Information Builders

WebFOCUS

Using Content
Release 8.2 Version 01M

May 02, 2017

Contents

Using Content

After you have created and customized your content, learn how to distribute the content and create schedules.

In this chapter:

Creating Distribution Lists

A Distribution List is an easy way to distribute content to multiple recipients by specifying the name of a list stored in the Repository that contains the individual recipients rather than entering each recipient separately into a schedule. A Distribution List can be made available to other users by sharing it or changing its ownership to be managed or published.

Creating a Distribution List

You create distribution list to distribute content to multiple recipients at one time. If you have an LDAP data source, you can access Email information that is stored in it by configuring the LDAP Email Setting in the ReportCaster Console Configuration tool. Once configured, you can select email addresses from within the email address book of your company, eliminating the need to type them in manually. For more information on the configuration of this functionality, see *LDAP Setting*.

For more information on using this feature, see *How to Retrieve Email Addresses from an LDAP Data Source*

Before creating a Distribution List, understand what groups or individual users require access to it to determine the folder in which to create it.

Procedure: **How to Create a Distribution List**

1. Right-click a Repository folder and select *New*, *Distribution List*.

   The Distribution List window opens, as shown in the following image.
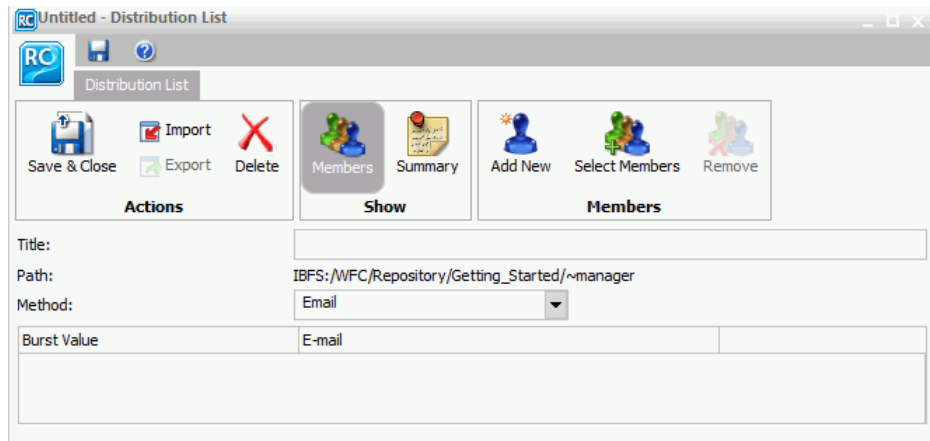
2. In the *Title* box, type a descriptive name for the Distribution List.
3. From the Method drop-down list, select the distribution method for the Distribution List. Email is the default distribution method.

   ❑ **If you select Email,** you must provide a list of email addresses and can optionally burst values associated with an address. For details on entering burst values, see *Bursting a Report* on page 15.

   In the *Address* box, specify the email addresses of the recipients (for example, chuck_hill@ibi.com for an individual user or #sales@ibi.com for a email server list that contains multiple email addresses). Be careful typing this information because there is no edit checking. The maximum number of email 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 email addresses within a single Address field. For more information, see *Specifying Multiple Email Addresses* on page 19.

   If the Email Delivery, Restrict Email Domains option is set to yes in the Server Configuration tool, then only those email domains (the portion of the email address following the at (@) symbol) listed in Allowed Email Domains (also in the Server Configuration tool) are valid email recipients.

❏ **If you select Print,** 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 15.

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.)

4. If you are finished creating a Distribution List, click *Save & Close*.

   Note:

   ❏ The maximum length of a title value for a file is 256 characters.

   ❏ If the title of your file has the same name of an existing file in the folder, you will receive a message asking if you wish to replace the file.

Procedure: **How to Retrieve Email Addresses from an LDAP Data Source**

Note: In order to use this procedure, LDAP must be configured. For more information, see *Using the ReportCasterReport Broker Console*.

1. From the Distribution List toolbar, click *Add New*.

The Add New Member dialog box displays, as shown in the following image.

2. Click the *Search* button adjacent to the email address field.

The Find dialog box displays, as shown in the following image.

3. Select the criteria (Last Name, First Name, or Email) and the operator (Equals, Starts with, Ends with, or Contains). Enter the search string (for example, M* to locate all records beginning with that letter).

4. Click *Search*.

   ReportCaster retrieves and displays the specified names from the LDAP data source.

   Note: You can select one record at a time or use the CTRL key to select multiple records simultaneously.

5. Click the *To* button to add the selected email address or addresses to your selection.

6. Click *OK* to save them in the Distribution List.

7. On the Add New Member dialog box, click *OK*.

   The email recipients are then listed in the Email column on the Distribution List dialog box.

Maintaining Distribution Lists

A Distribution List is an easy way to distribute content to multiple recipients by specifying the name of a list stored in the Repository that contains the individual recipients rather than entering each recipient separately into a schedule. A Distribution List can be made available to other users by sharing it or changing its ownership to be managed or published.

Editing and Deleting a Distribution List

If you are authorized to access the Distribution List tool, you can view and edit the Distribution Lists of which you are the owner. If the Distribution List is owned by a group or is published, you have to be authorized to edit it.

Procedure: **How to Edit a Distribution List**
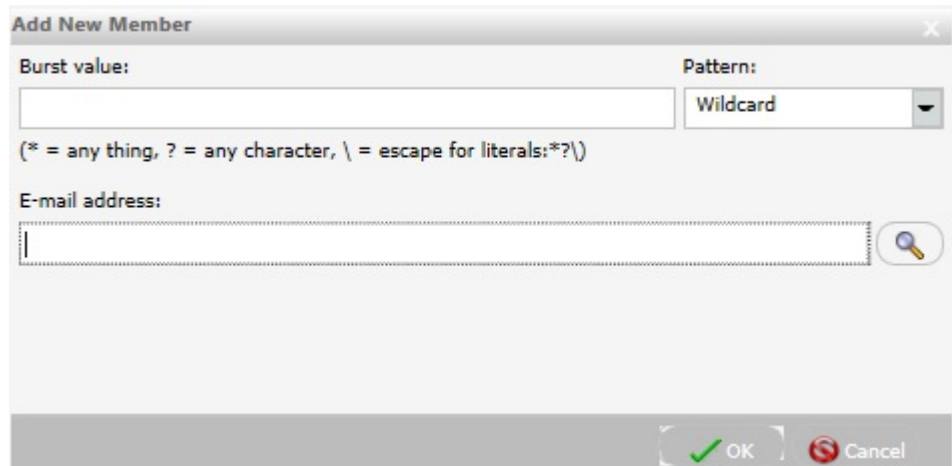
1. From the Resources tree, select the Distribution List you want to edit, right-click and click *Edit*. Optionally, you can double-click the distribution list to open it.

    A window opens displaying the properties of the selected Distribution List, as shown in the following image.
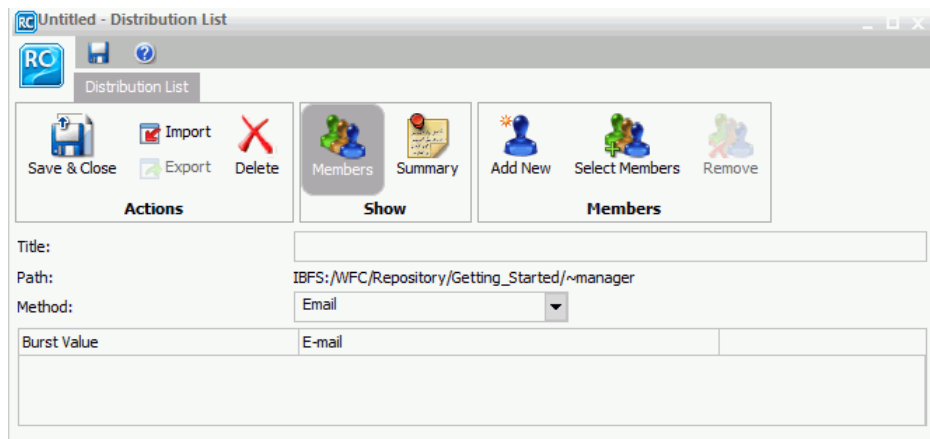
2. From this window, you can perform the following:

    ❏ Change the name of the Distribution List by typing a new name in the *Title* field.

    ❏ Change the Distribution Method.

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❏ Click *Add New* or double-click within the area below the Burst Value column to add a New Member to the Distribution List below Burst Value and Email. The Add New Member dialog box appears, as shown in the following image.

❏ Delete a Distribution List entry by selecting the item to be deleted, then click *Delete*.

3. When you have completed your changes, click *Save & Close*.

Note: If the title of your file has the same name of an existing file in the folder, you will receive a message asking if you wish to replace the file.

To exit the editing window without making changes, click *Close*.

Accessing Distribution Lists

Sharing your private Distribution Lists allows you to permit groups and users to see its content and use it in schedules while you retain ownership. Authorized users can share their private Distribution Lists with groups and users with whom they are permitted to share. The Distribution List can be accessed by users authorized to access the folder in which the shared Distribution Lists are located.

Authorized users can publish and unpublish Distribution Lists to make them available to users authorized to access the folder in which they are located. Publishing requires the folder the item is located in to be published in order to publish an item within the folder. If the folder is subsequently unpublished, all items in that folder are unpublished.

Procedure: **How to Share a Distribution List**

From the Resources tree, if you are authorized to share your private content, you can share a Distribution List with users authorized to access the folder in which the Distribution List is located by right-clicking the folder or Distribution List in the Resources tree and selecting *Share*.

Note: In order to share a Distribution List in the BUE, it must reside in the My Content folder. If you have created the Distribution List in a different folder, simply drag the Distribution List into the My Content folder to enable the sharing options that are available to you.

If you are authorized for advanced sharing, you can share your private content with specific groups and users with whom you are authorized to share by performing the following steps.

1. In the Resources tree, select the Distribution List you want to share.
2. Right-click the Distribution List and select *Share with*.

   The Set Sharing dialog box displays, as shown in the following image.
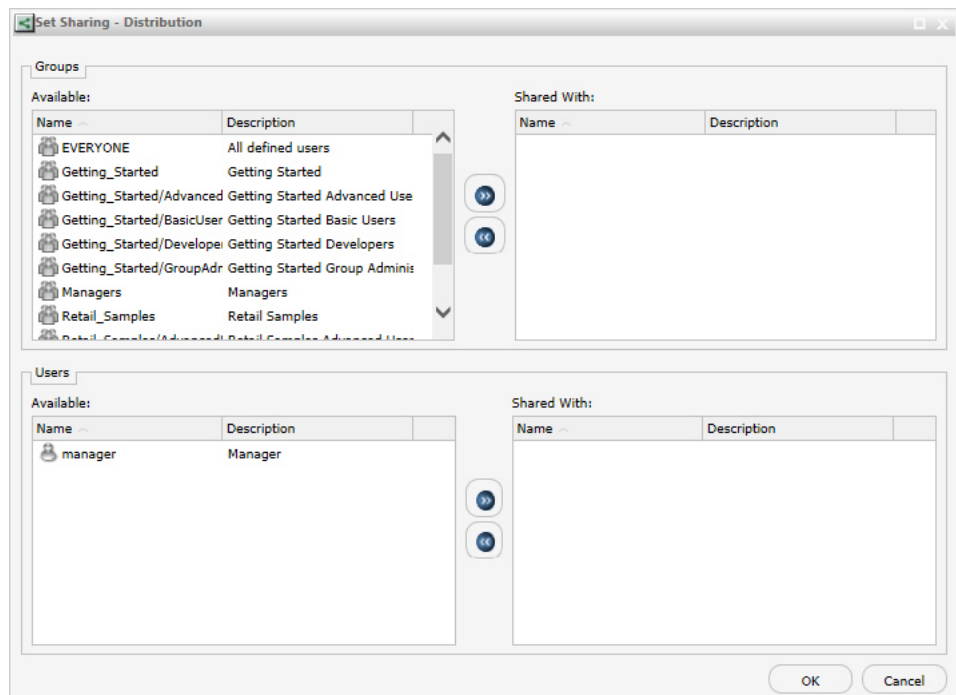
3. Use the left and right arrow buttons to select which Groups will have access to the Distribution List.
4. Use the left and right arrow buttons to select which Users will have access to the Distribution List.

5. Click *OK*.

Procedure: **How to Publish Distribution Lists**

The following steps allow you to publish a Distribution List or folder.

Note: A folder must be published in order to publish items within it. Published items or folders display in color. Those that are unpublished display in black and white.

1. From the Resources tree or ReportCaster Explorer, select the Distribution List or folder that you want to publish.
2. Right-click the folder or Distribution List and select *Publish*.

Procedure: **How to Unpublish Distribution Lists**

From the Resources tree or ReportCaster Explorer, you can unpublish a Distribution List or folder.

1. From the Resources tree or ReportCaster Explorer, select the Distribution List or folder that you want to unpublish.
2. Right-click the published folder or item that you want to unpublish and select *Unpublish*.

Bursting a Report

Instead of distributing an entire report from a scheduled report procedure (FEX), you can use the ReportCaster burst feature to break the report into sections to be distributed separately to the same or different destinations. Bursting enables you to target relevant sections of a report to individual users. Each report section is saved to a separate file.

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 (email addresses and files or printers) for each section you want to send. You can also send several report sections to one destination. 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 the bursting option within the Task for a schedule. The burst values specified in the Burst Value column in the Distribution List are ignored unless the Task specifies to burst the report.

❏ Report names containing more than 60 National Language Support (NLS) characters are truncated to 60 characters prior to distribution. This prevents a report name from becoming corrupted when the report is emailed.

