Self-Service Learning
WebFOCUS
Business User Edition

Module 5: Using Your Content → Lesson 2: Creating a Schedule → *Learn*

Welcome to *Module 5, Lesson 2*. In this lesson you will learn how to quickly schedule and distribute content (a report, chart, or document) from the WebFOCUS Business User Edition portal.

Using ReportCaster's Scheduling tool, you can quickly administer the distribution of content from a single screen, allowing you to distribute your content automatically over a set duration. This can save a great deal of time that would otherwise be spent in organizing content and sending emails, especially when there are numerous recipients who need different information.

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To open the Scheduling tool, right-click the content that you want to distribute, point to *Schedule*, and choose a destination type.
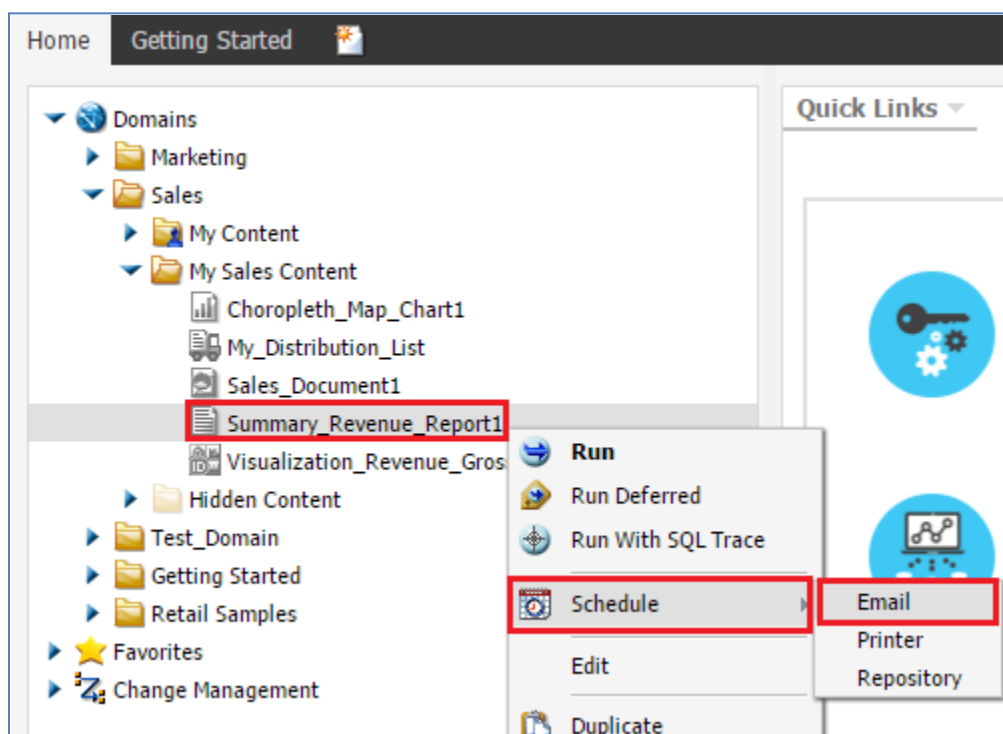
You can send the content via email, set it to print automatically from a specified printer, or you can send it to one of the folders in your repository. Since you can schedule the content to distribute repeatedly over a period of time, you can use the folder to collect different versions of the file as the data used in it changes over time.

The Scheduling tool opens to the Task screen.

You've already selected the file that you want to send, but you can choose to burst the chart or report if you want, which will send filtered versions of the content to different addresses in a Distribution List for which you have specified burst values.

For example, if you have data for different countries in your report, you can burst it to recipients for whom you have set different countries as burst values. You can also change the name with which the report is saved.

You can also add a parameter like &YYMD to the end of the Save Report As name to have it save with a date value to identify the different distributions of the file.

You can click the *Recurrence* tab to schedule the distribution of the content. You have many options for scheduling a recurrence.

