

# **WebFOCUS**

## ReportCaster End User's Manual

Version 7 Release 7.02

DN4501007.1110

Cactus, EDA, EDA/SQL, FIDEL, FOCUS, Information Builders, the Information Builders logo, iWay, iWay Software, Parlay, PC/FOCUS, RStat, TableTalk, Web390, and WebFOCUS are registered trademarks, and DataMigrator and Magnify are trademarks of Information Builders, Inc.

Adobe, the Adobe logo, Acrobat, Adobe Reader, Flash, Adobe Flash Builder, Flex, and PostScript are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Due to the nature of this material, this document refers to numerous hardware and software products by their trademarks. In most, if not all cases, these designations are claimed as trademarks or registered trademarks by their respective companies. It is not this publisher's intent to use any of these names generically. The reader is therefore cautioned to investigate all claimed trademark rights before using any of these names other than to refer to the product described.

Copyright © 2011, by Information Builders, Inc. and iWay Software. All rights reserved. Patent Pending. This manual, or parts thereof, may not be reproduced in any form without the written permission of Information Builders, Inc.

# Contents

<b>Preface.....</b>	<b>7</b>
Documentation Conventions.....	8
Related Publications.....	9
Customer Support.....	9
Information You Should Have.....	9
User Feedback.....	11
Information Builders Consulting and Training.....	11
<b>1. Introducing ReportCaster.....</b>	<b>13</b>
Overview of ReportCaster.....	14
The ReportCaster Development Interface.....	14
Considerations When Using ReportCaster.....	15
<b>2. Creating and Maintaining Distribution Lists.....</b>	<b>17</b>
About Distribution Lists.....	18
Creating a Distribution List.....	19
Editing and Deleting a Distribution List.....	22
Bursting a Report.....	24
Bursting Guidelines and Limitations.....	26
Specifying Multiple E-mail Addresses.....	28
<b>3. Creating a ReportCaster Schedule.....</b>	<b>31</b>
About the Scheduling Tool.....	32
Creating a Schedule.....	33
Copying Tab Contents.....	35
Frequency Options.....	35
The Once Run Interval.....	36
The Minutes Run Interval.....	36
The Hourly Run Interval.....	37
The Daily Run Interval.....	38
The Weekly Run Interval.....	38

The Monthly Run Interval.....	39
The Yearly Run Interval.....	41
The Custom Run Interval.....	41
Applying a Secondary Run Interval.....	43
About Tasks.....	44
WF Server Procedure Task Options.....	46
Standard Reports and My Reports Task Options.....	47
URL Task Options.....	48
File Task Options.....	49
FTP Task Options.....	49
Distribution Options.....	52
Distributing Scheduled Output Using E-mail.....	53
Distributing Scheduled Output Using FTP or SFTP.....	60
Notification Options.....	64
Setting On Error and Always Notification.....	65
<b>4. Maintaining a Schedule.....</b>	<b>67</b>
About Maintaining a Schedule.....	68
Editing a Schedule.....	69
Cloning a Schedule.....	70
Deleting a Schedule.....	72
Viewing a Log Report.....	73
Purging the Log File.....	75
Setting Schedule Blackout Dates.....	77
Creating, Changing, and Deleting an Execution ID.....	79
<b>5. Tracking ReportCaster Schedules.....</b>	<b>83</b>
Using Schedule Logs.....	84
Troubleshooting Log Reports.....	89
Checking the Schedule Status.....	89
<b>A. ReportCaster Formats for Scheduled Output.....</b>	<b>91</b>
AHTML.....	92
ALPHA.....	92
COM.....	92

COMMA.....	93
COMT.....	93
DFIX.....	94
DHTML.....	94
DOC.....	95
EXCEL.....	95
EXL07.....	96
EXL2K.....	96
EXL2K FORMULA.....	97
EXL2K PIVOT.....	97
EXL2K TEMPLATE.....	98
EXL97.....	98
Flash.....	99
GIF.....	99
HTML.....	100
HTML ODP.....	100
JPEG.....	100
PDF.....	101
PNG.....	101
PPT.....	102
PPT Template.....	102
PS.....	102
SVG.....	103
TAB.....	104
TABT.....	104
VISDIS.....	104
WK1.....	104
WP.....	105
XML.....	105
<b>B. Working With Distribution Lists in the HTML User Interface.....</b>	<b>107</b>
Accessing the Distribution or Address Book List Interface.....	108
Creating a Distribution or Address Book List.....	109
Editing a Distribution List.....	116

Deleting a Distribution List.....117

**C. Maintaining a Schedule Using the HTML User Interface.....119**

    About the Schedules Interface.....120

    Editing a Schedule in the HTML User Interface.....121

    Cloning a Schedule.....123

    Deleting a Schedule.....125

    Viewing a Log Report.....126

    Purging the Log File.....132

    Schedule Blackout Dates.....134

    Checking the Status of a Scheduled Job.....137

    Creating, Updating, and Deleting an Execution ID.....138

**Reader Comments.....147**

# Preface

This documentation describes how a Managed Reporting Analytical user or a Business Intelligence Dashboard user can create schedules to automatically distribute output from Standard Reports or their own My Reports to specified recipients.

## How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
<b>1</b>	Introducing ReportCaster	Provides an introduction to ReportCaster and its main features, and describes the scheduling and maintenance tools available to the End User.
<b>2</b>	Creating and Maintaining Distribution Lists	Describes how you can edit the properties of a schedule, delete a schedule, clone a schedule, or run a schedule immediately once you have created it.
<b>3</b>	Creating a ReportCaster Schedule	Describes how to schedule a ReportCaster job.
<b>4</b>	Maintaining a Schedule	Describes how to check the status of a schedule, edit the properties of a schedule, clone and delete a schedule, and run a log report to obtain additional information. Also describes purging log records and explains how to create, update, and delete your Execution IDs.
<b>5</b>	Tracking ReportCaster Schedules	Describes how to obtain details about a schedule through log reports and job status information.
<b>A</b>	ReportCaster Formats for Scheduled Output	Provides descriptions, suggested uses, and considerations about each ReportCaster output format.

	Chapter/Appendix	Contents
<b>B</b>	Working With Distribution Lists in the HTML User Interface	Discusses how to create, edit, and delete a Distribution List using the HTML User Interface.
<b>C</b>	Maintaining a Schedule Using the HTML User Interface	Discusses how to edit the properties of a schedule, clone a schedule, delete a schedule, check the status of a schedule, or run a log report to obtain information about a schedule. Describes purging log records and how to create, update, and delete your Execution IDs.

## Documentation Conventions

The following table lists and describes the conventions that apply in this manual.

Convention	Description
<code>THIS TYPEFACE</code> or <code>this typeface</code>	Denotes syntax that you must enter exactly as shown.
<i>this typeface</i>	Represents a placeholder (or variable), a cross-reference, or an important term.
<u>underscore</u>	Indicates a default setting.
<b>this typeface</b>	Highlights a file name or command. It may also indicate a button, menu item, or dialog box option you can click or select.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices; type one of them, not the braces.
[ ]	Indicates a group of optional parameters. None is required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis points (...).



Convention	Description
.	Indicates that there are (or could be) intervening or additional commands.
.	
.	

## Related Publications

To view a current listing of our publications and to place an order, visit our Technical Documentation Library, <http://documentation.informationbuilders.com>. You can also contact the Publications Order Department at (800) 969-4636.

## Customer Support

Do you have any questions about this product?

Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing tips and techniques, <http://forums.informationbuilders.com/eve/forums>.

You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our World Wide Web site, <http://www.informationbuilders.com>. It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of [www.informationbuilders.com](http://www.informationbuilders.com) also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

Call Information Builders Customer Support Service (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 a.m. and 8:00 p.m. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities and documentation. Please be ready to provide your six-digit site code number (xxxx.xx) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

## Information You Should Have

To help our consultants answer your questions effectively, be prepared to provide the following information when you call:

- ☐ Your six-digit site code (xxxx.xx).
- ☐ Your WebFOCUS configuration:
  - ☐ The front-end you are using, including vendor and release.
  - ☐ The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
  - ☐ The software release.
  - ☐ Your server version and release. You can find this information using the Version option in the Web Console.
- ☐ The stored procedure (preferably with line numbers) or SQL statements being used in server access.
- ☐ The Master File and Access File.
- ☐ The exact nature of the problem:
  - ☐ Are the results or the format incorrect? Are the text or calculations missing or misplaced?
  - ☐ The error message and return code, if applicable.
  - ☐ Is this related to any other problem?
- ☐ Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?
- ☐ What release of the operating system are you using? Has it, your security system, communications protocol, or front-end software changed?
- ☐ Is this problem reproducible? If so, how?
- ☐ Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing just the code to access the data source?
- ☐ Do you have a trace file?
- ☐ How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

## User Feedback

In an effort to produce effective documentation, the Documentation Services staff welcomes your opinions regarding this manual. Please use the Reader Comments form at the end of this manual to communicate suggestions for improving this publication or to alert us to corrections. You can also use the Documentation Feedback form on our Web site, <http://documentation.informationbuilders.com/feedback.asp>.

Thank you, in advance, for your comments.

## Information Builders Consulting and Training

Interested in training? Information Builders Education Department offers a wide variety of training courses for this and other Information Builders products.

For information on course descriptions, locations, and dates, or to register for classes, visit our World Wide Web site (<http://www.informationbuilders.com>) or call (800) 969-INFO to speak to an Education Representative.



# 1 Introducing ReportCaster

Using ReportCaster, Managed Reporting Analytical Users can schedule and distribute Standard Reports or their own My Reports. Reports can be distributed to a printer, to a Managed Reporting folder, to the Report Library, or distributed through e-mail. In addition, if you are a Managed Reporting Analytical User with Advanced privileges, you can also schedule Managed Reporting Custom Reports.

## Topics:

- ❑ Overview of ReportCaster
- ❑ The ReportCaster Development Interface
- ❑ Considerations When Using ReportCaster

## Overview of ReportCaster

As a Managed Reporting Analytical User with ReportCaster scheduling and library privileges, you can use ReportCaster to schedule a Standard Report or My Report to be distributed either through an e-mail, to a printer, to a Managed Reporting folder, or to the Report Library. To change or request ReportCaster privileges, see the Managed Reporting Administrator.

ReportCaster scheduling options allow you to customize the distribution of your reports. You can designate when the report will be distributed and choose the format in which the report will be delivered, for instance, as a text file, an HTML active report, or as a Microsoft Excel spreadsheet or PowerPoint presentation. You can distribute the report to a single recipient or to several recipients. By creating a Distribution List you can specify a group of recipients, for example, all managers in a department, and conveniently reuse the list in current or future schedules. Instead of Distribution Lists, Access Lists are used for distributions to the Report Library to specify multiple recipients who are allowed to view your report.

You can also specify the priority at which ReportCaster should process your schedule, and whether or not to send notification regarding the schedule status. Another ReportCaster scheduling option, bursting a report, allows you to break a report into sections, distribute each section as a separate report, and designate the recipient of each section.

The ReportCaster Development interface (or the ReportCaster HTML User Interface accessed from Managed Reporting) enables Managed Reporting Analytical Users to create and maintain Distribution Lists and Access Lists, manage schedules, run log reports, and purge the log file. Additionally, you can create, update, and delete an Execution ID, which is a valid user ID that is used to run a schedule on a specified server.

This section describes how to access the ReportCaster End User scheduling and management tools.

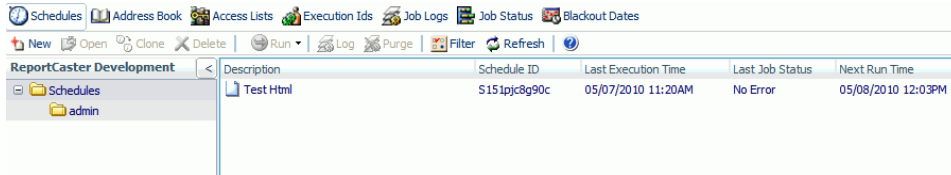
## The ReportCaster Development Interface

The ReportCaster Development Interface allows you to manage your schedules and perform maintenance tasks. From this interface you can view the status of a schedule, purge the log report, create a Distribution List and a Library Access List, edit or delete a schedule, and view schedule blackout dates.

You can access the ReportCaster Development Interface from:

- ❑ The Business Intelligence Dashboard by selecting *Tools*, then *ReportCaster* in Dashboard banner.
- ❑ From the WebFOCUS Welcome Page, by selecting the ReportCaster, ReportCaster Development link.

The ReportCaster Development interface opens, as shown in the following image.



From the ReportCaster Development Interface, you can:

- ❑ Create and maintain a Distribution List that you can then assign to scheduled reports.
- ❑ Create and maintain a Library Access List that you can then assign to scheduled reports that are distributed to the Report Library.
- ❑ Create schedules, and edit, clone, or delete schedules that you own. You can also run a log report to obtain information about a schedule, and purge the log file to conserve space.
- ❑ View the dates on which schedules cannot run or be set to run.
- ❑ Check the status of a scheduled job.
- ❑ Create, update, and delete an Execution ID.

You can access the Report Library from the Business Intelligence Dashboard by selecting *Tools*, then *Library* in Dashboard banner.

## Considerations When Using ReportCaster

The following are important considerations when using ReportCaster:

- ❑ ReportCaster interfaces are Section 508 compliant. This includes the ReportCaster Scheduling tool, the Development Interface, the Administration Interfaces, and the Report Library, as well as the legacy tools and interfaces.
- ❑ Although ReportCaster End Users can only view and perform actions on their own objects (Schedules, Distribution Lists, Log Files, Access Lists, and Execution IDs), ReportCaster Administrators can view and perform actions on all user objects.
- ❑ The language in which the ReportCaster user interfaces are presented is controlled by a setting in the WebFOCUS Administration Console.
- ❑ ReportCaster Administrators can customize the ReportCaster environment and the Scheduling Tool to present the options that are specific to your organization.





## 2 | Creating and Maintaining Distribution Lists

When creating a schedule, you can distribute scheduled output to a single recipient, or to several recipients. If you are distributing output to several recipients, you may want to create a list consisting of multiple recipients. The list of multiple recipients can then be assigned to any schedule.

If the entire report is not relevant to those receiving it, you can specify sections of the report to be sent using the burst option. Each recipient on your Distribution List can receive different sections of the report depending on the individual burst values you specify.

### Topics:

- ❑ [About Distribution Lists](#)
- ❑ [Creating a Distribution List](#)
- ❑ [Editing and Deleting a Distribution List](#)
- ❑ [Bursting a Report](#)
- ❑ [Specifying Multiple E-mail Addresses](#)

## About Distribution Lists

A Distribution List is an easy way to distribute content to multiple recipients by citing a list that contains the individual recipients rather than entering each recipient separately into a schedule. You can create a series of lists that target specific recipients relevant to your organization. These lists can be used and reused with any ReportCaster schedule. Distribution Lists can be made available to all ReportCaster users (public lists) or restricted for your own use (private lists).

A ReportCaster schedule can distribution content to multiple recipients through a:

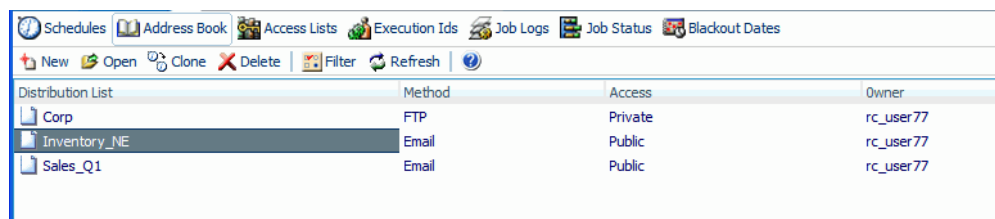
- ❑ **Distribution List** using the ReportCaster Address Book interface. For more information, see [Creating a Distribution List](#) on page 19.
- ❑ **External distribution file** created in a text file that is accessible to the ReportCaster Distribution Server.
- ❑ **Dynamic distribution list** by executing a WebFOCUS procedure against a data source where destinations are stored.

A Distribution List can be a list of:

- ❑ E-mail addresses that will receive ReportCaster content.
- ❑ FTP file names that will receive ReportCaster content.
- ❑ Printers that will receive ReportCaster content.

As a ReportCaster user, you can view any public Distribution List, but are restricted to editing only the lists that you own.

To access the Distribution Lists interface from the ReportCaster Development Interface, click the Address Book tab. The following image shows an example of the Address Book tab.



Distribution List	Method	Access	Owner
Corp	FTP	Private	rc_user77
Inventory_NE	Email	Public	rc_user77
Sales_Q1	Email	Public	rc_user77

From the Address Book you can:

- ❑ Create a new Distribution List.
- ❑ Clone a Distribution List.
- ❑ Delete a Distribution List.

If you are a ReportCaster user, you must own the list to delete it.

- ❑ Filter the list of Distribution Lists displayed in the Address Book tab. You can filter by the distribution method (E-mail, FTP, or printer) and by the access (Public, Private).

This section explains how to create and edit Distribution Lists, and how to use the burst feature with a Distribution List. This section also explains how to create an external and dynamic Distribution List.

## Creating a Distribution List

### How to:

Create a Distribution List

When you create a Distribution List, you specify a name for the Distribution List, select the distribution method (E-mail, FTP, or printer), the destinations to which the report is distributed, the optional burst values, and whether public or private access is applied.

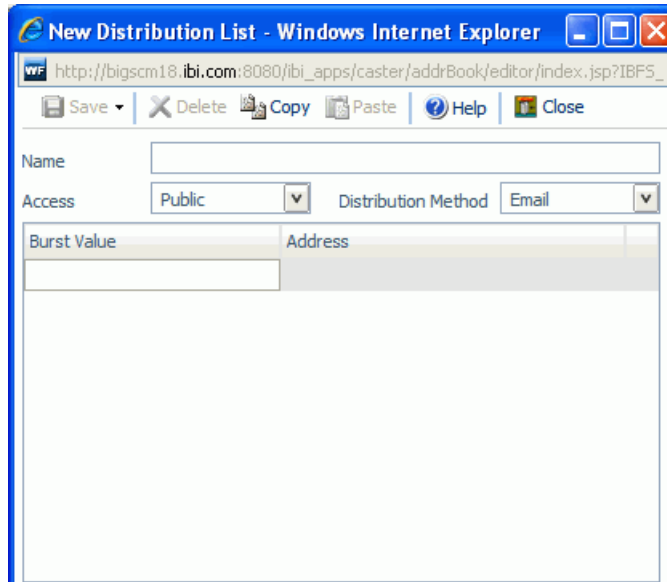
For more information about bursting reports, see [Bursting a Report](#) on page 24.

### Procedure: How to Create a Distribution List

To create a Distribution List:

1. In the ReportCaster Development Interface Address Book tab, click *New*.

The New Distribution List window opens, as shown in the following image.

The image shows a screenshot of a web browser window titled "New Distribution List - Windows Internet Explorer". The address bar shows a URL starting with "http://bigscm18.ibi.com". The browser's menu bar includes "Save", "Delete", "Copy", "Paste", "Help", and "Close". The form itself has a "Name" text input field. Below it are two dropdown menus: "Access" with "Public" selected, and "Distribution Method" with "Email" selected. At the bottom, there is a table with two columns: "Burst Value" and "Address". The "Burst Value" column has a single empty text input field. The "Address" column is a large, empty text area for entering email addresses.

2. In the Name field, type a descriptive name for the Distribution List.
3. From the Access drop-down list, select *Public* or *Private*.  
Only the owner and ReportCaster administrators can view a Private Distribution List, whereas, all ReportCaster users can view a Public Distribution List. The values in the Access drop-down list are dependent on your ReportCaster configuration.
4. From the Distribution Method drop-down list, select the distribution method of the list. Email is the default value.

- ❑ **If you select E-mail**, you must provide a list of e-mail addresses and, optionally, burst values associated with an address. For details on entering burst values, see [Bursting a Report](#) on page 24.

In the Address field, specify the e-mail addresses of the recipients (for example, chuck\_hill@ibi.com). Be careful typing this information because there is no edit checking. The maximum number of e-mail addresses you can specify in a Distribution List is 9999. You can specify a maximum of 800 characters within a single Address line.

You can specify multiple e-mail addresses within a single Address field. For more information, see [Specifying Multiple E-mail Addresses](#) on page 28.

- ❑ **If you select FTP**, you must specify the names of the FTP files that will hold the report (including the extension) and, optionally, burst values associated with FTP file.

The extension specified here should be appropriate for the format selected when creating the schedule. For example, if you selected Excel or EXL2K on a Windows platform, the file should be *drive:\directory\filename.xls*. The maximum number of FTP files you can specify in a Distribution List is 9999. For details on entering burst values, see [Bursting a Report](#) on page 24 and [Considerations When Distributing a Burst Report Using FTP](#) on page 25.

When using FTP to transfer Cascading Style Sheet (CSS) files from any platform to z/OS UNIX and the z/OS UNIX httpd.conf file contains the default MIME type of 8-bit for CSS files, then the CSS files must be transferred in binary mode.

- ❑ **If you select Printer**, you must specify the printers that will receive the distribution and, optionally, burst values associated with the printer. For details on entering burst values, see [Bursting a Report](#) on page 24.

In the Printer input field, specify the printer using the following format:

*queue@printserver*

where:

*queue*

Is the name of the printer queue.

*printserver*

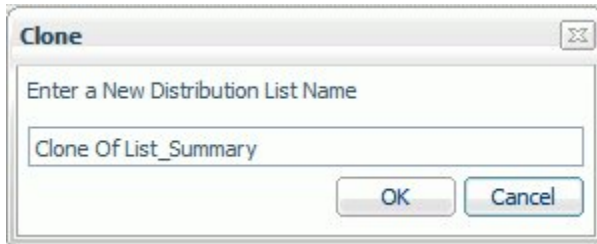
Is the host name or IP address of the printer.

Although ReportCaster supports specifying only the print server (host name or IP address), we recommend that you specify both the print queue and print server. (ReportCaster differentiates between the printer queue and the printer server by detecting the presence of the '@' separator.)

5. Click Save.
6. If you are finished creating a Distribution List, click Close.

**Note:** To create another list, you must close the New Distribution List window for the list you just created, then click New to open a refreshed New Distribution List window.

You can also create a new list by cloning an existing list and modifying it. To do this, in the Address Book tab, select an existing Distribution List and click *Clone*. The Clone window opens, as shown in the following image.



Type a name for the cloned Distribution List and click *OK*. The cloned Distribution List appears in the Distribution List column in the Address Book tab. You can then edit the Distribution List to contain the properties you want.

## Editing and Deleting a Distribution List

### How to:

Edit a Distribution List

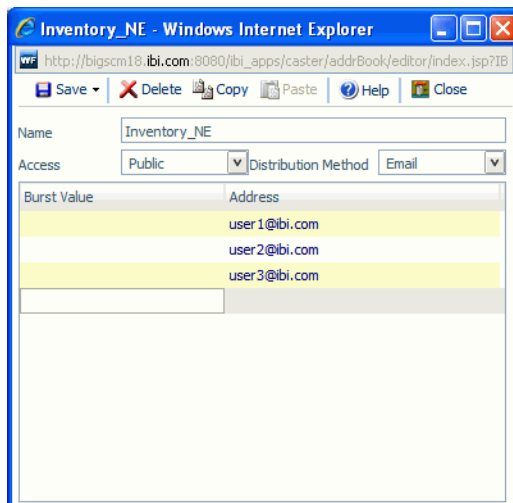
ReportCaster users can only edit the Distribution Lists that they own.

### Procedure: How to Edit a Distribution List

To edit a Distribution List:

1. In the ReportCaster Development Interface Address Book tab, select the Distribution List you want to edit and click *Open*, or double-click the list.

A window opens displaying the properties of the selected Distribution List, as shown in the following image.



2. From this window, you can perform the following:
  - ❑ Change the name of the Distribution List by typing a new name in the *Name* field.
  - ❑ Change the value of the existing Distribution List entries. For example, you can make the Distribution List Private instead of Public, or change the Distribution Method.
  - ❑ Add or copy and paste burst values and addresses, files, or printer names. Select the row you want to copy, click *Copy*, place the cursor where you want to paste, then click *Paste*.
  - ❑ Delete a Distribution List entry. Select the item to be deleted, then click *Delete*.
3. When you have completed your changes, click *Save*.  
To exit the editing window without making changes, click *Close*.

## Bursting a Report

### **In this section:**

Bursting Guidelines and Limitations

### **Reference:**

Considerations When Distributing a Burst Report Using FTP

Instead of distributing an entire report, you can use the ReportCaster burst feature to break a report into sections to be distributed separately. Bursting enables you to target relevant sections of a report to individual users. Each report section is saved as a separate file.

WF Server Procedures, Standard Reports, and My Reports support bursting. If you are distributing a burst tabular report, the burst value is determined by the first BY field. If you are distributing a burst graph report, the burst value is determined by the second BY field. The burst value is automatically determined by the internal matrix, which is a memory area that stores each database field value and calculates values referenced by the TABLE or GRAPH request.

You can send several report sections to one recipient by specifying the destination of that recipient (e-mail addresses, FTP files, or printers) for each section you want to send. You can send several report sections to one destination, or you can send one report section to several destinations. The burst values you specify in the Distribution List must exist in the data source you are reporting against.

**Note:** If you want to burst a report, you must enable bursting when you create a Task for a schedule. The burst values specified in the Burst Value column in the Distribution List window are ignored unless the Task specifies to burst the report.



**Example: Specifying Burst Values in a Distribution List**

You can specify sort field burst values and destinations (E-mail addresses, FTP file names, or printers) when creating or editing a Distribution List. The following image shows burst values and the destination e-mail addresses specified in the Distribution List window.

The screenshot shows a web browser window titled 'Sales Team - Windows Internet Explorer'. The address bar displays a URL from 'http://bigscm18.ibi.com'. The browser's menu bar includes 'Save', 'Delete', 'Copy', 'Paste', 'Help', and 'Close'. The form contains the following elements:

- Name:** A text box containing 'Sales Team'.
- Access:** A dropdown menu set to 'Public'.
- Distribution Method:** A dropdown menu set to 'Email'.
- Burst Value and Address Table:**

Burst Value	Address
Northeast	Chuck_Hill@ibi.com
Northeast	Adam_Abernathy@ibi.com
Southeast	Chuck_Hill@ibi.com
Southwest	Cathy_Foster@ibi.com

Using the primary sort field values (Northeast, Southeast, and Southwest), the e-mail address of each representative is associated with the relevant sales report data. Since Adam Abernathy needs only the data for the Northeast branch, the sort value Northeast is listed in the Burst Value column opposite his e-mail address in the Address column.