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

You can specify sort field burst values and destinations (email addresses or printers) when creating or editing a Distribution List. The following image shows burst values and the destination email addresses specified in the Distribution List window.
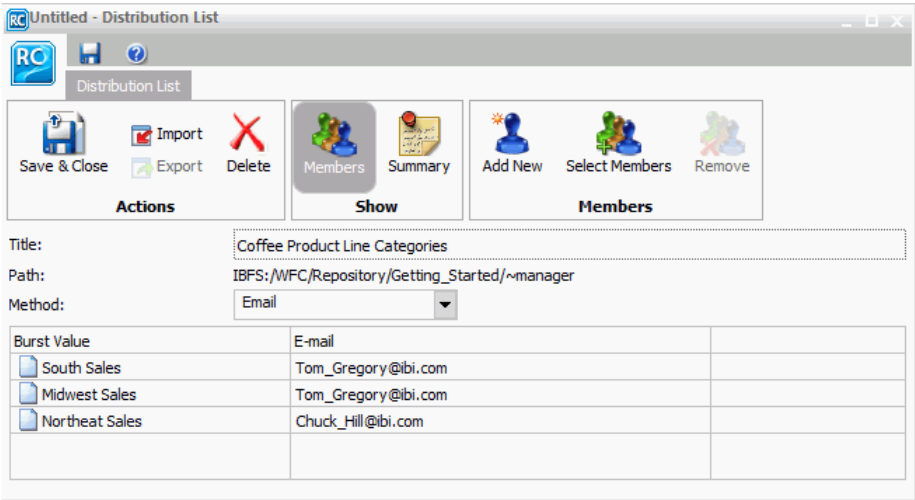
Using the primary sort field values (Northeast Sales, South Sales, and Midwest Sales), the email address of each representative is associated with the relevant sales report data. Since Chuck Hill needs only the data for the Northeast branch, the sort value Northeast is listed in the Burst Value column and is associated with his email address in the E-mail column.

However, Tom Gregory works in both the Midwest and South regions. Since he requires data for both regions, his email address is listed in the E-mail column twice, next to a Burst Value column entry for each region.

Note: You can click on a column heading to sort the data in that column.

Tip: You can specify multiple email addresses on a single Address line. For details, see *Specifying Multiple Email Addresses* on page 19.

Bursting Guidelines and Limitations

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

When a schedule task specifies to burst a report procedure (FEX), all data values generated for each burst section are returned to the Distribution Server.

❏ For the Repository distribution method, each burst section is distributed to the repository. The owner of the schedule must have write access to the repository folder specified in the schedule when the scheduled job runs for the report output to be successfully distributed. Access to the report sections is controlled by the repository security rules that are created when the report is distributed.

❏ For the email and printer distribution methods, specific burst sections are distributed based on the burst values specified when creating the Distribution List or Single Address used by the schedule.

The following are guidelines and limitations that apply to the 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, [regexp]:, as shown in the following examples.

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

  [regexp]:[^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.

❏ **'%BURST' Syntax.** You can include a burst value in the name of a distributed file by using the '%BURST' syntax in the name. The use of '%BURST' is not supported in a zip file name when the Packet email setting is Yes.

The following are example entries in an email 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 output from a scheduled report procedure (FEX) 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.** All formats support bursting except XML and EXCEL. Each burst section of the report output from a scheduled report procedure (FEX) 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 report output from a scheduled report procedure (FEX), you must also include a BY field. Bursting occurs on the BY field.

❏ **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 output from a scheduled report procedure (FEX), and a SUBFOOT for only the last page of the report output from a scheduled report procedure (FEX). When bursting report output from a scheduled report procedure (FEX), 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
```

❑ **A** *n* **V field types.** Bursting is not supported on a field with the A*n*V (where *n* is an integer value) field type.

Specifying Multiple Email Addresses

When creating a schedule or Distribution List, you can specify multiple email addresses within a single field, row, or record.

When creating a schedule or Distribution List, you can separate each email address with a comma (,) or a semicolon (;).

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

Note:

❑ To distribute separate emails for each address, specify the email addresses on separate lines within the Distribution List.

❑ If the Email Delivery, Restrict Email Domains option is set to yes in the Server Configuration tool, then only those email domains (the portion of the email address following the at (@) symbol) listed in Allowed Email Domains (also in the Server Configuration tool)are valid email recipients.

Example: ### Specifying Multiple Burst Email Addresses

If you are using the default configuration (Packet Email = YES), one email is distributed for multiple burst values specified for the same email address. The email 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 email 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 emails when the scheduled output is distributed. In the first email, user1@abcd.com; user2@abcd.com appears in the email To line and one attachment is distributed for burst value A. In the second email, 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 email for each row (Packet Email = NO), then the following behavior occurs for our example. Three separate emails are distributed. In the first email, user1@abcd.com; user2@abcd.com appears on the To line and one attachment is distributed for burst value A. The second email is sent to user1@abcd.com with one attachment for burst value B. The third email is sent to user1@abcd.com with one attachment for burst value C.

If a schedule has Packet Email = BURST, then for each burst value the output for each task is combined and distributed. In our example, three separate emails are distributed. In the first email, user1@abcd.com; user2@abcd.com appears on the To line and all output from the tasks for burst value A are distributed. The second email is sent to user1@abcd.com with all output from all tasks for burst value B. The third email 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 emails are distributed for user1@abcd.com. In the first email, user1@abcd.com; user2@abcd.com appears in the To line and the attachment is for burst value A. In the second email, 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 Email 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 email 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 email, user1@abcd.com; user2@abcd.com appears in the To line and the attachment is for the full report output from a scheduled report procedure (FEX). The second email 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 email is distributed for user3@abcd.com. However, if Packet Email = NO, two separate emails are distributed to user3@abcd.com.

Creating Schedules

A schedule allows you to specify when to run a report, the format in which to create the output, and how it will be distributed.
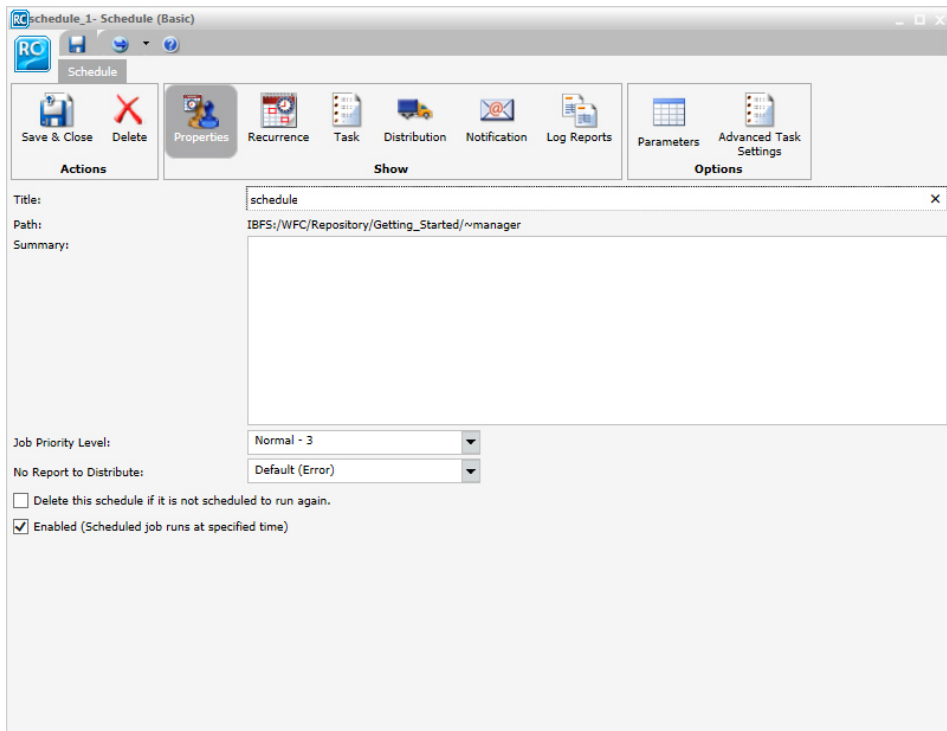
About the Basic Scheduling Tool

The Basic Scheduling tool provides the ability to create a schedule for a procedure (FEX) from the Resources tree when a report procedure (FEX) is selected from the BUE portal. The WebFOCUS Client security authorization model controls whether users are authorized to access the application content stored in the Repository and the Scheduling tools.

To create a new schedule for a report procedure (FEX), navigate to the Resources tree and expand a folder to display your report procedures (FEX). Right-click the report procedure (FEX) you want to schedule, select *Schedule*, and then select the method to distribute the report procedure (FEX). You can distribute the report procedure (FEX) by Email, Printer, or Repository, as shown in the following image.
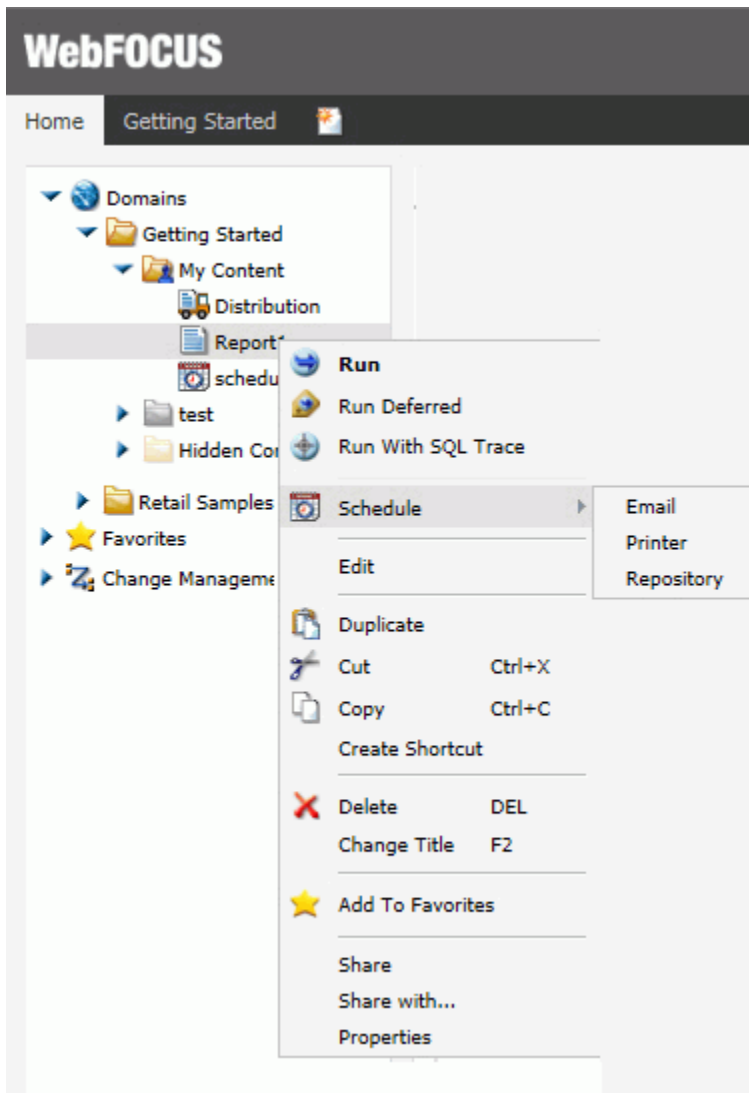
The following image shows the Basic Scheduling tool that consists of a Quick Access Toolbar and the ribbon from which you access the schedule options.


Basic Scheduling Tool Quick Access Toolbar

The Quick Access Toolbar, located at the top of the Basic Scheduling tool, is always visible no matter which options are selected. It provides access to the most commonly used functions. From the Quick Access Toolbar, you can select the ReportCaster button to access the New Distribution List, Save, Save As, Delete, and Close options. You can also access the Save, Run, and Help options from the toolbar.

Run options are available for selection from the Run drop-down list.

Note: The schedule must be saved for Run options to be available or enabled.

The Run options you can select include: Run with default traces, Run with no traces, Run with Schedule traces, and Run with Schedule and Report traces, as shown in the following image.
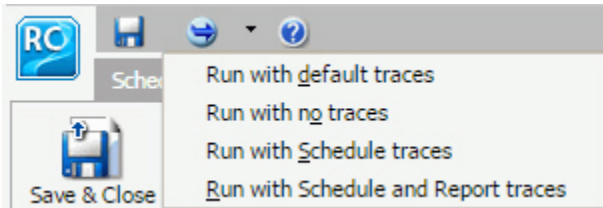
Note:

❏ If you have the Session Traces privilege, you will have the Run with Traces options in the schedule tools. If you are not authorized to run with traces, these options will not display.

❏ Online help is available by clicking the online help icon .

Basic Scheduling Tool Ribbon

The Basic Scheduling tool ribbon partitions the scheduling options into the following categories:
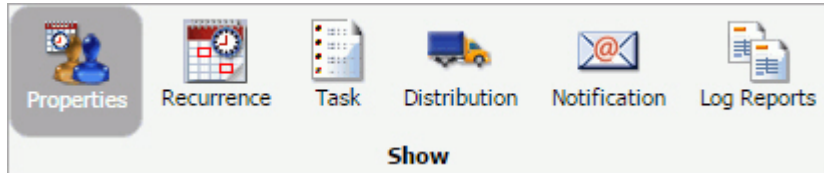
❏ **Actions**

The Actions portion of the ribbon is shown in the following image.

❏ **Save & Close.** Saves and closes the schedule.

❏ **Delete.** Deletes the schedule and closes the Scheduling tool.

❏ **Show**

The Show portion of the ribbon is shown in the following image.

❏ **Properties.** Provides a Title, Path where the schedule will be created or was opened from, Summary, Job Priority Level, No Report to Distribute, and other settings for the schedule. The *Delete this schedule if it is not scheduled to run again* check box specifies to delete the schedule if, after it is run, it is not scheduled to run again. The *Enabled (Scheduled job runs at specified time)* check box specifies to run the schedule as specified by the Recurrence settings within the schedule. The *No Report to Distribute* drop-down list box specifies whether to process a No Report to Distribute result as an Error or a Warning.

❏ **Recurrence.** Provides run-time intervals for distribution and repeat options.

❏ **Distribution.** Provides options to specify the recipients or location to which the report will be distributed.

❏ **Task.** Provides information on the report procedure (FEX) that is being scheduled.

❏ **Notification.** Provides the options to set up notification of the schedule status.