You can have it run once or at regular intervals. You can even make a selection of various dates following no regular pattern using the Custom setting.
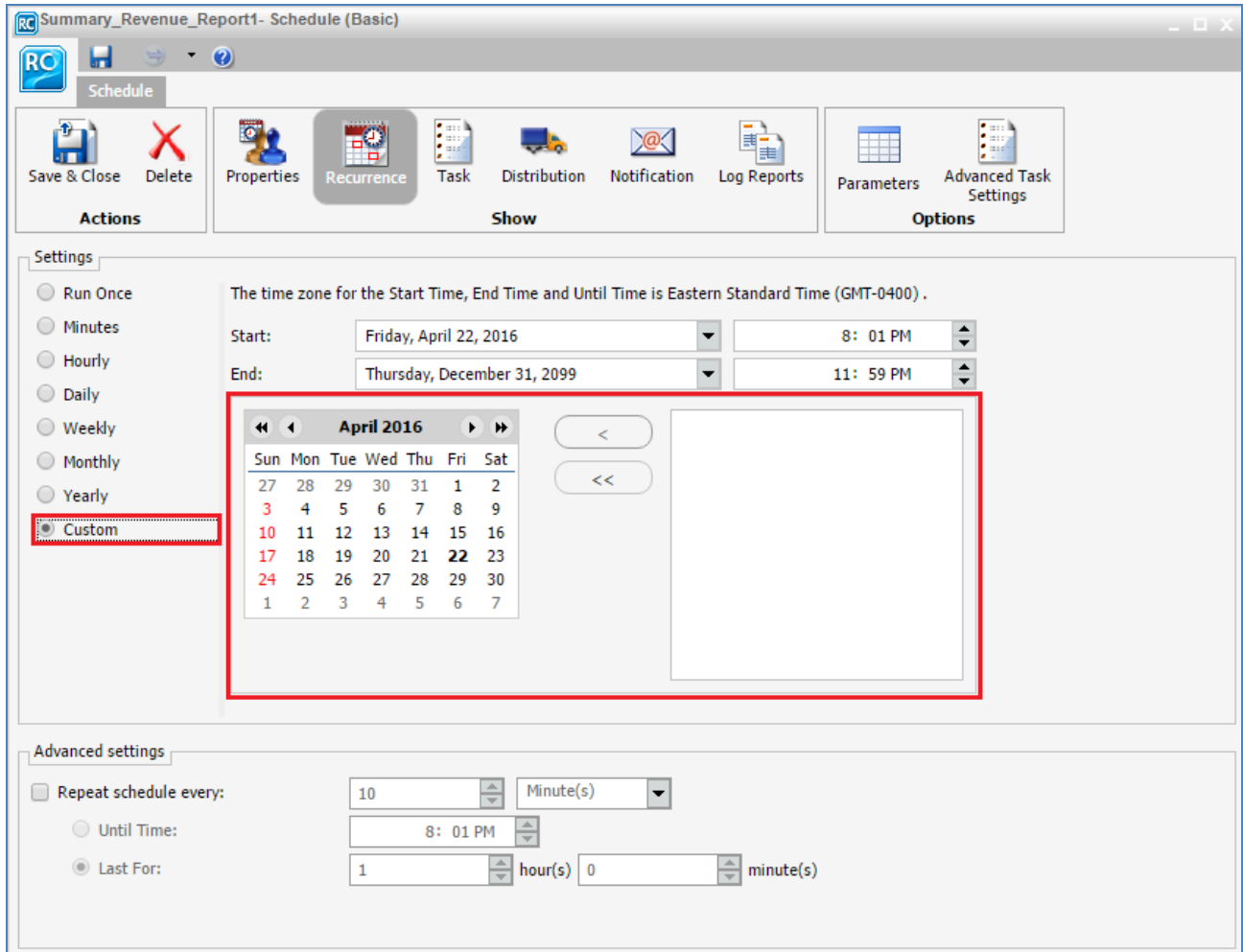
Each setting has its own specifications. For example, if you choose hourly, you can set the number of hours between each recurrence and set on which days you want the Schedule to run.
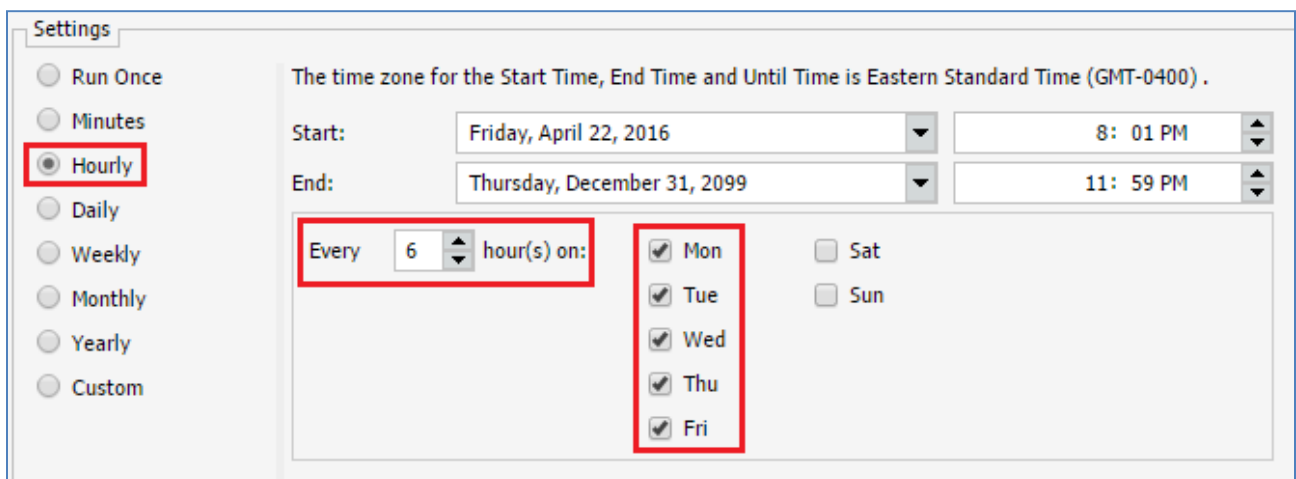
Each setting allows you to set a start and end date. The default start is whenever you began to configure the Schedule and the default end date is at the end of the year 2099. You can make it later if you want the report to continue sending well into the distant future.

