Report SCHEDULER

User Guide

Document M3300 Version 4.0 rev. 04 October 2007

BadgerNT

Document	**ReportSCHEDULER: User Guide**
Reference	**M3300**
Version	**4.0 rev. 04 October 2007 [PDF date: January 12, 2009]**

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About this guide

Purpose

This guide tells you how to set up and use BadgerNT's ReportSCHEDULER, which is an edition of ActivitySCHEDULER designed exclusively for scheduling Crystal Reports.

Structure

This guide contains the following chapters:

- **Chapter 1: Introduction** gives an overview of ReportSCHEDULER and its uses.
- **Chapter 2: Installing ReportSCHEDULER** tells you how to install the software on your computer.
- **Chapter 3: Installing Crystal Reports run-time** tells you how to install the run-time version of Crystal Reports on your computer.
- **Chapter 4: Configuring ReportSCHEDULER** describes how to set up email facilities to allow you to send reports by email. It also tells you how to configure the Web interface to the product, if you are licensed for this facility.
- **Chapter 5: Using the Report Wizard** tells you how to generate and prepare reports ready for scheduling.
- **Chapter 6: Using the Policy Manager** tells you how to use the Policy Manager to schedule and run your Crystal Reports.

Need help?

If you have questions about ReportSCHEDULER, or encounter any problems when using it, please contact your supplier or the BadgerNT Service Desk for assistance.

BadgerNT Service Desk staff are better able to help you with a problem if you have all the necessary information at hand. Therefore, before you report a software problem, please make sure that you have recorded the following:

- The ReportSCHEDULER software version.
- The operating system and version that is running on the computer where you have installed ReportSCHEDULER.
- Any operations that you were attempting to perform before the problem was reported.
- The exact error messages that appeared.

BadgerNT Service Desk staff may ask you to send them copies of the ReportSCHEDULER log files and screen shots that could be relevant to your problem.

You can check for error messages from ReportSCHEDULER by using the Event Viewer to view the Application log.

Contents

1

Introduction

ReportSCHEDULER is a special edition of BadgerNT's ActivitySCHEDULER, designed to make it easy for you to run Crystal Reports on schedules of your own choice. You do not need to be familiar with ActivitySCHEDULER and its components, other than those described in this book.

ReportSCHEDULER is supplied as a download executable file that you can unlock and run to do the following:

- Install ReportSCHEDULER
- Install the run-time version of Crystal Reports
- Configure ReportSCHEDULER's email facilities. Once you have purchased the relevant option, you can also configure the product's Web interface (provided that you have IIS).

When you first download ReportSCHEDULER you are automatically assigned a demonstration license, which allows you to use the product for 30 days. At any time from then, you can upgrade to a trial license or a full product license. If you purchase a full product license you also have the option of including the product's Web interface.

In order to prepare your existing Crystal Reports for scheduling, all you need to do is to collect them in a folder that ReportSCHEDULER can access, then use the supplied Report Wizard to prepare them for scheduled running   You can then define and activate schedules for individual reports in the Policy Manager.

By default, ReportSCHEDULER looks for report definitions in the \Reports folder of your installation folder (typically c:\Program Files\Bnt\Reports) but you can redirect this search to any accessible folder on your computer.

Reports can be scheduled to run in several ways:

- According to a daily, weekly, monthly, yearly, or custom calendar
- At fixed intervals during the day
- On an ad hoc, manual, basis

You do not need to be familiar with ActivitySCHEDULER, or its terminology and components, before using ReportSCHEDULER. However, you may feel that you need to learn more about ActivitySCHEDULER in order to understand some of the more advanced features of the Policy Manager, for example. In such cases you should consult the relevant manuals in the ActivitySCHEDULER documentation suite, which are available from the BadgerNT Members Area, once you have purchased the product.

Note that you cannot install ReportSCHEDULER and ActivitySCHEDULER together on the same computer, but you can upgrade from ReportSCHEDULER directly to ActivitySCHEDULER whenever you wish.

2

Installing ReportSCHEDULER

This chapter takes you through the window sequence displayed when you install ReportSCHEDULER.

Your first installation will use a demonstration license, which will be created automatically during the installation sequence; it will allow you to use the product for up to 30 days. You can upgrade to a trial or full product license at any time.

By default, ReportSCHEDULER will create its database using Microsoft Access – you do not need any additional software. However, note that if you need to use Oracle or MSSQL, then you must create the database and ODBC connection before you start to install ReportSCHEDULER. Contact the BadgerNT Service Desk for details.