❏ **Log Reports.** Shows the Number of Jobs and the Log Report for individual jobs.

❏ **Options**

The Options portion of the ribbon is shown in the following image.
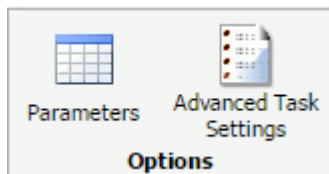
❏ **Parameters.** Specifies values for parameters that are required at run time by the report procedure (FEX) being scheduled.

❏ **Advanced Task Settings.** Allows you to input the report language and additional FOC Errors to be processed as warnings.

Creating a Schedule in the Basic Scheduling Tool

This section provides the overall procedure to create a new schedule for a report procedure (FEX). 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.

To save a schedule, the required information in the Properties, Recurrence, Distribution and Notification tabs must be provided. If required schedule information is missing when you save the schedule, a message will display informing you of the schedule information that needs to be entered.

Procedure: **How to Create a Schedule**

1. Open the Basic Scheduling tool, as described earlier in this section. The Basic Schedule Distribution tab appears. For more information, see *About the Basic Scheduling Tool* on page 21.

   In the Distribution tab, you can adjust your distribution preferences for your schedule. The options available will change depending on whether you have selected Email, Printer, or Repository distribution. for more information, see *Distribution Options in the Basic Scheduling Tool* on page 41.

2. In the Properties tab, you can edit the name for the schedule in the *Title* box.

   This is a required field and a default name is provided.

3. Type a descriptive summary in the *Summary* box.

   Note: This is an optional field.

4. Select a Job Priority Level.

   Normal - 3 Job Priority Level is the default.

5. Check the *Delete this schedule if it is not scheduled to run again* check box if you do not want this schedule to be stored in the Repository if it will not run again as specified in the Schedule recurrence settings.

6. Leave the *Enabled (Scheduled job runs at specified time)* check box checked if you want scheduled jobs to run as specified in the recurrence settings.

7. Select the Recurrence tab and make the following selections.

   a. From the Settings radio button list, select a time interval that the schedule will use to run the report procedure (FEX).

You can set the interval to Run Once, Minutes, Hourly, Daily, Weekly, Monthly, Yearly, or at Custom intervals.

   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 Advanced settings, click the *Repeat schedule every:* check box to enable custom intervals.

      Note: This option is disabled for the Run Once, Minutes, and Hourly settings options.

8. Select the *Task* tab. The Path, Procedure, Server Name, and Save Report As fields are populated according to the report procedure (FEX) you selected to schedule. For a description of the Task tab, see *About Tasks in the Basic Scheduling Tool* on page 28.

9. Select the *Notification* tab and specify 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.** ReportCaster will not send a notification of the schedule status under any circumstances. This is the default value.

   ❏ **Always.** Send a notification each time the schedule runs.

   ❏ **On Error.** Only send a notification when there is an error running the schedule.

   For more information, see *Notification Options in the Basic Scheduling Tool* on page 47.

10. In the Log Reports tab, you can view log and manage log reports for the schedule.

11. To save the schedule, click *Save & Close* on the ribbon.

   Note: You can optionally click *Save* on the toolbar to remain in the scheduling tool. The Save dialog box appears.

12. Select the folder that will contain the schedule.

   Note:

   ❏ You must be authorized to create content in this folder.

   ❏ The default location for saving a schedule is dependent upon your privileges. If you can create content in the folder where the scheduling tool is launched, the Save dialog will be positioned in that folder. If you are not allowed to create content in that folder, the Save dialog will be positioned in the My Content folder located under that folder. If a My Content folder is not available, the Save dialog will be positioned in the first writable folder found.

13. Enter a name for the schedule and click *Save*.

Note:

❏ The maximum length of a title value for a file is 256 characters.

❏ If the title of your file has the same name of an existing file in the folder, you will receive a message asking if you wish to replace the file.

About Tasks in the Basic Scheduling Tool

When you access the Basic Scheduling tool, the information for the Task tab options is predefined with the selected report procedure (FEX) information. You can complete the available task options, such as specifying parameter values, as well as select whether or not to burst the report.

Note: You can use parameters (amper variables) when specifying a value in the Save Report As field of a schedule. These parameters can be system variables, such as &YYMD or any amper variable for which a value is returned by the Reporting Server when the scheduled procedure is executed. To use the dot file extension separator after a variable, terminate the variable with the '|' character, for example, &YYMD|.htm. Similarly, to use the ampersand character itself, follow the ampersand with the '|' character (for example, Smith&|Jones). If a value for a parameter specified in a schedule is not returned by the Reporting Server when the procedure executes, the schedule will fail with a "No report to distribute" error. If the scheduled task is burst, you can also use the '%BURST' symbol to include the burst value in the Save Report As field.

Task Options in the Basic Scheduling Tool

The options available when you select the Task tab are:

❏ **Path.** Shows the report path in the Repository or on the Reporting Server.

❏ **Procedure.** The name of the procedure you are scheduling.

❏ **Server Name.** The Reporting Server to which the report procedure (FEX) will be submitted.

❏ **Execution ID.** The user ID running the report procedure (FEX) on the Reporting Server. Click on the *Password* button to the right of this field to set the password.

❏ **Password.** Enter a password for the Execution ID.

❏ **Alert.** Specifies how to reactivate the alert or to deactivate the alert condition when it is triggered. Click *Alert* to specify the alert options.

Select one of the following options from the Alert Options dialog box.

❏ **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. This is the default value.

❏ **Continue After Alert.** After the alert is triggered, reactivate the alert immediately.

❏ **Deactivate Schedule After Alert.** Deactivate the schedule after the alert is triggered.

❏ **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: Be sure that you set the schedule interval to a time period greater than the time it takes to run the scheduled procedure. When the schedule interval is less than the time it takes to run the procedure and the Delay option is selected, an alert schedule will distribute (based on the Distribution that you selected) more frequently than expected. For email distribution, this can result in unnecessary distribution of emails which can impact the business or operational goals of the Alert report distribution.

❏ **Enabled.** Selected by default, this option allows you to disable a task.

Report Properties

❏ **Burst Report.** If you want to burst the report, select the *Burst Report* check box. The burst feature enables you to instruct the Reporting Server to create the report in sections so that they can be distributed separately.

❏ **Override the Format Specified in the Procedure.** Select this check box to indicate a format other than the one specified in the procedure.

❏ **Save Report As.** Allows you to specify a different name for the report, which defaults to the name of the report that you selected to schedule.

Specifying Parameter Values

You can customize a report and control its execution with parameters. When scheduling a report procedure (FEX), the schedule task Parameters section allows you to supply a value for parameters referenced in the report procedure or add a parameter to the schedule by creating a new parameter and specifying the parameter name and value.

Procedure: How to Specify Parameter Values

If the scheduled procedure contains parameters for which values must be supplied at run time, these parameters are displayed in the parameters section of the scheduling tool.

In the Basic Scheduling tool, click the *Parameters* tab to open the Task Parameters dialog box, shown in the following image.

Parameters may have default values and may have values that can be selected from a static or dynamic list. For more information about selecting parameters in the Scheduling Task Parameters dialog box, see the examples provided in this chapter.

Reference: ### Considerations When Specifying Parameter Values

The following are considerations when specifying parameter values for a procedure:

❏ The maximum number of characters for each individual parameter value is 3200. You can store multiple values for a single parameter. Multiple values for a parameter are stored as one entry, which must not exceed the 3200 maximum character limit.

❏ ReportCaster displays the description for the parameter when it is specified in the procedure. Otherwise, ReportCaster displays the parameter name.

❏ ReportCaster displays default variable values, as well as static or dynamic single-select and multiselect lists.

Note:

❏ The No Selection option is displayed for dynamic multi-select lists. When selected, this option does not perform any data selection test on that field.

❏ ReportCaster does not support using the -HTMLFORM command to create a dynamic selectable list of parameter values.

❏ ReportCaster displays global variables that are used in FILTERS defined in Master Files and referenced by a procedure. For example, if a Master File contains