However, Chuck Hill works in both the Northeast and Southeast regions. Since he requires data for both regions, his e-mail address is listed in the Address column twice, next to a Burst Value column entry for each region.

**Tip:** You can specify multiple e-mail addresses on a single Address line. For details, see [Specifying Multiple E-mail Addresses](#) on page 28.

**Reference: Considerations When Distributing a Burst Report Using FTP**

When distributing a burst report using FTP, consider the following:

- ❑ When using a format of HTML, PDF, or EXL2K, an index page for the burst report output is generated.
- ❑ The index page for FTP distribution will only contain the burst values specified in the distribution list. The report output is distributed only for the specified burst values.

- ❑ The index page links for burst report output distributed using FTP are incorrect when specifying BASEURL in the scheduled procedure. This is because ReportCaster does not parse and evaluate the procedure code of the scheduled job. To resolve this, move the distributed files to the BASEURL directory or specify the fully qualified directory path of the distributed output in the index page.
  - ❑ On z/OS, burst report output distributed using FTP is created in sequential data sets having the following qualifiers:
    - ❑ **High-level Qualifier:** User ID specified for the FTP Server.
    - ❑ **Additional Qualifiers:** Location value in the Distribution tab and file(s) supplied in a Distribution List.
- To send burst output to a partitioned data set, specify an existing partitioned data set as Location and specify member names, without extensions, in the Distribution List File column. For example, *highlevelqualifier.location.file*.
- ❑ On z/OS, do not use an index name that is the same as the data (input) file from which you are reporting. If you specify an index name that is the same as the DDNAME in the DYNAM for your data file, the data file is overwritten with the report output.
  - ❑ On z/OS, the index page is generated with extra characters preceding the burst values. The links on the page to the report sections are correct.

## Bursting Guidelines and Limitations

This section provides detailed information to assist you in defining burst values.

When a report is burst, all data values generated for each burst section are returned to the ReportCasterDistribution Server.

- ❑ For the Managed Reporting and Library distribution methods, each burst section is distributed to Managed Reporting or the Report Library. Each burst section may be viewed by the owner of the schedule. Library user access to burst report sections is restricted as per the authorization (owner, public, access list) specified in the schedule information and Managed Reporting security if the scheduled report is a Managed Reporting procedure.
- ❑ For the e-mail and printer distribution methods, specific burst sections are distributed based on the burst values specified when creating the Distribution List, Distribution File, Single Address, or Dynamic Address List used by the schedule.

The following are guidelines and limitations that apply to the ReportCaster burst feature:

- ❑ **Case.** Burst values are case-sensitive.

- ❑ **Keywords.** Burst values can contain the following keywords:
  - ❑ **Wildcard Characters.** Use an asterisk (\*) and a question mark (?) as wildcards to represent characters at the beginning, end, or middle of the burst values. The asterisk represents one or more characters, while the question mark represents any single character. Precede each instance of a burst value using a wildcard with the wildcard keyword enclosed in brackets followed by a colon, [wildcard]:, as shown in the following examples.
 

[wildcard]:abc\* = all values that start with 'abc'.

[wildcard]:a?c = all three-character values that start with 'a' and end with 'c'.

[wildcard]:a?c\* = all values that start with 'a' and have a 'c' as the third character.
  - ❑ **Java Regular Expressions.** Use to identify strings of text. Precede each instance of a burst value using a Java regular expression with the regular expression keyword enclosed in brackets followed by a colon, [regex]:, as shown in the following examples.
 

[regex]:[bcr]at = values that are bat, cat, or rat.

[regex]:[^bcr]at = any value that is not bat, cat, or rat.
  - ❑ **Default Distribution.** You can provide a default destination for burst values that are not specified in the Distribution List. To do this, enter the following in the burst value column of the Distribution List.
 

[elsesend] = reports for burst values not contained in the Distribution List will be sent to the named recipient.

The following are example entries in an e-mail distribution list that illustrate the use of the wildcard and default distribution keywords in burst values.

Burst Value	Address
[wildcard]:*an*	sml@company.com
England	ray@company.com
[elsesend]:	jt@company.com

Using a scenario where the report is burst on the Country field that contains values of Germany, USA, France, Canada, Italy, Chile, England, and Japan, then:

- ❑ Report information for Germany, France, Canada, England, and Japan will be delivered to sml@company.com.
- ❑ Report information for England will be delivered to ray@company.com.

- ❑ Report information for USA, Italy, and Chile will be delivered to jt@company.com.
- ❑ **Formats.** The formats that support bursting are AHTML (except for FML reports), ALPHA, COM, COMMA, COMT, DHTML (except for FML reports), DFIX, DOC, EXL2K, EXL2K FORMULA, EXL2K TEMPLATE, EXL97, GIF, HTML and HTML ODP (except for FML reports), JPEG, PDF, PNG, PPT, PS, SVG, TAB, TABT, and WP. Each burst section of the report will be named *burstvalue\_filename.format* (for example, Northeast\_Sales.pdf).
- ❑ **ACROSS command.** This command is not evaluated as a primary sort field. To burst a report, you must also include a BY field. Bursting occurs on the BY field.
- ❑ **FML reports.** Bursting an FML report is supported only if the request has a BY field.
- ❑ **Coordinated Compound Reports.** ReportCaster can burst and distribute coordinated compound reports developed using the Document Composer in Developer Studio in DHTML, PDF, and PPT formats. Compound reports that are not coordinated cannot be burst.
- ❑ **TABLEF.** No internal sort processing is performed. The specification of a BY field requires that the data already be sorted in the data source.
- ❑ **ON TABLE SUBHEAD/ON TABLE SUBFOOT.** Creates a SUBHEAD for only the first page of the report, and a SUBFOOT for only the last page of the report. When bursting a report, the SUBHEAD and SUBFOOT should occur for each sort break. Therefore, specify the primary sort field in place of TABLE in the ON command. For example:  
  
`ON primarysortfield SUBHEAD`
- ❑ **AnV field types.** Bursting is not supported on a field with the AnV (where *n* is an integer value) field type.

## Specifying Multiple E-mail Addresses

When creating a schedule, distribution list, external distribution file, or dynamic distribution list, you can specify multiple e-mail addresses within a single field, row, or record.

When creating a schedule, distribution list, or dynamic distribution list, you can separate each e-mail address with a comma or a semicolon.

When creating an external distribution file, multiple e-mail addresses within a single record (line) must be separated by a semicolon (separation of e-mails by a comma is not supported because a comma is the delimiter character between the e-mail address and burst value).

The multiple e-mail addresses will appear in the To line of a single e-mail when the scheduled output is distributed.

### Note:

- ❑ To distribute separate e-mails for each address, specify the e-mail addresses on separate lines within the distribution list, external distribution file, or dynamic distribution list.

### Example: Specifying Multiple Burst E-mail Addresses

If you are using the default configuration (Packet Email = YES), one e-mail is distributed for multiple burst values specified for the same e-mail address. The e-mail address values specified on each row are treated as a string that is a key. If there are multiple rows with the same address value (key), one e-mail is distributed with all the burst values. For example, consider the following Distribution List:

#### Burst Value Address

```
A          user1@abcd.com;user2@abcd.com
B          user1@abcd.com
C          user1@abcd.com
```

In this example, user1@abcd.com receives two e-mails when the scheduled output is distributed. In the first e-mail, user1@abcd.com; user2@abcd.com appears in the e-mail To line and one attachment is distributed for burst value A. In the second e-mail, user1@abcd.com appears in the To line and two attachments are distributed, one for burst value B and one for burst value C.

If you are using the configuration that specifies to distribute a single e-mail for each row (Packet Email = NO), then the following behavior occurs for our example. Three separate e-mails are distributed. In the first e-mail, user1@abcd.com; user2@abcd.com appears on the To line and one attachment is distributed for burst value A. The second e-mail is sent to user1@abcd.com with one attachment for burst value B. The third e-mail is sent to user1@abcd.com with one attachment for burst value C.

If a schedule has multiple tasks and Packet Email = BURST, then for each burst value the output of all of the tasks is combined and distributed. In our example, three separate e-mails are distributed. In the first e-mail, user1@abcd.com; user2@abcd.com appears on the To line and all output from the multiple tasks for burst value A are distributed. The second e-mail is sent to user1@abcd.com with all output from all tasks for burst value B. The third e-mail is sent to user1@abcd.com with all output from all tasks for burst value C.

Another consideration is when using the default configuration (Packet Email = YES) and the same burst value is specified multiple times for the same Address (key) value. For example, consider the following Distribution List:

#### Burst Value Address

```
A          user1@abcd.com;user2@abcd.com
B          user1@abcd.com
B          user1@abcd.com
```

In this Distribution List, only two e-mails are distributed for user1@abcd.com. In the first e-mail, user1@abcd.com; user2@abcd.com appears in the To line and the attachment is for burst value A. In the second e-mail, user1@abcd.com appears in the To line and the attachment is for burst value B. The third row in the Distribution List is ignored since it contains the same key and the same burst value, B, as the second row.

As a best practice, be sure to review your distribution information to make sure you have not duplicated the same burst and address value pairs.

### **Example: Specifying Multiple Non-Burst E-mail Addresses**

Consider the following sample Distribution List, which does not contain burst values:

#### **Address**

```
user1@abcd.com;user2@abcd.com
user1@abcd.com
user2@abcd.com
user3@abcd.com
user1@abcd.com;user2@abcd.com;user3@abcd.com
```

In this Distribution List, an e-mail is distributed for each address line regardless of whether Packet Email is set to YES or NO. This is because each address value is unique. For the first e-mail, user1@abcd.com; user2@abcd.com appears in the To line and the attachment is for the full report. The second e-mail is distributed to user1@abcd.com, and so on.

If one of the address lines is repeated in the Distribution List (for example, if user3@abcd.com is added as the sixth line in the example Distribution List), the behavior would work as follows. If Packet Email = YES, only one e-mail is distributed for user3@abcd.com. However, if Packet Email = NO, two separate e-mails are distributed to user3@abcd.com.

# 3 | Creating a ReportCaster Schedule

A ReportCaster schedule allows you to specify when to run a report, what format the output will take, and how it will be distributed. ReportCaster schedules are created with the Scheduling tool.

**Note:** This section describes all of the options available in the ReportCaster Scheduling tool. If your administrator has customized the ReportCaster environment or the Scheduling tool template, your version of the Scheduling tool may not include all of these options.

## Topics:

- ☐ About the Scheduling Tool
- ☐ Creating a Schedule
- ☐ Frequency Options
- ☐ About Tasks
- ☐ Distribution Options
- ☐ Notification Options

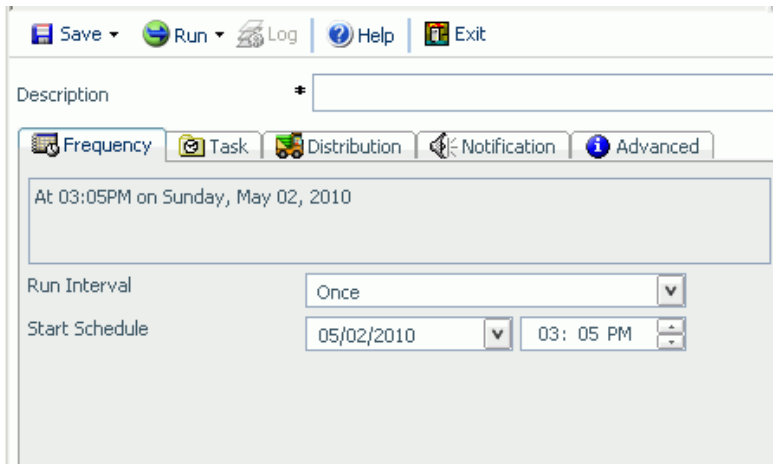
## About the Scheduling Tool

A ReportCaster schedule directs the execution of a report. The ReportCaster Scheduling tool provides the options needed to define the parameters of a schedule, such as, when a report will run, what format the output will take, and where the output will be distributed.

The Scheduling tool is accessed from:

- ❑ The Business Intelligence Dashboard by right-clicking a Standard Report or My Report and selecting *Schedule* from the drop-down list.
- ❑ The ReportCaster Development Interface by selecting the Schedules tab and clicking *New*.

The following image shows the Scheduling tool. It consists of a toolbar with options to Save, Run, or Exit the schedule, a field to provide description of the report that you are scheduling, and a series of tabs from which you access the schedule options.



The Scheduling tool tabs partition the options into the following categories:

- ❑ **Frequency.** Provides the options related to the time interval to run the schedule.
- ❑ **Task.** Allows you to view the task associated with the schedule, and create new tasks for the schedule.
- ❑ **Distribution.** Provides a drop-down list of distribution methods and their corresponding distribution options.
- ❑ **Notification.** Provides the options to set up notification of the schedule status.
- ❑ **Advanced.** Provides options to set the schedule priority level, and selections to enable or delete the schedule.



## Creating a Schedule

### In this section:

Copying Tab Contents

### How to:

Create a Schedule

This section provides the overall procedure to create a new schedule for a report. Some steps in the procedure contain details on the associated options, while other steps direct you to a separate section that contains detailed descriptions of the options and additional information, such as tips in making a selection.

### Procedure: How to Create a Schedule

To create a ReportCaster Schedule:

1. Open the Scheduling tool, as described earlier in this section.
2. In the Description field at the top of the tool, type a name for the schedule. This is a required field.
3. Make the following selections in the Frequency tab.
  - a. From the Run Interval drop-down list, select the time interval that the schedule will use to run the report.  
  
You can set the interval to run the schedule once, or every specified minutes, hours, days, weeks, months, years, or according to a custom interval.
  - b. From the Start Schedule options, select the date (from the drop-down calendar) and time you want the schedule to begin running.  
  
**Note:** To change the time setting, select either the hour or minutes and use the arrows to increase or decrease the value.
  - c. If applicable to the Run Interval selection, from the End Schedule options, select the date and time you want the schedule to stop running.
  - d. If applicable to the Run Interval selection, from the Every option, use the up and down arrows to set the number of times you want the schedule to run for the selected interval, for example, three times each month.
  - e. Select the remaining options associated with the chosen run interval. For a description of the run interval options, see [Frequency Options](#) on page 35.

4. In the Task tab, the Task Type, Task Name, Report, WF Reporting Server, and Execution Id options are populated according to the report you selected to schedule. In this tab, you can add additional tasks, pre-processing and post-processing procedures, and parameters, as described in [About Tasks](#) on page 44.
5. In the Distribution tab, select the method to distribute the report from the Distribute report by drop-down list. The distribution methods are:

- ☐ E-mail
- ☐ FTP
- ☐ SFTP
- ☐ Printer
- ☐ Managed Reporting
- ☐ Report Library

Select the appropriate distribution options. For options related to each distribution method, see [Distribution Options](#) on page 52.

6. In the Notification tab, select whether or not you want to send a notification when the schedule runs and under what conditions to send it. The notification options are:
  - ☐ **Never.**
  - ☐ **Always.** Send a notification each time the schedule runs.
  - ☐ **On Error.** Only send a notification when there is an error running the schedule.

7. In the Advanced tab, select the following options:

- ☐ **Priority Level for the Job.** Use the drop-down list to select the priority for running the job, with 1 being the highest priority and 5 the lowest priority. The default priority level is 3.

The ReportCaster Distribution Server queue sorts scheduled jobs by priority and then by time. If multiple jobs share the same priority and time, ReportCaster arbitrarily schedules the jobs.

- ☐ **Enabled (Scheduled job runs at specified time).** Select this option to activate the schedule to run.
- ☐ **Delete this schedule if it is not scheduled to run again.** This option is useful for test purposes.

8. To save the schedule, click Save in the Scheduling tool toolbar.

## Copying Tab Contents

For your convenience, you can copy the entire contents of one tab, for example, the Distribution tab, to the corresponding tab in another schedule.

To do this, right-click anywhere in the tab that you want to copy and select *Copy tab name*, for example, *Copy Distribution*. Then right-click in the corresponding tab of the schedule you are copying the content to and select *Paste tab name*, for example, *Paste Distribution*. The tab is refreshed and updated with the copied content.

## Frequency Options

### In this section:

- The Once Run Interval
- The Minutes Run Interval
- The Hourly Run Interval
- The Daily Run Interval
- The Weekly Run Interval
- The Monthly Run Interval
- The Yearly Run Interval
- The Custom Run Interval
- Applying a Secondary Run Interval

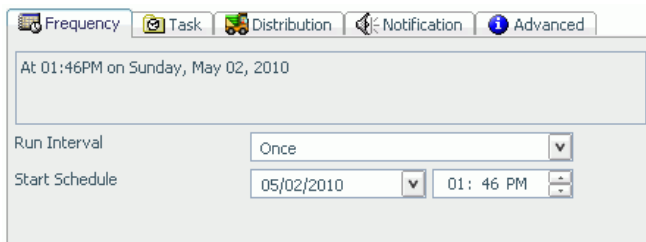
You can schedule a report to run just once or repeatedly, for example, twice a week or the last Thursday of every month. This section describes the options available in the Scheduling Tool Frequency tab when the schedule is set to the following run intervals:

- ☐ Once
- ☐ Minute(s)
- ☐ Hour(s)
- ☐ Day(s)
- ☐ Week(s)
- ☐ Month(s)
- ☐ Year(s)
- ☐ Custom

**Note:** ReportCaster administrators can define dates on which schedules cannot run or be set to run. These are known as schedule blackout dates.

### The Once Run Interval

The Once option in the Run Interval drop-down list sets the job to execute immediately. You can modify the date or time if you do not want the schedule to run immediately. You can specify the date and time you want the schedule to run using the Start Schedule options, as shown in the following image.



The screenshot shows a configuration window with several tabs: Frequency, Task, Distribution, Notification, and Advanced. The 'Frequency' tab is active. Below the tabs, there is a text box containing the text 'At 01:46PM on Sunday, May 02, 2010'. Below this text box, there are two rows of controls. The first row is labeled 'Run Interval' and has a dropdown menu with 'Once' selected. The second row is labeled 'Start Schedule' and has two dropdown menus: the first shows '05/02/2010' and the second shows '01:46 PM'.

To select a date, choose a date from the drop-down date calendar. To select a time, select either the hour or minutes and use the up and down arrows to increase or decrease the value.

### The Minutes Run Interval

The Minute(s) option in the Run Interval drop-down list, sets the schedule to run every  $n$  minutes.

In the Every minute(s) field, type or select the minutes interval (1 to 59), check the days of the week on which you want to run the schedule, and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. For example, the following schedule will run every 30 minutes on Mondays beginning at noon May 16, 2010 and ending 6:00 PM October 30, 2010.

The screenshot shows the 'Frequency' tab of the ReportCaster Schedule configuration window. The summary text reads: 'Every 30 minute(s) from 12:00PM every Mon of every week Starting Sunday, May 16, 2010 and Ending at 06:00PM, Sunday, October 30, 2011'. The 'Run Interval' is set to 'Minute(s)' with a dropdown arrow. The 'Start Schedule' is set to '05/16/2010' at '12: 00 PM'. The 'End Schedule' is set to '10/30/2010' at '06: 00 PM'. At the bottom, the 'Every' field is set to '30' with a spinner, followed by 'minute(s)'. The 'on' checkbox is checked, and the 'Mon' checkbox under the day selection row is also checked, while 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun' are unchecked.

**Tip:** Selecting this option may affect system performance if you choose to run the schedule every 5 minutes or less. We recommend specifying a minimum of 30 minutes. The minute interval option is primarily useful for alert schedules.

## The Hourly Run Interval

The Hour(s) option in the Run Interval drop-down list, sets the schedule to run every  $n$  hours.

In the Every hour(s) field, type or select the hours interval (1 to 24), check the days of the week on which you want to run the schedule, and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. For example, the schedule shown in the following image will run every three hours on Mondays and Fridays beginning at noon May 16, 2010 and ending 6:00 PM October 30, 2010.

The screenshot shows the 'Frequency' tab of the ReportCaster Schedule configuration window. The summary text reads: 'Every 3 hour(s) from 12:00PM every Mon, Fri of every week Starting Sunday, May 16, 2010 and Ending at 06:00PM, Saturday, October 30, 2010'. The 'Run Interval' is set to 'Hour(s)' with a dropdown arrow. The 'Start Schedule' is set to '05/16/2010' at '12: 00 PM'. The 'End Schedule' is set to '10/30/2010' at '06: 00 PM'. At the bottom, the 'Every' field is set to '3' with a spinner, followed by 'hour(s)'. The 'on' checkbox is checked, and the 'Mon' and 'Fri' checkboxes under the day selection row are checked, while 'Tue', 'Wed', 'Thu', 'Sat', and 'Sun' are unchecked.

## The Daily Run Interval

The Day(s) option in the Run Interval drop-down list, sets the schedule to run every  $n$  days. In the Every day(s) field, type or select the days interval to run the schedule and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. For example, the schedule shown in the following image will run every five days beginning at noon May 16, 2010 and ending 6:00 PM October 30, 2010.

The screenshot shows the 'Frequency' tab of a scheduling window. The summary text reads: 'At 12:00PM every 5 day(s)' and 'Starting Sunday, May 16, 2010 and Ending at 12:00PM, Saturday, October 30, 2010'. The 'Run Interval' dropdown is set to 'Day(s)'. The 'Start Schedule' is set to '05/16/2010' at '12: 00 PM'. The 'End Schedule' is set to '10/30/2010' at '6: 00 PM'. The 'Every' field is set to '5' day(s). There is an unchecked checkbox for 'Apply a secondary run interval'.

You can also set a secondary run interval. For information about this setting, see [Applying a Secondary Run Interval](#) on page 43.

## The Weekly Run Interval

The Week(s) option in the Run Interval drop-down list, sets the schedule to run every  $n$  weeks.

In the Every week(s) field, type or select the weekly interval to run the schedule, check the days of the week on which you want to run the schedule, and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. The following schedule will run every two weeks on both Monday and Friday beginning at noon May 16, 2010 and ending 6:00 PM October 30, 2010.

The screenshot shows the 'Frequency' tab of a scheduling window. The summary text reads: 'At 12:00PM every Mon, Fri of every 2 week(s)' and 'Starting Sunday, May 16, 2010 and Ending at 06:00PM, Saturday, October 30, 2010'. The 'Run Interval' dropdown is set to 'Week(s)'. The 'Start Schedule' is set to '05/16/2010' at '12: 00 PM'. The 'End Schedule' is set to '10/30/2010' at '06: 00 PM'. The 'Every' field is set to '2' week(s). Below this, there are checkboxes for the days of the week: Mon (checked), Tue (unchecked), Wed (unchecked), Thu (unchecked), Fri (checked), Sat (unchecked), and Sun (unchecked). There is an unchecked checkbox for 'Apply a secondary run interval'.

**Important:** When selecting the Week(s) interval, set the Start Schedule to the date of the first day (current or future) of the week you want the schedule to run. If you select the current date, then you must make sure that the Start Schedule time is later than the current time when you save the schedule. If the Start Schedule time is less than or equal to the current time, the calculation for the next run time results in the schedule not running on the current date.

You can also set a secondary run interval. For information about this setting, see [Applying a Secondary Run Interval](#) on page 43.

## The Monthly Run Interval

The Month(s) option in the Run Interval drop-down list, sets the schedule to run every  $n$  months. You can then refine the monthly interval with one of the following options. Note that these options are mutually exclusive.

- ☐ Every first, second, third, fourth, or last  $n$  day of the week (where  $n$  is Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, or Sunday) every  $n$  months.
- ☐ Specific days every  $n$  months.

Also select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. The following image shows a schedule set to run on the first Monday of every month beginning at noon May 15, 2010 and ending 6:00 PM October 30, 2011.

Frequency Task Distribution Notification Advanced

At 12:00PM on first Monday of every 1 month(s)  
Starting Saturday, May 15, 2010 and  
Ending at 11:59PM, Sunday, October 30, 2011

Run Interval: Month(s)

Start Schedule: 05/15/2010 12:00 PM

End Schedule: 10/30/2011 6:00 PM

Every: 1 month(s)

☒ The: first Monday

☐ Day(s)

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	Last Day of Month			

☐ Apply a secondary run interval

The following image shows a schedule set to run on the 2nd, 9th, 16th, 23rd, and 30th of every month, regardless of the day of the week those dates fall on.

Frequency Task Distribution Notification Advanced

At 12:00PM on of every 1 month(s)  
Starting Saturday, May 15, 2010 and  
Ending at 06:00PM, Sunday, October 30, 2011

Run Interval: Month(s)

Start Schedule: 05/15/2010 12:00 PM

End Schedule: 10/30/2011 06:00 PM

Every: 1 month(s)

☐ The

☒ Day(s)

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	Last Day of Month			

☐ Apply a secondary run interval

You can also select the *Last Day of the Month* option at the end of the calendar to run the schedule on the last day of the month.

**Note:** When selecting the Month(s) interval, set the Start Schedule to the date of the first day (current or future) of the month you want the schedule to run. If you select the current date, then you must make sure that the Start Schedule time is later than the current time when you save the schedule. If the Start Schedule time is less than or equal to the current time, the calculation for the next run time results in the schedule not running on the current date.

You can also set a secondary run interval. For information about this setting, see [Applying a Secondary Run Interval](#) on page 43.



## The Yearly Run Interval

The Year(s) option in the Run Interval drop-down list, sets the schedule to run every  $n$  years during a specific time period. The following image shows a schedule set to run every two years beginning at noon May 15, 2010 and ending 6:00 PM October 30, 2022.

The screenshot shows the 'Frequency' tab of the ReportCaster Schedule configuration window. The 'TimeYearLabel' section displays 'Starting Saturday, May 15, 2010 and Ending at 06:00PM, Sunday, October 30, 2022'. The 'Run Interval' is set to 'Year(s)'. The 'Start Schedule' is '05/15/2010' at '12:00 PM'. The 'End Schedule' is '10/30/2022' at '06:00 PM'. The 'Every' field is set to '2' year(s). The checkbox 'Apply a secondary run interval' is unchecked.