The time zone for the Start Time, End Time and Until Time is Eastern Standard Time (GMT-0400).

| Start: | Friday, April 22, 2016 | ▼ | 8: 01 PM |
| End: | Friday, December 31, 9999 | ▼ | 11: 59 PM |

Every 6 hour(s) on:
- ☑ Mon   ☐ Sat
- ☑ Tue   ☐ Sun
- ☑ Wed
- ☑ Thu
- ☑ Fri

You can click the *Properties* tab if you want to change the name of the Schedule or type in a summary of it for your own organizational purposes. You can also set the Schedule to automatically delete if it is not set to run again.
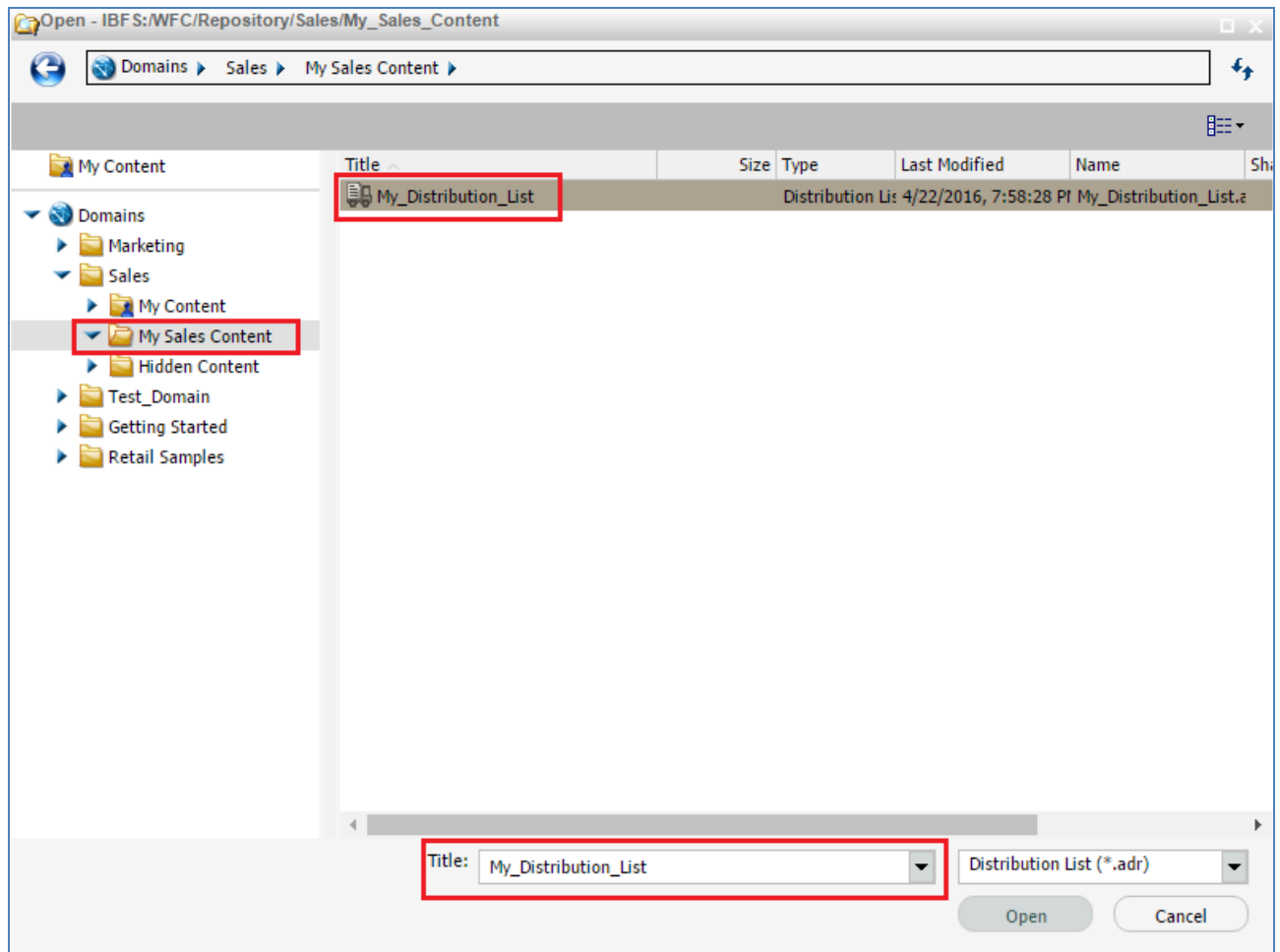