```
FILENAME=CAR,SUFFIX=FOC
VARIABLE NAME=&&COUNTRY1, USAGE=A10, DEFAULT=ENGLAND,$
FILTER FILTER1=COUNTRY EQ '&&COUNTRY1'; $
```

and the procedure being scheduled contains

```
WHERE FILTER1
```

then ReportCaster displays COUNTRY1 in the Parameters window.

❏ ReportCaster does not prompt for the value of its internal variables that are set by the Distribution Server at schedule execution time. For example, &DSTOWNER is the user ID of the schedule owner. If this parameter is referenced in a scheduled procedure, the value will be available because the Distribution Server sets the value to the owner of the schedule at schedule execution time. However, the scheduling tool will not prompt for this value in the Task Parameters dialog box.

❏ Once a parameter is stored for a schedule, ReportCaster will continue to display that parameter in the Parameter list and submit the parameter to the Reporting Server when the schedule is run even if the parameter is removed from the underlying report. To remove the parameter from the schedule information, edit the schedule and delete the parameter. For information on how to delete a parameter from a schedule, see *Deleting a Parameter* on page 38.

❏ A parameter value that contains special characters should not be used in a schedule setting that refers to an output file name, since file names cannot contain special characters. Examples of affected schedule settings include the Save Report As value, the Report Name value for single-file FTP distribution, and the Zip File Name.

❏ A FEX can be coded to set the Display Value for any value. For example, if a value is named ENGLAND, the Display Value can be set to display as England.

Example: **Adding a Static Single-Select List of Parameter Values**

The following image shows an example of a static parameter list for the CATEGORY parameter created in WebFOCUS InfoAssist+.
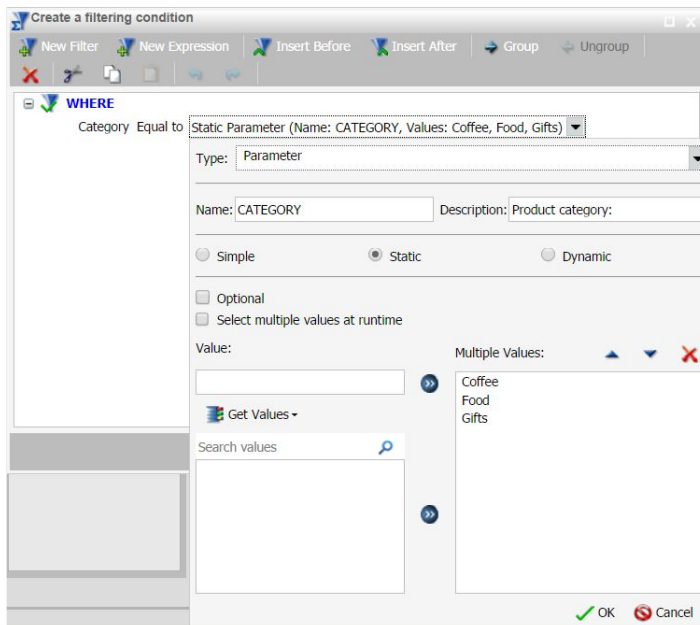
For more information on how to create filters, see the *WebFOCUS InfoAssist+* manual.

The following image shows the Task Parameters dialog box displaying the CATEGORY parameter. The CATEGORY parameter has been encoded to only use the values Coffee, Food or Gifts. InfoAssist+, the content developer tool in WebFOCUS Business User Edition, does not allow you to set default values. Therefore, the Use Default column will always be blank.

To supply a value for a single select parameter, select the Value field drop-down list box and choose a value. Your selected value will be shown in the value column. You can select only one value for a static single-select parameter.

Example: **Adding a Dynamic Single-Select List of Parameter Values**

The following image shows an example of a dynamic single-select parameter list for the Product parameter. This filter is created in WebFOCUS InfoAssist+.
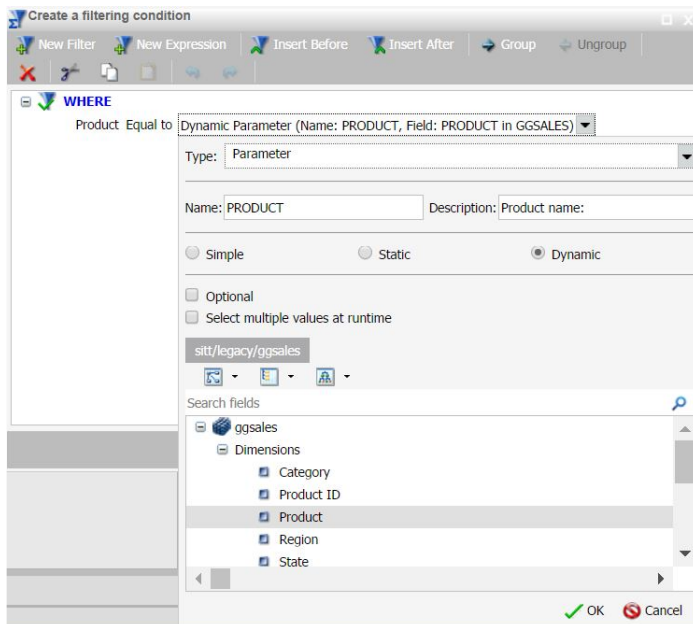
For more information on how to create filters, see the *WebFOCUS InfoAssist+* manual.

The following image shows the Task Parameters dialog box displaying the PRODUCT parameter. To change a parameter value, click the *PRODUCT* parameter in the table and change the parameter value using the Value field drop-down list in the Parameter Properties section.

Example: **Adding a Dynamic Multiselect List of Parameter Values**

The following image shows an example of a dynamic multiselect parameter list for the Product parameter. This filter is created in WebFOCUS InfoAssist+.
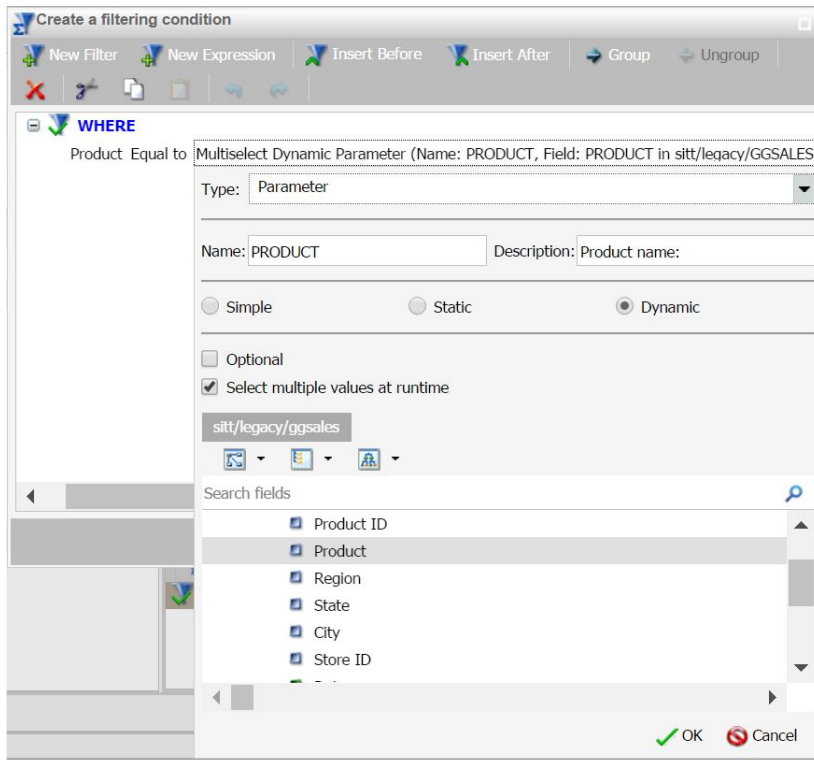
For more information on how to create filters, see the *WebFOCUS InfoAssist+* manual.

The following image shows the PRODUCT parameter selected in the Task Parameters table.

In the Parameter Properties section, click the *Value* button to display the Parameter Value for Amper Variable dialog box, as shown in the following image.
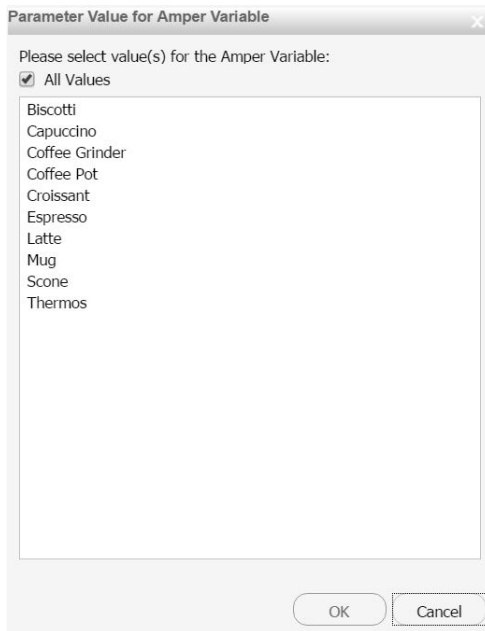
The check box All Values is selected by default. If the All Values check box is cleared, you can select a single value, or you can select multiple values by holding down the Crtl key.

Deleting a Parameter

It is important to verify that the parameters you delete when scheduling a report procedure (FEX) will be handled, as follows, so that the scheduled job will run successfully:

❏ A default value is specified in the report procedure (FEX) being scheduled.

❏ A value will be dynamically assigned to the parameter by the report procedure (FEX) processing when the scheduled job runs on the Reporting Server.

❏ The parameter will not be referenced when the report procedure (FEX) is processed by the Reporting Server.

To delete a parameter so that it is not stored with the schedule information, highlight the parameter in the parameter table you want to delete, and click the *Delete* button.

Creating a New Parameter

If you need to have the schedule job send a parameter and value that is not defined in the report procedure being scheduled, you can create a new parameter in the Task Parameters dialog box. Parameters referenced during processing by the Reporting Server must be assigned a value for the scheduled job to run successfully. The schedule job log report will contain information when required parameter values were not provided.

Procedure: **How to Create a New Parameter**

You can create parameters for a task as follows:

1. On the ribbon, click *Parameters* to open the Task Parameters dialog box. The Task Parameters dialog box is shown in the following image.
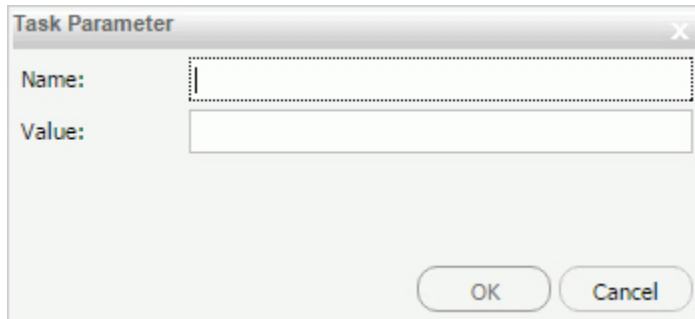
2. Click the *New* button located above the Parameter Properties section.

The Task Parameter dialog box displays, as shown in the following image.

3. Enter a value in the *Name* and *Value* boxes.

4. Click *OK*.

   The *Name* and *Value* boxes are populated in the Task Parameters dialog box Parameters table.

5. If you would like to change the parameter value, select the parameter in the Parameters table and specify the values in the *Description* and *Value* fields located in the Parameter Properties section.

6. Click *OK* when you have completed entering parameter settings for the task.

Advanced Task Settings

The Advanced Task Settings option in the Options group provides access to the Additional FOC Errors to be Processed as Warnings dialog box, where you can specify one or more FOCUS error message numbers, separated by a comma. If one of these FOCUS error numbers is encountered during schedule execution, ReportCaster will process it as a warning rather than an error. For example, if a FOC1517 error is generated by the procedure, add 1517 to the text box to convert this error to a warning. This means that if a report is produced, it will be distributed in spite of the FOCUS error number. It also means that this FOCUS error number will not trigger error notification if the schedule is configured to notify on error.

Note: When an accordion report is distributed through ReportCaster, an error may be generated. To prevent this, the error FOC 3330 (EXPANDBYROW: Not Supported with BORDER) can been added to the list of FOC Errors to be Processed as Warnings.

The following image shows the error FOC 3330 saved in the Additional FOC Errors to be Processed as Warnings dialog box.
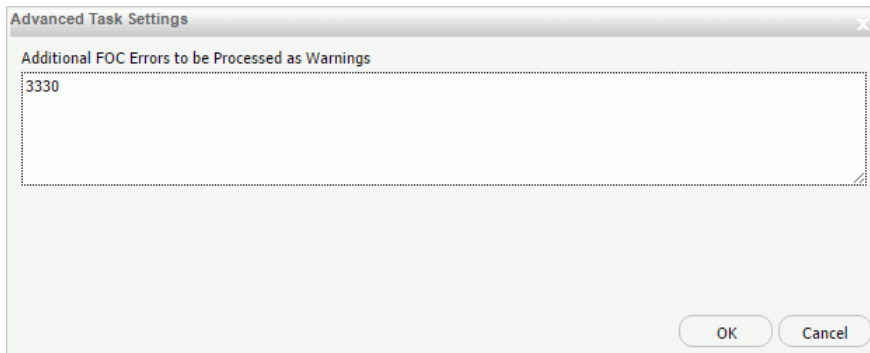
Distribution Options in the Basic Scheduling Tool

The Distribution tab in the Basic Scheduling tool provides the options available for distributing the report output for the scheduled report procedure (FEX). You can distribute a report output using one of the following methods.

❏ Email

❏ Printer

❏ Repository

Note:

❏ Distribution methods can be limited globally (for all users) in ReportCaster configuration and for groups or individual users by security operations.

❏ Maps can be distributed to the WebFOCUS Repository only. Maps distributed by Email do not open correctly.

Using the Email Distribution Option in the Basic Scheduling Tool

When you distribute a report through email, you can include the report in the body of the email (known as an inline email message) or send it as an attachment. Only the HTML, DHTML, WP, and DOC formats can be distributed as an inline email message.

Note: You must be authorized to distribute by Email in order to create a schedule that uses Email distribution.

Distributing a report as an inline email message is particularly useful when the report is distributed to mobile devices or through email systems that do not support attachments.

You can also distribute a report to a fax machine, as explained later in this section. The following image shows the email distribution options in the Distribution tab of the Basic Scheduling tool when the email method is selected.

Note:

❏ The availability of the inline message option when you create a schedule depends on the *Inline Report Distribution* setting in the ReportCaster Configuration tool accessible from the ReportCaster Console.

❏ The display of a report that is distributed as an inline email message can be affected by settings and restrictions of your email server or email client.

❏ When distributing HTML reports by email, the scheduled report (.fex) must set a fully qualified FOCEXURL and FOCHTMLURL for the report styling options defined below. These reference the JavaScript components located on the web or application server where the Client is configured. The Distribution Server will set a fully qualified FOCEXURL and FOCHTMLURL for email distribution using the host name and port provided at installation time. This can be overridden by setting these values in the scheduled procedure. For example:

```
SET FOCEXURL='hostname:port/ibi_apps/'