You can also set a secondary run interval. For information about this setting, see [Applying a Secondary Run Interval](#) on page 43.

## The Custom Run Interval

The Custom option in the Run interval drop-down list allows you to select a set of dates that do not follow a specific pattern. For example, if you want to run a quarterly report on a different day of each quarter, then you can use the Custom run interval to set the schedule to run on dates such as, March 3 (Wednesday), June 4 (Friday), September 7 (Tuesday), and December 2 (Thursday).

The following image shows the Custom Run Interval options, which includes Start Schedule (initially set to the current date and time) and the End Schedule date and time options, the Custom calendar, and the Custom Date List node that appears in the right pane.

Frequency Task Distribution Notification Advanced

Starting Saturday, May 15, 2010 and  
Ending at 11:59PM, Thursday, December 31, 2009

Run Interval: Custom

Start Schedule: 05/15/2010 12:00 PM

End Schedule: 12/31/2009 11:59 PM

Custom Date List \*

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

☐ Apply a secondary run interval

Define the time period in which the schedule will run by selecting the Start Schedule date and time, and the End Schedule date and time. Select the specific days on which to run the schedule by clicking on the day in the calendar. (Use the forward and back buttons at the top of the calendar to move through the months and years.) As you select a date, it appears in the Custom Date List. (If it does not already exist, a folder for the year and month of the date you select is automatically created under the Custom Date List node.) The following image shows an example of a selection of Custom dates in the calendar and the Custom Date List.

Run Interval: Custom

Start Schedule: 02/18/2010 10:44 AM

End Schedule: 12/31/2009 11:59 PM

Custom Date List \*

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

☐ Apply a secondary run interval

Custom Date List

- 2010
  - March
    - 4 (Thu)
    - 12 (Fri)
  - June
    - 9 (Wed)
    - 21 (Mon)

To remove a date from the list, click that date in the calendar. The date is no longer highlighted in the calendar and will not appear in the Custom Date List.

You can also set a secondary run interval. For information about this setting, see [Applying a Secondary Run Interval](#) on page 43.

## Applying a Secondary Run Interval

The Apply a secondary run interval option allows you to create a secondary run interval within the day the schedule runs. You can apply the secondary run interval every  $n$  minutes or hours for a specified number of hours and minutes or until a specified time. This option is available for schedules that run every day(s), week(s), month(s), or year(s).

The secondary run interval will not be validated when the schedule is created. Instead, validation is performed every time the next run time of the schedule is calculated when running within the secondary run interval. The secondary run interval cannot exceed the next run time for the primary run interval. For example, a daily schedule cannot have a secondary run interval greater than Every 1 day(s). If a secondary run interval is scheduled to run after the next primary run interval of the schedule, the secondary run interval is stopped and an error message appears. This error message is also written to the log file.

When you select Apply a secondary run interval, the options related to this setting appear in the Frequency section. The following image shows an example of set secondary run interval options.

The screenshot shows a configuration window for a secondary run interval. At the top, the checkbox "Apply a secondary run interval" is checked. Below it, there are three radio button options: "Every" (selected), "Until time", and "Last for". The "Every" option is active, showing a value of "10" in a numeric field and "minute(s)" in a dropdown menu. The "Until time" option is inactive, showing a time of "4:00 PM". The "Last for" option is also inactive, showing a duration of "1 hour(s) 0 minute(s)".

The Apply secondary run interval options are:

- ☐ **Every  $n$  [minutes|hours].** Applies the secondary run interval every  $n$  minutes or hours (in this example every 10 minutes) within the day the schedule runs.
- ☐ **Until Time.** The time up until which the secondary run interval will be applied. In this example, the schedule will be rerun every 10 minutes until 4:00 P.M.
- ☐ **Lasts for  $n$  hour(s)  $n$  minute(s).** The duration, specified in hours and minutes, during which the secondary run interval will be applied. This option and the Until time option are mutually exclusive, so, in this example, this option is inactive.

**Note:** When a schedule is updated, the next run time is recalculated based only on the primary run interval. This means that if a schedule that includes a secondary run interval is updated before the secondary schedule is able to run, then the secondary run interval is ignored and the NEXTRUNTIME is calculated based on the primary interval.

For example, a schedule exists that is set to run daily at 2:00 PM with a secondary run interval of every 10 minutes from 2:00 PM to 3:00 PM. When the schedule runs at 2:00 PM, the NEXTRUNTIME is reset to run at 2:10, which honors the secondary run interval. If this schedule is updated at 2:03 PM, the NEXTRUNTIME is recalculated to be 2:00 PM the next day, rather than 2:10 PM on the current day.

## About Tasks

### **In this section:**

WF Server Procedure Task Options

Standard Reports and My Reports Task Options

URL Task Options

File Task Options

FTP Task Options

### **How to:**

Schedule Pre-Processing and Post-Processing Procedures

### **Reference:**

Selecting a Report Format

When creating a schedule, you must create a Task to be distributed by ReportCaster. If you are scheduling a report from Dashboard, the task that appears in the schedule is that report. You then have the option to add more tasks, or pre-processing and post-processing procedures to the schedule. The task types are:

- ❑ **WF Server Procedure.** Schedules the distribution of a WebFOCUS report that resides on a specified WebFOCUS Reporting Server.
- ❑ **Standard Reports.** Schedules the distribution of a WebFOCUS report that resides in a Managed Reporting Standard Reports folder.
- ❑ **My Reports.** Schedules the distribution of a WebFOCUS report that resides in a Managed Reporting My Reports folder.
- ❑ **URL.** Schedules the contents of a URL to specified recipients. To drill-down on the information within the contents of the URL, the links must have a fully qualified path, or a defined root URI in the page. When performing a drill down, the most current information is retrieved since all drill downs are executed in real time.

- ❑ **File.** Schedules the distribution of a file to which the ReportCaster Distribution Server has read access. When scheduling a file, you must type the fully qualified path and file name (for example, *d:\reportcaster77\filename.doc*) of the file. For example, if you want to distribute a Word document, you can send the static file to ReportCaster recipients.
- ❑ **FTP.** Schedules the retrieval of a file from any FTP server.

When you access the Scheduling tool by right-clicking a Standard Report or My Report from the Dashboard, the Task tab options are predefined with the selected report. You can complete the available task options, such as defining parameter values, and selecting whether or not to burst the report.

The following image shows an example of a predefined Task tab when the Scheduling tool is accessed from Dashboard.

Name	Type	Scheduling Object	Format
Task 1	Standard Reports	app/cc	HTML

Task Type: Standard Reports

Task Name: \* Task 1

Report: \* Default Domain/cc/cc

WF Reporting Server: \* EDASERVE

Execution Id: \* | Set Password

Alert: | 0 |

Parameter Name	Parameter Value

Report Format: HTML - Web Page (\*.htm, \*.html)

Burst Report: ☐

Save Report As: \* app\_cc.htm

Advanced Procedure

To create a Task:

1. From the Task Type drop-down list, select the type of task you want to create.
2. In the Task Name field, type a descriptive name for the task.
3. Depending on the type of task you are creating, provide the appropriate parameters. For example, provide the FTP server name, FTP user, the file name, the transfer file type, and the name to save the file as on the FTP site.

4. If applicable, select report parameters, the report format, and whether or not the report is burst.
5. If applicable, add pre-processing and post-processing procedures to the scheduled job.
6. Click Save.

## WF Server Procedure Task Options

The options available when you select the WF Server Procedure Task Type are:

- ☐ **Task Name.** Type a name that describes the task you are creating, for example, Sales Report.
- ☐ **WF Reporting Server.** From the drop-down list, select the server from which you want to select a report.
- ☐ **Execution Id.** From the Execution Id drop-down list, specify an ID that is authorized to execute procedures on the server specified in the WF Reporting Server field.

If the Execution Id field is not grayed out, and you will be using an ID that you previously used for a Task on the selected server, you can select the ID (for example, radmin) from the drop-down list.

If the Execution Id field is not grayed out and you will be using a new ID, you can type the new ID and click *Set Password*. The Password Editor opens. Type a password for the Id in the *Password* field and retype it in the *Confirm password* field, then click *OK*.

To change the password for an existing Execution Id, click *Change Password*. The Password Editor opens, where you can type a new password and click *OK*.

**Note:** The Execution Id is added to the ReportCaster Repository and is viewable in theReportCaster Console.

- ☐ **Procedure Name.** From the Procedure Name drop-down menu, navigate through the WF Server Procedure tree and select the WebFOCUSserver procedure that you want to schedule.
- ☐ **Parameter Name and Value.** Optionally, if your report has parameters or you want to schedule pre-processing or post-processing procedures, click *Advanced*. For more information, see [How to Schedule Pre-Processing and Post-Processing Procedures](#) on page 50.
- ☐ **Report Format.** From the Report Format drop-down list, select the report format. HTML is the default value. For guidelines on selecting a report format, see [Selecting a Report Format](#) on page 51.

- ❑ **Burst Report.** If you want to burst the report, select the *Burst Report* check box. The burst feature enables you to break a report into sections and distribute the sections separately. Burst values may be specified in a Distribution List, distribution file, or by creating a dynamic distribution list. For more information about bursting, see [Bursting a Report](#) on page 24.
- ❑ **Save Report As.** Type a file name to identify the report when it is distributed.

## Standard Reports and My Reports Task Options

The options available when you select either Standard Reports or My Reports Task Type are:

- ❑ **Task Name.** Type a name that describes the task you are creating, for example, Sales Report.
- ❑ **Report.** From the Report drop-down menu, navigate to the report you want to schedule.
- ❑ **WF Reporting Server.** From the drop down list, select the server from which you want to select a report.
- ❑ **Execution Id.** From the ID drop-down list, specify an ID that is authorized to execute procedures on the server specified in the WF Reporting Server field.

If the Execution Id field is not grayed out, and you will be using an ID that you previously used for a Task on the selected server, you can select the ID (for example, radmin) from the drop-down list.

If the Execution Id field is not grayed out and you will be using a new ID, you can type the new ID and click *Set Password*. The Password Editor opens. Type a password for the ID in the *Password* field and retype it in the *Confirm password* field, then click *OK*.

To change the password for an existing ID, click *Change Password*. The Password Editor opens, where you can type a new password and click *OK*.

**Note:** The Execution ID is added to the ReportCaster Repository and is viewable in the ReportCaster Console.

- ❑ **Alert.** (Standard Reports only) Click *Alert* to specify alert schedule options. If you are scheduling an alert, the Alert button will be activated.

The Alert Schedule dialog box opens. Select one of the following options:

- ❑ **Automatically Reset.** After the alert is triggered, reactivate the alert when the condition is no longer true. The system will keep checking the condition after the alert has been triggered. As soon as the condition is no longer true, it will reactivate the alert.
- ❑ **Continue After Alert.** After the alert has been triggered, reactivate the alert immediately.

- ☐ **Deactivate Schedule After Alert.** Deactivate the schedule after the alert is triggered. This is the default value.
- ☐ **Delay.** Restart the alert after a specified period. You can specify to restart the alert after a maximum of 99 hour(s), day(s), week(s), month(s), or year(s).  
**Caution:** An alert schedule distributes e-mails to your mail server more frequently than expected when the schedule interval is less than the time it takes to run the procedure and the Delay option is selected. Be sure to set the schedule interval to a time period greater than the time it takes to run the scheduled procedure.
- ☐ **Parameter Name and Value.** Optionally, if your report has parameters or you want to schedule pre-processing or post-processing procedures, click *Advanced*. For more information, see [How to Schedule Pre-Processing and Post-Processing Procedures](#) on page 50.
- ☐ **Report Format.** From the Report Format drop-down list, select the report format. HTML is the default value. For guidelines on selecting a report format, see [Selecting a Report Format](#) on page 51.
- ☐ **Burst Report.** If you want to burst the report, select the *Burst Report* check box. The burst feature enables you to break a report into sections and distribute the sections separately. Burst values may be specified in a Distribution List, distribution file, or by creating a dynamic distribution list. For more information about bursting, see [Bursting a Report](#) on page 24.
- ☐ **Save Report As.** Type a file name to identify the report when it is distributed.

## URL Task Options

The options available when you select the URL Task Type are:

- ☐ **Task Name.** Type a name that describes the task you are creating, for example, Sales Report.
- ☐ **URL Address.** In the URL Address field, type the fully qualified path of the URL address you want to schedule (for example, <http://www.informationbuilders.com>).

Note that you can also specify parameter names and associated values using the following format:

[www.address.com?&parameter1\\_name=parameter1\\_value&parameter2\\_name=parameter2\\_value](http://www.address.com?&parameter1_name=parameter1_value&parameter2_name=parameter2_value)

The maximum length of this field is 1200 characters.

- ☐ **Execution Id.** From the Execution ID drop-down list, select an execution ID that is authorized to execute a URL on a secured Web server.

To change the password for an existing ID, click *Change Password*. The Password Editor opens, where you can type a new password and click *OK*.



**Note:** The Execution Id is added to the ReportCaster Repository and is viewable in the ReportCaster Console.

- ☐ **Parameter Name and Value.** Optionally, if your URL has parameters, you can provide them in these fields.
- ☐ **Save Report As.** Type a file name to identify the task when it is distributed.

## File Task Options

The options available when you select the File Task Type are:

- ☐ **Task Name.** Type a name that describes the task you are creating, for example, Sales Report.
- ☐ **File.** Type the name of the file you want to schedule. You must type the fully qualified path (for example, *d:\reportcaster77\filename.doc*) of the file. In addition, the file must be accessible to the ReportCaster Distribution Server.
- ☐ **Save Report As.** Type a name for the content to be distributed. Be sure to include the extension. For example, you might save this report as *hrletter.doc*, therefore, this file will be distributed as *hrletter.doc*.
- ☐ **Delete the file after it is distributed.** Select this option to delete the file once it has been distributed.

**Note:** If a schedule has multiple tasks and one of the tasks fails, then the file will not be deleted. This is true even when the file is distributed successfully.

## FTP Task Options

The options available when you select the FTP or SFTP Task Type are:

- ☐ **Task Name.** Type a name that describes the task you are creating, for example, Sales Report.
- ☐ **FTP Server Name.** Specify the name of the FTP server from which you will retrieve the file.
- ☐ **FTP User.** Specify the user ID and password you will use to gain access to the FTP Server.
- ☐ **File Name.** Specify the name of the file you want to schedule. You can browse to the file or type the fully qualified path to the file on the FTP server. An example of a fully qualified path on Windows is *C:\Reports\Inventory\NEstores.xls*, and on UNIX is */Docs/Specs/proto5.txt*.
- ☐ **File Transfer Type.** From the File Transfer Type drop-down list, select Binary (for non-text files) or ASCII (for text files). Binary is the default value.

- ❑ **Save Report As.** Type a name for the content to be distributed. Be sure to include the extension. For example, you might save this report as hrletter.doc, therefore, this file will be distributed as hrletter.doc.
- ❑ **Delete File.** Select this option if you want the schedule to run once and then be deleted on the FTP server. Note that the FTP user ID must be authorized to delete the file on the FTP server.

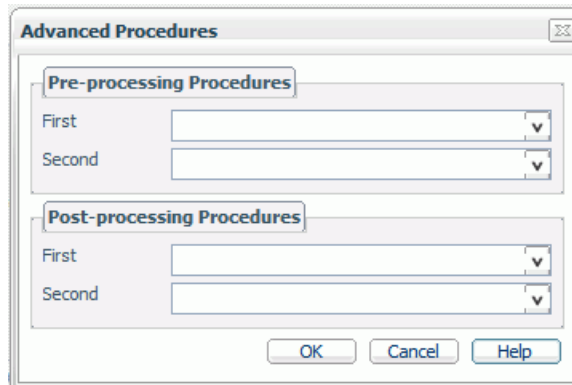
**Note:** If a schedule has multiple tasks and one of the tasks fails, then the file will not be deleted. This is true even when the file is distributed successfully.

### **Procedure: How to Schedule Pre-Processing and Post-Processing Procedures**

If you are scheduling a report Task that is a WF Server Procedure, Standard Report, or My Report, you can schedule a maximum of two pre-processing and post-processing procedures. The pre-processing and post-processing procedures that you schedule must reside on the WebFOCUS Reporting Server.

To schedule pre-processing and post-processing procedures for a Task:

1. Click *Advanced Procedure*. The Advanced Procedures window opens, as shown in the following image.



2. Select the following information:

- a. **Pre-processing Procedures:**

**First.** From the drop-down list, select the first pre-processing procedure. ReportCaster will run this procedure immediately preceding the scheduled Task.

**Second.** From the drop-down list, select the second pre-processing procedure. ReportCaster will run this procedure immediately after the first pre-processing procedure, but before the scheduled Task.

**b. Post-processing Procedures:**

**First.** From the drop-down list, select the first post-processing procedure. ReportCaster will run this procedure immediately following the scheduled Task.

**Second.** From the drop-down list, select the second post-processing procedure. ReportCaster will run this procedure immediately after the first post-processing procedure.

3. Click OK to return to the Task tab.

**Reference: Selecting a Report Format**

Use the following guidelines when selecting a format:

- ❑ The report format specified in the Report Format field overrides the format statement in the procedure, except for specialized formats (EXL2K FORMULA, EXL2K PIVOT, EXL2K TEMPLATE, PPT TEMPLATE, DFIX). When a report uses a specialized format, the format selection in the report schedule must match that specified in the report.
- ❑ There are limitations on what formats are valid for certain options. For instance, not all formats are supported for bursting or printing.
  - ❑ The formats that support bursting are AHTML (except for FML reports), ALPHA, COM, COMMA, COMT, DHTML (except for FML reports), DFIX, DOC, EXL07, EXL2K, EXL2K FORMULA, EXL2K TEMPLATE, EXL97, Flash/Flex, GIF, HTML and HTML ODP (except for FML reports), JPEG, PDF, PNG, PPT, PS, SVG, TAB, TABT, and WP.
  - ❑ The formats that support printing are DOC, PDF (when ReportCaster is configured to allow PDF to be printed and the printer has the appropriate driver), PS, and WP.
  - ❑ When scheduling a procedure that was created using Graph Assistant or Advanced Graph Assistant and:
    - ❑ an image format (JPEG, GIF, PNG, SVG) was chosen as the output format, then you must select an image format as the schedule output.
    - ❑ the PDF/SVG or PDF/GIF format was chosen as the output format, then you must select PDF as the schedule output.
  - ❑ The HTML ODP format can only be distributed to the Report Library.
- ❑ If the report is a Coordinated Compound PDF Report, then you can select any supported compound format (AHTML, DHTML, EXL2K, Flash/Flex, PDF, or PPT), but keep in mind that not all of these formats support bursting.

- ❑ When scheduling a chart or graph report, the available formats will depend on which tool was used to create the report. When the report was created using:
  - ❑ Graph Assistant or Advanced Graph Assistant, then the available formats are GIF, JPEG, PDF, PNG, and SVG.
  - ❑ Report Assistant or InfoAssist, then the available formats are all formats except GIF, JPEG, PDF, PNG, and SVG.
  - ❑ Power Painter, then the available formats are AHTML, DHTML, EXL2K, EXL2K PIVOT, Flash, PDF, and PPT.
  - ❑ If the FEX was created using an editor, then all formats that the ReportCaster administrator set to appear in the formats option list will be available.

## Distribution Options

### **In this section:**

Distributing Scheduled Output Using E-mail

Distributing Scheduled Output Using FTP or SFTP

The Distribution tab in the Scheduling Tool provides the options available for distributing the scheduled report. You can distribute a report using one of the following methods:

- ❑ Email
- ❑ FTP
- ❑ SFTP
- ❑ Printer
- ❑ Managed Reporting
- ❑ Report Library

This section describes the options available for each distribution method.

## Distributing Scheduled Output Using E-mail

**How to:**

Distribute Scheduled Output Using E-mail

**Reference:**

E-mail Distribution Examples

When you distribute a report through e-mail, you can include the report in the body of the e-mail (known as an inline e-mail message) or send it as an attachment. Distributing a report as an inline e-mail message is particularly useful when the report is distributed to mobile devices, fax machines, or through e-mail systems that do not support attachments. You can also distribute a report to a Fax machine, as explained later in this section.

**Note:**

- ❑ The availability of the inline message option when you create a schedule depends on the Inline Report Distribution setting in the ReportCaster Server Configuration tool.
- ❑ The display of a report that is distributed as an inline e-mail message can be affected by settings in the e-mail client.

The following image shows the e-mail distribution options in the Distribution tab of the Scheduling Tool.

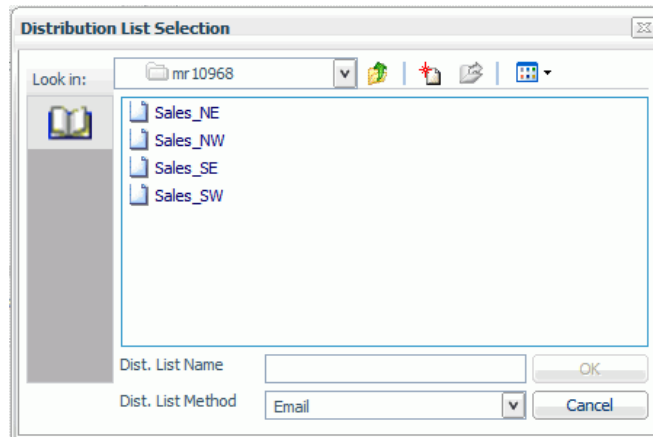
The screenshot shows the 'Distribution' tab of the Scheduling Tool. The interface includes a menu bar with 'Save', 'Run', 'Log', 'Help', and 'Exit'. Below the menu bar is a 'Description' field containing 'Schedule for dash\_report 04262010 0932AM'. A tabbed interface shows 'Frequency', 'Task', 'Distribution' (selected), 'Notification', and 'Advanced'. The 'Distribution' tab contains the following fields and options:

- 'Distribute report by:' dropdown menu set to 'Email'.
- 'Mail Server Name' field set to 'ibsmtp.ibi.com'.
- 'Distribution List' dropdown menu with a '+' icon and a list box containing one empty entry.
- 'From' field.
- 'Reply Address' field with a '+' icon.
- 'Subject' field set to 'Schedule for dash\_report 04262010 0932AM'.
- 'Send Report as an Attachment' checkbox, which is checked.
- 'Message' text area containing 'Please see attachment'.
- 'Add Reports to Zip File' checkbox, which is unchecked.
- 'Zip File Name' field.

### **Procedure: How to Distribute Scheduled Output Using E-mail**

1. From the Distribute report by drop-down list, select *Email*.
2. In the Mail Server Name field, the SMTP e-mail server specified in the ReportCaster Server Configuration tool appears. You can accept the default e-mail server, or type another name for the e-mail server that will distribute the scheduled output. ReportCaster requires the SMTP server domain name, not its IP address.
3. From the drop-down list that appears under Mail Server Name, select the method in which you will provide the e-mail addresses that will receive the distribution. The options are:

- ❑ **Distribution List.** The report will be sent to all e-mail addresses in the selected Distribution List. To select a Distribution List, click the icon next to the Distribution List field. The Distribution List Selection dialog box opens. In the display pane, double-click the folder with your ID. The display pane lists the e-mail Distribution Lists that are public and that you own. The following image is an example of the Distribution List Selection dialog box displaying a group of Distribution List belonging to specific user ID.



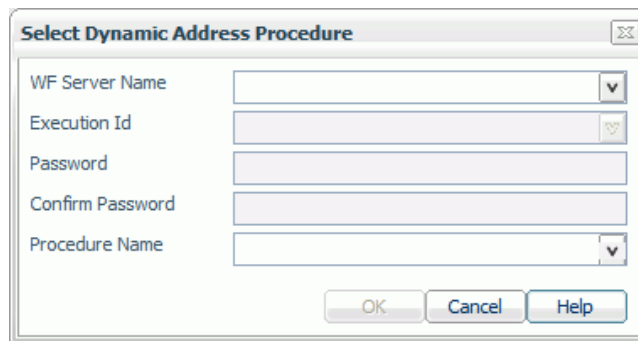
**Note:** While in the Distribution List Selection dialog box, you can view additional information about the Distribution Lists in the display pane by selecting *Details* from the far-right icon, and edit an existing Distribution List (select a list and click the *Open* icon). You can also create a Distribution List by clicking the *New* icon. For information on creating Distribution Lists, see [Creating and Maintaining Distribution Lists](#) on page 17.

Click the Distribution List you want to use. It will appear in the Dist. List Name field. Then click OK. The Distribution List name appears in the Schedule Distribution List field.

- ❑ **Distribution File.** Type the full path and file name of the external distribution file you want to use for this schedule. The path and file must be accessible to the ReportCaster Distribution Server.
- ❑ **Email Address(es).** The report will be sent to a single e-mail address or multiple e-mail addresses. Type the e-mail address in the accompanying text box. ReportCaster cannot validate the e-mail address. An incorrect or unresolved address may not be noted in the log file. This is dependent upon the ability of the SMTP mail server to validate the e-mail address. The SMTP mail server returns undeliverable e-mail messages to the reply address you specify for the schedule.

**Tip:**

- ❑ You can specify multiple e-mail addresses in the Email Address(es) field. Separate each e-mail address with a comma or a semicolon. The e-mail addresses will appear in the To line of a single e-mail when the scheduled output is distributed. Each individual e-mail address can be a maximum of 130 characters according to the SMTP specification. The total maximum length of this field is 800 characters. For more information, see [Specifying Multiple E-mail Addresses](#) on page 28.
- ❑ Additionally, you can use group mail lists (defined on your mail server) with the Email Address(es) option. Group mail lists enable you to distribute a report or notification to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository. The format of the group mail list is dependent upon the mail server being used. For example, if you are using a Microsoft Exchange Server and your group mail list is defined as #group1, you would enter `group1@listdomain` in the Email Address(es) field. If the group mail list contains a space within its name, it must be enclosed within quotation marks. For more information, see your mail server administrator.
- ❑ **Dynamic Address.** A dynamic address enables you to return in memory either a list of burst values and destinations, or only a list of destinations from a data source (for example, a flat file, SQL database, FOCUS data source, or LDAP). To select a Dynamic Address, click the icon next to the Dynamic Address field. The Select Dynamic Address Procedure dialog box opens, as shown in the following image.