To use a Distribution List or add individual recipients, click *Distribution* on the ribbon.
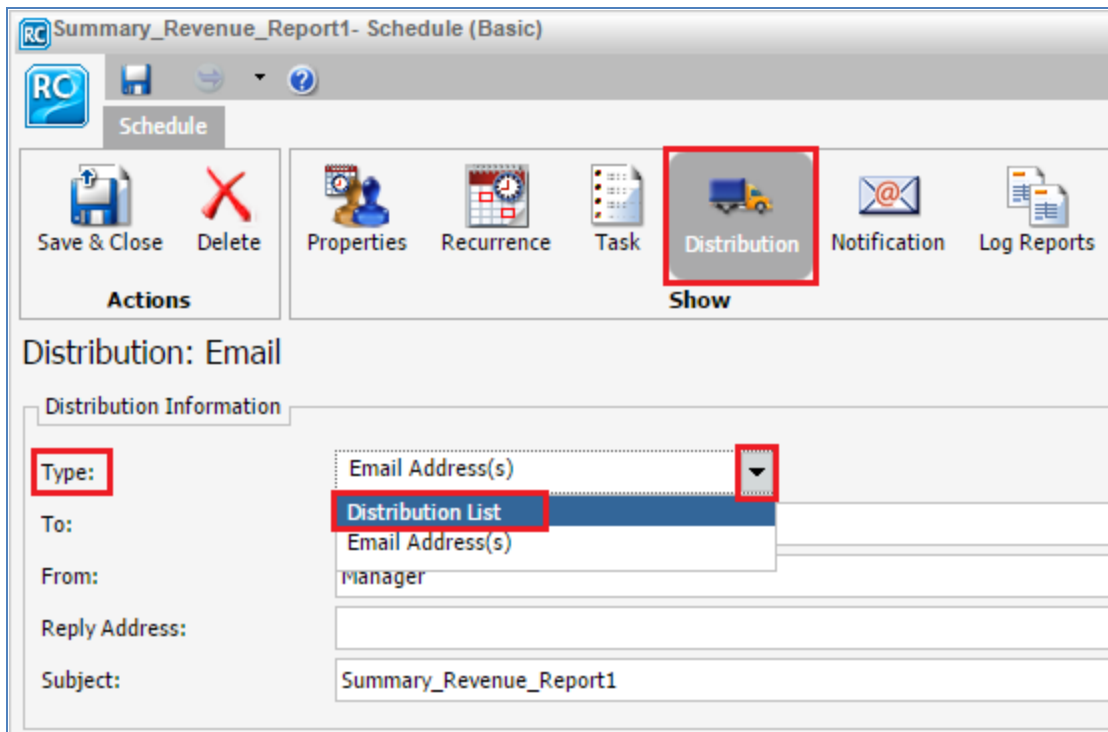
You can enter the recipient addresses manually or use the drop-down menu to use a Distribution List that uses that distribution method and find it using the *To…* button.
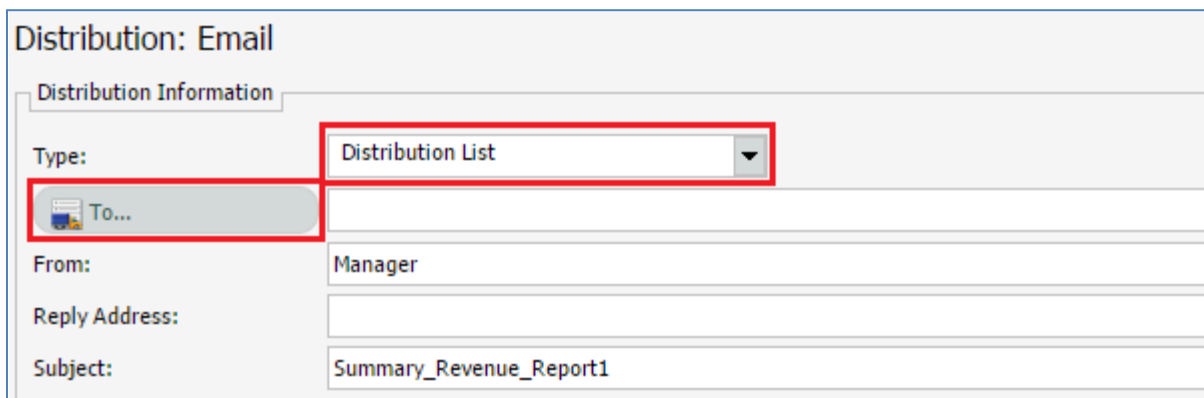
The Open dialog box is displayed.