Starting the installation procedure

ReportSCHEDULER is provided as a downloaded file, **rsdownload.exe**. When you run this file you will first be asked to confirm that you have your installation password ready - this will have been emailed to you after the download.

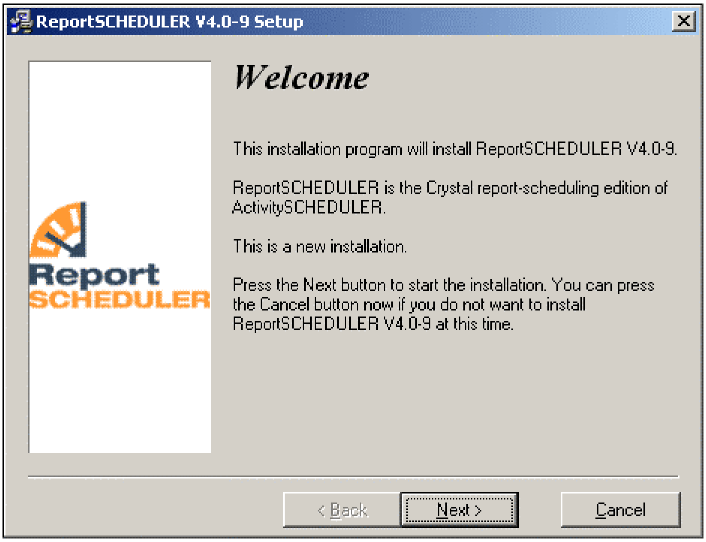
You cannot continue without this password, which you will be prompted to enter on the next panel:

Enter your password and click OK. You will then be asked whether you want to read the product User Guide (this document).

When you are asked whether you are ready to install ReportSCHEDULER, click the Yes button and proceed as described below. Note that, if you are not logged in as Administrator, you may be asked to confirm that you have Administrator privileges.

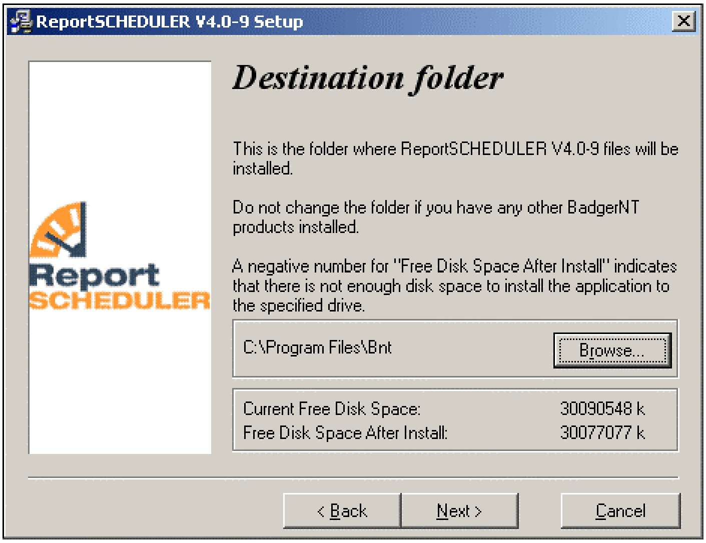
The installation sequence

The first window that you will see is shown below.



If the installation program discovers a previously installed version of ReportSCHEDULER on your computer, you may be asked to close any components that are still open before continuing. You are recommended to close all Windows programs before installing ReportSCHEDULER.

Click the Next button to display the window below:

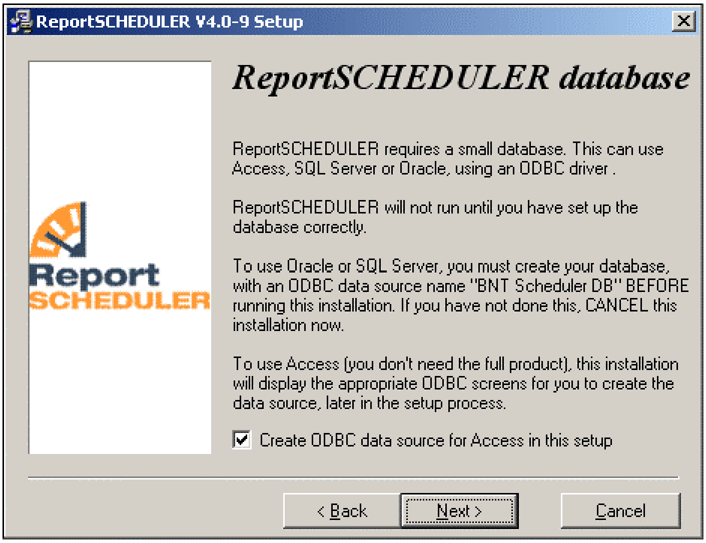


Either accept the offered default folder, or click the Browse button to select an alternative. You are recommended to retain the C:\Program Files\Bnt folder as the destination, but you may choose a different location if necessary. Check that there is a comfortable amount of free disk space available on the chosen drive.

Click the Next button to continue.

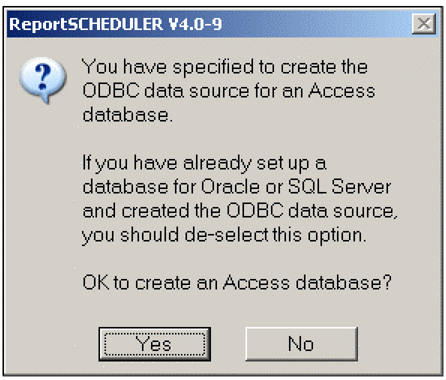
Entering database details

When you continue through the installation procedure, you are first prompted as follows:



Leave the checkbox turned on, unless you need to use Oracle or MSSQL and you have already created the database and an ODBC connection named **Bnt Scheduler DB**. Click the Next button to continue.

You will be prompted to confirm your choice, as shown:

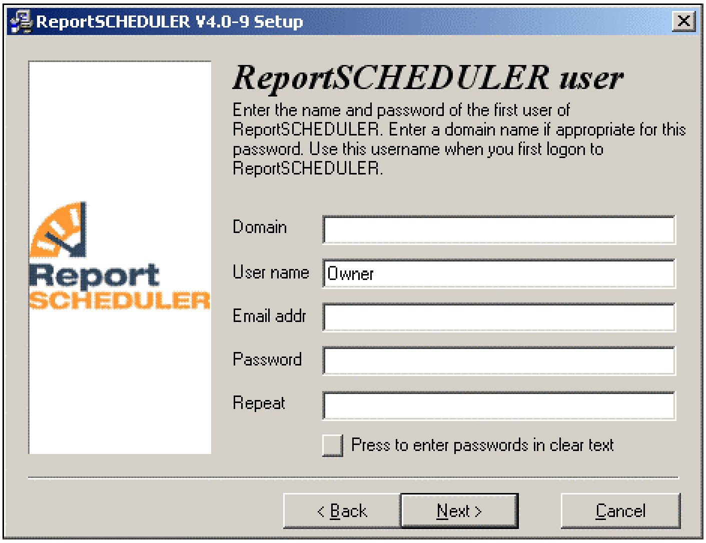


Click the Yes button to proceed to the ReportSCHEDULER User window, shown and described in ***Specifying the first user*** on page 13.

If you have specified that you will be using an Oracle or MSSQL database you will next be shown a Database Authentication window that asks you to confirm the user name and password that were defined when the database was set up. Check with the BadgerNT Service Desk if you have any problems here – the user name and password for an Access database are both **scheduler**.

Specifying the first user

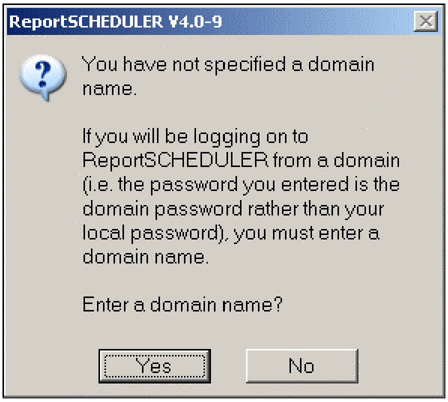
The next window prompts you to enter information about the first user of ReportSCHEDULER:



Any default values shown here will be taken from the current session. However, you may replace these if you wish to nominate a different user as the first and main user of the product.