The image shows a dialog box titled "Select Dynamic Address Procedure". It contains five input fields: "WF Server Name" (a dropdown menu), "Execution Id" (a text field with a search icon), "Password" (a text field), "Confirm Password" (a text field), and "Procedure Name" (a dropdown menu). At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Help".

In this dialog box, select or type a value for the WF Server Name, Execution Id, password to access the server, and the procedure name that creates the Dynamic Address.

Then click **OK**. The designated dynamic address procedure appears in the Schedule, Dynamic Address field.



4. In the From field, type any value (for example, the name of the person creating the schedule). This field is not required by ReportCaster, but may be required by your e-mail system.
5. In the Reply Address, type a valid e-mail address. If recipients reply to the e-mail, their messages are sent to this address. If your e-mail system is unable to deliver the content, the undeliverable output message is also returned to this address. This field is required by ReportCaster.
6. In the Subject field, type the text you want to appear in the e-mail subject line. This information is not required by ReportCaster, but may be needed by your e-mail system. The value you entered in the schedule Description field is used as the default Subject value.

When creating a schedule, you can place multiple parameters and burst values from the scheduled procedure in an e-mail subject line. This allows the subject to be dynamically created in order to personalize e-mails to recipients. Parameters referenced in the subject line must be stored with the schedule information in the ReportCaster tables.

Parameters must be specified in the format '&parmname' (where *parmname* is the name of the parameter). Burst values must be specified using the syntax '%BURST'.

**Note:**

- ☐ The parameter name cannot be the name of an existing report procedure. You can specify an unlimited number of parameters.
- ☐ If you have multiple burst values in a Distribution List, only the first value sent to the ReportCaster Distribution Server is included in the subject.

For an example of specifying parameters and burst values in an e-mail subject line, see [E-mail Distribution Examples](#) on page 57.

7. Specify whether or not you want the report to be sent as an e-mail attachment or within the body of the e-mail (inline) by selecting or clearing the Send Report as an Attachment option. (The availability of the inline option depends on your ReportCaster configuration.)

If you select the Send Report as an Attachment option, you can also:

- a. Type a message to appear in the e-mail body.
- b. Zip the attachment by selecting the Add the Reports to Zip File option. Provide a name for the file in the Zip File Name field.

**Reference: E-mail Distribution Examples**

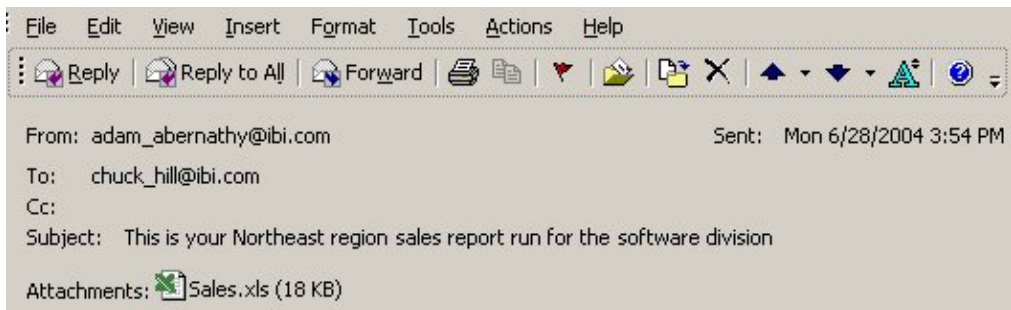
This section provides an example of using burst values and multiple parameters when sending the report in an e-mail, and distributing a report to a Fax machine using e-mail.

**Example: Specifying Parameters and Burst Values in an E-mail Subject Field**

The following schedule specifies burst values and multiple parameters in the e-mail subject line.

Email Address(es)	* chuck_hill@ibi.com
From	
Reply Address	* adam_abernathy@ibi.com
Subject	This is our '%BURST' region '&reporttype' report run for the '&division' division

The following image shows an example of a resulting e-mail subject line.

**Example: Distributing a Report to a Fax Machine Using E-mail**

To distribute an inline e-mail message to a fax machine, you must register your e-mail address with a third-party e-mail distribution provider. The features offered by providers, (such as supported area codes and file formats), in addition to requirements on the structure of e-mail parameter values, may vary. It is important that you select a provider whose features are compatible with ReportCaster.

**Note:** You cannot distribute an e-mail attachment to a Fax machine.

The following example shows how to distribute a report directly to a fax machine. The e-mail address, john\_doe@xyz.com, was registered with the e-mail distribution provider called *emfax.com*. During the processing of the request, ReportCaster generates the scheduled report output and then distributes it using the e-mail address of *emfax.com*. The reply address specified in ReportCaster is the registered e-mail address that is validated by *emfax.com*. If the e-mail address is valid, *emfax.com* distributes the report to the fax number 12129999999. The validation of the registered e-mail address is performed by *emfax.com*, not by ReportCaster.

**Note:** The syntax used in this illustration is specific to this example. The required syntax for your provider may be different.

The following image shows the Distribution tab of the Scheduling Tool, which contains the name of the report to be distributed, fields, drop-down lists, and option buttons that enable you to specify the destination(s) for the scheduled report, and an e-mail address to which report recipients can reply.

1. From the Distribute report by drop-down list, select *Email*.
2. From the mail drop-down list, select *Email Address(es)*.

In the accompanying text box, type the e-mail address to be used by the e-mail provider according to their requirements. In this example, it is *phone-number@emfax.com* or *12129999999@emfax.com* (where *emfax.com* is the name of your e-mail provider).

**Note:** You can also select a Distribution List. However, be sure to use the syntax required by your provider.

3. In the From field, type any value (for example, the name of the person creating the schedule). This field is not required by ReportCaster, but may be required by your e-mail system or by the e-mail provider.
4. In the Reply Address field, type your registered e-mail address. If your e-mail system is unable to deliver the content, the undeliverable output message is returned to this address. This field is required by ReportCaster.
5. In the Subject field, type the text you want to appear in the message subject line. This information is not required by ReportCaster, but may be needed by your e-mail system or e-mail provider.
6. Continue selecting the remaining schedule options, then click *Save* to save the schedule.

## Distributing Scheduled Output Using FTP or SFTP

### How to:

Distribute Scheduled Output to FTP or SFTP

This section provides information about distributing scheduled output using FileTransfer Protocol (FTP) or SSH File Transfer Protocol (SFTP). The benefit of using SFTP over FTP is that it encrypts the data and user credentials distributed over the network. Host key fingerprints are not used in this SFTP implementation.

### Note:

- ❑ Both FTP and SFTP distribution use an FTP distribution list.
- ❑ The SFTP distribution method does not support Prepared Reports.

The following image shows the FTP distribution options in the Distribution tab of the Scheduling Tool.

The screenshot shows the 'Distribution' tab of the Scheduling Tool. The interface includes a menu bar with 'Save', 'Run', 'Log', 'Help', and 'Close'. Below the menu bar is a 'Description' field. The 'Distribution' tab is selected, showing options for 'Distribute report by:' (set to 'FTP'), 'FTP Server Name' (set to 'RCWIN2K3'), 'Directory', 'FTP User' (set to 'webqa'), 'FTP Password' (masked with dots), 'Distribution List' (a dropdown menu), 'Index File Name', 'Zip File Type' (set to 'None'), and 'Zip File Name'.

### Procedure: How to Distribute Scheduled Output to FTP or SFTP

1. From the Distribute report by drop-down list, select *FTP* or *SFTP*. In this procedure, we refer to either of these selections as (S)FTP.
2. In the (S)FTP Server Name field, the (S)FTP server specified in the ReportCaster Server Configuration tool appears. You can accept the default (S)FTP server, or type another name for the (S)FTP server that will distribute the scheduled output.

In this field, you can also designate a port for the (S)FTP server other than the default assignment using the syntax:

*hostname:port*

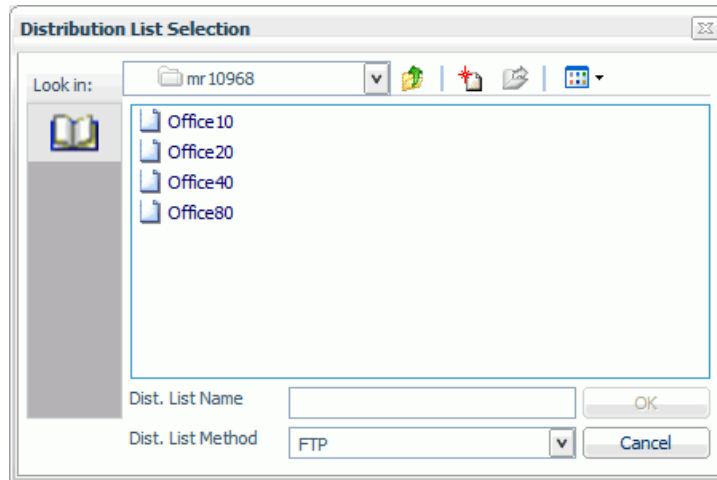
**3.** In the Directory field, type the destination to which the output will be sent.

- ☐ You cannot create new Prepared Reports. However, all previously created Prepared Reports will be supported.
- ☐ For WF Server Procedures and Managed Reporting reports other than Prepared Reports, specify the (S)FTP logon directory and path of the user ID to whose account on the (S)FTP server the report will be sent.
- ☐ If left blank, this specifies that WF Server Procedures distributed using (S)FTP will be sent to the home directory of the (S)FTP user.
- ☐ If the (S)FTP server resides on an OpenVMS file system, use UNIX-style directory specifications.
- ☐ If the (S)FTP server resides on a z/OS UNIX system in data set mode, you must type a forward slash (/) as the first character for the directory.
- ☐ If the (S)FTP server resides on a VM system, you must type ./ for the directory. This will send reports to the default VM minidisk of the (S)FTP user.

**Note:** When scheduling a Managed Reporting report from Domain Builder for (S)FTP distribution, the maximum number of characters that can be specified for the directory is 64, including the full path name.

- 4.** In the (S)FTP User and (S)FTP Password fields, type the user ID and password for the (S)FTP server account to which the scheduled output will be sent. You can specify a default (S)FTP user ID and password within the ReportCaster Server Configuration tool.
- 5.** From the drop-down list that appears under (S)FTP Password, select *Distribution List*, *Distribution File*, *File Name*, or *Dynamic Address*.

- ❑ **Distribution List.** The report will be sent to all (S)FTP addresses in the selected Distribution List. To select a Distribution List, click the icon next to the Distribution List field. The Distribution List Selection dialog box opens. In the display pane, double-click the folder with your ID. The display pane lists the (S)FTP Distribution Lists that are public and that you own. The following image is an example of the Distribution List Selection dialog box displaying a group of Distribution List belonging to specific user ID.

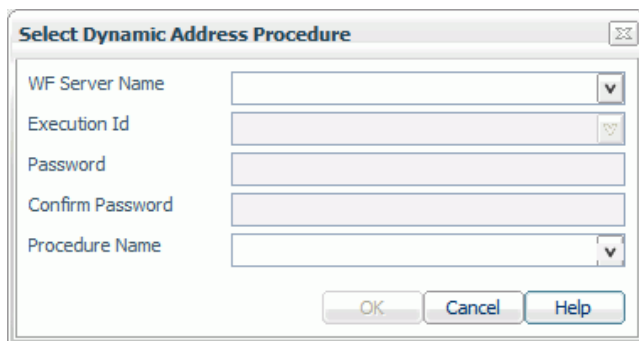


**Note:** While in the Distribution List Selection dialog box, you can view additional information about the Distribution Lists in the display pane by selecting *Details* from the far-right icon, and edit an existing Distribution List (select a list and click the *Open* icon). You can also create a Distribution List by clicking the *New* icon. For information on creating Distribution Lists, see [Creating and Maintaining Distribution Lists](#) on page 17.

Click the Distribution List you want to use. It will appear in the Dist. List Name field. Then click *OK*. The Distribution List name appears in the Schedule Distribution List field.

- ❑ **Distribution File.** Type the full path and file name of the external distribution file you want to use for this schedule. The path and file must be accessible to the ReportCaster Distribution Server.
- ❑ **File Name.** Type the name of the FTP file. ReportCaster cannot validate the FTP file. The burst option is not supported with this distribution option. The maximum length of this field is 800 characters.

- ❑ **Dynamic Address.** A dynamic address enables you to return in memory either a list of burst values and destinations, or only a list of destinations from a data source (for example, a flat file, SQL database, FOCUS data source, or LDAP). To select a Dynamic Address, click the icon next to the Dynamic Address field. The Select Dynamic Address Procedure dialog box opens, as shown in the following image.



The image shows a dialog box titled "Select Dynamic Address Procedure". It contains five input fields: "WF Server Name" (a dropdown menu), "Execution Id" (a text field with a small icon on the right), "Password" (a text field), "Confirm Password" (a text field), and "Procedure Name" (a dropdown menu). At the bottom right, there are three buttons: "OK", "Cancel", and "Help".

In this dialog box, select or type a value for the WF Server Name, Execution Id, password to access the server, and the procedure name that creates the Dynamic Address.

Then click *OK*. The designated dynamic address procedure appears in the Schedule, Dynamic Address field.

6. In the optional Index File Name field, specify a name for the index file of the report. (Availability of this option is dependent on your ReportCaster configuration.)

**Note:** For WF Server Procedures, if you are going to specify that the report is to be burst, type the name of the file in which you want the index page to be created.

The name of the index must be typed in the case specific to your operating system.

The following table lists the case you should use for a specific operating system:

Case	Operating System
Uppercase	z/OS
Lowercase	Windows UNIX

**Note:** Index pages for burst report output contain only the burst values specified in the Distribution List.

7. From the Zip File Type drop-down list, select one of the following:
  - ☐ *None* if you do not want to Zip the output.
  - ☐ *Add Reports to One Zip File* to Zip the output in a single file. Type a name for the file in the Zip File Name field.

## Notification Options

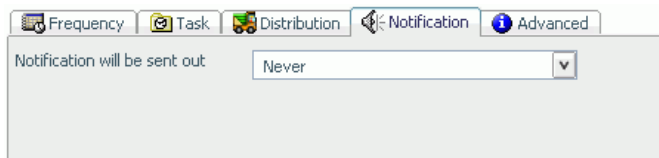
### In this section:

Setting On Error and Always Notification

### Reference:

Notification and Log Information for Unavailable Options

The Notification tab in the Scheduling Tool, shown in the following image, provides the options to send a notification of the schedule status to specific e-mail recipients.



You can send notification:

- ☐ **Never.** ReportCaster will not send a notification of the schedule status under any circumstances. This is the default value.
- ☐ **On Error.** The specified users are notified when errors are encountered while running the schedule. We recommend using the On Error notification option.
- ☐ **Always.** The specified users are always notified when the schedule runs.



## Setting On Error and Always Notification

When you select the On Error or Always notification option, additional options become available, as shown in the following image.

The screenshot shows the 'Notification' tab of a configuration window. At the top, there are tabs for 'Frequency', 'Task', 'Distribution', 'Notification', and 'Advanced'. The 'Notification' tab is active. Below the tabs, there are several settings:

- 'Notification will be sent out' is set to 'On Error' via a dropdown menu.
- 'Type' is set to 'Full Notification' via a dropdown menu.
- 'Full Notification' is followed by an asterisk and an empty text input field.
- 'Brief Notification' is followed by an empty text input field.
- 'Reply Address' is followed by an asterisk and an empty text input field.
- 'Subject' is followed by an empty text input field.

The On Error and Always notification options are:

- ❑ **Type.** Select either a brief or detailed notification, as follows.
    - ❑ **Full Notification.** A full notification sends a complete log report as an e-mail attachment.
    - ❑ **Brief Notification.** A brief notification sends the ID and job description of a schedule, as well as messages about the schedule (such as, [Completed Successfully](#)).
    - ❑ **Full & Brief Notification.** Sends both types of notifications.
- Tip:** We recommend using the Brief Notification option when you are sending notification to devices that have limited memory, such as pagers and cell phones. If you want to notify multiple recipients, you can use group mail lists defined on your mail server provided that you append an at sign (@) followed by a valid domain.
- ❑ **Full Notification.** When the notification type is Full Notification or Full & Brief Notification, type the e-mail address to which you want a full notification sent. There is no syntax error checking for this field.
  - ❑ **Brief Notification.** When the notification type is Brief Notification or Full & Brief Notification, type the e-mail address where you want a full notification sent. There is no syntax error checking for this field.
  - ❑ **Reply Address.** Type the e-mail address of the sender. If report recipients reply to the report sender, their messages are sent to this address. If your e-mail system is unable to deliver a report, the undeliverable report message is also returned to this address.
  - ❑ **Subject.** Type the text you want to display in the subject line of the e-mail notification. There is a limit of 255 alphanumeric characters. By default, this field contains the report name and data and time stamp.

**Reference: Notification and Log Information for Unavailable Options**

When schedules with unavailable Task Types or distribution methods are not permitted to run, an error notification is triggered. The full and brief notifications and the log report informs you that the ReportCaster administrator or the owner of the schedule must change the unavailable Task Types or distribution methods in the schedule.

When schedules with unavailable Task Types or distribution methods are permitted to run, normal job occurs and a message appears in the log report indicating that your ReportCaster administrator is allowing existing schedules using the unavailable Task Types or distribution methods to run.

# 4

## Maintaining a Schedule

The ReportCaster Development Interface provides access to your existing schedules and allows you to edit the properties of a schedule, clone a schedule, delete a schedule, or run a log report to obtain information about a schedule. Additionally, you can purge log records to conserve space in the log file, view the dates on which you cannot run or set schedules to run, check the status of your scheduled jobs, and create, update, and delete your Execution IDs.

As a ReportCaster administrator, you can use the ReportCasterDevelopment Interface to manage your own schedules and the schedules of the users that you are administering. This includes viewing, cloning, and deleting schedules, running log reports and purging log records to conserve space in the log file. In addition, you can create, delete, and update passwords of Execution IDs.

### Topics:

- ❑ About Maintaining a Schedule
- ❑ Editing a Schedule
- ❑ Cloning a Schedule
- ❑ Deleting a Schedule
- ❑ Viewing a Log Report
- ❑ Purging the Log File
- ❑ Setting Schedule Blackout Dates
- ❑ Creating, Changing, and Deleting an Execution ID

## About Maintaining a Schedule

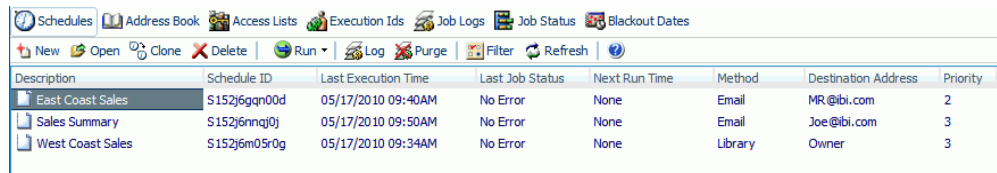
As a Managed Reporting user with ReportCaster scheduling privileges, you can access the ReportCaster Development Interface, where you can perform various maintenance functions on the schedules that you created.

The ReportCaster Development Interface is available from the:

- ❑ Business Intelligence Dashboard by selecting *Tools*, then *ReportCaster*.
- ❑ WebFOCUS Welcome Page by clicking the *ReportCaster Development* link in the ReportCaster section.

By default, the ReportCaster Development Interface opens to the Schedules tab, which displays a list of all the scheduled jobs you have created.

An example of the Schedules tab is shown in the following image.



Description	Schedule ID	Last Execution Time	Last Job Status	Next Run Time	Method	Destination Address	Priority
East Coast Sales	S152j6gn00d	05/17/2010 09:40AM	No Error	None	Email	MR@ibi.com	2
Sales Summary	S152j6nnq0j	05/17/2010 09:50AM	No Error	None	Email	Joe@ibi.com	3
West Coast Sales	S152j6m05r0g	05/17/2010 09:34AM	No Error	None	Library	Owner	3

Each schedule listing includes the schedule description (Description) and schedule ID, the last time the schedule was executed (Last Execution Time) and the status (Last Job Status), the net time the job is scheduled to run (Next Run Time), the distribution method (Method), the delivery address (Distribution Address), and priority level of the schedule (Priority).

From the Schedules tab you can perform the following tasks in addition to these, you can also create a new schedule in the Schedules tab, which is described in [Creating a ReportCaster Schedule](#) on page 31.

- ❑ Open and edit an existing schedule.
- ❑ Create a new schedule by cloning a schedule that appears in the list of schedules.
- ❑ Delete one or more schedules.
- ❑ Run a schedule with various tracing options.
- ❑ View a log report for one or more selected schedules.
- ❑ Purge log file information for one or more selected schedules or for all schedules in the list.
- ❑ Filter the list of schedules based on parameters, such as, start date, priority, method, and so on.
- ❑ Refresh the current schedule list with any newly created schedules.

**Note:** You can initiate these tasks by either selecting a schedule and clicking the specific task icon in the toolbar, or by right-clicking a schedule and making the appropriate selection from the drop-down menu.

## Editing a Schedule

### How to:

#### Edit a Schedule

From the Schedule tab, you can edit your own previously created schedules at any time.

### Procedure: How to Edit a Schedule

To edit a schedule:

1. Select the schedule you want to edit and click *Open*, or double-click the schedule. The selected schedule opens in the ReportCaster Scheduling tool, as shown in the following image.

2. Make the required changes to the schedule. For details on the Scheduling tool options, see [Creating a ReportCaster Schedule](#) on page 31.
3. Click Save.

### Reference: Considerations When Editing a Schedule

The following are considerations when editing a schedule:

- ❑ If a schedule already exists and your ReportCaster administrator changes the available options, the existing schedule runs as previously defined, regardless of the changes. However, if you attempt to specify unavailable options (Task Types, distribution methods, report formats, or Library Distribution Options) when editing a schedule, a message is displayed informing you that the options available for scheduling have been changed by your ReportCaster administrator. Information is then displayed that describes the change(s) that you must make for the schedule to use available options. Changes to the schedule cannot be saved until the schedule uses available options.
- ❑ If you selected once for the run interval, the schedule runs immediately unless you change the Start Time to a time later than the current time. All other run intervals run at the next run time of the schedule.
- ❑ If you want your selected schedule(s) to run immediately, click *Run*. A new schedule ID is created for the job. Be advised that this results in multiple entries in the Report Library for scheduled output distributed to the library.

## Cloning a Schedule

### How to:

#### Clone a Schedule

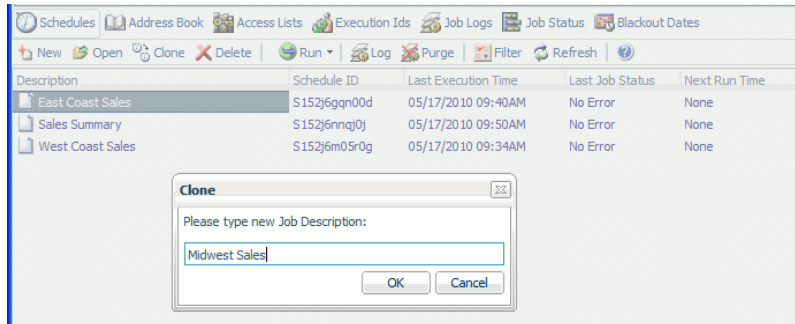
For your convenience, you can clone an existing schedule for use as a template to create a new schedule. The cloned schedule is automatically disabled, so you must enable it for use.

### **Procedure:** How to Clone a Schedule

To clone a schedule:

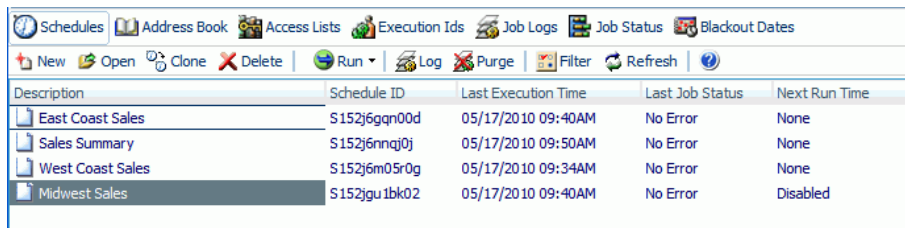
- 1.** In the Schedules tab, select the schedule you want to clone.
- 2.** Click *Clone*.

The Clone window opens, as shown in the following image.

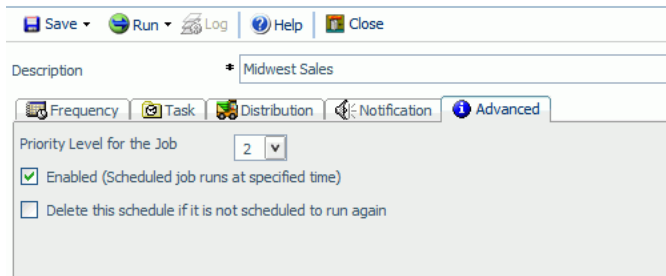


3. Type a description of the new schedule in the Job Description field (for example, Midwest Sales) and click OK.

The following image shows the new cloned schedule in the Schedules window. Note that the cloned schedule is disabled by default, as specified in the Next Run Time column.



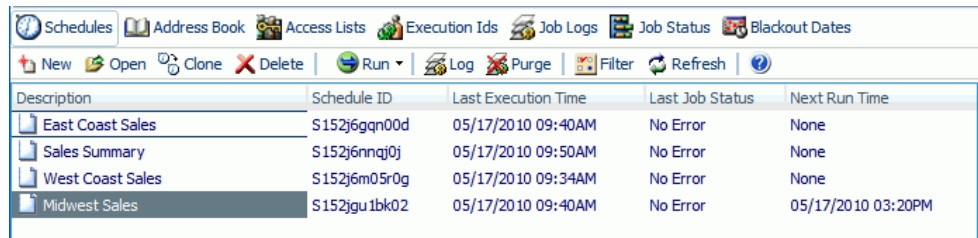
4. Enable the cloned schedule, as follows:
  - a. Open the schedule in the Scheduling tool by clicking *Open* or by double-clicking the schedule.
  - b. Click the *Advanced* tab. The Advanced tab is shown in the following image.



- c. Check the *Enabled (Scheduled job runs at specified time)* check box.

