) destination.
- 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.