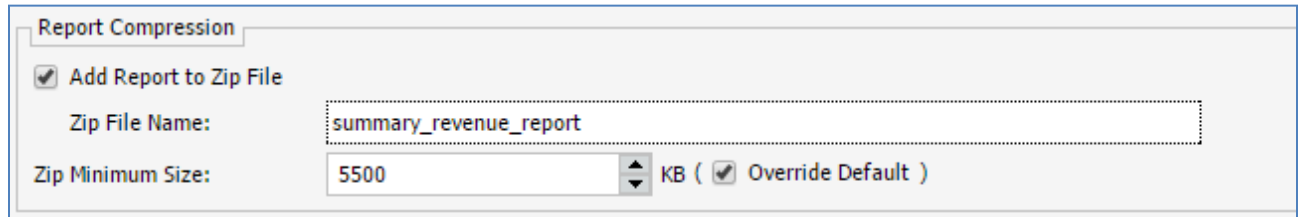Select your configured Distribution List and click *Open*.

Only Distribution Lists of email addresses will be available for an email Schedule. Fill out the rest of the fields as you would a regular email.

You can use certain parameters to contextualize your emails if you wish. For example, you can type a variable like ampersand YYMD or ampersand DATE here as well to add a date value to the email subject line whenever it sends.

Enabling Packet Email will send only one email to each recipient, even if they are the target of multiple burst reports. The printer and repository distribution types will have different options.
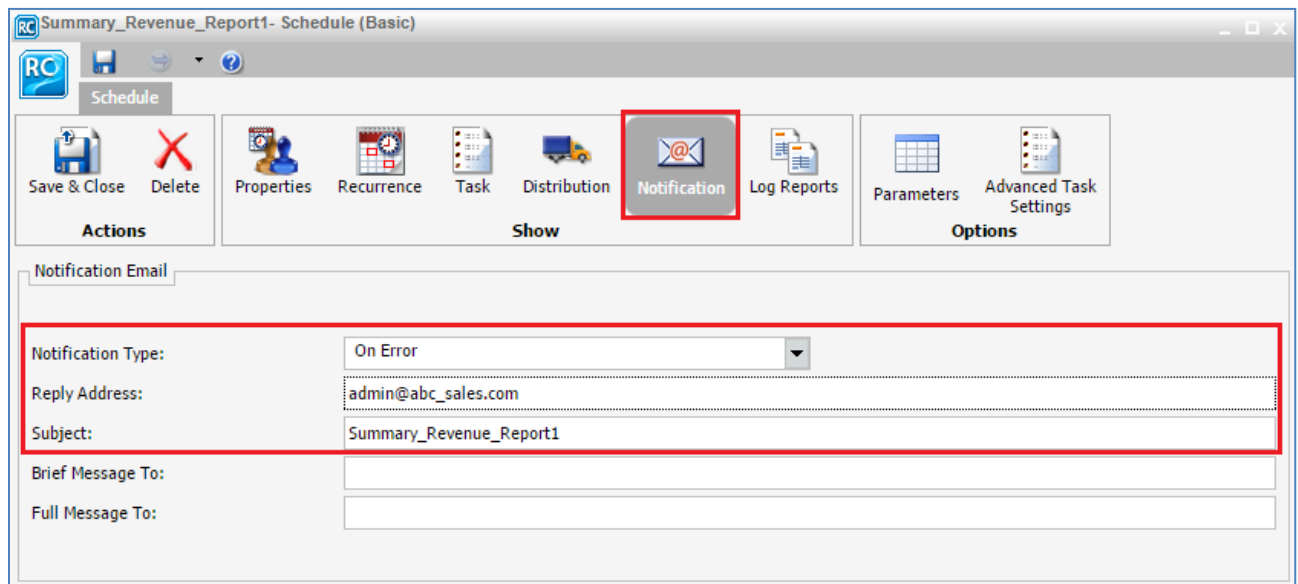
You can also choose whether to have your content sent as a Zip file. You can check the *Add Report to Zip File* check box to send all attachments as a Zip file, or you can check this box and check *Override Default* to set a minimum size to determine whether attachments should be compressed.