SET FOCHTMLURL='hostname:port/ibi_apps/ibi_html'
```

Styling options include:

❑ Accordion reports

❑ Table of Contents (TOC) reports

❑ Peer Graphics/Data Visualization graphical reporting

❑ Multi-drill reports

❑ HFREEZE options

Procedure: **How to Use the Email Distribution Option**

Note: You can use parameters (amper variables) when specifying values in the Email settings of a schedule. These parameters can be system variables, such as &YYMD, or any amper variable for which a value is returned by the Reporting Server when the scheduled procedure is executed. To use the dot file extension separator after a variable, terminate the variable with the '|' character (for example, &YYMD|.htm). Similarly, to use the ampersand character itself, follow the ampersand with the '|' character (for example, Smith&|Jones). If a value for a parameter specified in a schedule is not returned by the Reporting Server when the procedure executes, the schedule will fail with a "No report to distribute" error. If the scheduled task is burst, you can also use the '%BURST' symbol to include the burst value. If the Packet Email setting is Yes, the burst value will not be substituted in the Zip filename.

1. Right-click a report procedure (FEX), select *Schedule*, and then select *Email*.

   The Basic Scheduling tool appears.

2. Select the *Distribution* tab.

3. From the Type drop-down list, select the method you will use to provide the email addresses that will receive the distribution. The options are Distribution List, Distribution File, Dynamic Distribution List, and Email Address(es). These options all show where the report procedure (FEX) distributes To, From, Reply Address, and Subject. Additionally, in the Email Information section, select whether you would like to send all reports as attachments or send a report as an inline message.

   ❑ **Distribution List.** The report will be sent to all email addresses in the selected email Distribution List.

❑ **Email Address(s).** This is the default method for supplying email addresses in the scheduling tools. The default value of this field is the email address of the user that is creating the schedule. You can specify multiple email addresses in the Email Address(s) field. Separate each email address with a comma (,) or a semicolon (;). The email addresses will appear in the To line of a single email when the scheduled output is distributed. Each individual email address can be a maximum of 130 characters, according to the SMTP specification. The total maximum length of this field is 800 characters.

Additionally, you can use group mail lists (defined on your mail server) with the Email Address(es) option. You can use group mail lists to distribute a report or notification to multiple recipients without having to maintain multiple email addresses in the Repository. The format of the group mail list depends on 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, enclose the space with double quotation marks ('' ''). For more information, see your mail server administrator.

4. In the To box, type the email address of the recipient.

5. In the From box, type any value (for example, the name of the person creating the schedule). ReportCaster does not require a value for this field, but your email system may require one.

6. In the Reply Address box, type a valid email address. If recipients reply to the email, their messages will be sent to this address. If your email system is unable to deliver the content, the undeliverable output message is also returned to this address. ReportCaster requires this field.

7. In the Subject box, type the text that you want to appear in the email subject line. ReportCaster may not require this information, but it may be needed by your email system. The value you entered in the schedule Title field is the default Subject value.

8. Specify whether you want to send the report as an email attachment, or within the body of the email inline by selecting or clearing the *Send all reports as attachments* option. For more information, see *Using the Email Distribution Option in the Basic Scheduling Tool* on page 41.

9. Optionally, you can type a message to appear in the email body to replace the default message, *Please see attachment(s)*.

Note: You can also provide a custom default distribution message using the Email Distribution and Notification settings in the ReportCaster Configuration tool in the ReportCaster Console. This allows you to override the default message, *Please see attachment(s)*, by enabling you to create a custom message specific to your organization. The message displays when creating a schedule using Email distribution. For more information, see *ReportCaster Configuration*.

10. Optionally, select a file from the WebFOCUS Repository that contains the message you want to distribute with your Email distribution.

    Note: When you use the file option, the information can be maintained in one common place. It can also be revised among multiple schedules. There is no size limit to the contents of the file, other than what the email client and server support.

11. Optionally, specify a value for the Packet Email or accept the default value. The Packet Email option is set to the default value configured by the Manager. For a schedule that has a task that is burst, you can decide how many emails to send to each recipient. Options include:

    ❏ **No.** Sends each attachment in a separate email.

    ❏ **Yes.** Sends one email that contains all attachments.

    ❏ **By Burst Values.** Sends one email with multiple attachments for each burst value.

12. Specify whether to send the report as a compressed (.zip) file by selecting or clearing the *Add Report to Zip File* check box.

    You have the option of converting your distributed report into a password-protected compressed file. By default, the Add Report to Zip File check box is not selected and the report will not be compressed. You can optionally password protect a zipped file by including a password in a Distribution File or Dynamic Distribution List.

13. If the *Add Report to Zip File* check box is selected, enter the name of the Zip file in the *Zip File Name* box.

    Note: Support of Unicode characters in a Zip file name and content within a Zip file on Windows 7 and Windows 2008 Server R2 requires the following hotfix from Microsoft: *http://support.microsoft.com/kb/2704299/en-us*. Without this hotfix, file names are corrupted after you decompress a .zip file in Windows 7 or in Windows Server 2008 R2.

14. Additionally, you can specify the minimum size (in KBs) a file must exceed before it is automatically added to a Zip file. The Zip minimum size is set to the default value configured by the administrator. To automatically zip an attachment that exceeds a certain size, set this value to the desired size.

15. Select the *Notification* tab to specify whether to send an email notification of the schedule job status. If you select Always or On Error, then you have to specify the Reply Address, Subject, Brief Message To, and Full Message To.

16. Next, select the *Properties* tab to specify the Title, Priority, whether to delete the schedule if it will not run again, and whether the schedule is enabled to run. For more information, see *About Properties in the Basic Scheduling Tool* on page 50.

17. Select the *Recurrence* tab to specify how often to run the schedule. If you want the schedule to run on the current day, set the Start Date and Start Time to values later than the current time. For more information, see *About Recurrence in the Basic Scheduling Tool* on page 52.

18. Select *Save & Close* to save the schedule.

Using the Printer Distribution Option in the Basic Scheduling Tool

The report formats that support printing are DOC, PDF (when you configure ReportCaster to enable PDF to print and the printer has the appropriate driver), PS, and WP.

Note:

❏ You must be authorized to distribute to a Printer in order to create a schedule that uses Printer distribution.

❏ Problems may occur in printed output if the distributed reports contain UTF-8 characters.

❏ Since a Printer schedule will not work unless the report output format is a valid print format, ReportCaster always sets the format of a schedule with distribution to a printer to a valid format. If the default configuration of PDF as a valid print format is in place, the override format is set to PDF. Otherwise, the override format is set to DOC. You can change this format on the Task tab.

Procedure: **How to Use the Printer Distribution Option**

Note: You can use parameters (amper variables) when specifying a value for the Printer Name field of a schedule. These parameters can be system variables, such as &YYMD, or any amper variable for which a value is returned by the Reporting Server when the scheduled procedure is executed. To use the dot file extension separator after a variable, terminate the variable with the '|' character (for example, &YYMD|.htm). Similarly, to use the ampersand character itself, follow the ampersand with the '|' character (for example, Smith&|Jones). If a value for a parameter specified in a schedule is not returned by the Reporting Server when the procedure executes, the schedule will fail with a "No report to distribute" error. If the scheduled task is burst, you can also use the '%BURST' symbol to include the burst value.

1. Right-click a report procedure (FEX), select *Schedule*, and then select *Printer*.

   The Basic Scheduling tool appears.

2. Click the *Distribution* tab.

3. From the Type drop-down menu, select the method in which you will provide the file names to distribute to the printer. The options are:

❏ **Distribution List.** The report will be sent to all printers in the selected Distribution List. To select a Distribution List, click the icon next to the Distribution List field.

❏ **Printer Name.** 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.

ReportCaster can differentiate between the printer queue and the printer host name or IP address due to the presence of the '@' separator. Although ReportCaster supports specifying only the host name or IP address of the printer, we recommend that you specify both the printer queue and host name or IP address when distributing ReportCaster output to a printer. The maximum length of this field is 800 characters.

4. If you select Distribution List, click the *Name* button, which will display the Open dialog box to allow you to select a Distribution List. If you select *Distribution File*, specify in the Name field the fully qualified path and file name where the external Distribution File is located. If you select Printer, specify the printer name in the Name field.

5. Select the *Notification* tab to specify whether to send an email notification of the schedule job status. If you select Always or On Error, then you must specify the Reply Address, Subject, Brief Message To, and Full Message To.

6. Select the *Properties* tab to specify the Title, Priority, whether to delete the schedule if it will not run again, and whether the schedule is enabled to run. For more information, see *About Properties in the Basic Scheduling Tool* on page 50.

7. Select the *Recurrence* tab to specify how often to run the schedule. If you want the schedule to run on the current day, set the Start Date and Start Time to values later than the current time. For more information, see *About Recurrence in the Basic Scheduling Tool* on page 52.

8. Select *Save & Close* to save your changes.

Notification Options in the Basic Scheduling Tool

The Notification tab in the Basic Scheduling tool, shown in the following image, provides the options to send a notification of the schedule status to specific email recipients.

Note:

❑ Notification will not work unless a mail server is configured. If a mail server is not configured, notification will fail and an error message will be recorded in the schedule job log. For more information about configuring a mail server, refer to the *Installation* topic in the Information Center.

❑ You can use parameters (amper variables) when specifying values for the Notification fields of a schedule. These parameters can be system variables, such as &YYMD, or any amper variable for which a value is returned by the Reporting Server when the scheduled procedure is executed. To use the dot file extension separator after a variable, terminate the variable with the '|' character (for example, &YYMD|.htm). Similarly, to use the ampersand character itself, follow the ampersand with the '|' character (for example, Smith&|Jones). If a value for a parameter specified in a schedule is not returned by the Reporting Server when the procedure executes, the schedule will fail with a "No report to distribute" error.

The notification options are:

❑ **Never.** ReportCaster will not send a notification of the schedule status under any circumstances. This is the default value.

❑ **Always.** The specified users are always notified when the schedule runs.

❑ **On Error.** The specified users are notified when errors are encountered while running the schedule. Information Builders recommends the use of the On Error notification option.

Setting On Error and Always Notification in the Basic Scheduling Tool

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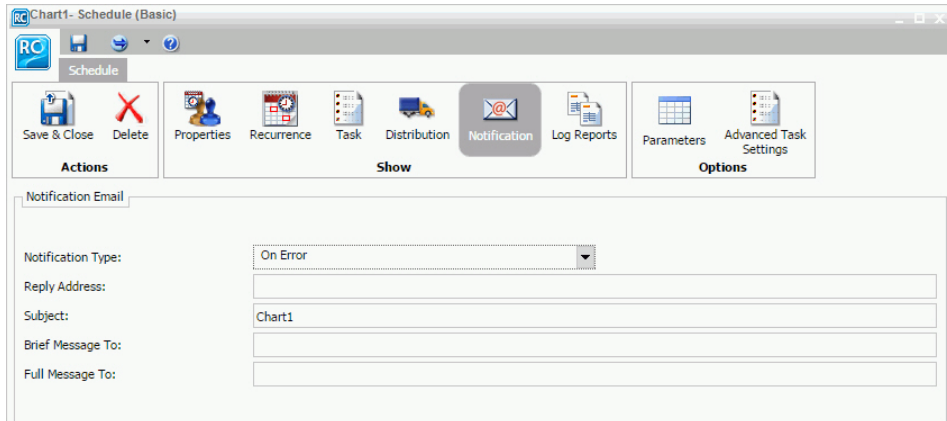
The On Error and Always notification options are:

❏ **Reply Address.** Type the email address of the sender. If report recipients reply to the report sender, then their messages are sent to this address. If your email system is unable to deliver a report, then the undeliverable report message is also returned to this address.

   Note:

   ❏ If you are authenticating to the mail server with your user ID and password, then the reply address will be the email address associated with that user ID.

   ❏ If the mail server is configured with authentication and the Reply Address is configured in the ReportCaster Configuration tool, then the Reply Address field in the scheduling tools will be disabled. If a Reply Address is not configured, then the field is enabled to allow a Reply Address to be sent to the email server, however the actual Reply Address of the delivered email will be that of the authenticating account.

❏ **Subject.** Type the text you want to display in the subject line of the email notification. There is a limit of 255 alphanumeric characters. By default, this field contains the report name and date and time stamp.

❏ **Brief Message To.** Type the email address where you want a full notification sent. There is no syntax error checking for this field.

> **Tip:** Use the Brief Message To 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 Message To.** Type the email address to which you want a full notification sent. There is no syntax error checking for this field.