- d. Make any other changes you want to the schedule and then click **Save**.
  - e. Click **Close** to return to the Schedules tab.
5. Click **Refresh**.

The cloned schedule appears as active in the list of schedules, as shown in the following image.



Description	Schedule ID	Last Execution Time	Last Job Status	Next Run Time
East Coast Sales	S152j6gqn00d	05/17/2010 09:40AM	No Error	None
Sales Summary	S152j6nnqj0j	05/17/2010 09:50AM	No Error	None
West Coast Sales	S152j6m05r0g	05/17/2010 09:34AM	No Error	None
Midwest Sales	S152jgu1bk02	05/17/2010 09:40AM	No Error	05/17/2010 03:20PM

## Deleting a Schedule

### How to:

Delete a Schedule

From the Schedules tab, you can delete schedules at any time using the following procedure.

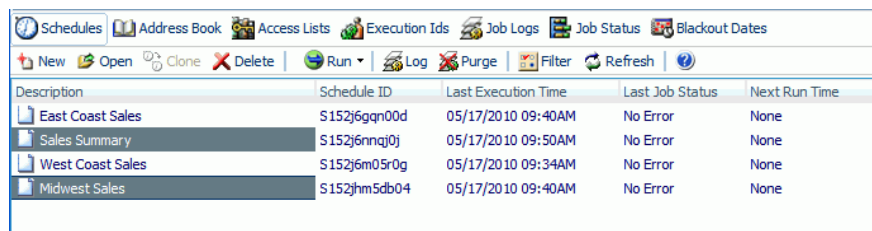
### Procedure: How to Delete a Schedule

To delete one or more schedules:

1. In the Schedules tab, select the schedule(s) you want to delete.

**Note:** To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface.

The following image shows the Sales Summary and Midwest Sale schedules selected in the Schedules window.



Description	Schedule ID	Last Execution Time	Last Job Status	Next Run Time
East Coast Sales	S152j6gqn00d	05/17/2010 09:40AM	No Error	None
Sales Summary	S152j6nnqj0j	05/17/2010 09:50AM	No Error	None
West Coast Sales	S152j6m05r0g	05/17/2010 09:34AM	No Error	None
Midwest Sales	S152jhm5db04	05/17/2010 09:40AM	No Error	None



2. Click *Delete*. A message appears asking to confirm that you want to delete the selected schedule(s).
3. Click *OK* to delete the schedule(s).

## Viewing a Log Report

### How to:

View a Log Report

The Log option enables you to run a log report that contains information about a distributed job, such as whether or not the job executed successfully, when the report output was distributed, in what format the report output was sent, and the method of distribution. Log reports are stylized HTML format, and appear in a separate browser window. You can search, print, or save the log report.

### Procedure: How to View a Log Report

From the Schedules tab, you can view one or more log reports for a schedule, as follows:

1. In the Schedules tab, select the schedule or schedules for which you want to view a log report.

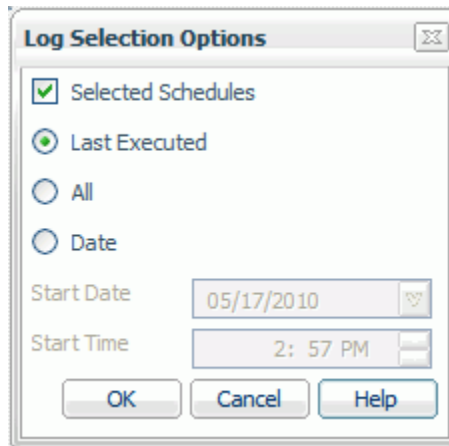
**Note:** To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface.

The following image shows the East Coast Sales and Sales Summary schedules selected in the Schedules tab.

<div> <div>Schedules</div> <div>Address Book</div> <div>Access Lists</div> <div>Execution Ids</div> <div>Job Logs</div> <div>Job Status</div> <div>Blackout Dates</div> </div> <div> <div>New</div> <div>Open</div> <div>Clone</div> <div>Delete</div> <div>Run</div> <div>Log</div> <div>Purge</div> <div>Filter</div> <div>Refresh</div> <div></div> </div>				
Description	Schedule ID	Last Execution Time	Last Job Status	Next Run Time
East Coast Sales	S152j6gqn00d	05/17/2010 09:40AM	No Error	None
Midwest Sales	S152jhm5db04	05/17/2010 09:40AM	No Error	None
Sales Summary	S152j6nnqj0j	05/17/2010 09:50AM	No Error	None
West Coast Sales	S152j6m05r0g	05/17/2010 09:34AM	No Error	None

2. Click *Log*.

The Log Selection Options window opens, as shown in the following image.



To switch from the schedule you selected to viewing information about all of your schedules, deselect *Selected Schedules* option. If you want to change your selection criteria, click *Cancel* and select another schedule from the list.

**3.** Select one of the following options:

- ☐ **Last Executed.** Produces a log report containing the most currently run process for the selected schedule(s) or for all schedules (if you did not select a schedule). This is the default option.
- ☐ **All.** Produces a log report containing all run processes for the selected schedule(s) or for all schedules (if you did not select a schedule).
- ☐ **Date Executed.** Activates the Start Date and Start Time fields.

If you have selected the Date option, proceed to the following step. Otherwise, go to Step 6.

- 4. Start Date.** Specify the date on which you want the log report to begin. The report displays all processes for the selected schedule (or schedules) that were run on or after the specified Start Date. You can select a Start Date from the pop-up calendar, or you can accept the default Start Date, which is the current date.
- 5. Start Time.** Specify a start time for the Start Date by typing in the time or using the scroll arrows.
- 6.** Click *OK* to view the log report.

The Job Process Log Report opens. The following image is an example of a Log Report.



For more details on Log Reports, see [Using Schedule Logs](#) on page 84.

## Purging the Log File

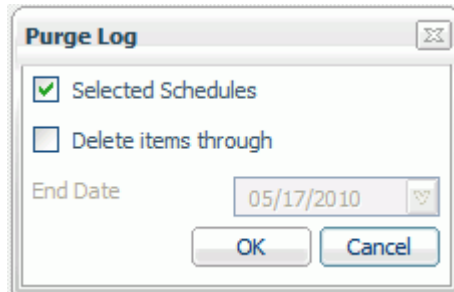
The log file accumulates information and can become difficult to navigate. Information Builders recommends that you periodically purge log records to conserve space.

The ReportCaster administrator configures the number of days in which the log files will automatically be purged. To find out how long your log reports will be available, see your ReportCaster Administrator.

You can purge the log file in one of two ways:

- ❑ **Purge log file information for specific schedules.** Select one or more schedules and then click *Purge*.

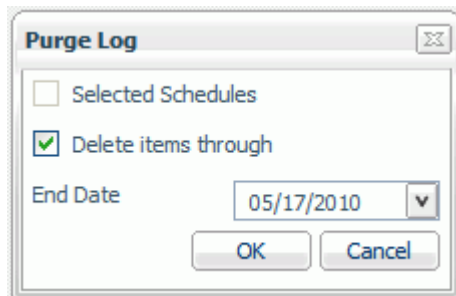
The Purge Log dialog box opens with the Selected Schedules option selected, as shown in the following image.



To switch from purging the selected schedule(s) to purging all schedules, uncheck the *Selected Schedule* check box.

- ❑ **Purge log file information for all schedules.** Without selecting a schedule, click *Purge*.

The Purge Log dialog box opens with the Delete Items through option selected, as shown in the following image. The Selected Schedule option is not available in this instance.



Selecting the Delete items through option activates the End Date field, where you can specify the date through which you want to purge the log records. The default value for the End Date is the current date. To change the End Date, click the calendar to the right of the End Date field.

A calendar window opens, as shown in the following image. Select the month and year of the End Date using forward and back arrows, and a day by clicking a day on the calendar.



Click *OK* to purge the log file, or click *Cancel* to cancel the purge request.

**Note:** The deletion of log files is immediate. To verify that the specified log files have been deleted, you can run a log report again to note the new log output.

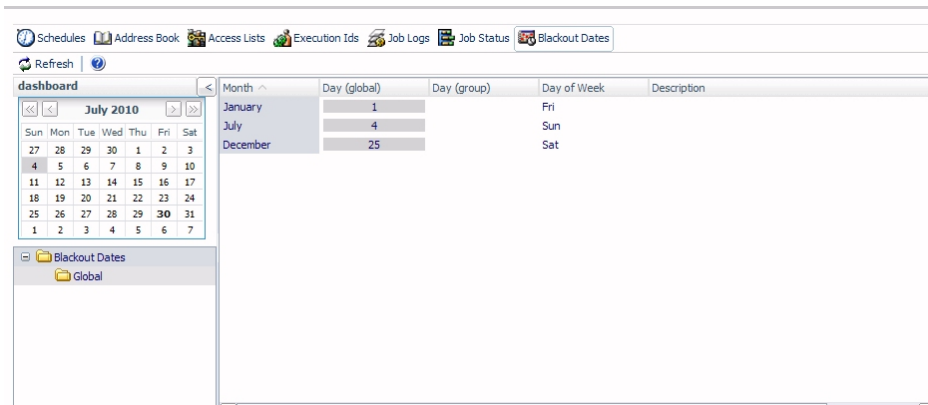
## Setting Schedule Blackout Dates

### Reference:

Schedule Behavior for Blackout Dates

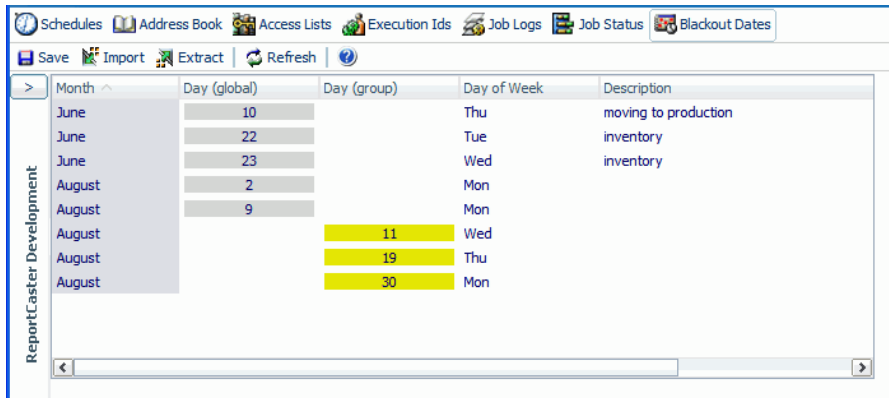
Schedule blackout dates are those dates on which schedules will not run and cannot be set to run. As a ReportCaster user, you can view schedule blackout dates that have been set for all users (global dates) and those set for the groups to which you belong. Only ReportCaster administrators and Managed Reporting Group Administrators can define, update, and delete schedule blackout dates.

To view schedule blackout dates, in the ReportCaster Development Interface, select the *Blackout Dates* tab. The Schedule Blackout Dates interface, shown in the following image, provides a calendar and a list of groups to which you belong in the left pane. The right pane displays a list of schedule blackout dates for the selected group. The Blackout Dates tab initially opens to the Global group.



To view the schedule blackout dates for a particular group, select that group in the left pane. The list of blackout dates in the calendar and right pane refresh to display the selected group blackout dates, which are shaded in yellow, along with the global blackout dates, shaded in gray.

You can change the month or year using the arrows at the top of the calendar. Click *Refresh* to load the latest blackout dates. Dates only appear as available or unavailable. You can toggle between exposing and hiding the left pane by clicking the arrow in the top-right corner of the pane. The following image shows the display with the left pane hidden.



### Reference: Schedule Behavior for Blackout Dates

Blackout dates are enforced during schedule creation and at run time:

- ❑ When creating or editing one of the date fields in a schedule, ReportCaster dynamically checks the first upcoming date on which the schedule will run to ensure that this date has not been blacked out. If there is a conflict with the date, an error message appears and the schedule cannot be saved until the conflict is resolved by either changing the schedule date or by not blacking out the date.
- ❑ At run time, each schedule is checked against the list of blackout dates. If a blackout date has been defined for the scheduled date, the schedule will not run. If notification is enabled, a notification is distributed indicating that the schedule did not run because of a defined blackout date.

**Note:** Schedule blackout dates for a specific user include the global blackout dates and the blackout dates assigned to the group(s) to which the user belongs.

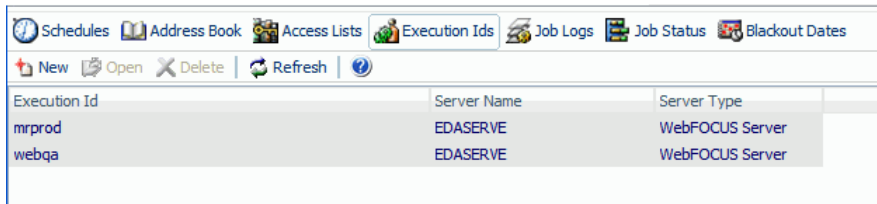
## Creating, Changing, and Deleting an Execution ID

### How to:

- Create a New Execution ID
- Change an Execution ID and Password
- Delete an Execution ID

An Execution ID is a valid user ID that is used to run a schedule on a specified server. When an Execution ID is created, changed, or deleted on a server, it must also be created, changed, or deleted in the ReportCaster Repository tables using ReportCaster. Similarly, when the password for an Execution ID is changed on the server, the password for that Execution ID must also be changed in the ReportCaster Repository tables. Exceptions are when Execution credentials are Trusted.

To view a list of execution IDs, in the ReportCaster Development Interface, select the *Execution Ids* tab. The following image is an example of the Execution Ids tab.



Execution Id	Server Name	Server Type
mrprod	EDASERVE	WebFOCUS Server
webqa	EDASERVE	WebFOCUS Server

From this tab, you can:

- ☐ Create a new Execution ID.
- ☐ View the properties of an existing Execution ID.
- ☐ Delete an Execution ID.
- ☐ Refresh the list of Execution IDs.

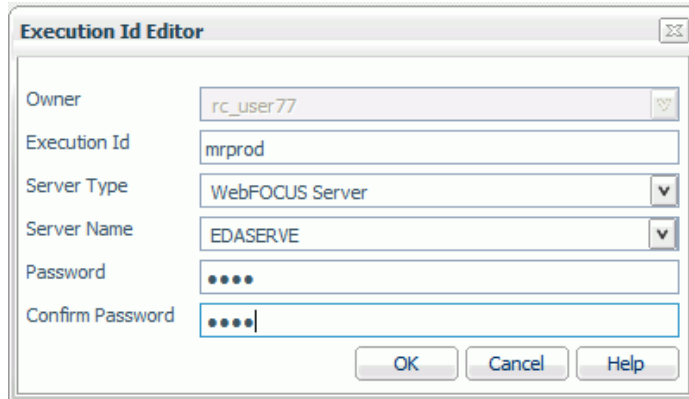
**Note:** When you create, change, or delete an Execution ID, the ReportCaster Repository tables are updated so that they are synchronized with the specified server. However, the credentials of the user ID on the server itself remain unchanged.

### Procedure: How to Create a New Execution ID

To create a new Execution ID:

1. In the Execution Ids tab, click New.

The Execution Id Editor opens, as shown in the following image.

The image shows a dialog box titled "Execution Id Editor". It contains several input fields: "Owner" with the value "rc\_user77", "Execution Id" with the value "mrprod", "Server Type" with a dropdown menu showing "WebFOCUS Server", "Server Name" with a dropdown menu showing "EDASERVE", "Password" with four dots, and "Confirm Password" with four dots. At the bottom right, there are three buttons: "OK", "Cancel", and "Help".

2. Specify the following parameters:
  - a. **Execution Id.** Type a valid execution Id.
  - b. **Server Type.** Select the type of server from the drop-down list. Selections are WebFOCUS, FTP, or Web server.
  - c. **Server Name.** From the Server Name drop-down list, select the name of a WebFOCUS Reporting Server that will be used to run schedules.
  - d. **Password.** Type the password of the user ID. Note that you are not creating this password on the specified server, but are entering the existing password into the ReportCaster Repository.
  - e. **Confirm Password.** Retype the password.
3. Click *OK* to create the Execution ID in the ReportCaster Repository table or click *Cancel* to cancel the request.

#### **Procedure: How to Change an Execution ID and Password**

To change an password for a specific server:

1. From the list of Execution IDs, select the Execution ID whose properties you want to change (for example, caster). This activates the Open option.
2. Click *Open*.



The Execution Id Editor opens, as shown in the following image.

The screenshot shows the 'Execution Id Editor' dialog box. It has a title bar with the text 'Execution Id Editor' and a close button. The dialog contains the following fields and values:

- Owner:** rc\_user77
- Execution Id:** webqa
- Server Type:** WebFOCUS Server
- Server Name:** EDASERVE
- Password:** (empty)
- Confirm Password:** (empty)

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

3. Specify the following information:
  - a. **Password.** Enter the password for the Execution ID. This password must match the current password for this user ID on the server that appears in the Server Name field.
  - b. **Confirm Password.** Reenter the password.

Changing the password using ReportCaster does not change the password on the specified server.

### **Procedure: How to Delete an Execution ID**

To delete an Execution ID:

1. Select the Execution ID you want to delete.
2. Click *Delete*. A message appears asking for confirmation to delete the selected Execution ID.
3. Click *OK*.

After the Execution ID is deleted, a scheduled job that requires this Execution ID on the specified server is not run unless the schedule is modified to use a valid Execution ID. If you modify the Execution credentials for a single schedule that specifies the deleted Execution ID, ReportCaster makes this modification for all schedules that specify the deleted Execution ID.



# 5 | Tracking ReportCaster Schedules

Information about a schedule, such as date, time, execution status, and recipients of a distributed job can be accessed by running a log report and checking the job status.

## Topics:

- ❑ Using Schedule Logs
- ❑ Checking the Schedule Status

# Using Schedule Logs

**In this section:**

Troubleshooting Log Reports

**Reference:**

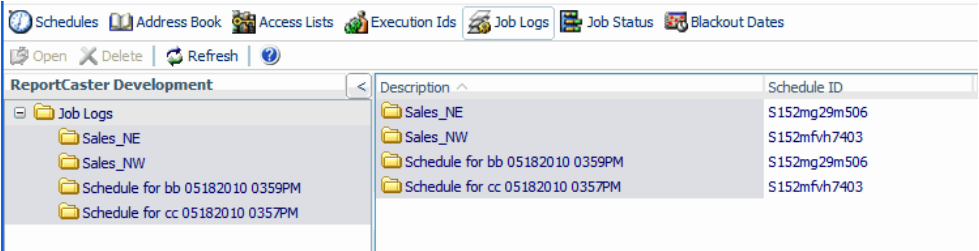
&ECHO and -TYPE Support in Log Reports

Considerations When Viewing a Log Report

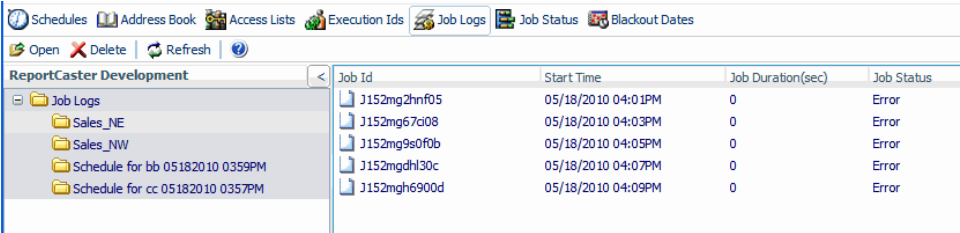
Log reports enable you to view information about a distributed job, such as whether or not the job executed successfully, when the scheduled output was distributed, in what format the distributed output was sent, and the method of distribution. Log reports are stylized HTML format and display in a separate browser window. You can search, print, or save the log report.

The log file accumulates information and can become difficult to navigate. Therefore, you should periodically purge log records in order to conserve space. For details on purging the log file, see [Purging the Log File](#) on page 75.

From the ReportCaster Development Interface, access the schedule job logs by selecting the *Job Logs* tab. The following image is an example of the logs displayed in the Job Logs tab.



Select the job folder in the left pane to display the jobs that ran for that schedule. The following image shows the jobs for the Sales\_NE schedule.



The list in the right pane provides basic information about the job execution, including the Job Id, the time the job started running, the amount of time it took to complete the execution of the job, and the general status of the job. To view a full log report for a job, double-click the job of interest in the job list.

### **Example: Reading a Log Report**

The log report displays information according to your specifications in a separate browser window. One log record is produced for each scheduled job run in the specified time frame. The following image provides an example of a typical log report.



If you chose to view log reports for multiple schedules, the Job Process Log Report contains a log record for each schedule you selected. The following image shows an example of a log report for multiple schedules.

Job Process Log Report	
<b>Job Description:</b> East Coast Sales2	
<b>User:</b> writer1	Starting worker thread
<b>Procedure:</b> J1253h0hs70b	Starting task: writer1/myreport1
<b>Schedule ID:</b> S1253gydlkj0b	Task type: MR My Report
<b>Start Time:</b> 2007-03-12 12:52:01 PM	Retrieving MR report: writer1/myreport1
<b>End Time:</b> 2007-03-12 12:52:01 PM	Connecting to server EDASERVE with execution id Writer1
	Executing focexec.
	0 HOLDING HTML FILE ON PC DISK ...
	Task finished.
	distributed to Report Library
<b>Job Description:</b> Sales	
<b>User:</b> writer1	Starting worker thread
<b>Procedure:</b> J1253hbhe90d	Starting task: writer1/myreport1
<b>Schedule ID:</b> S1253h1rsd0c	Task type: MR My Report
<b>Start Time:</b> 2007-03-12 12:58:01 PM	Retrieving MR report: writer1/myreport1
<b>End Time:</b> 2007-03-12 12:58:01 PM	Connecting to server EDASERVE with execution id Writer1
	Executing focexec.
	0 HOLDING HTML FILE ON PC DISK ...
	Task finished.
	Sale 2006.htm distributed to SalesTeam@ibi.com

The log report first lists the job description for the record, which is the unique description identifier that you specified when you created the schedule. Underneath the Job Description, the left column of the log report includes the following information:

- ❑ **User.** ReportCaster user ID, indicating the owner of the schedule.
- ❑ **Procedure.** Unique key generated by ReportCaster that identifies a specific execution of a scheduled job.
- ❑ **Schedule ID.** Unique key generated by ReportCaster that was assigned to the job when it was scheduled.
- ❑ **Start Time.** Date and time the job started running.
- ❑ **End Time.** Date and time the job finished running.

In the second column, the log report specifies messages consisting of the following:

- ❑ General information, such as the method of distribution for a particular job (for example, e-mail distribution).

- ❑ Processing information, indicating that the request started, distribution was successful, and the request was completed. Processing information also includes reasons why a request failed, such as the unavailability of a data source.

### **Reference: &ECHO and -TYPE Support in Log Reports**

Values from &ECHO variables and -TYPE commands in WebFOCUS procedures appear in log reports. The &ECHO variable displays command lines as they execute in order to test and debug procedures. The -TYPE command enables you to comment and evaluate your code for informational and debugging purposes. For example, if the following procedure is scheduled using ReportCaster, it may produce a log report similar to the example that follows this procedure.

```
-SET &ECHO=ALL;
-TYPE Country Sales and Growth
-TYPE Parameter RATE is passed into report to forecast potential sales
growth
TABLE FILE CAR
HEADING
"Sales Growth Forecast using Rate: &RATE "
SUM SALES AS 'Sales'
COMPUTE GROWTH/D12.2 = (SALES * &RATE) + SALES; AS 'Sales, Forecast'
BY COUNTRY AS 'Country'
END
```

The following image shows an example of the log report.



**Note:** For more information about &ECHO variables, see *Testing and Debugging a Dialogue Manager Procedure* in the *Developing Reporting Applications* manual.

### Reference: Considerations When Viewing a Log Report

When viewing a log report, be aware of the following considerations.

#### Task and Report Names:

The ReportCaster Log references Managed Reporting folders and FEXes by their names and not their descriptions.

#### E-mail Addresses:

ReportCaster cannot validate e-mail addresses since e-mail validation is performed by the mail server. The log report will include any e-mail addresses validated by the mail server and returned to ReportCaster.



**Burst Reports:**

- ❑ If a valid burst value is omitted in a Distribution List, Distribution File, or Dynamic Address List, ReportCaster treats the blank value as if it is a valid burst value, and no entries indicating a blank burst value appear in the log file. This will significantly reduce the size of the log file, particularly when the database contains many values for the primary field and only a small subset of those values are burst.

- ❑ If a burst value is specified in a Distribution List, Distribution File, or Dynamic Address List and it is not found in the database, the following message appears in the log file:

*Burst Value: value is not in the database.*

- ❑ When a report is successfully burst, the log file will include the following message for each burst value:

*FILE filename SUCCESSFULLY DISTRIBUTED TO destination FOR burst value.*

**Unavailable Options:**

When schedules with unavailable Task Types or distribution methods are not permitted to run, error notification is triggered. Information is included in the full and brief notifications and in the log report that your ReportCaster administrator or the owner of the schedule must change the unavailable Task Types or distribution methods in the schedule.

When schedules with unavailable Task Types or distribution methods are permitted to run, normal job execution occurs and a message appears in the log report indicating that your ReportCaster administrator is allowing existing schedules using the unavailable Task Types or distribution methods to run.

**Troubleshooting Log Reports**

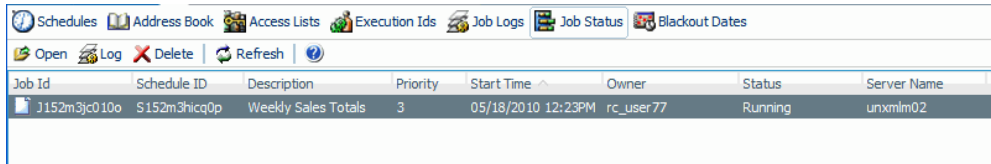
If you do not receive a log report because there is an insufficient amount of memory available, this may be because the report is too large or you have too many windows open. We recommend closing all windows and attempting to run the log report again. If you are still unsuccessful, rerun a schedule that successfully created a log report. If you are successful in running the log report, this confirms that the original log report that did not run was too large to be processed. Contact your ReportCaster administrator to help you troubleshoot this issue.