This can be useful if you are using burst values to send many reports to some recipients but only one or two reports to other recipients. Emails with attachments larger than the specified size will have those attachments zipped.

If you would like information about the Schedule execution process when it sends, you can make changes in the Notification section. You can choose to have an email sent to you whenever the Schedule runs or encounters an error.
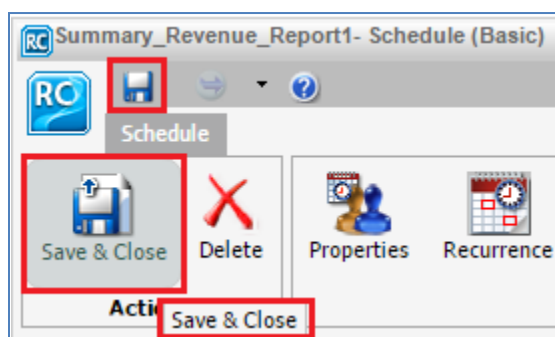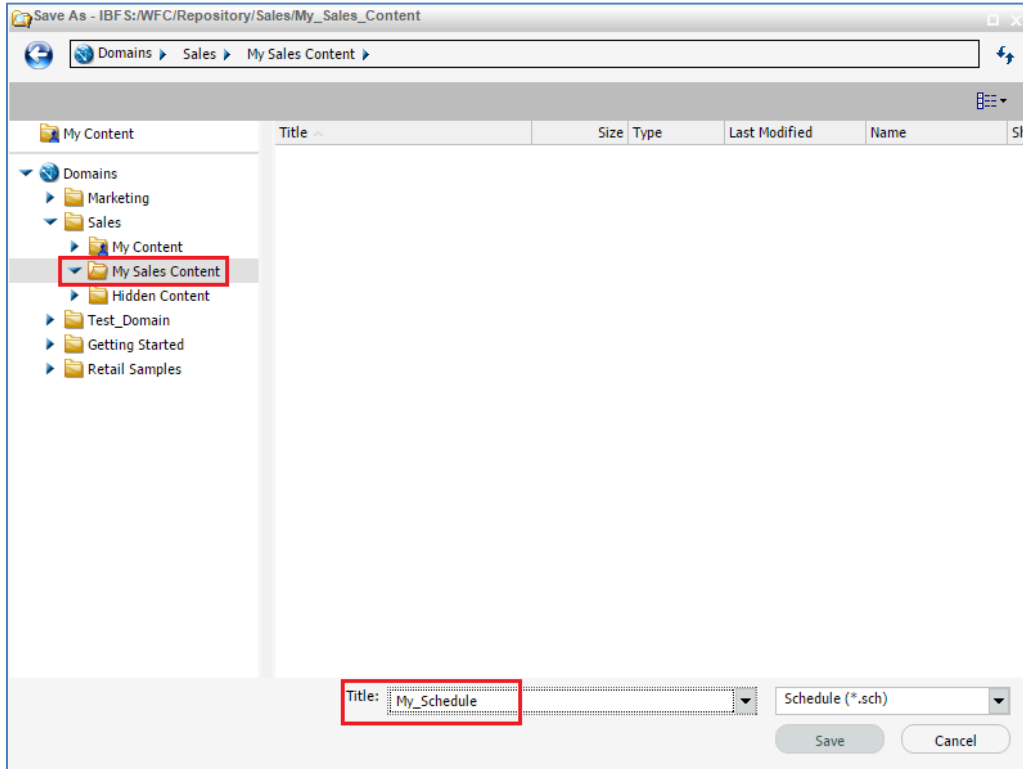