About Properties in the Basic Scheduling Tool

When you access the Basic Scheduling tool, the Title and Path Properties options are predefined for the selected report procedure (FEX). The following image displays the Properties tab in the Basic Scheduling tool.

The options within the Properties tab are:

❑ **Title.** This allows you to provide a brief description of the purpose of the schedule. It is pre-populated with the Title of the report procedure being scheduled when creating schedules with the Basic Scheduling tool. You can edit the Title while creating the schedule or after saving the schedule from within the Schedule tools. You can also edit the title from the Properties option from the Resources tree after saving the schedule.

The Title of the schedule is the default name assigned when saving the schedule. If the name value already exists in the selected tree folder, a message is displayed informing you that the name already exists. You can change the Title field in the Save dialog box, which when saved, will also update the Title field within the schedule information.

❑ **Path.** This is the Repository path of the report procedure (FEX) you selected to schedule.

❑ **Summary.** This allows you to insert a detailed description for the schedule. This is an optional field.

❑ **Job Priority Level.** This specifies the priority the scheduled job will be given when processed by the Distribution Server. The default Job Priority Level is set to Normal - 3. However, you can use the drop-down list to set the priority level, as shown in the following image.
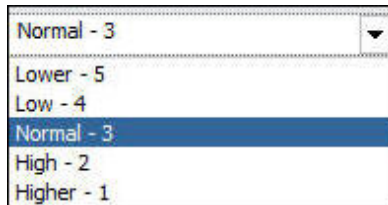
❑ **No Report to Distribute.** This option is set to the default value configured by the Manager. To trigger error notification if no report is generated, set this value to Error. If you do not want to trigger notification when no report is generated, set this value to Warning.

❑ **Delete this schedule if it is not scheduled to run again.** This check box allows you to specify that the schedule should be deleted after the scheduled job processing is completed if the schedule is not scheduled to run again. Selecting this option for schedules you will not utilize again is recommended as it will improve overall performance within the Resources tree listing folder contents and within the ReportCaster Explorer tool when listing schedules.

❑ **Enabled (Scheduled job runs at specified time).** This check box is selected by default to specify that the schedule should be evaluated by the Distribution Server when polling for scheduled jobs to run. If you do not want to distribute the schedule based on its NEXTRUNTIME value, clear this check box.

About Recurrence in the Basic Scheduling Tool

When you access the Basic Scheduling tool, the Recurrence tab options allow you to define how often to run the schedule. The following image displays the Recurrence tab in the Basic Scheduling tool.

Options that users must determine include frequency of distribution, start and end times, and Advanced interval settings. Select one of the following frequency of distribution settings:

❏ Run Once

❏ Minutes

❏ Hourly

❏ Daily

❏ Weekly

❏ Monthly

❏ Yearly

❏ Custom

You can assign start and end times by using the drop-down lists. When you click on the down arrow, a calendar will display that enables an authorized user to set the date for schedule distribution. Use the up and down arrows to set a specific time for schedule distribution. Alternatively, you can enter the time manually.

If the user has the privilege to set Advanced settings, check the *Repeat schedule every* check box to enable Advanced interval setting options. Set how often you want to repeat schedule distribution, when you want to stop distributing the schedule (Until Time), and the duration to distribute the schedule (Last For). Enter this information manually or use the up and down arrows to set parameters.

The Run Once Interval

The Run Once option sets the job to execute immediately. This is the default value. 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.

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. Alternatively, you can enter the time manually.

The Minutes Interval

The Minute(s) option 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* and *End* date and time to define the time period in which the schedule will run. For example, the following image shows a schedule that will run every 30 minutes on Mondays beginning at noon May 16, 2012 and ending 6:00 PM October 30, 2012.

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 for alert schedules.

The Hourly Interval

The Hourly option 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* and *End* 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, 2012 and ending 6:00 PM October 30, 2012.

The Daily Interval

The Daily 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 *Start* and *End* date and time to define the 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, 2012 and ending 6:00 PM October 30, 2012.

You can also set a secondary run interval. For information about this setting, see *Advanced Settings* on page 62.

The Weekly Interval

The Weekly 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* and *End* date and time to define the time period in which the schedule will run. The following image shows a schedule that will run every two weeks on both Monday and Friday beginning at noon May 16, 2012 and ending at 6:00pm on October 30, 2012.

Note: When selecting the *Weekly* interval, set the *Start* 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* time is later than the current time when you save the schedule. If the *Start* 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 more information about this settings, see *Advanced Settings* on page 62.

The Monthly Interval

The Monthly option 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.

Additionally, select the *Start* and *End* 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 16, 2012 and ending 6:00 PM October 30, 2012.

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 on which those dates fall.

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* date 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* time is later than the current time when you save the schedule. If the *Start* 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 *Advanced Settings* on page 62.

The Yearly Interval

The Yearly option 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 16, 2012 and ending 6:00 PM October 30, 2022.

You can also set a secondary run interval. For information about this setting, see *Advanced Settings* on page 62.

The Custom Interval

The Custom option 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 (Saturday), June 4 (Monday), September 7 (Friday), and December 2 (Sunday).

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

Define the time period in which the schedule will run by selecting the *Start* date and time and the *End* date and time. Select the specific days on which to run the schedule by clicking 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.

To remove a date from the list, click the date in the calendar. The date is no longer highlighted in the calendar and will not appear in the Custom Date List. You can optionally use the left single arrow to remove a date from the list. The double arrow button removes all defined lists.

You can also set secondary run interval. For information about this setting, see *Advanced Settings* on page 62.

Advanced Settings

The Advanced settings option enables 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).

Note: When a schedule is saved, the hours setting is converted to minutes. When a schedule is edited, this value appears as minutes.

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 you schedule a secondary run interval 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.

The Advanced settings section allows you to specify repeat options, as well as time intervals. The following image shows an example of set secondary run interval options.

The Apply secondary run interval options are:

❑ **Repeat schedule every.** 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 rerun every 10 minutes until 4:10 PM when the Until Time option is selected.

❑ **Last For.** 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.

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 resets 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.

Tracking 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 in the ReportCaster Console Job Status tool.

Log Reports

Log reports are stylized HTML format and appear in a separate browser window. You can search, print, or save the 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.

Tracking Schedules in the Console

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. For more information, see *Using the ReportCaster Console*.

Using Schedule Logs

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. Log reports can be accessed within the scheduling tool when editing a schedule or by right-clicking on a schedule from the Resources tree.

The log file accumulates information. You should periodically purge log records to manage the number of log reports stored in the Repository, as well as the performance of log report information that is displayed.

The list in the right panel 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 in the job list.

Checking the Job Status

Another resource for tracking schedules is the schedule job status. The schedule status provides a list of scheduled jobs that are in the Distribution Server queue. Status information includes the schedule ID, the time it started running, and the status of the job.
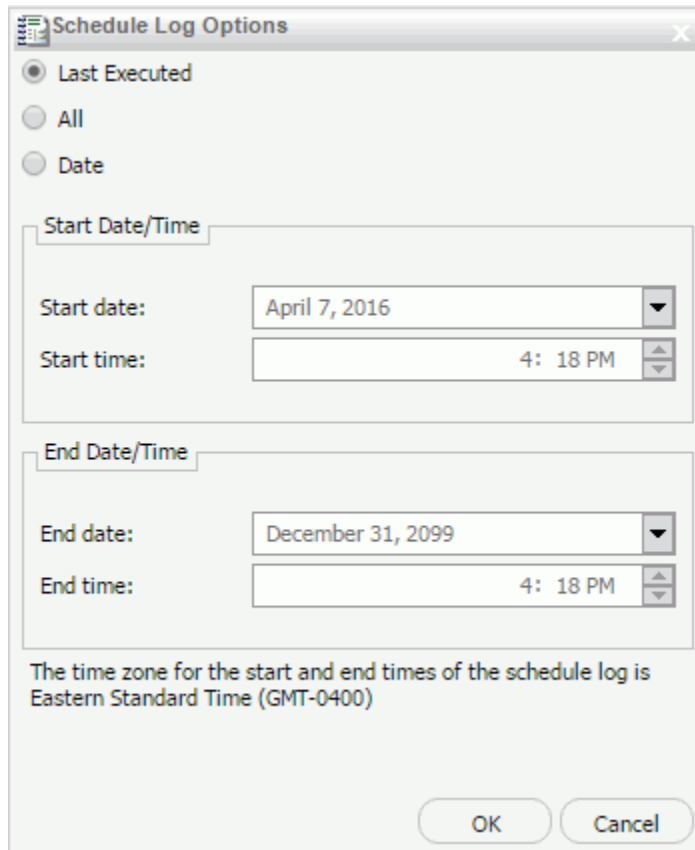
To access the schedule job status information, see the Job Status tab in the ReportCaster Console. For more information, see *Using the ReportCaster Console*.

Procedure: How to View a Log Report From the Resources Tree

1. Right-click the schedule from the Resources tree and select *View Log*, as shown in the following image.
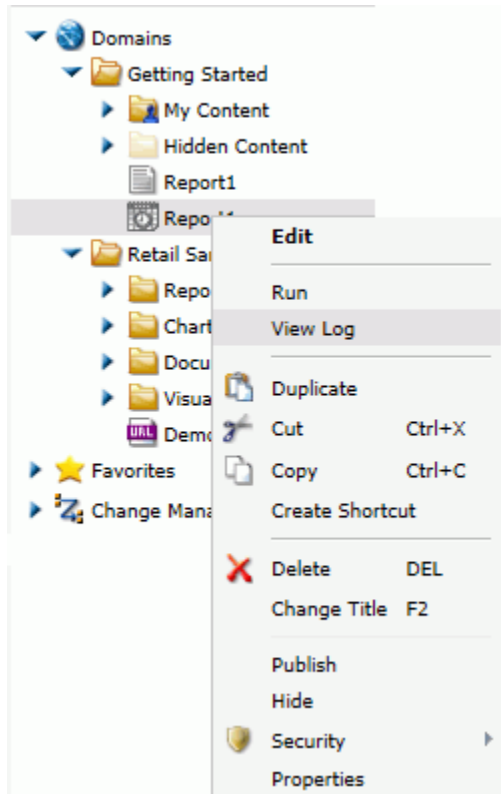
The Schedule Log Options dialog box appears, as shown in the following image.

2. Specify which log report you would like to view by selecting *Last Executed*, *All*, or *Date*.

   If you select *Date*, you will have the option to specify your search using start date and time and end date and time parameters.

3. Click *OK*.

The log reports that match your search criteria appear, as shown in the following image.

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, email 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.

Procedure: How to View a Log Report in the Scheduling Tool

1. From the Resources tree, right-click the schedule for which you want to see the logs, and click *Edit*.

   The Basic Scheduling tool opens.

2. From the Basic Scheduling tool, click the *Log Reports* tab.

   The Log Reports panel appears, as shown in the following image.
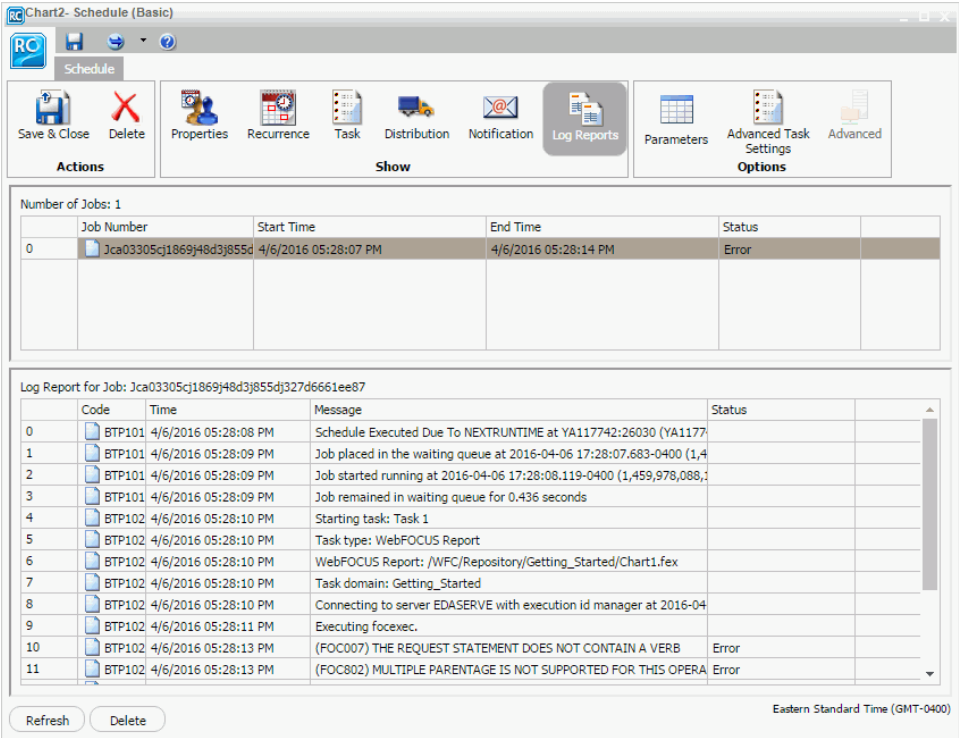
3. Observe the Number of Jobs that have run.

4. Click the Job Number to view the log report information for that job in the panel below the job listing.

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 WebFOCUS folders and procedures (FEXs) by their path and file names and not their descriptions.

Email Addresses

ReportCaster cannot validate email addresses since email validation is performed by the mail server. The log report will include any email 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 Distribution 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 Distribution 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 procedure (FEX) 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, an error notification is triggered. The error is shown in red text within the job process log report. The log report, as well as the full and brief notifications, contains information on the unavailable options that the owner of the schedule must change.

❏ 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 existing schedules using the unavailable task types or distribution methods are able to run. For more information on configuring available task types and distribution methods, see *Configuration Tab Folders*.

Maintaining Schedules

Maintaining a schedule allows you to edit schedule properties or delete the schedule when it is no longer needed. If a schedule contains properties that you want to use in a new schedule, the duplicate or copy option creates a template with those properties for the new schedule. You can also check the status of a schedule and run a log report to obtain detailed information about the schedule.

About Maintaining a Schedule in the Basic Scheduling Tool

As a user with the ability to access the Basic Scheduling tool, you can perform various maintenance functions on the schedules you are authorized to access.

If you right-click a schedule in the Resources tree, the options shown in the following image are available.

Note: The options shown are dependent on your security effective policy.
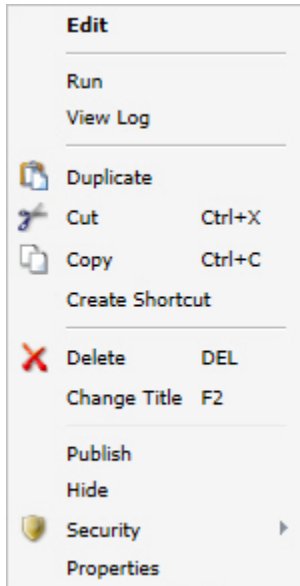
Edit

Allows you to open and edit an existing schedule.

Run

Runs the schedule.

View Log

Allows you to view a log report for one or more selected schedules.

Duplicate

Creates a new schedule with the same properties in the same folder. The new schedule is disabled automatically, because it is a duplicate of an existing schedule.

Cut

Allows you to move the schedule from the original folder to a target folder using the Paste operation.

Copy

Allows you to create a new schedule by copying an existing schedule.

Create Shortcut

Allows you to create a shortcut to the schedule.

Delete

Deletes the existing schedule.

Change Title

Allows you to rename the schedule.

Publish and Unpublish

An owner of a schedule can make a schedule available to other members of the top-level folder in which the schedule resides. The schedule owner remains the execution ID. The following table describes the shortcut menu options permitted to the different groups associated with a top-level folder.

	Basic	Advanced	Developer	Group Administrator	Manager
Run	✘	✔	✔	✘	✔
View Log	✘	✔	✔	✘	✔
Edit	✘	✔	✔	✘	✔
Publish/Unpublish	✘	✘	✔	✔	✔
Security	✘	✘	✔	✘	✔
Hide/Show	✘	✘	✔	✘	✔
Copy/Duplicate	✘	✔	✔	✘	✔
Properties	✔	✔	✔	✔	✔
Change Title	✘	✘	✔	✘	✔
Delete	✘	✘	✔	✘	✔

Note: The default setting is Unpublish.

Hide and Show

Once an owner publishes a schedule, they can elect to Hide the schedule from groups not authorized to create content in the folder. To hide or show a schedule, right-click on a schedule and select the *Hide* or *Show* option.

Note: The default setting is Show.

Share