**Checking the Schedule Status**

Another resource for tracking schedules is the schedule job status. The schedule status provides a list of scheduled jobs that are in the ReportCaster Distribution Server queue. Status information includes the schedule ID, the time it started running, and the status of the job.

To access the schedule status information, click the *Job Status* tab in the ReportCaster Development Interface.

The following image show the Job Status tab.



Job Id	Schedule ID	Description	Priority	Start Time	Owner	Status	Server Name
J152m3jc010o	S152m3hicq0p	Weekly Sales Totals	3	05/18/2010 12:23PM	rc_user77	Running	unxmlm02

The schedule information includes:

- ❑ **Job Id.** The ID assigned to the job.
- ❑ **Schedule ID.** A unique, ReportCaster-generated key assigned to the job when it was scheduled.
- ❑ **Description.** The description provided when the schedule was created.
- ❑ **Priority.** The priority level of the schedule.
- ❑ **Start Time.** The time that the schedule was run.
- ❑ **Owner.** The name of the user who created the schedule.
- ❑ **Status.** The status of the scheduled job. It contains one of the following values:
  - ❑ **Running.** The scheduled job is currently running.
  - ❑ **Queue.** The scheduled job is waiting for a thread to become available to run the request.
- ❑ **Server Name.** The server that will run the scheduled job.

# A | ReportCaster Formats for Scheduled Output

When you create a schedule, you specify the format for the scheduled output. This section describes each format available to ReportCaster, and includes suggestions for using the format and considerations that you should be aware of when distributing that format.

## Topics:

- ❑ AHTML
- ❑ ALPHA
- ❑ COM
- ❑ COMMA
- ❑ COMT
- ❑ DFIX
- ❑ DHTML
- ❑ DOC
- ❑ EXCEL
- ❑ EXL07
- ❑ EXL2K
- ❑ EXL2K FORMULA
- ❑ EXL2K PIVOT
- ❑ EXL2K TEMPLATE
- ❑ EXL97
- ❑ Flash
- ❑ GIF
- ❑ HTML
- ❑ HTML ODP
- ❑ JPEG
- ❑ PDF
- ❑ PNG
- ❑ PPT
- ❑ PPT Template
- ❑ PS
- ❑ SVG
- ❑ TAB
- ❑ TABT
- ❑ VISDIS
- ❑ WK1
- ❑ WP
- ❑ XML

## AHTML

**Format:** AHTML (.htm, .html)

**Description:** Provides customizable options for creating HTML formatted reports that enable users to experience features normally found in Excel workbooks.

**Suggested Uses:** Report Library, e-mail for display in a Web browser.

**Considerations:**

- ☐ Bursting is supported except for FML reports.
- ☐ Can only be distributed as an e-mail attachment. Inline e-mail messages are not supported.

## ALPHA

**Format:** ALPHA (.ftm, .txt)

**Description:** Saves scheduled output as fixed-format character data.

**Suggested Uses:** For display in a text document, for further reporting in WebFOCUS, and as a transaction file for modifying a data source.

**Considerations:**

- ☐ When created as a HOLD file, a corresponding Master File is created.
- ☐ Bursting is supported.

## COM

**Format:** Com (.cvs)

**Description:** Saves scheduled output as a variable-length text file in comma-delimited format with character values enclosed in double quotation marks. Blanks within fields are not retained.

This format is required by certain software packages, such as Microsoft Access.

**Suggested Uses:** For further processing in a database application. This format type can be imported into applications, such as Excel or Lotus.

**Considerations:**

- ☐ This format type does not create a Master File.
- ☐ Bursting is supported.
- ☐ Can be opened in the Report Library with Excel.

- ❑ Smart date fields and dates formatted as I or P fields with date format options are treated as numeric and are not enclosed in double quotation marks in the output file. Dates formatted as alphanumeric fields with date format options are treated as alphanumeric and enclosed in double quotation marks.
- ❑ Continental decimal notation (CDN=ON|SPACE|QUOTE) is not supported. A comma within a number is interpreted as two separate columns by a destination application, such as Microsoft Access.

## COMMA

**Format:** COMMA (.csv)

**Description:** Saves scheduled output as a variable-length text file in comma-delimited format with character values enclosed in double quotation marks. All blanks within fields are retained.

This format is required by certain software packages, such as Microsoft Access.

**Suggested Uses:** For further processing in a database application. This format type can be imported into applications, such as Excel or Lotus.

**Considerations:**

- ❑ This format type does not create a Master File.
- ❑ Bursting is supported.
- ❑ Can be opened in the Report Library with Excel, or you can open COMMA reports in Lotus 1-2-3 by right-clicking the report and saving it as a COMMA file outside of the library.
- ❑ Smart date fields and dates formatted as I or P fields with date format options are treated as numeric and are not enclosed in double quotation marks in the output file. Dates formatted as alphanumeric fields with date format options are treated as alphanumeric and enclosed in double quotation marks.
- ❑ Continental decimal notation (CDN=ON|SPACE|QUOTE) is not supported. A comma within a number is interpreted as two separate columns by a destination application, such as Microsoft Access.

## COMT

**Format:** COMT (.csv)

**Description:** Adds titles to a COMMA file. Saves scheduled output as a variable-length text file in comma-delimited format with character values enclosed in double quotation marks. All blanks within fields are retained.

This format is required by certain software packages, such as Microsoft Access.

**Suggested Uses:** For further processing in a database application. This format type can be imported into applications, such as Excel or Lotus.

**Considerations:**

- ❑ This format type does not create a Master File.
- ❑ Bursting is supported.
- ❑ Cannot be opened in the Report Library with Excel.
- ❑ Smart date fields and dates formatted as I or P fields with date format options are treated as numeric and are not enclosed in double quotation marks in the output file. Dates formatted as alphanumeric fields with date format options are treated as alphanumeric and enclosed in double quotation marks.
- ❑ Continental decimal notation (CDN=ON|SPACE|QUOTE) is not supported. A comma within a number is interpreted as two separate columns by a destination application, such as Microsoft Access.

## DFIX

**Format:** DFIX (.ftm, .txt)

**Description:** Allows you to define any character to act as the delimiter (DELIMITER = your choice of character), include quotation marks around alpha fields (ENCLOSURE = “), and include column titles (HEADER = YES/NO).

The following is an example of a PCHOLD statement that specifies the pipe character (|) as the delimiter, adds quotation marks around alpha fields, and does not include column titles or headings.

```
ON TABLE PCHOLD AS OUT1 FORMAT DFIX DELIMITER | ENCLOSURE " HEADER NO
```

**Suggested Uses:** Use in files that require custom (non-standard) delimiters.

**Considerations:**

- ❑ Missing data is indicated by showing no data. If you specified an enclosure, then missing alpha fields are indicated by “”. Missing numeric fields are indicated by two delimiters.
- ❑ Bursting is supported.

## DHTML

**Format:** DHTML (.htm, .mht)

**Description:** Supports hyperlinks and other World Wide Web features. Retains StyleSheet formatting.

Along with the features of the HTML format, DHTML supports the Web archive format (.mht). An .mht file can contain multiple reports and graphs and is utilized for WebFOCUS Coordinated Compound Reports.

**Suggested Uses:** Report Library, e-mail for display in a Web browser.

**Considerations:**

- ☐ Bursting is supported except for FML reports.
- ☐ Can be distributed as an e-mail attachment and be sent as an inline e-mail message when the output is .htm, but not when the output is .mht.
- ☐ Will return two possible formats:
  - ☐ The scheduled procedure (FOCEXEC) outputs an HTML file when the request does not contain the SET HTMLARCHIVE=ON command.
  - ☐ The scheduled procedure (FOCEXEC) outputs a Web archive file (.mht) when the SET HTMLARCHIVE=ON is specified.

## DOC

**Format:** DOC (.txt)

**Description:** Scheduled output opens as a plain-text word processing document. Text can be opened by any word processing application. Retains ASCII form feed characters to correctly display page output.

**Suggested Uses:** Word Processing applications, printing unformatted reports, e-mail, Report Library.

**Considerations:**

- ☐ Does not retain most formatting. Does not support hyperlinks or alerts.
- ☐ Can be distributed as an e-mail attachment or as an inline e-mail message.
- ☐ Bursting is supported.
- ☐ Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.

## EXCEL

**Format:** EXCEL (.xls)

**Description:** For Excel 2000 and earlier, scheduled output opens as a Microsoft Excel spreadsheet file.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Any version of Microsoft Excel must be installed.
- ❑ Cannot use the print distribution method.
- ❑ Does not support bursting reports or alerts.
- ❑ Does not retain headings, footings, subheads, or subfoots.
- ❑ The format is binary.
- ❑ Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.
- ❑ When ReportCaster distributes EXCEL reports created with a TABLE request containing BY HIGHEST *primarysortfield* syntax, the report contains page breaks on each primary sort field value.

## EXL07

**Format:** EXL07 (.xls)

**Description:** Scheduled output opens within Excel 2007.

Supports most StyleSheet attributes, allowing for full report formatting.

**Suggested Uses:** E-mail, Report Library.

**Considerations:** When scheduling a report to be distributed in this format, ensure that either the FEX or the ReportCaster configuration setting, Excel server URL, specify the application server that will zip the Excel 2007 file components for distribution. The Excel server URL in the FEX will override the value in the Configuration tool.

## EXL2K

**Format:** EXL2K (.xls)

**Description:** Scheduled output opens within Excel 2000 or higher.

Supports most StyleSheet attributes, allowing for full report formatting.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Microsoft Excel 2000 or higher must be installed.
- ❑ Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.
- ❑ The format is ASCII.



- ❑ All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server MIME table so that the .xls extension is ascii/application data instead of binary.
- ❑ Bursting is supported.

## EXL2K FORMULA

**Format:** EXL2K FORMULA (.xls)

**Description:** Scheduled output opens within Excel 2000 or higher.

Contains Excel formulas that calculate and display the results of any type of summed information, such as column totals, row totals, and sub-totals.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Microsoft Excel 2000 or higher must be installed.
- ❑ Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.
- ❑ The format is ASCII.
- ❑ All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server MIME table so that the .xls extension is ascii/application data instead of binary.
- ❑ Bursting is not supported.

## EXL2K PIVOT

**Format:** EXL2K PIVOT (.xls)

**Description:** Scheduled output opens within Excel 2000 or higher.

Used to analyze complex data much like the OLAP tool in WebFOCUS. It allows you to drag and drop data fields within a PivotTable, providing different views of the data, such as sorting across rows or columns.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Microsoft Excel 2000 or higher must be installed.
- ❑ Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.

- ❑ The format is ASCII.
- ❑ The procedure you are scheduling must contain the SET WEBARCHIVE=ON command. This command ensures that the WebFOCUS Reporting Server creates a single output file rather than a main file and a cache file.
- ❑ All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server MIME table so that the .xls extension is ascii/application data instead of binary.
- ❑ Bursting is not supported.

## EXL2K TEMPLATE

**Format:** EXL2K TEMPLATE (.xls)

**Description:** Scheduled output opens within Excel 2002 or higher.

Excel templates that are populated with data from scheduled output.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ The scheduled procedure must contain a PCHOLD statement such as the following:  

```
ON TABLE PCHOLD FORMAT EXL2K TEMPLATE templatename
```
- ❑ Must be using Windows XP or Windows 2003.
- ❑ Microsoft Excel 2002 or higher must be installed.
- ❑ The format is ASCII.
- ❑ All EXL2K output with an .mht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server MIME table so that the .xls extension is ascii/application data instead of binary.
- ❑ Bursting is supported.

## EXL97

**Format:** EXL97 (.xls)

**Description:** Scheduled output opens as an Excel97 spreadsheet file, an HTML-based display format that supports report formatting and drill-downs.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Microsoft Excel 97 or higher must be installed.

- ❑ Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.
- ❑ Bursting is supported.

## Flash

**Format:** Flash

**Description:** This format provides portability and interactive enhancements to active reports.

**Suggested Uses:** Report Library, e-mail for display in a Web browser.

**Considerations:**

- ❑ Bursting is not supported.
- ❑ Most commonly used browsers recognize an active report in the Flash format as a Shockwave Flash Object.
- ❑ To enable Flash output, configure Java services on the WebFOCUS Reporting Server with a Java Heap Size of 512 MB or higher.

## GIF

**Format:** GIF (.gif)

**Description:** Scheduled output opens as a graph image in GIF format.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Only works with procedures that contain GRAPH FILE syntax.
- ❑ Bursting is supported and is performed on the second BY field in the GRAPH FILE request.
- ❑ Drill-downs are not supported since the GIF format creates a static image.
- ❑ You cannot distribute multiple images within a single report when using the GIF format. Instead, use the PDF format to distribute multiple images within a single report.
- ❑ To distribute a GIF report on UNIX or z/OS, edit the schbkr script file and add the following code after the #!/bin/ksh line:

```
DISPLAY=IP_Address export DISPLAY TERM=xterm export TERM
```

where:

*IP\_Address*

Is the IP address of the machine that is running the xterm.

**Note:** This step is necessary only if you are distributing a graph created by a WebFOCUS GRAPH FILE request (WF Server Procedure, Standard Report, My Report), and is not necessary if you are distributing a file.

## HTML

**Format:** HTML (.htm, .html)

**Description:** Supports hyperlinks and other World Wide Web features. Retains StyleSheet formatting.

**Suggested Uses:** Report Library, e-mail for display in a Web browser.

**Considerations:**

- ☐ Bursting is supported except for FML reports.
- ☐ Can be distributed as an e-mail attachment or as an inline e-mail message.

## HTML ODP

**Format:** HTML ODP (.htm, .html)

**Description:** This is an HTML format with On-demand Paging, which saves the report to the Web server and delivers the output to you one page at a time. HTML supports hyperlinks and other World Wide Web features, and retains StyleSheet formatting.

**Suggested Uses:** On-demand Paging is only available for reports distributed to the Report Library.

**Considerations:**

- ☐ Bursting is supported except for FML reports.
- ☐ Do not use the ON TABLE SET WEBVIEWTARG command in a report scheduled for distribution to the Report Library in the HTML ODP format.

## JPEG

**Format:** JPEG (.jpg, .jpeg, .jpe, .jfif)

**Description:** Scheduled output opens as a graph image in JPEG format.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ☐ Only works with procedures that contain GRAPH FILE syntax.
- ☐ Bursting is supported and is performed on the second BY field in the GRAPH FILE request.

- ❑ Drill-downs are not supported since the JPEG format creates a static image.

## PDF

**Format:** PDF (.pdf)

**Description:** Appearance of the scheduled output is preserved in an electronic document when printed using Adobe Acrobat or distributed to a printer that has an appropriate driver. Retains all relevant StyleSheet formatting.

**Suggested Uses:** E-mail, printing, Report Library.

**Considerations:**

- ❑ Does not support hyperlinks in e-mail attachments. Recipient must have an Adobe Acrobat application to view.
- ❑ The z/OS USS (UNIX System Services) platform requires the Web server configuration file to have the MIME setting for PDF set to binary in mime.wfs.
- ❑ Printing is supported when ReportCaster is configured to allow PDF to be printed and the printer has the appropriate driver.
- ❑ Bursting is supported.
- ❑ When ReportCaster distributes PDF reports created with a TABLE request containing BY HIGHEST *primarysortfield* syntax, the report contains page breaks on each primary sort field value.
- ❑ When distributing a PDF report to a Managed Reporting Repository on z/OS, the PDF report cannot be viewed in Managed Reporting. As a workaround, save the PDF file to your local machine and then view the PDF using Adobe Acrobat. This limitation is due to z/OS being an EBCDIC-based platform and PDF being an ASCII-based format.
- ❑ The PDF Drill-Through feature is supported.

## PNG

**Format:** PNG (.png)

**Description:** Scheduled output opens as a graph image. These graphs are bit-mapped and can support 16 million colors. In addition, PNG graphs have lossless compression (data is decompressed 100% back to the original). Therefore, saving, altering, and re-saving a PNG does not degrade its overall quality. For these reasons, PNG graphs are superior to GIF graphs.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Only works with procedures that contain GRAPH FILE syntax.
- ❑ Bursting is supported and is performed on the second BY field in the GRAPH FILE request.
- ❑ Drill-downs are not supported, as this format creates a static image.

## PPT

**Format:** PPT (.ppt)

**Description:** Generates a new PowerPoint file in the Web archive format.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Bursting is supported.
- ❑ PPT can be output as a single report and can also include as many graphs as desired embedded in the StyleSheet of the report (TABLE). In addition, a single PPT report can be placed inside an existing PPT template.
- ❑ PPT can be used with SAVE, HOLD, or PCHOLD commands.

## PPT Template

**Format:** PPT Template (.ppt)

**Description:** Generates a new PowerPoint file in the Web archive format.

PPT Templates that are populated with data from scheduled output.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ PPT can be output as a single report and can also include as many graphs as desired embedded in the StyleSheet of the report (TABLE). In addition, a single PPT report can be placed inside an existing PPT template.
- ❑ PPT Template can be used with SAVE, HOLD, or PCHOLD commands.

## PS

**Format:** PS (.ps)

**Description:** Appearance of the scheduled output is preserved in an electronic document when printed using PostScript. Retains all relevant StyleSheet formatting.

**Suggested Uses:** Printing.

**Considerations:**

- ❑ Does not support hyperlinks.
- ❑ Printers must support PostScript. Recipient must have an application (for example, GhostView) that supports PostScript.
- ❑ Distribution to Managed Reporting is not supported.
- ❑ Bursting is supported.

## SVG

**Format:** SVG (.svg)

**Description:** Scheduled output opens as a graph image. This file format, based on Extensible Markup Language (XML), presents powerful, interactive images.

**Suggested Uses:** E-mail, Report Library.

**Considerations:**

- ❑ Recipient must have an SVG viewer, such as Adobe SVG Viewer for Windows. To download Adobe SVG Viewer for Windows, go to <http://www.adobe.com>.
- ❑ Only works with procedures that contain GRAPH FILE syntax.
- ❑ Bursting is supported and is performed on the second BY field in the GRAPH FILE request.
- ❑ Drill-downs are not supported, as this format creates a static image.
- ❑ SVG graphs delivered by e-mail or to Managed Reporting from a z/OS ReportCaster Distribution Server cannot be opened. To resolve this issue, edit the ReportCaster Distribution Server sendmodes.xml file (located in the /cfg directory) and change the <mode> value from binary to text. For example:

```
<sendmode>
  <extension>svg</extension>
  <mode>text</mode>
  <mime>image/svg+xml</mime>
</sendmode>
```

## TAB

**Format:** TAB (.tab, .tsv, .txt)

**Description:** Scheduled output opens in tab-delimited format.

This format is required by certain software packages, such as Microsoft Access.

**Suggested Uses:** E-mail, Report Library.

**Considerations:** Bursting is supported.

## TABT

**Format:** TABT (.tab, .tsv, .txt)

**Description:** Scheduled output opens in tab-delimited format, including column headings in the first row.

This format is required by certain software packages, such as Microsoft Access.

**Suggested Uses:** E-mail, Report Library.

**Considerations:** Bursting is supported.

## VISDIS

**Format:** (.txt)

**Description:** This file is used as input to Visual Discovery controls on a Web page.

**Suggested Uses:** Visual Discovery Reports.

**Considerations:**

- ☐ Bursting is not supported.
- ☐ Only FTP and SFTP distribution options are supported.

## WK1

**Format:** WK1 (.wk1)

**Description:** Scheduled output opens within Lotus 1-2-3, Excel.

**Suggested Uses:** E-mail.

**Considerations:**

- ☐ Lotus 1-2-3 or Excel must be installed. Internet Explorer 5.5 or higher is the preferred browser.
- ☐ In the mime.wfs configuration file:



- ☐ Specify no in the Redirect column to launch Lotus 1-2-3.
- ☐ Specify yes in the Redirect column to launch Excel.
- ☐ The format is binary.
- ☐ Cannot use the print distribution method.
- ☐ Does not support bursting reports or alerts.
- ☐ Does not retain headings, footings, subheads, or subfoots.
- ☐ Cannot be opened in the Report Library. However, you can open WK1 reports in Lotus 1-2-3 by right-clicking the report and saving it as a WK1 file outside of the library.

## WP

**Format:** WP (.txt, .wp)

**Description:** Scheduled output opens as a plain-text word processing document in the Web browser. Text can be opened by any word processing application.

**Suggested Uses:** Word processing applications, printing unformatted reports, e-mail, Report Library.

**Considerations:**

- ☐ Does not retain page breaks or most formatting.
- ☐ Does not support hyperlinks or alerts.
- ☐ Can be distributed as an e-mail attachment or as an inline e-mail message.
- ☐ Bursting is supported.

## XML

**Format:** XML (.xml)

**Description:** Scheduled output opens in XML format, a markup language that is derived from the Standard Generalized Markup Language (SGML).

**Suggested Uses:** Describing and exchanging data for applications on different systems.

**Considerations:** Bursting is not supported.



# **B** Working With Distribution Lists in the HTML User Interface

This section explains how to create and maintain Distribution Lists using the HTML User Interface. When creating a schedule, you can distribute report output to a single recipient or several recipients. If you are creating a schedule to be distributed to several recipients, you may want to create a Distribution List. A Distribution List consisting of multiple recipients and can be assigned to several schedules.

If the entire report is not relevant to those receiving it, you can specify sections of the report to be sent using the burst option. Each person on your Distribution List can receive different sections of the report depending on the individual burst values you specify.

If you are distributing to the Report Library, you must create an Access List instead of a Distribution List.

## **Topics:**

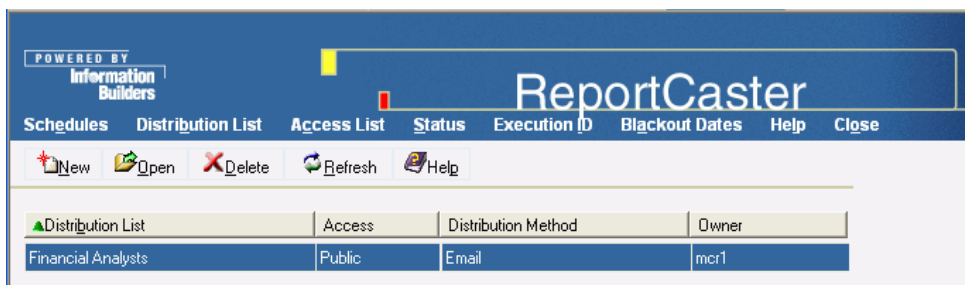
- ❑ Accessing the Distribution or Address Book List Interface
- ❑ Creating a Distribution or Address Book List
- ❑ Editing a Distribution List
- ❑ Deleting a Distribution List

## Accessing the Distribution or Address Book List Interface

A Distribution List is an easy way to distribute reports or content to multiple recipients by citing a list that contains the individual recipients. You can create a series of lists to target specific groups of people in an organization. Distribution and Address Book Lists can be reused as often as needed, and assigned to multiple schedules.

**From the ReportCaster HTML User Interface**, click the *Distribution List* option. All Distribution Lists to which you have access (public lists and your own private lists) appear. Each Distribution List contains columns specifying its properties. Sorting is available for each column by clicking the column heading. In addition, the interface includes toolbar icons that enable you to perform tasks on each Distribution List.

The following image shows the Distribution List pane of the ReportCaster HTML User Interface, with the available options and data fields.



From the Distribution List pane and the Address Book tab, you can:

- ☐ Create a new Distribution List. For more information, see [Creating a Distribution or Address Book List](#) on page 109.
- ☐ Edit the properties of a Distribution List. For more information, see [Editing a Distribution List](#) on page 116.
- ☐ Delete a Distribution List. For more information, see [Deleting a Distribution List](#) on page 117.
- ☐ Refresh the window so that it contains the latest Distribution List information.
- ☐ Open the online Help.

## Creating a Distribution or Address Book List

### How to:

Create a Distribution List

Retrieve E-mail Addresses for a Distribution List Using Address Search

### Reference:

Considerations When Creating a Printer Distribution List

When you create a Distribution List, you specify the name of the Distribution List, the distribution method (e-mail or printer), the destinations to which the report is distributed, the optional burst values, and whether public or private access is applied.

### Procedure: How to Create a Distribution List

To create a Distribution List:

1. From the Distribution List pane, click **New**.

The following image shows the available options, input fields, and drop-down lists in the Distribution List pane.

Burst Value	Destination

2. In the Distribution List field, specify a name for your Distribution List (for example, Sales Team).

3. From the Access drop-down list, select *Public* (default) or *Private*.

Only the owner and ReportCaster Administrators can view a Private Distribution List, whereas every ReportCaster user can view a Public Distribution List.

4. From the Distribution Method drop-down list, select *Email* (default) or *Printer*.

5. If you are bursting a report, specify individual sort values in the Burst Value field. The burst value is case-sensitive, can be a maximum of 75 characters, and, when used with keywords, can contain wild cards and Java regular expressions.

The burst value for a tabular report is the first BY field, which is the primary sort field. The burst value for a graph report is the second BY field. The burst value specified must exist in the data source that the scheduled job reports against.

For more information, see [Bursting a Report](#) on page 24.

6. In the Destination field, specify the destinations to which the report is distributed:

- ☐ If you selected Email as the distribution method, type the e-mail addresses of the recipients (for example, chuck\_hill@ibi.com). Be careful typing this information because there is no edit checking.

**Note:** If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at symbol) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.

- ☐ If you selected Printer as the distribution method, specify the printer using the following format

`queue@printserver`

where:

`queue`

Is the name of the printer queue.

`printserver`

Is the host name or IP address of the printer.






Although ReportCaster supports specifying only the host name (or IP address), we recommend that you specify both the printer queue and the host name (or IP address) when distributing ReportCaster output to a printer. ReportCaster differentiates between the printer queue and the printer host name (or IP address) when the at sign (@) is present as the separator.


You can specify a maximum of 800 characters within a single Destination line.

**Note:**

- ❑ If you specify burst values, be sure to match the specified e-mail or printer destinations with the appropriate burst values.
  - ❑ The maximum number of e-mail addresses or printers you can specify in a Distribution List is 9999.
  - ❑ If you are specifying more than ten e-mail addresses or printers in your Distribution List, click *Insert* to insert additional rows.
  - ❑ You can specify multiple e-mail addresses within a single Destination field. For more information, see [Specifying Multiple E-mail Addresses](#) on page 28.
  - ❑ You can retrieve e-mail addresses defined in an LDAP data source. For more information, see [How to Retrieve E-mail Addresses for a Distribution List Using Address Search](#) on page 111.
  - ❑ For more information about creating a printer Distribution List, see [Considerations When Creating a Printer Distribution List](#) on page 115.
- 7.** Click *Save* to save the Distribution List and return to the Distribution List pane.