You can also click *Log Reports* to view information about the Schedule once it has run to see any potential issues.
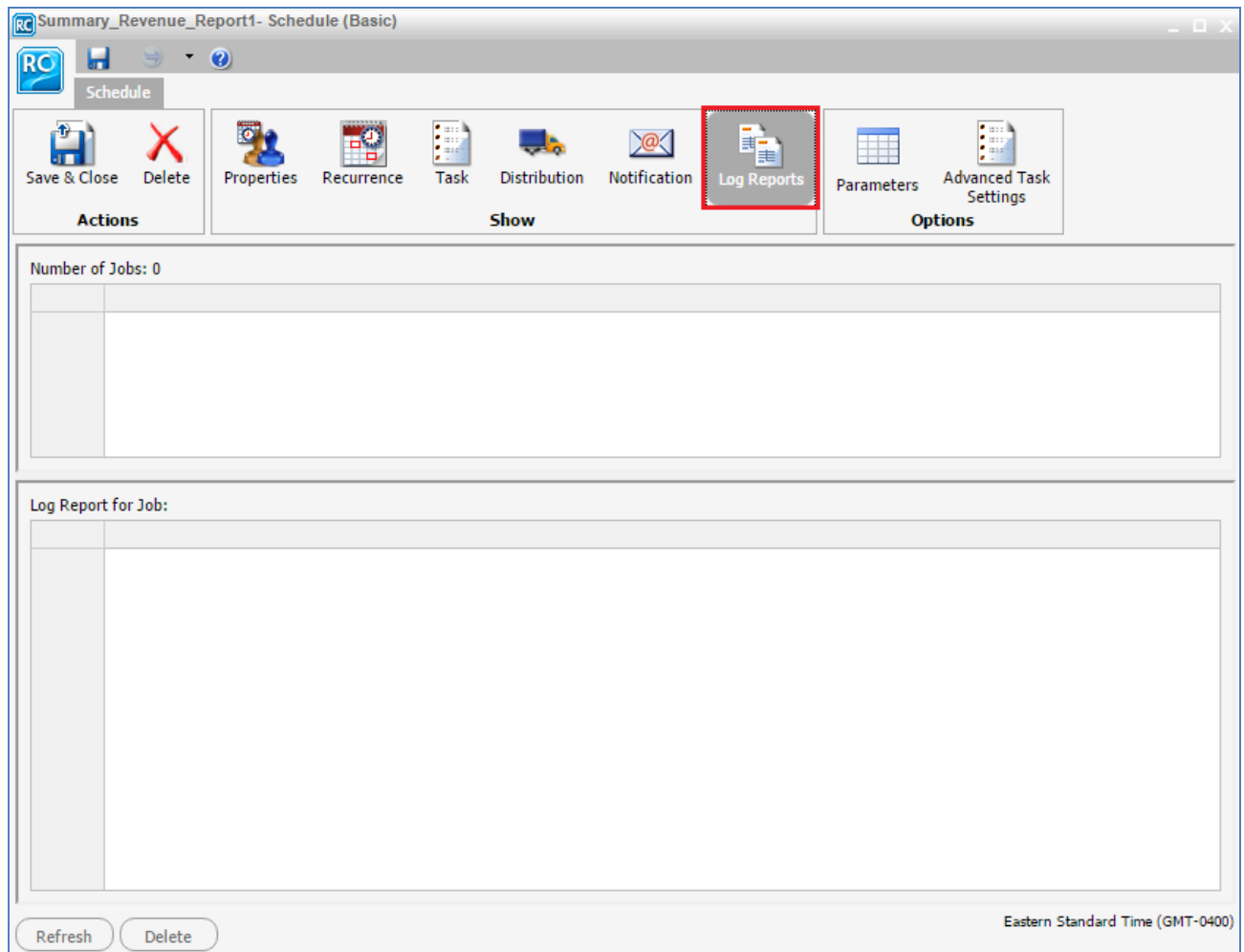
Once you are finished creating the Schedule, you can click *Save & Close* on the ribbon or optionally click *Save* and then *Run* on the Quick Access toolbar if you wanted to run the schedule but remain in the scheduling tool.
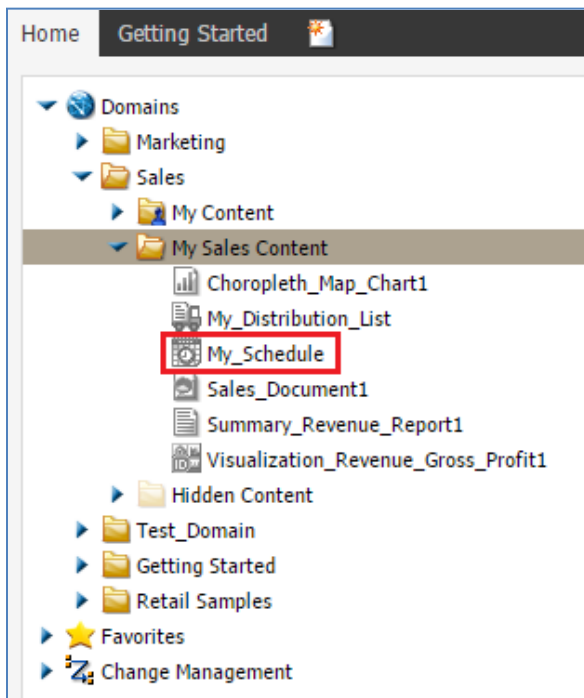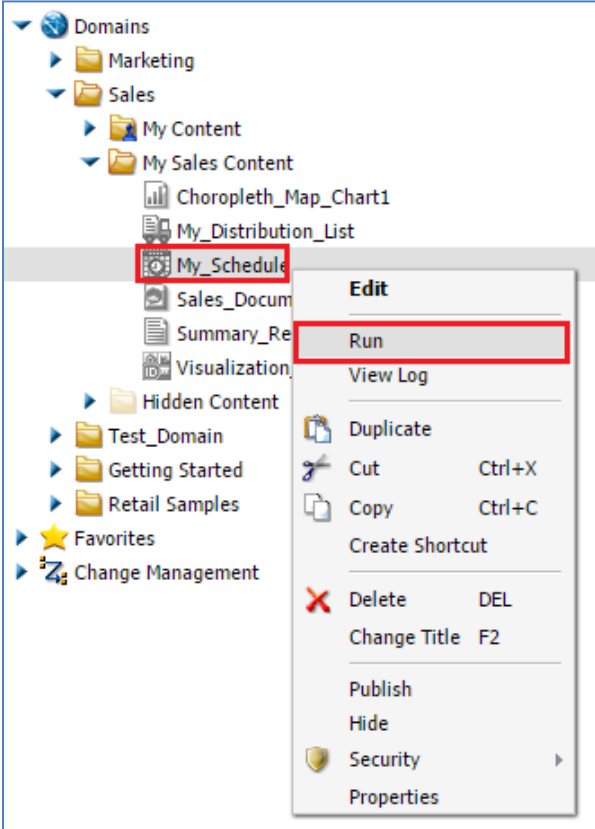
The Save As dialog box opens.