Allows you to share the selected schedule. You can subsequently Unshare the schedule via the same menu.

Share with

Allows you to specify the groups and users with whom you want to share the selected schedule.

Unshare

Allows you to remove sharing on a shared schedule. This option only displays if you have previously shared the schedule.

Security

Allows you to view and modify the ownership of the schedule. Options include: Rules, Rules on this Resource, and Effective Policy.

Properties

Allows you to view properties of the schedule, as well as modify title and summary information. You can also change the name of a schedule using the Properties dialog box. In addition, you can access Security features, including Owner and Sharing.

Editing a Schedule in the Basic Scheduling Tool

From the Resources tree, you can edit the schedules you are authorized to access.

Procedure: How to Edit a Schedule in the Basic Scheduling Tool

1. Right-click the schedule you want to edit and select *Edit*.

2. Make the required changes to the schedule. For details on the Basic Scheduling tool options, see *Creating a Schedule in the Basic Scheduling Tool* on page 26.

3. Click *Save & Close*.

Reference: **Considerations When Editing a Schedule in the Basic Scheduling Tool**

❏ When you open a schedule that uses unavailable options, such as a distribution method, information is displayed that describes the change or changes 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 *Run 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 primary run-time interval of the schedule.

❏ You must save your changes in order to be able to run from within the scheduling tool.

❏ If you want your selected schedule or schedules to run immediately, click *Run*.

Copying a Schedule in the Basic Scheduling Tool

For your convenience, you can copy an existing schedule for use as a template to create a new schedule. The copied schedule is created disabled because it is a duplicate schedule.

Procedure: **How to Copy a Schedule in the Basic Scheduling Tool**

Note: The cut, copy, and paste options display when you are authorized to use these options.

1. From the Resources tree, right-click the schedule you want to copy and select *Copy*.

2. Right-click the folder you wish to copy the schedule into and select *Paste*.

Deleting a Schedule in the Basic Scheduling Tool

From the Resources tree, you can delete schedules using the following procedure.

Procedure: **How to Delete a Schedule in the Basic Scheduling Tool**

Note that the Delete option displays when you are authorized to delete the selected schedule.

1. Right-click the schedule you want to delete and select *Delete*.

   Note: To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface. A message appears asking to confirm if you want to delete the selected schedules.

2. Click *OK* to delete the schedule or schedules.

Sharing Schedules

The owner of a schedule that is located in a My Content folder can share that schedule with other users.

Procedure: **How to Share Schedules**

From the Resources tree, you can share one or more schedules by performing the following steps.

1. In the Resources tree, select one or more Schedules that you want to share.

2. Right-click the selected schedule or schedules and select *Share*.

   If you are a group administrator or user with the share schedule privilege, the schedule or

   schedules are shared. The Schedule icon changes to denote that it is shared.

Procedure: **How to Share Schedules With Specific Groups or Users**

From the Resources tree, you can specify the groups or users with whom you want to share the selected schedule or schedules.

1. In the Resources tree, select one or more schedules that you want to share.

2. Right-click the selected schedule or schedules and select *Share with*.
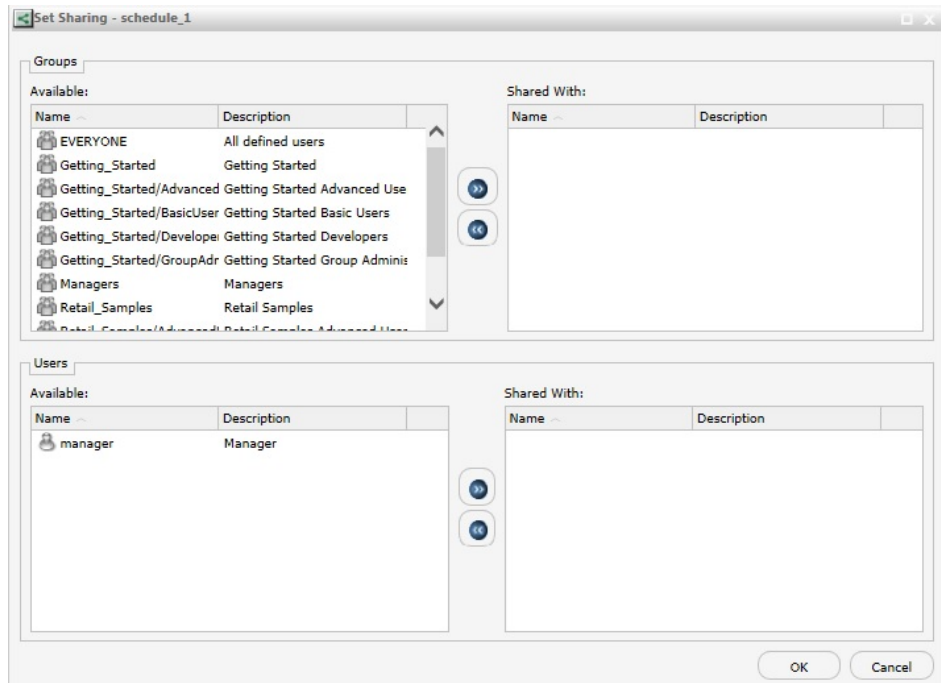
3. Use the left and right arrow buttons to select which Groups will have access to Schedules.

4. Use the left and right arrow buttons to select which Users will have access to Schedules.

5. Click *OK*.

Publishing Schedules

A published schedule is visible to all users with access to the folder in which it resides. The shortcut menu options that appear on the schedule depend upon the privileges of the user that is signed in. For example, a user with the Run privilege is able to run the published schedule. When a published schedule runs, it runs as the creator of the schedule and not as the signed in user that initiated the run.

Note: A published schedule runs as the creator of the schedule. A user that is allowed to edit a published schedule may make a change to the schedule that the creator of the schedule is not permitted to make. In this case, the schedule will fail at run time. For example, a user may change the Distribution List used in the schedule to a private Distribution List that is not available to the creator of the schedule. When the changed schedule runs, it will fail due to inability of the creator to retrieve the Distribution List from the WebFOCUS Repository.

Procedure: **How to Publish a Schedule**

From the Resources tree, you can publish a schedule by performing the following steps.

1.   In the Resources tree, select a schedule that you want to publish.

2.   Right-click the selected schedule and select *Publish*.

The schedule is published.

Using Favorites

You can further customize your Personal Portal, by using the Favorites feature. When you save content as a Favorite, it automatically appears in the Favorites node in the Resources tree. Here, you can interact with your content and view its properties.

Procedure: **How to Add Content to Favorites**

1.   In the Resources tree, right-click a report, chart, document, visualization, shortcut, or URL, and then click *Add to Favorites* .

The item is added to the Favorites node, as shown in the following image.

2.   Right-click the item inside the Favorites node to access the shortcut menu for this item.

Procedure: **How to Remove a Favorite**

1.   In the Resources tree, under the Favorites node, right-click an item.

2.   Click *Remove Favorite*.

The item is removed from the Favorites node.

Publishing Content

When you create a new item (for example, folder, report, or chart), it is private. Only you can see it, run it, edit it, and so on. A private item is illustrated with a gray icon.

Information Builders

When you are ready to allow others to access the item you can publish it. This turns on any rules set on the item itself or inherited from a higher level. The icon of the item appears in full color to indicate the item is live.

Managers and developers have the ability to publish items. Once the item id published, it becomes visible to all users.

Using Visualizations at Run-Time

In InfoAssist+, you can run visualizations that are either saved or run dynamically at run time. In this case, the visualization opens in a separate browser window, as shown in the following image.
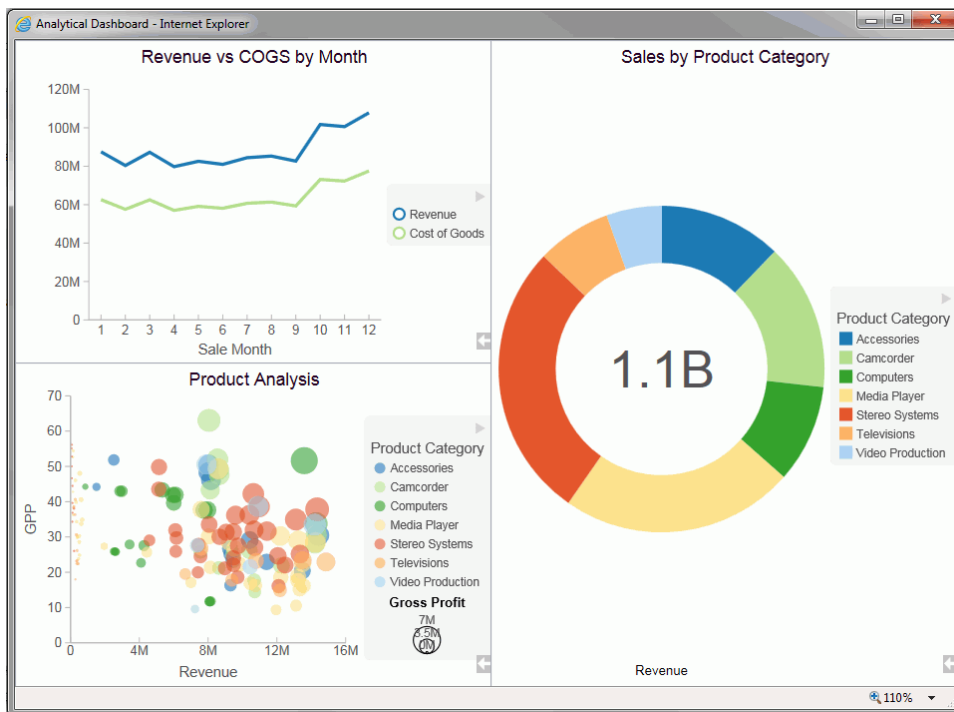
In the WebFOCUS BUE portal, all users can run stored visualizations that are available to them. In this case, the visualization opens in a new page, as shown in the following image.
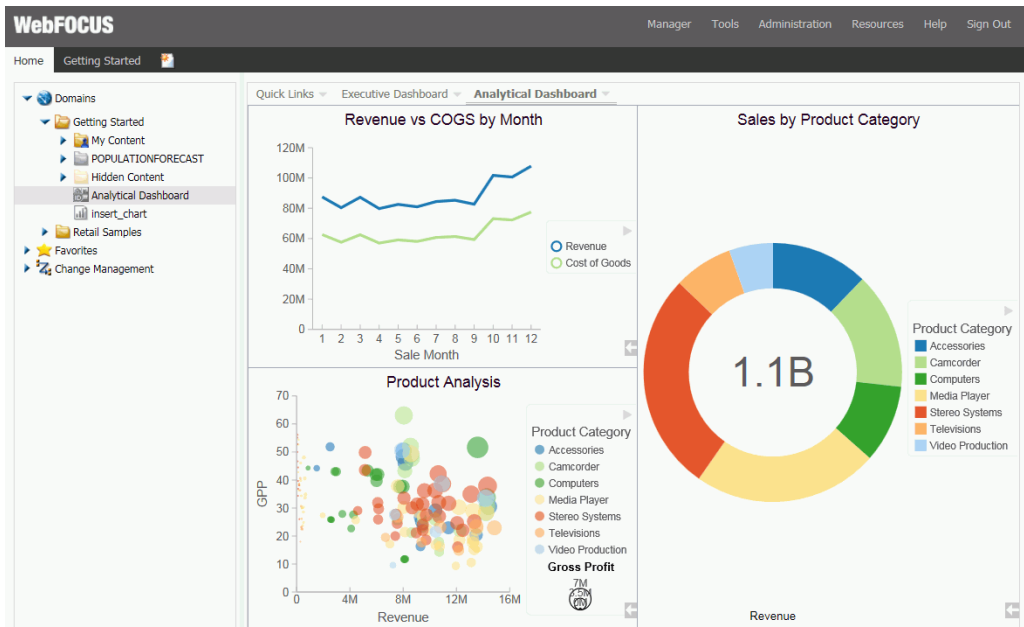
Working With Filters at Run Time

If you have added a filter to your visualization, you can use the Prompts panel to control the display of information. When you run your visualization, the Prompts panel appears. This enables you to select additional components by which to filter the visualization.

Note: The filters that you apply at run time can be removed using the Remove Filter option in the Run-Time toolbar. This does not apply to filters that were added prior to running the visualization.

The following image shows an example of a visualization with an open Prompts panel.
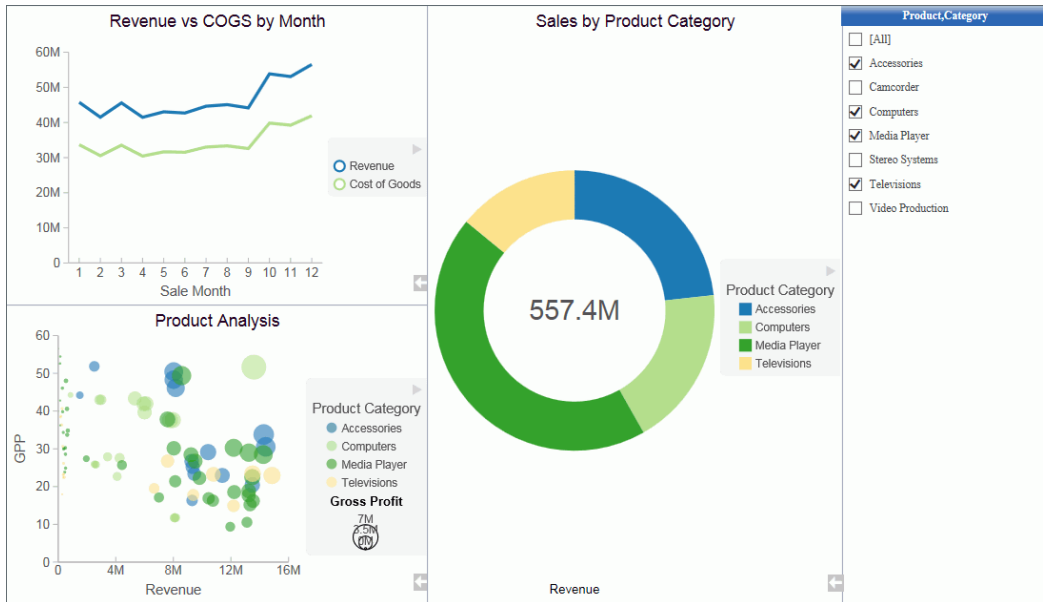
Note: If you select (or lasso) components of your visualization, the Prompts panel does not automatically update to reflect your selections.

Procedure: **How to Filter Data With Tooltips at Run Time**

1. Run a visualization from one of the following locations:

    ❏ From the Resources tree in the WebFOCUS BUE portal.

    ❏ From the Application Main Menu or Quick Access Toolbar in InfoAssist+.

2. Click, point to, or lasso data in your visualization.

A tooltip opens, as shown in the following image.
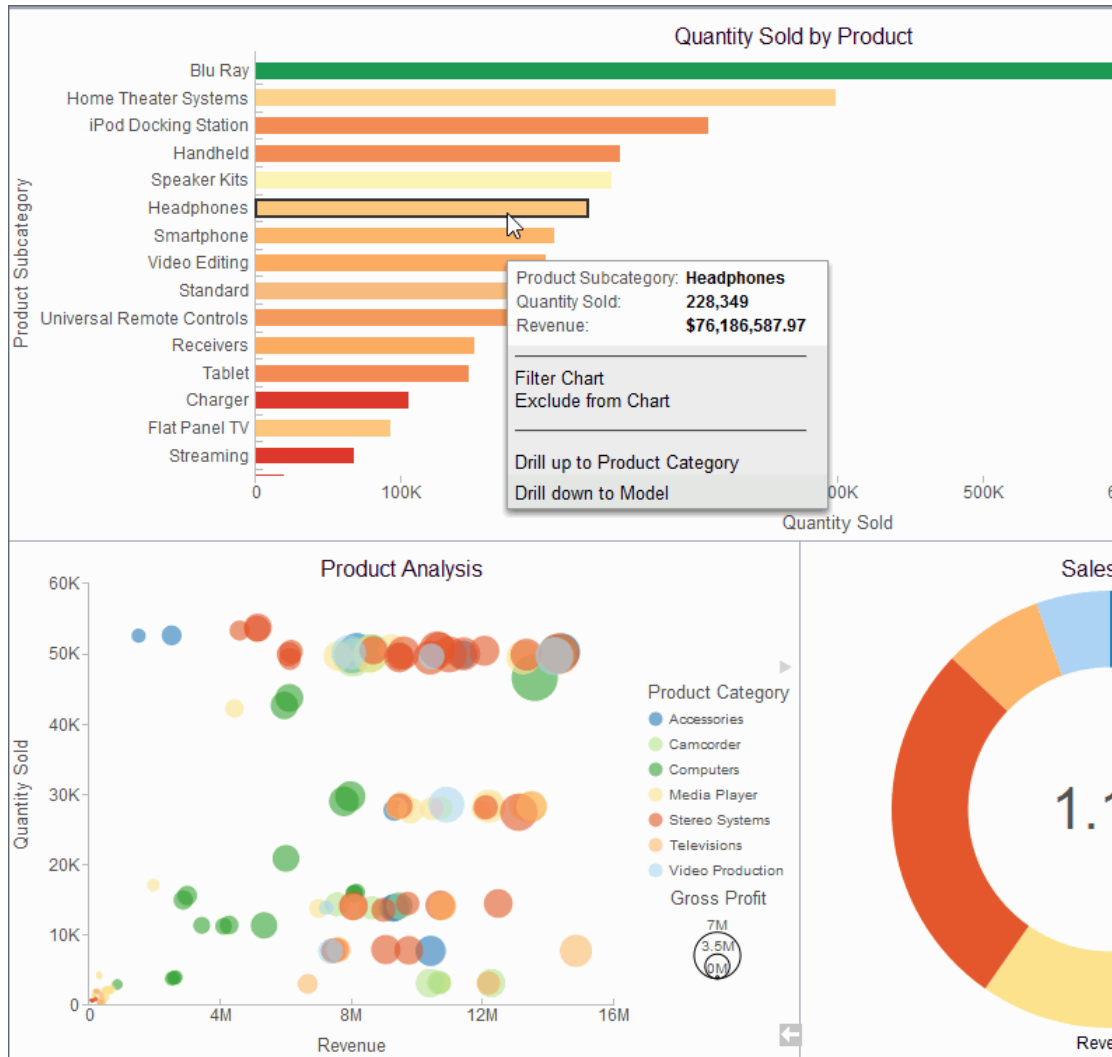
The tooltip includes the following options:

❏ **Filter Chart.** Filters the visualization by the data values that you have selected.

❏ **Exclude from Chart.** Excludes the selected data values from the visualization.

❏ **Remove Filter.** Removes the filter and returns the visualization to its original state.

Note: The same run-time options are available when you run your visualization on a mobile device.

Viewing Data at Run Time

When viewing data at run time, you can access the data behind each visual in your visualization. Using the Show Data option, which is available from the Run-Time toolbar, you can view your data in summary format. This grid display includes totals for the categories in your visual, based on the data fields that you selected. All InfoAssist+ users can use this option with the visualizations that are available to them.

Procedure: **How to View Data at Run Time**

1. Run a visual or visualization from one of the following locations:

   ❑ From the Application Main Menu or Quick Access Toolbar in InfoAssist+.

   ❑ From the Resources tree in the WebFOCUS BUE portal.

2. In the bottom-right corner of the visual cell, click the arrow.

   The Run-Time toolbar opens.

3. Click the *Show Data* button .

   The visual changes to the grid view, displaying the underlying data for the selected visual.

   Click the *Show Data* button again to return to your visual.

   Note: The same run-time options are available when you run your visualization on a mobile device.

Using the Run-Time Toolbar Options

You can access the Run-Time toolbar by clicking the arrow button, which is located in the bottom-right corner of each visual cell at run time. The Run-Time toolbar is shown in the following image.

The Run-Time toolbar options are described in the following table:

Icon	Name	Description
	Show Data	Alternates between the visual and the grid view, which shows the underlying data. To return to the visual view, click the Show Data button again.
	Reset to Default	Resets all changes and returns the visualization to its original state.
	Remove Filter	Removes the filter and returns the visualization to its original state. This option is only available if a filter is applied at run time.

Note: The same run-time options are available when you run your visualization on a mobile device.

Using the Deferred Report Status Interface

The following topics provide an overview of the Deferred Report Status Interface including a detailed description of its appearance and functions. Specific procedures guide you through viewing, saving and deleting reports, deleting deferred reports that are being processed but are not yet complete, and reviewing parameters for reports containing amper variables.

The Deferred Report Status Interface enables you to obtain information about deferred reports. From this Interface, you can perform the following actions on a deferred report:

❑ Sort deferred report output by date, description, domain, and server ID.

❑ View deferred report output.

❑ Delete a deferred report from the WebFOCUS Reporting Server.

❑ Save the report output as private content.

❑ Review or change parameters associated with a deferred report.

❑ View the number of days remaining prior to expiration (deletion) on the server.

❑ Terminate a deferred request that is in the deferred report queue.

❑ Terminate a deferred report that is running.

❑ Delete all expired, unknown, completed, running, and queued tickets.

You can access the Deferred Status Report Interface from the BUE portal, by clicking *Tools,* in the Menu bar, and then clicking *Deferred Status*.

Running a Report as Deferred

When you run a report as deferred, the report title is assigned as the deferred report description by default. If the Custom Deferred Report Description feature is enabled, you are prompted to edit a report description. This feature allows you to distinguish between the outputs of the same report that you ran at different times.

You can view information about a deferred report in the Deferred Report Status interface window. The window indicates the time the report was submitted and whether the report was completed, and also provides Delete, View, Save, as well as Run or Parameters options.

Procedure: **How to Run a Report as Deferred**

1. From the Resources tree, right-click a report that you want to run as deferred, and then click *Run Deferred*.

    If the Custom Deferred Report Description feature is enabled, the Deferred Report Description dialog box opens, as shown in the following image. If you run a parameterized report as deferred, the Deferred Report Description field is displayed in the Parameters prompt window.

    Deferred Report Description
    Arc - Sales by Region

    OK   Cancel

    Note: The Custom Deferred Report Description feature is disabled by default. To enable this feature, in the Administration Console, click *Configuration*. Under Application Settings, click *Deferred Reporting*, and then set the IBI_Deferred_Custom_Description setting to *True*.

2. Optionally, type a new or updated description and click *OK*.

The Deferred Report Notification dialog box appears, reflecting the updated description, as shown in the following image.

Deferred Report Notification

3/2/2017, 2:43:51 PM
Arc - Sales by Region
has been successfully submitted for deferred processing.
To view the status of the deferred report, use the Deferred Report Status interface.

3. To open the Deferred Report Status window directly from the dialog box, click the *Deferred Report Status* link.

4. To review the deferred report later, close the dialog box. On the BI Portal Menu bar, click *Tools*, then click *Deferred Status*.

Deferred Report Status Interface Features

The Deferred Report Status Interface includes:

❏ A banner at the top of the window that lists the date and time of the request.

❏ A gray toolbar below the banner that contains Refresh and Help options, a Sort By drop-down list to select sort values, a sort order button to toggle between ascending and descending order, and a Delete drop-down list. The Delete drop-down list has options to delete All, All Completed, All Running, All Queued, All Expired, or All Unknown reports, depending on which report status types exist in the Interface.

❏ The status of each report within the Interface.

Sort Controls for the Deferred Report Status Interface