The following image shows that the Distribution List you created (Sales Team) is added to the list of available Distribution Lists.

 **New**
 **Open**
 **Delete**
 **Refresh**
 **Help**

 Distribution List	Access	Distribution Method	Owner
Financial Analysts	Public	Email	rcanalytical
Sales Team	Public	Email	rcanalytical

### **Procedure:** How to Retrieve E-mail Addresses for a Distribution List Using Address Search

**Note:** The Address Search options appear automatically if your ReportCaster Administrator has set the Email LDAP Enabled parameter to YES in the ReportCaster Server Configuration tool. If the Address Search options do not appear, contact your ReportCaster Administrator.

The following image shows the Address Search pane that appears to the right of the Distribution List pane while creating or editing a Distribution List.

The screenshot shows the Address Search pane with a toolbar at the top containing Save, Insert, Delete, Cancel, and Help icons. Below the toolbar, there are fields for Distribution List, Access (set to Public), and Distribution Method (set to Email). A table with columns Burst Value and Destination is visible. To the right, the Search pattern section includes a Maximum retrieval field set to 300, a search criteria dropdown set to Last Name, an operator dropdown set to Equals, and an empty search string field. Search, Insert, and Help buttons are located below these fields. At the bottom, there are columns for Name and Email Address.

1. Type the search string. You can search using the following combinations:

- ☐ Last Name [Equals | Starts with | Ends with | Contains]
- ☐ First Name [Equals | Starts with | Ends with | Contains]
- ☐ Email [Equals | Starts with | Ends with | Contains]

For example, if you type S after the Last Name Starts with field, as shown in the following image, ReportCaster retrieves last names that start with the letter S. The Address Search pane also contains action buttons, input fields, and drop-down lists.

This close-up shows the Search pattern section with the Maximum retrieval field set to 300. The search criteria dropdown is set to Last Name, the operator dropdown is set to Starts with, and the search string field contains the letter S. Search, Insert, and Help buttons are positioned below the search string field.

**Note:** By default, ReportCaster retrieves a maximum of 300 e-mail addresses. You can change this default value for the duration of your session. However, if you log out and log back in, the Address Search pane displays the default value of 300. ReportCaster allows the retrieval of a maximum of 500 e-mail addresses. If you suspect your search will return more than 500 records, you should refine your search criteria.

2. Click Search.

ReportCaster retrieves the specified names from the LDAP data source.



The following image shows retrieved search data under the Name and Email Address column headings in the Address Search pane.

**Search pattern**

Maximum retrieval:

Last Name

Name	Email Address
Snow, Steve	Steve_Snow@abcd.com
Stoudamire, Latrell	Latrell_Stoudamire@abcd.com
Smith, Robert	Robert_Smith@abcd.com
Strickland, Daniel	Daniel_Strickland@abcd.com
Sampson, Kirk	Kirk_Sampson@abcd.com
Sweetney, DeShawn	DeShawn_Sweetney@abcd.com
Skinner, Bobby	Bobby_Skinner@abcd.com
Snyder, Josh	Josh_Snyder@abcd.com
Scalabrino, John	John_Scalabrino@abcd.com

3. Select an e-mail address you want to use in your Distribution List.

The following image shows a highlighted data selection under the Name and Email Address column headings in the Address Search pane.

**Search pattern**

Maximum retrieval:

Last Name

Name	Email Address
Snow, Steve	Steve_Snow@abcd.com
Stoudamire, Latrell	Latrell_Stoudamire@abcd.com
Smith, Robert	Robert_Smith@abcd.com
Strickland, Daniel	Daniel_Strickland@abcd.com
Sampson, Kirk	Kirk_Sampson@abcd.com
Sweetney, DeShawn	DeShawn_Sweetney@abcd.com
Skinner, Bobby	Bobby_Skinner@abcd.com
Snyder, Josh	Josh_Snyder@abcd.com
Scalabrino, John	John_Scalabrino@abcd.com

4. Click *Insert* to insert the e-mail address into your Distribution List.

**Note:** Alternatively, you can double-click an e-mail address to automatically insert it into your Distribution List.

5. Repeat Step 3 and Step 4 if you want to select and insert additional e-mail addresses into your Distribution List.

The following image shows selected Email Address data transferred from the Address Search pane on the right to the Distribution List pane on the left.

The screenshot shows the ReportCaster HTML User Interface. On the left is the 'Distribution List' pane, and on the right is the 'Search pattern' pane.

**Distribution List Pane:**

- Buttons: Save, Insert, Delete, Cancel, Help
- Distribution List: [Empty text box]
- Access: Public (dropdown)
- Distribution Method: Email (dropdown)
- Table:
 

Burst Value	Destination
	Steve_Snow@abcd.com,Bobby_Skinner@abcd.com

**Search pattern Pane:**

- Maximum retrieval: 300
- Last Name: [Empty dropdown]
- Starts with: [Empty dropdown]
- Search: [Button]
- Insert: [Button]
- Help: [Button]
- Table:
 

Name	Email Address
Snow, Steve	Steve_Snow@abcd.com
Stoudamire, Latrell	Latrell_Stoudamire@abcd.com
Smith, Robert	Robert_Smith@abcd.com
Strickland, Daniel	Daniel_Strickland@abcd.com
Sampson, Kirk	Kirk_Sampson@abcd.com
Sweetney, DeShawn	DeShawn_Sweetney@abcd.com
Skinner, Bobby	Bobby_Skinner@abcd.com
Snyder, Josh	Josh_Snyder@abcd.com
Scalabrino, John	John_Scalabrino@abcd.com

By default, ReportCaster separates multiple e-mail addresses with a comma. The e-mail addresses appear in the To line of a single e-mail when the scheduled output is distributed.

**Note:** Repeat these steps if you want to change your search criteria or insert additional e-mail addresses into your Distribution List. If you insert additional e-mail addresses while the original e-mail addresses are selected, the new e-mail addresses replace the old ones. If your cursor is positioned after the original e-mail addresses, the new e-mail addresses are appended to the old ones, separated by a comma. However, be aware that the maximum number of characters is 800 when inserting addresses.

### Reference: Considerations When Creating a Printer Distribution List

When printing on Windows and UNIX, ReportCaster uses the lp (line printer) protocol, which runs on top of TCP/IP to communicate to printers. lp printing with the Novell Client is not supported. For printing on z/OS, ReportCaster uses the lpr (line printer remote) UNIX command, which has special options on the mainframe for sysout dest and class.

When creating a printer Distribution List on z/OS, the printer should be a SYSOUT class (such as A) that has been routed to a printer. For example, you can indicate that scheduled report output be distributed to a specific network printer by typing the following printer identification

```
A DEST printserver
```

where:

A

Is the SYSOUT class to be assigned to a network printer.

*printserver*

Is the printer host name (for example, IBVM.P24E2).

**Note:** Before creating a Distribution List, we recommend verifying that you can connect to your printer by test printing a document outside of ReportCaster.

## Editing a Distribution List

**How to:**  
Edit a Distribution List






From the Distribution List pane in the ReportCaster HTML User Interface, you can edit your own previously created Distribution Lists at any time by performing the following steps.

### Procedure: How to Edit a Distribution List

To edit a Distribution List:





- 1. Select the Distribution List you want to edit.

The following image shows a selected Distribution List named Sales Team.

 New  Open  Delete  Refresh  Help			
▲Distribution List	Access	Distribution Method	Owner
Financial Analysts	Public	Email	rcanalytical
Sales Team	Public	Email	rcanalytical

- 2. Click Open.

The following image shows the properties of the selected Distribution List.

 Save  Insert  Delete  Cancel  Help	
Distribution List	<input type="text" value="Sales Team"/>
Access	<input type="text" value="Public"/>
Distribution Method	<input type="text" value="Email"/>
▲Burst Value	Destination
	joe_smith@ibi.com
	chuck_hill@ibi.com

3. You can perform the following functions:
  - ❑ Copy the Distribution List by changing its name. The original Distribution List remains unaltered.
  - ❑ Change the values of already existing entries. For example, you can make the Distribution List Private instead of Public or you can change the destinations.
  - ❑ Insert additional Burst values and Destinations by clicking *Insert*. A new row appears where your cursor is positioned, enabling you to insert additional entries.
  - ❑ Delete Burst Values and Destinations by selecting the row and clicking *Delete*.
4. After you have made the necessary changes to your Distribution List, click *Save* to save the changes.

## Deleting a Distribution List

### How to:

Delete a Distribution List


From the Distribution List pane in the ReportCaster HTML User Interface, you can delete your own Distribution Lists at any time by performing the following steps.


### Procedure: How to Delete a Distribution List


To delete a distribution list:


1. Select the Distribution List you want to delete.


The following image shows a selected Distribution List named Sales Team.


New

Open

Delete

Refresh

Help

 Distribution List	Access	Distribution Method	Owner
Financial Analysts	Public	Email	rcanalytical
Sales Team	Public	Email	rcanalytical

2. Click *Delete*. A message appears asking for confirmation to delete the list. Click *OK* to delete the Distribution List.



# C Maintaining a Schedule Using the HTML User Interface

The ReportCaster Interface, accessed from either Dashboard (select *Tools*, then *ReportCaster*) or the WebFOCUS Welcome Page (ReportCaster Development), provides the same functionality as the ReportCaster HTML User Interface with a different look and feel. This section explains the options and features of maintaining a schedule from the ReportCaster HTML User Interface perspective, but can be used to work with the current ReportCaster Interface.

Both interfaces provides access to your existing schedules and allows you to edit the properties of a schedule, clone a schedule, delete a schedule, or run a log report to obtain information about a schedule. Additionally, you can purge log records to conserve space in the log file, view the dates on which you cannot run or set schedules to run, check the status of your scheduled jobs, and create, update, and delete your Execution IDs.

## Topics:

- ❑ About the Schedules Interface
- ❑ Editing a Schedule in the HTML User Interface
- ❑ Cloning a Schedule
- ❑ Deleting a Schedule
- ❑ Viewing a Log Report
- ❑ Purging the Log File
- ❑ Schedule Blackout Dates
- ❑ Checking the Status of a Scheduled Job
- ❑ Creating, Updating, and Deleting an Execution ID

## About the Schedules Interface

As a Managed Reporting user with ReportCaster scheduling privileges, you can access the HTML User Interface, where you can perform various maintenance functions on the schedules that you created. The ReportCaster HTML User Interface is available from the Business Intelligence Dashboard and Managed Reporting. For instruction on accessing this interface, see [The ReportCaster Development Interface](#) on page 14.

Once you are in the ReportCaster HTML User Interface, click the *Schedules* option. A list of all the scheduled jobs you have created appears in the interface. The following image shows how each scheduled job contains information displayed under column headings for Schedule Id, Description, Next Run Time, Method, Distribution, and Active. The window includes toolbar icons that enables you to perform functions on each scheduled job. Sorting is available for each column by clicking the column heading.

Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S13kg8b2sk0g	East Coast Sales	10/21/08 1:47 PM	E Mail	EC_sales@ibi.cc	Y	mcr1	3
S13kg89v3a0f	West Coast Sales	None	E Mail	WC_sales@ibi.cc	Y	mcr1	3
S13kg1ajbo0d	Sales	None	E Mail	jtr@ibi.com	Y	mcr1	3

From the Schedules window, you can:

- ❑ Open the Scheduling Wizard to edit the properties of a selected schedule. For more information, see [Editing a Schedule in the HTML User Interface](#) on page 121.
- ❑ View a log report for one or more selected schedules. For more information, see [Viewing a Log Report](#) on page 126.
- ❑ Delete one or more selected schedules. For more information, see [Deleting a Schedule](#) on page 125.
- ❑ Purge log file information for one or more selected schedules or for all schedules in your list. For more information, see [Purging the Log File](#) on page 132.
- ❑ Clone a selected schedule. For more information [Cloning a Schedule](#) on page 123.
- ❑ Run one or more selected schedules.
- ❑ Refresh the current schedule list with any newly created schedules.
- ❑ Open the online Help.



**Note:** When you select a schedule in the ReportCaster HTML User Interface, the Open, Log, Delete, and Clone options are enabled. As an alternative to selecting items in the toolbar, you can use Alt-O for Open, Alt-L for Log, Alt-D for Delete, and Alt-C for Clone.

## Editing a Schedule in the HTML User Interface

### How to:

Edit a Schedule

### Reference:

Considerations When Editing a Schedule

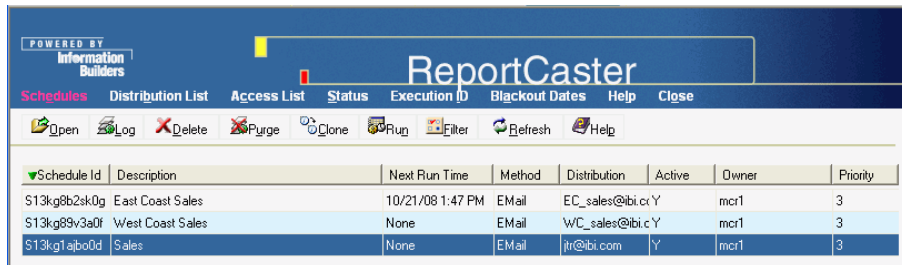
From the Schedule window in the ReportCaster HTML User Interface, you can edit your own previously created schedules at any time using the following procedure.

### Procedure: How to Edit a Schedule

To edit a schedule:

1. In the Schedules window, select the schedule you want to edit.

The following image shows the Schedules window with a schedule named Sales selected.



Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S13kg8b2sk0g	East Coast Sales	10/21/08 1:47 PM	Email	EC_sales@ibi.ci.Y	Y	mcr1	3
S13kg89v3a0f	West Coast Sales	None	Email	WC_sales@ibi.ci.Y	Y	mcr1	3
S13kg1ajbo0d	Sales	None	Email	itr@ibi.com	Y	mcr1	3

2. Click *Open* or double-click the schedule.

The Scheduling Wizard opens to the Schedule window, as shown in the following image. The Schedule window contains all of the information that was previously entered for the Sales schedule.

**Schedule**

Description:

**Interval**

Schedule Job:  
 Every  hour(s) on

☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

**Date/Time**

Start Date:

Start Time:  :

End Date:

End Time:  :

**Options**

☒ Enabled (Scheduled jobs run at specified time)  
☐ Delete job if it is not scheduled to run again

3. Make the changes to the schedule.
4. Click Save.

### Reference: Considerations When Editing a Schedule

The following are considerations when editing a schedule using the Scheduling Wizard:

- ☐ You can only access a schedule created using the ReportCaster Development and Administration Interface (Java Swing applet-based) if it is a Managed Reporting schedule (Standard Report or My Report) containing a single Task. Otherwise, you will receive a message informing you that the schedule cannot be opened.

- ❑ If a schedule already exists and your ReportCaster Administrator changes the available options, the existing schedule runs as previously defined, regardless of the changes. However, if you attempt to specify unavailable options (Task Types, distribution methods, report formats, or Library Distribution Options) when editing a schedule, a message is displayed informing you that the options available for scheduling have been changed by your ReportCaster Administrator. Information is then displayed that describes the change(s) that you must make for the schedule to use available options. Changes to the schedule cannot be saved until the schedule uses available options. In addition, a Custom Run Interval cannot be opened with this tool.
- ❑ If you selected once for the run interval, the schedule runs immediately unless you change the Start Time to a time later than the current time. All other run intervals run at the next run time of the schedule.
- ❑ If you want your selected schedule(s) to run immediately, click *Run*. A new schedule ID is created for the job. Be advised that this results in multiple entries in the Report Library for scheduled output distributed to the library.

## Cloning a Schedule

### How to:

Clone a Schedule

From the Schedules window in the ReportCaster HTML User Interface, you can clone your own previously created schedules at any time using the following procedure.

### Procedure: How to Clone a Schedule

To clone a schedule:

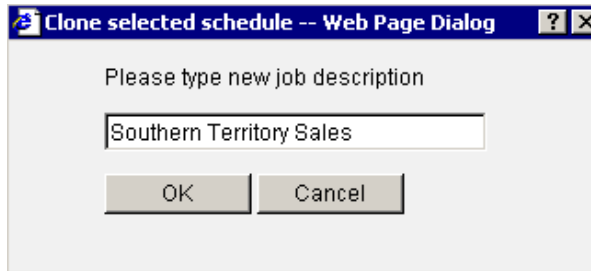
1. In the Schedules window, select the schedule you want to clone.

The following image shows the Sales schedule selected in the Schedules window.

Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S13kg8b2sk0g	East Coast Sales	10/21/08 1:47 PM	EMail	EC_sales@ibicr.com	Y	mcr1	3
S13kg89v3a0f	West Coast Sales	None	EMail	WC_sales@ibicr.com	Y	mcr1	3
S13kg1ajbo0d	Sales	None	EMail	jtr@ibicr.com	Y	mcr1	3

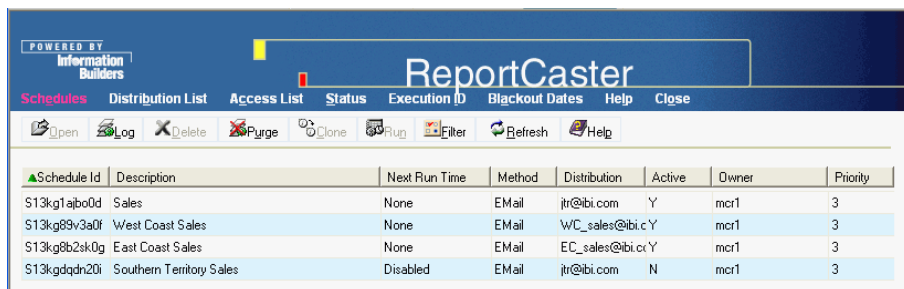
2. Click *Clone*.

The following image shows the Clone selected schedule – Web Page Dialog box that opens, prompting you to type a new description for the cloned schedule.



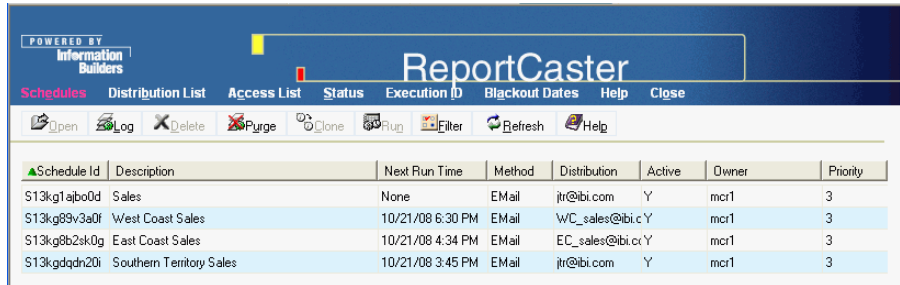
3. Type a new schedule description (for example, Southern Territory Sales) and click OK.

The following image shows the new cloned schedule in the Schedules window. Note that the cloned schedule is disabled by default, as specified in the Next Run Time column.



4. To enable the schedule, perform the following steps:
  - a. Edit the schedule by clicking *Open* or by double-clicking the schedule.  
The Edit Schedule window opens, displaying the Schedule tab.
  - b. Check the *Enabled* check box.
  - c. Make any other changes you want to the schedule and then click *Save*.  
The Updated Schedule Successfully message appears.
  - d. Click *Close* to return to the Schedules window in the ReportCaster HTML User Interface.
  - e. Click *Refresh*.

The following image shows that the Southern Territory Sales schedule is active in the Schedules window. If the only change you made was setting the schedule to enabled, it contains the same properties as the Sales schedule from which it was cloned.



Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S13kg1aib0d	Sales	None	Email	jtr@bi.com	Y	mcr1	3
S13kg89v3a0f	West Coast Sales	10/21/08 6:30 PM	Email	WC_sales@bi.c	Y	mcr1	3
S13kg8b2sk0g	East Coast Sales	10/21/08 4:34 PM	Email	EC_sales@bi.c	Y	mcr1	3
S13kgdgd20i	Southern Territory Sales	10/21/08 3:45 PM	Email	jtr@bi.com	Y	mcr1	3

## Deleting a Schedule

### How to:

Delete a Schedule

From the Schedules window in the ReportCaster HTML User Interface, you can delete your own schedules at any time using the following procedure.

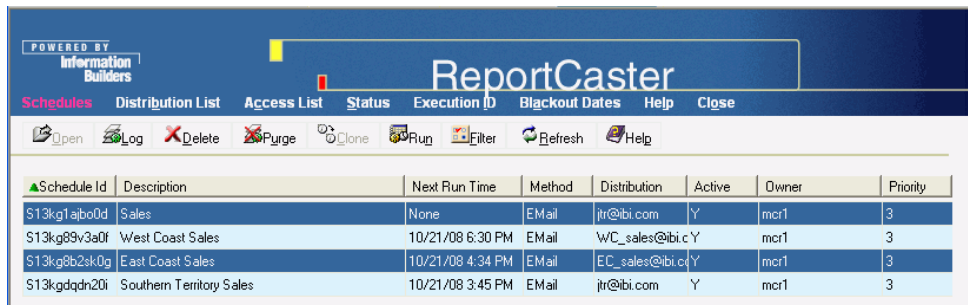
### Procedure: How to Delete a Schedule

To delete one or more schedules:

1. In the Schedules window, select the schedule(s) you want to delete.

**Note:** To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface.

The following image shows the Sales and East Coast Sale schedules selected in the Schedules window.



The screenshot shows the ReportCaster Schedules window. At the top, there is a header bar with the text "POWERED BY Information Builders" and "ReportCaster". Below the header, there is a navigation bar with tabs: Schedules, Distribution List, Access List, Status, Execution ID, Blackout Dates, Help, and Close. Under the Schedules tab, there is a toolbar with icons for Open, Log, Delete, Purge, Clone, Run, Filter, Refresh, and Help. Below the toolbar is a table with the following columns: Schedule Id, Description, Next Run Time, Method, Distribution, Active, Owner, and Priority. The table contains four rows of data:

Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S13kg1ajbo0d	Sales	None	Email	itr@ibi.com	Y	mcr1	3
S13kg89v3a0f	West Coast Sales	10/21/08 6:30 PM	Email	WC_sales@ibi.c	Y	mcr1	3
S13kg8b2sk0g	East Coast Sales	10/21/08 4:34 PM	Email	EC_sales@ibi.c	Y	mcr1	3
S13kgdqdn20i	Southern Territory Sales	10/21/08 3:45 PM	Email	itr@ibi.com	Y	mcr1	3

2. Click *Delete*. A message appears asking for confirmation to delete the selected schedule(s).
3. Click *OK* to delete the schedule(s).

## Viewing a Log Report

### How to:

View a Log Report

### Reference:

&ECHO and -TYPE Support in Log Reports

Considerations When Viewing a Log Report

Troubleshooting ReportCaster Log Reports

Information about the date, time, execution status, and recipients of a distributed report job can be accessed using the Log icon. The Log icon enables you to run a log report that contains information about a distributed job, such as whether or not the job executed successfully, when the report output was distributed, in what format the report output was sent, and the method of distribution. Log reports are stylized HTML format, and appear in a separate browser window. You can search, print, or save the log report.

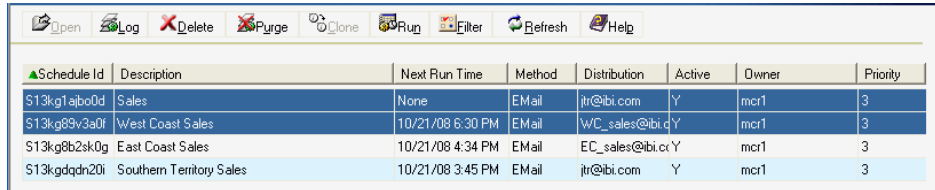
### Procedure: How to View a Log Report

From the Schedules window in the ReportCaster HTML User Interface, you can view one or more log reports for a schedule by performing the following steps:

1. In the Schedules window, select the schedule(s) for which you want to view the log report(s).

**Note:** To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface.

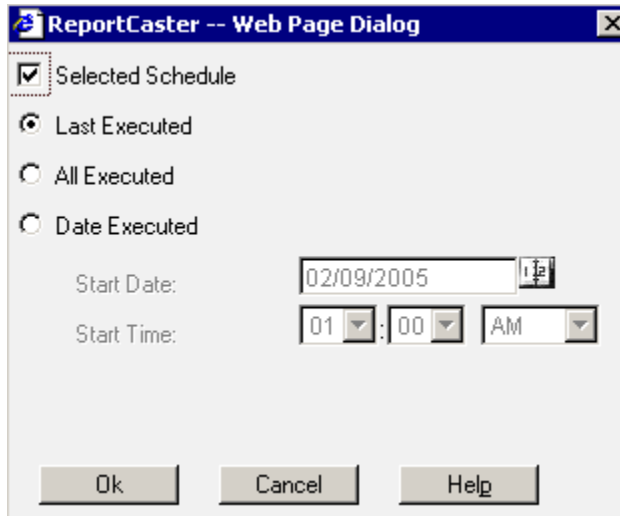
The following image shows the East Coast Sales and Sales schedules selected in the Schedules window.



Schedule Id	Description	Next Run Time	Method	Distribution	Active	Owner	Priority
S13kg1ajbo0d	Sales	None	E-Mail	jtr@ibi.com	Y	mcr1	3
S13kg89v3a0f	West Coast Sales	10/21/08 6:30 PM	E-Mail	wc_sales@ibi.com	Y	mcr1	3
S13kg8b2sk0g	East Coast Sales	10/21/08 4:34 PM	E-Mail	EC_sales@ibi.com	Y	mcr1	3
S13kgdqdn20i	Southern Territory Sales	10/21/08 3:45 PM	E-Mail	jtr@ibi.com	Y	mcr1	3

## 2. Click Log.

The following image shows the ReportCaster Web Page Dialog box that opens, with the Selected Schedule check box active and checked and the Last Executed option selected.