Specify a name for your Schedule and click *Save*.

Your new Schedule is now listed and available in the specified folder in the Resources tree.

You can run the Schedule at any time, even when it is not scheduled, by finding it in the Resource tree, right-clicking it, and then selecting *Run*.

You can also share your Schedule or change security settings such as Schedule ownership from this menu.
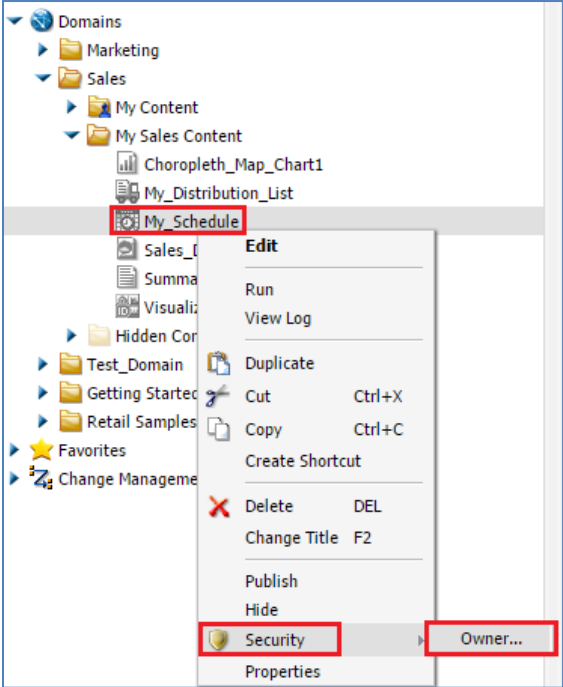
At any time you can go back and edit your Schedule by clicking *Edit* or simply by double-clicking the Schedule.