The sorting feature pertains to the entire report. When the default sort value (Date/Time Submitted) is changed, the new primary sort becomes your choice, but the secondary sort is always fixed as Date/Time Submitted. To resort the list, select the Sort by option:

❏ Date (default)

❏ Description

❏ Domain

You can optionally change the sort order (ascending or descending) by clicking the Reverse Sort Order ![A/Z icon] button, which toggles between A to Z and Z to A.

Note: When the sort value is Date, the sort order option A to Z means from new to old and not alphabetical from A to Z.

To see the results of the new sort options, click *Refresh*.

Deferred Report Status

The status of deferred requests are organized under the following sections within the Interface:

❏ **Completed.** Indicates that the Deferred Receipt request has finished processing.

❏ **Running.** Indicates that the Deferred Receipt request is processing.

❏ **Queued.** Indicates that the Deferred Receipt request is queued for processing.

❏ **Unknown.** Indicates that the Deferred Receipt request cannot be identified. This can occur when the file containing the deferred report results cannot be found. For more information, see *Deferred Report Expiration Setting* on page 88.

The following image shows a sample Deferred Report Status window with one completed report and two queued repots.

Column headings provide information about the published content including the date and time the published content was submitted, the domain of origin, a description of the report (the report name), an expiration indicator, and an Options heading for options within the Deferred Report Status Interface.

When you select the Deferred Status option, the status for all the deferred requests submitted by your Managed Reporting user ID is retrieved. Depending on how Managed Reporting is configured, deferred status may be coming from multiple WebFOCUS Reporting Servers on various platforms. If credentials are required for the connections, you are prompted by the WebFOCUS Dynamic Server System Signon feature. You can view the status of all the deferred requests submitted by your Managed Reporting user ID, but can only delete, view, save, stop, or review parameters for deferred requests submitted with an identical WebFOCUS Reporting Server user ID.

The options available in the Deferred Report Status Interface are based upon the status of the report request and security validation. You can perform various functions by clicking the buttons under the following options.

For more information on configuring Deferred Report Status options and buttons, see *Technical Memo 4719: Managed Reporting - Deferred Status Interface How to Hide Deferred Report Options (Buttons)*.

❏ **Delete.** Available for all report status types. The Delete option deletes the deferred request according to the report status, as follows:

   ❏ **Queued.** When a deferred request is listed in the Queued tab, the Delete option removes the deferred report from the WebFOCUS Reporting Server and deletes the deferred request ticket from the WebFOCUS Repository.

   ❏ **Unknown.** When a deferred request is listed in the Unknown tab, the Delete option deletes the deferred request ticket from the WebFOCUS Repository.

   ❏ **Completed.** When a deferred request is listed in the Completed tab, the Delete option removes the report from the window, deletes the deferred report results from the WebFOCUS Reporting Server, and deletes the deferred request ticket from the WebFOCUS Repository.

   ❏ **Running.** When a deferred request is listed in the Running tab, the Delete option deletes the deferred request ticket from the WebFOCUS Repository and cancels the job on the WebFOCUS Reporting Server.

Note: The Delete drop-down list in the toolbar at the top of the Interface provides options to delete All, All Completed, All Running, All Queued, All Expired, or All Unknown reports, depending on which report status types exist in the Interface.

❏ **View.** Available when the report status is Completed.

The View option displays the completed report in a new browser session, or the report format may result in the opening of a Windows dialog box that prompts you to save the report to disk or open the report within an application (such as Microsoft(R) Excel(R), Microsoft(R) Word, or Adobe(R) Acrobat(R)).

Note: Auto Drill functionality is not available for reports that are run deferred because Auto Drill uses live data, in an interactive session, for data drilling. Data values and totals may not be the same if the data has changed since the last deferred execution. Mixing past data with current data could impact the data analysis.

❏ **Save.** Available when the report status is Completed.

The Save option allows you to save Deferred Receipt reports to the WebFOCUS Repository, if you are authorized to save deferred reports and to create private content. You can save the report output to your My Content folder or a folder you are authorized to create content in and write to. When your deferred report is saved to the WebFOCUS Repository, it is removed from the Deferred Report Status Interface.

Note: This option appears for users authorized to save deferred reports.

❏ **Run.** Available for reports without parameters when the report status is completed or queued. The Run option runs the report deferred again.

Note: Auto Drill functionality is not available for reports that are run deferred because Auto Drill uses live data, in an interactive session, for data drilling. Data values and totals may not be the same if the data has changed since the last deferred execution. Mixing past data with current data could impact the data analysis.

❏ **Parameters.** Available for reports with parameters when the report status is completed or queued. The Parameters option allows you to review or change report variables. Changing report variables generates a new report that does not overwrite the original request.

Note: Deferred reports run from within any report development tool do not have an option to view or change amper variable parameter values in the Deferred Status Interface window.

Under certain circumstances, WebFOCUS is unable to submit the request to run in deferred mode. This can occur, for example, when the WebFOCUS Reporting Server is unavailable. When WebFOCUS is unable to submit a deferred request, a Deferred Receipt Notification window opens, notifying you of the failure.

Deferred Report Expiration Setting

The number of days until expiration appears next to each report. On the last day, the value Today appears.

The following image shows the results of a deferred status request, run on the afternoon of Tuesday, March 15. (The current date appears in the status bar at the top of the page.) Each report is listed with the time remaining before it is deleted from the WebFOCUS Reporting Server. The time remaining is based on 24-hour intervals (rather than whole days), beginning with the time that the report was submitted. For example, the last report shown on the list will be deleted shortly after 3:51 pm on March 14, not at midnight on March 13.

If a deferred report is not saved or deleted prior to its expiration, the output is automatically deleted from the WebFOCUS Reporting Server dfm_dir directory and the deferred report is moved to the Unknown status tab in the Deferred Report Status Interface. From here, you can only delete the orphaned report.

If deferred output expiration is not configured on your WebFOCUS Reporting Server, then the value never appears next to each report under the Expires In column.

Note: This setting does not affect deferred output saved to your private content area.

Saved Deferred Output Subject to Temporary Expiration

Saved Deferred Reports that utilize WebFOCUS features that create temporary files, such as OLAP, On-demand paging, and redirected formats are subject to expiration as defined by the WebFOCUS Client parameter, EXPIRE_REPORTS (located in cgivars.wfs).

Setting the Automatic Refresh Interval

You can set the automatic refresh interval to any value. The default is 5 seconds and there is no maximum value.

Procedure: **How to Set the Automatic Refresh Interval**

1. Enter a time interval (in seconds) in the input box below the gray toolbar.

    The default value is 5 seconds. There is no maximum value.

2. Check the box to enable automatic refresh.

Viewing Deferred Reports

You must access the Deferred Report Status Interface to view deferred reports.

Procedure: **How to View a Deferred Status Report**

1. Open the Deferred Report Status Interface.

2. To view the output of a deferred report:

   a. Locate the report description under the Completed tab.

   b. Click *View*, under the Options column, to view the report.

   The output appears in a new window.

3. The Deferred Report Status Interface remains open until closed.

   a. To return to the Deferred Report Status Interface, close or minimize the report output window.

   b. To return to your reporting environment, close or minimize the report output window, then close the Deferred Report Status Interface.

4. Click *Refresh* to obtain the most current status of deferred requests.

Reviewing Deferred Report Parameters

The Deferred Report Status Interface enables you to retrieve parameters submitted with a deferred request. You access parameters by opening the Deferred Report Status Interface and clicking the parameters button for the report of your choice. The parameters button is not available when the deferred request is submitted from within a report development tool, such as InfoAssist.

You can also change the parameters associated with a report and submit the report to run deferred with the new parameters you specified. WebFOCUS generates your report again using the new parameters and does not overwrite your original report request.

Procedure: **How to Retrieve Deferred Request Parameters**

1. Open the Deferred Report Status Interface.

2. In the Completed or Unknown tabs, identify the report containing the parameters to review.

3. Click *Parameter* under the Options column heading.

   An intermediate window (HTML form) opens.

   a. To review and accept the original parameters, close the browser window.

   b. To change the parameters, enter a new value in the input box.

      The original request runs in addition to the newly submitted request.

4. Click *Submit*.

   The Deferred Report Notification window opens.

5. Close the Deferred Report Notification window to return to the Deferred Report Status Interface.

Saving Deferred Reports

You can save Deferred Receipt reports to the WebFOCUS Repository, if you are authorized to save deferred reports. You can save the report output to your My Content folder or a folder you are authorized to create content in and write to. When your deferred report is saved to the WebFOCUS Repository, it is removed from the Deferred Report Status Interface. .

Procedure: **How to Save a Deferred Report**

1. Open the Deferred Report Status Interface.

2. Under the Completed tab, locate the report you want to save.

3. Under the Options column, click *Save*, which is located to the right of the deferred report description.

   The Save File Content dialog box opens.

4. Navigate to your My Content folder or another folder you are permitted to create content in and write to.

5. Click *Save* to save the deferred report results.

   Note:

   ❏ The maximum length of a title value for a file is 256 characters.

   ❏ If the title of your file has the same name of an existing file in the folder, you will receive a message asking if you wish to replace the file.

To return to your reporting environment, close the Deferred Report Status Interface.

Deleting Tickets for all Report Status Types

From the Deferred Status Interface, you can delete tickets for all report status types using the Delete drop-down list located in the toolbar at the top of the Interface. The drop-down list provides options to delete All, All Completed, All Running, All Queued, All Expired, and All Unknown reports, but only when one or more reports exist for that status type in the Deferred Status Interface. If a report status type is not displayed in the Interface, the corresponding status option does not appear in the Delete drop-down list.

You can also delete individual tickets using the Delete button, located in the Options column next to each report.

The following image shows the Deferred Status Interface with the Delete drop-down list expanded showing the available options.
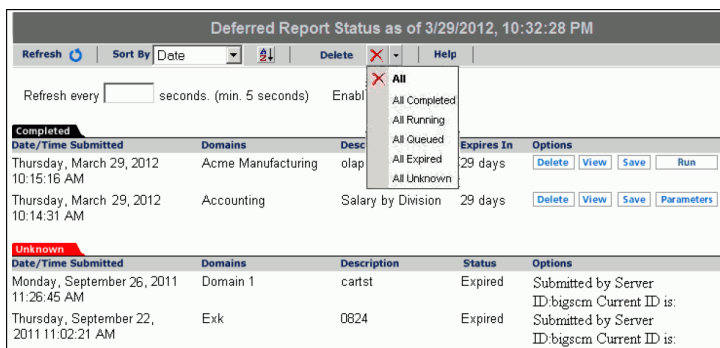
For Unknown tickets, the status column shows:

❏ *Expired* if the report has expired and is no longer stored on the Server.

❏ *Unknown* for cases where the status cannot be determined, including situations where the server is not running so a connection could not be made to determine the status.

Note: For Unknown reports, the Options column displays the Server ID that submitted the report along with the Current ID.

Procedure: How to Delete Tickets for All Report Status Types

1. Open the Deferred Status Interface.

2. Click the down-arrow next to Delete and select one of the following from the drop-down list that opens:

   ❏ All

   ❏ All Completed

❏ All Running

❏ All Queued

❏ All Expired

❏ All Unknown

You are prompted to conform the deletion.

3. Click *Ok* to delete all tickets for the selected status type or click *Cancel* to cancel the request.

Deferred Status Delete Confirmation Messages

The Deferred Status Interface presents the user with a delete confirmation message before deleting a deferred report that is in Completed, Running, or Queued states. (A confirmation message is already displayed for deferred reports in Unknown status.)

When you click the delete button from the Deferred Status page, you are prompted to confirm the delete before the deferred report is actually deleted. A similar confirmation message is used for all deferred reports, but the message varies depending on the conditions.

The following are the confirmation messages and the associated conditions:

❏ If the report is expired or was deleted from the server, the message recommends deletion and indicates that there is no report output on the specific WebFOCUS server.

❏ If the WebFOCUS server is unavailable, the message indicates there is an error attaching to the specific WebFOCUS server.

❏ If there is no entry for the server in the WebFOCUS client configuration, the message recommends deletion and indicates that the specific WebFOCUS server is not defined in the WebFOCUS client configuration file.

Each of the deletion confirmation messages also displays the date and time the deferred report was submitted, and the description that is displayed in the Deferred Status Interface.

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