**ReportCaster -- Web Page Dialog**

☒ Selected Schedule

☒ Last Executed

☐ All Executed

☐ Date Executed

Start Date: 02/09/2005

Start Time: 01:00 AM

Ok Cancel Help

To switch from the schedule you selected to viewing information about all of your schedules, uncheck the *Selected Schedule* check box. If you want to change your selection criteria, click *Cancel* and select another schedule from the list.

**3.** Select one of the following options:

- ☐ **Last Executed.** Produces a log report containing the most currently run process for the selected schedule(s) or for all schedules (if you did not select a schedule). This is the default option.
- ☐ **All Executed.** Produces a log report containing all run processes for the selected schedule(s) or for all schedules (if you did not select a schedule).
- ☐ **Date Executed.** Activates the Start Date and Start Time fields.

If you have selected the Date Executed option, proceed to the following step. Otherwise, proceed to Step 6.

- 4.** In the Start Date field, specify the date on which you want the log report to begin. The report displays all processes for the selected schedule (or schedules) that were run on or after the specified Start Date. You can select a Start Date from the pop-up calendar, or you can accept the default Start Date, which is the current date.
- 5.** In the Start Time field, specify a start time for the Start Date by using the drop-down lists. The default value for the Start Time is 1:00 AM.
- 6.** Click *OK* to view the log report.

The Job Process Log Report opens.

**Example: Reading a Log Report**

The log report displays information according to your specifications in a separate browser window. One log record is produced for each scheduled job run in the specified time frame. The following image provides an example of a typical log report.





If you chose to view log reports for multiple schedules, the Job Process Log Report contains a log record for each schedule you selected. The following images shows an example of a log report for multiple schedules.

Job Process Log Report	
<b>Job Description:</b> East Coast Sales2	
<b>User:</b> writer1	Starting worker thread
<b>Procedure:</b> J1253h0hs70b	Starting task: writer1/myreport1
<b>Schedule ID:</b> S1253gydkj0b	Task type: MR My Report
<b>Start Time:</b> 2007-03-12 12:52:01 PM	Retrieving MR report: writer1/myreport1
<b>End Time:</b> 2007-03-12 12:52:01 PM	Connecting to server EDASERVE with execution id Writer1
	Executing focexec.
	0 HOLDING HTML FILE ON PC DISK ...
	Task finished.
	distributed to Report Library
<b>Job Description:</b> Sales	
<b>User:</b> writer1	Starting worker thread
<b>Procedure:</b> J1253hbhe90d	Starting task: writer1/myreport1
<b>Schedule ID:</b> S1253h1rsd0c	Task type: MR My Report
<b>Start Time:</b> 2007-03-12 12:58:01 PM	Retrieving MR report: writer1/myreport1
<b>End Time:</b> 2007-03-12 12:58:01 PM	Connecting to server EDASERVE with execution id Writer1
	Executing focexec.
	0 HOLDING HTML FILE ON PC DISK ...
	Task finished.
	Sale 2006.htm distributed to SalesTeam@ibi.com

The log report first lists the job description for the record, which is the unique description identifier that you specified when you created the schedule. Underneath the Job Description, the left column of the log report includes the following information:

- ❑ **User.** ReportCaster user ID, indicating the owner of the schedule.
- ❑ **Procedure.** Unique key generated by ReportCaster that identifies a specific execution of a scheduled job.
- ❑ **Schedule ID.** Unique key generated by ReportCaster that was assigned to the job when it was scheduled.
- ❑ **Start Time.** Date and time the job started running.
- ❑ **End Time.** Date and time the job finished running.

In the second column, the log report specifies messages consisting of the following:

- ❑ General information, such as the method of distribution for a particular job (for example, e-mail distribution).

- ❑ Processing information, indicating that the request started, distribution was successful, and the request was completed. Processing information also includes reasons why a request failed, such as the unavailability of a data source.

**Reference: &ECHO and -TYPE Support in Log Reports**

Values from &ECHO variables and -TYPE commands in WebFOCUS procedures appear in log reports. The &ECHO variable displays command lines as they execute in order to test and debug procedures. The -TYPE command enables you to comment and evaluate your code for informational and debugging purposes. For example, if the following procedure is scheduled using ReportCaster, it may produce a log report similar to the example that follows this procedure.

```
-SET &ECHO=ALL;
-TYPE Country Sales and Growth
-TYPE Parameter RATE is passed into report to forecast potential sales
growth
TABLE FILE CAR
HEADING
"Sales Growth Forecast using Rate: &RATE "
SUM SALES AS 'Sales'
COMPUTE GROWTH/D12.2 = (SALES * &RATE) + SALES; AS 'Sales, Forecast'
BY COUNTRY AS 'Country'
END
```

The following image shows an example of the log report.

Job Process Log Report	
<b>Job Description:</b>	Sample of &ECHO and -TYPE in Log Report
<b>User:</b>	readmin Starting worker thread
<b>Procedure:</b>	J0v4b5jgo03 Starting task: Scheduled FEX with &ECHO and -TYPE
<b>Schedule ID:</b>	S0v4b59o8201 Task type: MRE Standard Report
<b>Start Time:</b>	2004-05-05 02:08:01 Procedure name: salesgrowth
<b>End Time:</b>	2004-05-05 02:08:02
	Connecting to server EDASERVE with execution id wfuser
	Executing focexec.
	-TYPE Country Sales and Growth
	Country Sales and Growth
	-TYPE Parameter RATE is passed into report to forecast potential sales growth
	Parameter RATE is passed into report to forecast potential sales growth
	TABLE FILE CAR
	HEADING
	"Sales Growth Forecast using Rate: .05 "
	SUM SALES AS Sales
	COMPUTE GROWTH/D12.2 = (SALES * .05)+ SALES; AS Sales, Forecast
	BY COUNTRY AS Country
	END
	SET DISTRIBUTE=OFF
	0 HOLDING HTML FILE ON PC DISK ...
	Task finished.
	salesgrowth.htm distributed to chuck_hill@ibi.com
	salesgrowth.htm distributed to casey_barnes@ibi.com

**Note:** For more information about &ECHO variables, see *Testing and Debugging a Dialogue Manager Procedure* in the *Developing Reporting Applications* manual.

### Reference: Considerations When Viewing a Log Report

When viewing a log report, be aware of the following considerations.

#### Task and Report Names:

The ReportCaster Log references Managed Reporting folders and FEXes by their names and not their descriptions.

#### E-mail Addresses:

ReportCaster cannot validate e-mail addresses since e-mail validation is performed by the mail server. The log report will include any e-mail addresses validated by the mail server and returned to ReportCaster.

### **Burst Reports:**

- ❑ If a valid burst value is omitted in a Distribution List, Distribution File, or Dynamic Address List, ReportCaster treats the blank value as if it is a valid burst value, and no entries indicating a blank burst value appear in the log file. This will significantly reduce the size of the log file, particularly when the database contains many values for the primary field and only a small subset of those values are burst.

- ❑ If a burst value is specified in a Distribution List, Distribution File, or Dynamic Address List and it is not found in the database, the following message appears in the log file:

*Burst Value: value is not in the database.*

- ❑ When a report is successfully burst, the log file will include the following message for each burst value:

*FILE filename SUCCESSFULLY DISTRIBUTED TO destination FOR burst value.*

### **Unavailable Options:**

When schedules with unavailable Task Types or distribution methods are not permitted to run, error notification is triggered and information is included in full and brief notifications and in the log report that your ReportCaster Administrator or the owner of the schedule must change the unavailable Task Types or distribution methods in the schedule.

When schedules with unavailable Task Types or distribution methods are permitted to run, normal job execution occurs and a message appears in the log report indicating that your ReportCaster Administrator is allowing existing schedules using the unavailable Task Types or distribution methods to run.

### **Reference: Troubleshooting ReportCaster Log Reports**

If you do not receive a log report because there is an insufficient amount of memory available, this may be because the report is too large or you have too many windows open. Information Builders recommends closing all windows and attempting to run the log report again. If you are still unsuccessful, rerun a schedule that successfully created a log report. If you are successful in running the log report, this confirms that the original log report that did not run was too large to be processed. Contact your ReportCaster Administrator to help you troubleshoot this issue.

## **Purging the Log File**

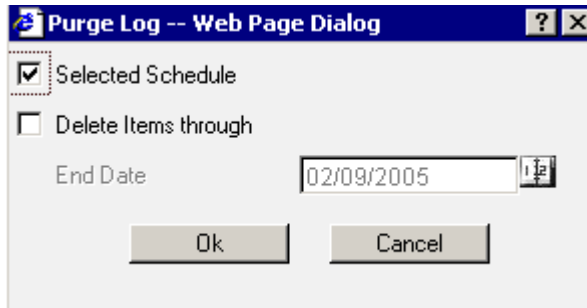
The log file accumulates information and can become difficult to navigate. Information Builders recommends that you periodically purge log records to conserve space.

The ReportCaster Administrators configures the number of days in which the log files will automatically be purged. To find out how long your log reports will be available, see your ReportCaster Administrator.

You can purge the log file in one of two ways:

- ❑ **Purge log file information for specific schedules.** Select one or more schedules and then click *Purge*.

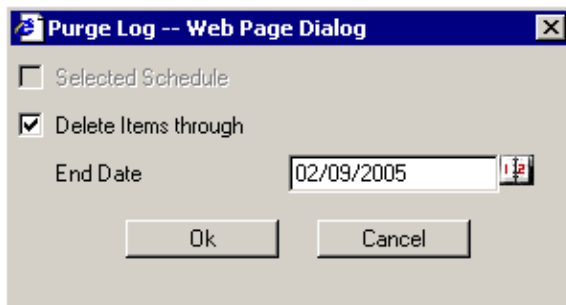
The Purge Log Web Page Dialog box opens with the Selected Schedule check box active and checked, and the Delete Items through check box inactive and unchecked, as shown in the following image.



To switch from purging the selected schedule(s) to purging all schedules, uncheck the *Selected Schedule* check box.

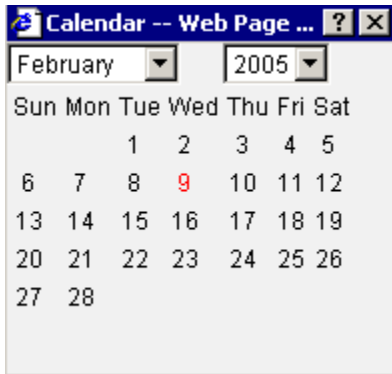
- ❑ **Purge log file information for all schedules.** Without selecting a schedule, click *Purge*. The Purge Log Web Page Dialog box opens.

The Purge Log Web Page Dialog box opens with the Selected Schedule check box inactive and unchecked, and the Delete Items through check box active and checked, as shown in the following image.



Selecting the Delete Items through check box activates the End Date field, where you can specify the date through which you want to purge the log records. The default value for the End Date is the current date. To change the End Date, click the calendar to the right of the End Date field.

The Calendar Web Page Dialog box opens, as shown in the following image. In this dialog box, select the month and year of the End Date using drop-down lists, and a day by clicking a day on the calendar.



Click *OK* to purge the log file, or click *Cancel* to cancel the purge request.

**Note:** To verify that the specified log files have been deleted, you can run a log report again to note the new log output. The deletion of log files is immediate.

## Schedule Blackout Dates

### Reference:

Schedule Behavior for Blackout Dates

Schedule blackout dates are those dates on which schedules will not run and cannot be set to run. As a ReportCaster user, you can view schedule blackout dates that have been set for all users (global dates) and those set for the groups to which you belong. Only ReportCaster Administrators and Managed Reporting Group Administrators can define, update, and delete schedule blackout dates.

To view schedule blackout dates, click the *Blackout Dates* option in the ReportCaster HTML User Interface. The Schedule Blackout Dates interface opens to a calendar of the current year. The group drop-down list in the top left corner provides a list of groups to which you belong and includes a Global selection. This interface initially opens to the Global group and global blackout dates shaded in gray. An example of the Schedule Blackout Dates interface is shown in the following image.

Refresh
Close
Help

Global
Schedule Blackout Dates
2007

**January**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

**February**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3

**March**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

**April**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

**May**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

**June**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**July**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

**August**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

**September**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

**October**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

**November**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

**December**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

To view the schedule blackout dates for a particular group, select that group from the drop-down list. The calendar refreshes and in addition to the global blackout dates, it displays the group blackout dates in yellow. The following image shows a partial calendar of Schedule Blackout Dates interface for a selected group. For the month of April, it shows group blackout dates on the 23rd and 24th, and global blackout dates on the 25th through the 27th. Schedules cannot be run or set to run on these dates.

**Refresh Close Help**

**Sales\_NE** **Schedule Blackout Dates**

**January**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

**February**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3

**April**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

**May**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

You can change the year using the arrows at the top right corner of the screen. Click *Refresh* to load the latest blackout dates. Dates only appear as available or unavailable.

Click *Close* to exit the HTML User Interface.

### Reference: Schedule Behavior for Blackout Dates

Blackout dates are enforced during schedule creation and at runtime:

- ❑ When creating or editing one of the date fields in a schedule, ReportCaster dynamically checks the first upcoming date on which the schedule will run to ensure that this date has not been blacked out. If there is a conflict with the date, an error message appears and the schedule cannot be saved until the conflict is resolved by either changing the schedule date or by not blacking out the date.
- ❑ At run time, each schedule is checked against the list of blackout dates. If a blackout date has been defined for the scheduled date, the schedule will not run. If notification is enabled, a notification is distributed indicating that the schedule did not run because of a defined blackout date.

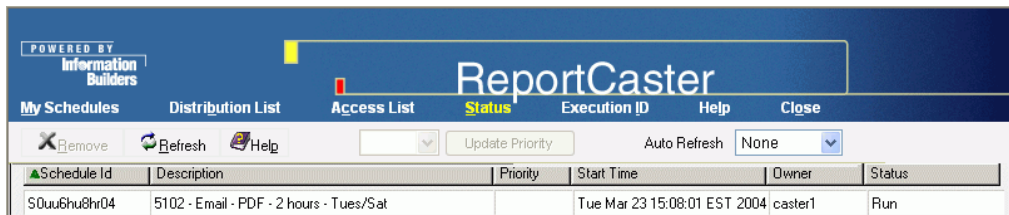


**Note:** Schedule blackout dates for a specific user include the global blackout dates and the blackout dates assigned to the group(s) to which the user belongs.

## Checking the Status of a Scheduled Job

From the ReportCaster HTML User Interface, click the *Status* menu option to generate a list of your scheduled jobs that are in the ReportCaster Distribution Server queue.

The following image shows how each scheduled job contains information displayed under column headings for Schedule Id, Description, Priority, Start Time, Owner, and Status. Sorting is available for each column by clicking the column heading.



The screenshot shows the ReportCaster HTML User Interface. At the top, there is a navigation bar with the ReportCaster logo and several menu options: My Schedules, Distribution List, Access List, Status (highlighted in yellow), Execution ID, Help, and Close. Below the navigation bar, there are several buttons: Remove (with a red X icon), Refresh (with a circular arrow icon), Help (with a question mark icon), a dropdown menu, an Update Priority button, and an Auto Refresh dropdown menu set to None. Below these buttons is a table with the following columns: Schedule Id, Description, Priority, Start Time, Owner, and Status. The table contains one row of data.

Schedule Id	Description	Priority	Start Time	Owner	Status
S0uu6hu8hr04	5102 - Email - PDF - 2 hours - Tues/Sat		Tue Mar 23 15:08:01 EST 2004	caster1	Run

The Status column contains one of the following values:

- ☐ **Run.** The scheduled job is currently running.
- ☐ **Queue.** The scheduled job is waiting for a thread to become available to run the request.

After you have generated a status list of scheduled jobs, you can:

- ☐ Select a scheduled job with a status of Queue and click *Remove*. The schedule is removed from the queue if it is still in the queue, and the Status list is refreshed.
- ☐ Select a scheduled job with a status of Queue to enable the Update Priority button. In the New Priority field, you can change the priority of the scheduled job using the drop-down list. Click *Update Priority* to change the priority of the scheduled job if it is still in the queue.
- ☐ Click *Refresh* to refresh the current list of schedules to show any new jobs that are in the ReportCaster Distribution Server queue. You can automate this process by selecting a value (for example, 10 Seconds) from the Auto Refresh drop-down list.
- ☐ Click *Help* to open the online Help.

## Creating, Updating, and Deleting an Execution ID

**How to:**

- Generate a List of Execution IDs
- Create a New Execution ID
- Change an Execution ID and Password
- Delete an Execution ID

An Execution ID is a valid user ID that is used to run a schedule on a specified server. When an Execution ID is created, changed, or deleted on a server, it must also be created, changed, or deleted in the ReportCaster Repository tables using ReportCaster. Similarly, when the password for an Execution ID is changed on the server, the password for that Execution ID must also be changed in the ReportCaster Repository tables. Exceptions are when Execution credentials are Trusted.

**Procedure:** How to Generate a List of Execution IDs

From the ReportCaster HTML User Interface, click the *Execution ID* menu option to generate a list of your Execution IDs defined to ReportCaster.

The following image shows a list of Execution IDs. The list includes the Execution ID, the Server Name where the Execution ID is authorized to run schedules, the Server Type (for example, WebFOCUS Server), and the Owner of the Execution ID for that server.

New

Open

Delete

Refresh

Help

Execution ID	Server Name	Server Type	Owner
caster	EDASERVE	WebFOCUS Server	admin
iadmin	EDASERVE	WebFOCUS Server	admin

**Note:** Execution IDs appear when the Run Id Type setting for that server is set to User. For Trusted servers, only the Execution ID can be changed.

After you have generated a list of Execution IDs, you can:

- Click *New* to create a new Execution ID.
- Select an Execution ID and click *Open* to optionally change the Execution ID for a specific server, or change the password of the Execution ID.
- Select an Execution ID and click *Delete* to delete the Execution ID from the ReportCaster Repository tables.

- ❑ Click *Refresh* to refresh the current list with any newly created Execution IDs.
- ❑ Click *Help* to open the online Help.

**Note:** When you create, change, or delete an Execution ID it updates the ReportCaster Repository tables so that they are synchronized with the specified server. However, the credentials of the user ID on the server itself remain unchanged.

### Procedure: How to Create a New Execution ID

To create a new Execution ID:

1. Click the *Execution ID* menu option.
2. Click *New*.

The following image shows the ReportCaster Web Page Dialog box that opens, which contains fields that enable you to create a new Execution ID and password, and assign the ID and password to a server.

3. Specify the following parameters:
  - a. **Execution ID.** Type a valid user ID for the server.
  - b. **Server Name.** From the Server Name drop-down list, select the name of a WebFOCUS Reporting Server that will be used to run schedules.
  - c. **Password.** Type the password of the user ID. Note that you are not creating this password on the specified server, but are entering the existing password into the ReportCaster Repository.
  - d. **Confirm Password.** Retype the password.

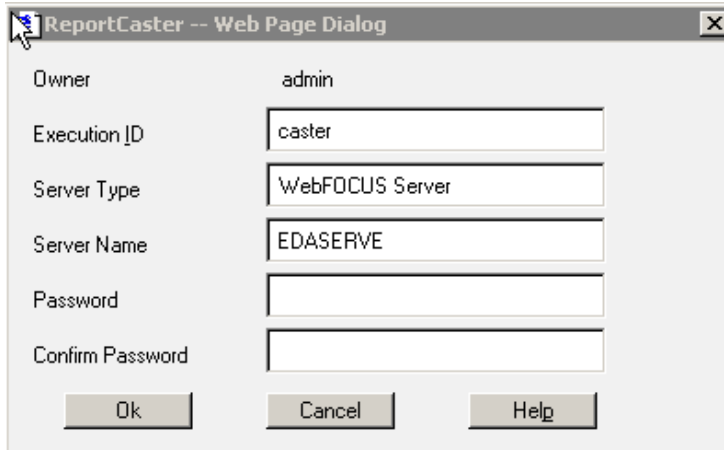
4. Click *OK* to create the Execution ID in the ReportCaster Repository table or click *Cancel* to cancel the request.

### **Procedure: How to Change an Execution ID and Password**

To change an Execution ID or password for a specific server:

1. Click the *Execution ID* menu option to generate a list of your Execution IDs.
2. Select the Execution ID whose properties you want to change (for example, *caster*). This activates the *Open* icon.
3. Click *Open*.

The following image shows the ReportCaster Web Page Dialog box that opens, which contains fields that enable you to change the Execution ID, the Execution ID password, or both.



4. Optionally, specify the following information:
  - a. **Execution ID.** Enter a value for the Execution ID. This should be an already existing and valid Execution ID. This Execution ID globally replaces the old Execution ID for all schedules on the specified server.
  - b. **Password.** Enter the password for the Execution ID. This password must match the current password for this user ID on the server that appears in the Server Name field.
  - c. **Confirm Password.** Reenter the password.

Changing the password using ReportCaster does not change the password on the specified server.

5. Click *OK* to change the Execution ID or password values in the ReportCaster Repository tables. A message appears confirming that the values have been changed.

**Procedure: How to Delete an Execution ID**

To delete an Execution ID:

1. Click the *Execution ID* menu option to generate a list of your Execution IDs.
2. Select the Execution ID you want to delete.
3. Click *Delete*. A message appears asking for confirmation to delete the selected Execution ID.
4. Click *OK*.

After the Execution ID is deleted, a scheduled job that requires this Execution ID on the specified server is not run unless the schedule is modified to use a valid Execution ID. If you modify the Execution credentials for a single schedule that specifies the deleted Execution ID, ReportCaster makes this modification for all schedules that specify the deleted Execution ID.



# Index

-TYPE commands 87, 130

&ECHO variables 87, 130

508 support 15

## A

Address Search option 111  
distribution lists 111

AHTML format 92

ALPHA format 92

Analytical Users 13

## B

blackout dates for schedules 77, 134

burst values 29, 58, 110  
specifying in an e-mail subject line 58

bursting reports 24, 25, 26, 29  
considerations for FTP reports 25  
guidelines and limitations 26

## C

cloning schedules 123

COM format 92

COMMA format 93

COMT format 93

considerations when using ReportCaster 15

creating a distribution list 19, 109

## D

deleting a distribution list 117

deleting a schedule 72, 125

DFIX format 94

DHTML format 94

display formats 91

distributing reports 13, 58, 115  
by e-mail 58  
by fax 58  
to printers 115

distribution files 28, 58

Distribution List 14

distribution lists 13, 19, 22, 28, 73, 107, 108,  
109, 111, 115, 116, 117, 126  
accessing an LDAP Address Book 111  
creating 19, 109, 115  
deleting 117  
editing 22, 73, 116, 126  
specifying multiple addresses in a field 28  
distribution methods  
FTP 25

DOC format 95

dynamic address lists 28

Dynamic Language Switch 15

## E

e-mail 58  
attachments 58  
inline reports 58  
editing a distribution list 116

editing a schedule 69, 121, 122  
editing a schedule with unavailable options 70, 123  
editing distribution lists 22  
EXCEL 97 format 98  
EXCEL format 95  
Execution ID 14  
Execution IDs 79, 80, 138, 139, 140, 141  
    changing 80, 140  
    creating 139  
    deleting 141  
    generating a list of 138  
EXL2K format 96  
EXL2K FORMULA format 97  
EXL2K PIVOT format 97  
EXL2K TEMPLATE format 98  
external distribution files 28, 58

## **F**

faxing reports 58  
Flash format 99  
format types 91  
FTP  
    considerations for bursting reports 25

## **G**

GIF format 99

## **H**

Help option 14  
HTML format 100  
HTML User Interface 13, 14, 119

HTML-ODP format 100

## **I**

inline e-mail reports 58

## **J**

jobs 24  
JPG format 100

## **L**

LDAP integration 111  
Library Access List 14  
localization for ReportCaster 15  
log files 75, 86, 129, 132  
    purging 75, 132  
log reports 73, 85, 86, 88, 89, 126, 128, 129, 131, 132  
    considerations 88, 131  
    reading 85, 128  
    troubleshooting 89, 132  
    viewing 73, 126

## **M**

maintaining a schedule 68, 120  
multiple e-mail addresses 28  
My Reports 13

## **N**

notification and log information for unavailable options 89, 132



**P**

parameters 58  
     specifying in an e-mail subject line 58  
 PDF format 101  
 PNG format 101  
 post-processing procedures 50  
 PPT format 102  
 PPT Template format 102  
 pre-processing procedures 50  
 printers 115  
     distributing reports to 115  
 procedures 50  
 Procedures tab 50  
 PS (PostScript) format 102  
 purging log files 75, 132

**R**

report formats 91  
 ReportCaster HTML User Interface 13, 14, 119  
 ReportCaster Scheduling Wizard 13  
 reports 24, 25, 26, 73, 107, 126  
     bursting 24, 25, 26  
     distributing 24  
     tracking 73, 126  
 retrieving e-mail addresses using Address Search  
 111

**S**

schedule blackout dates 14, 77, 134  
 schedules  
     checking status 137  
     cloning 123

schedules (*continued*)  
     deleting 72, 125  
     editing 69, 121, 122  
     maintaining 68, 120  
 Scheduling Wizard 13  
 section 508 support 15  
 specifying multiple e-mail addresses 28  
 specifying procedures 50  
 Status option 137  
 SVG format 103

**T**

TABT format 104

**U**

unavailable options in ReportCaster 70, 89, 123,  
 132

**V**

VISDIS format 104

**W**

WK1 format 104  
 WP format 105

**X**

XML format 105

**Z**

z/OS UNIX system 115

## **Reader Comments**

In an ongoing effort to produce effective documentation, the Documentation Services staff at Information Builders welcomes any opinion you can offer regarding this manual.

Please use this form to relay suggestions for improving this publication or to alert us to corrections. Identify specific pages where applicable. You can contact us through the following methods:

**Mail:** Documentation Services - Customer Support  
Information Builders, Inc.  
Two Penn Plaza  
New York, NY 10121-2898

**Fax:** (212) 967-0460

**E-mail:** [books\\_info@ibi.com](mailto:books_info@ibi.com)

**Web form:** <http://www.informationbuilders.com/bookstore/derf.html>

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Date: \_\_\_\_\_

Email: \_\_\_\_\_

Comments:

# **WebFOCUS**

## ReportCaster End User's Manual

Version 7 Release 7.02

Information Builders  
Two Penn Plaza  
New York, NY 10121-2898



Printed on recycled paper in the U.S.A.