- Enter a domain name in the Domain field if this is appropriate to the user and password – you will be prompted to confirm any value that you enter here.
- The User Name must be a Windows user name with sufficient privileges to run the reports.
- The Email Address that you enter here will be used as a default address for some error and information messages produced and sent by the system.
- The Password and Repeat Password entries must be identical, and must be the same as the specified user's Windows password. These field values will normally be shown as strings of asterisks, for security reasons, but if you wish you can click the "Press to enter…" button to display the passwords clearly as you type them. This button acts as toggle; note that the password fields are cleared whenever you click this button.

Click the Next button to continue. If you did not enter a domain name you will be prompted as shown:



Either click No to proceed, or Yes to return and amend the previous window.

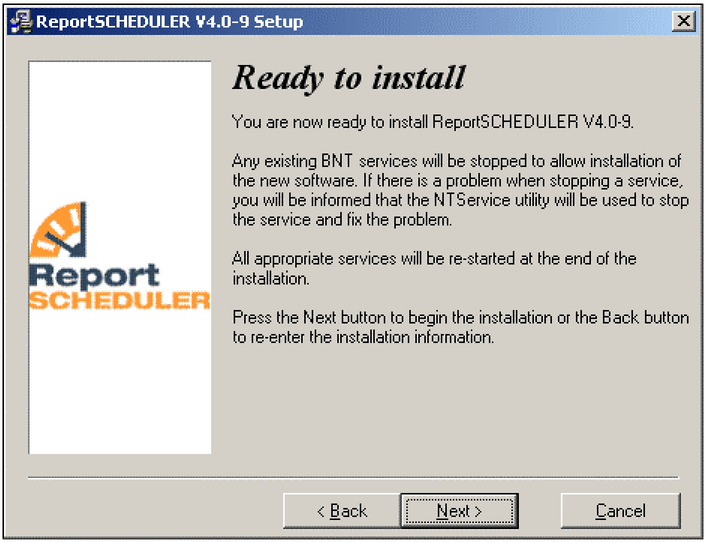
Performing the installation

The next window that you will see is as shown below:

If you do not want other users to be able to use ReportSCHEDULER shortcuts from the Programs list on the Start menu, leave the No radio button turned on. Otherwise, if you want these shortcuts to be seen by anyone logging in to the computer, then turn on the Yes radio button.

If you also want a set of ReportSCHEDULER shortcut icons to be added to your desktop, turn on the Shortcuts On Desktop checkbox.

The next window that you will see is shown below:

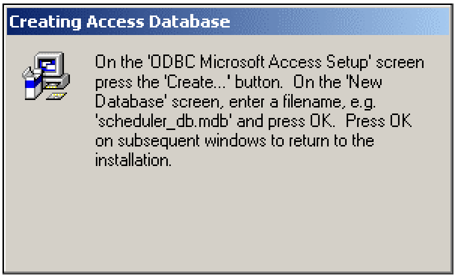


This is your last chance to backtrack through the previous windows and change any of the data you have entered so far. When you are ready to continue, click the Next button to start the installation.

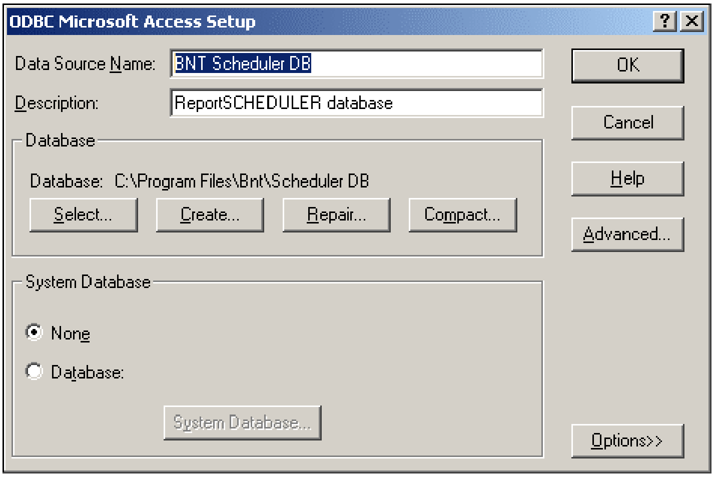
You will be shown a series of messages as the installation proceeds, telling you which actions are being performed during the set-up process. If this is a new installation, and you turned on the checkbox on the ReportSCHEDULER Database window to create a Microsoft Access ODBC data source, the installation will be interrupted with the window sequences shown and explained in the following sections. Otherwise, if you have already set up the database, skip the next section and proceed as described in ***Completing the installation*** on page 18.

Setting up a Microsoft Access database within the installation sequence

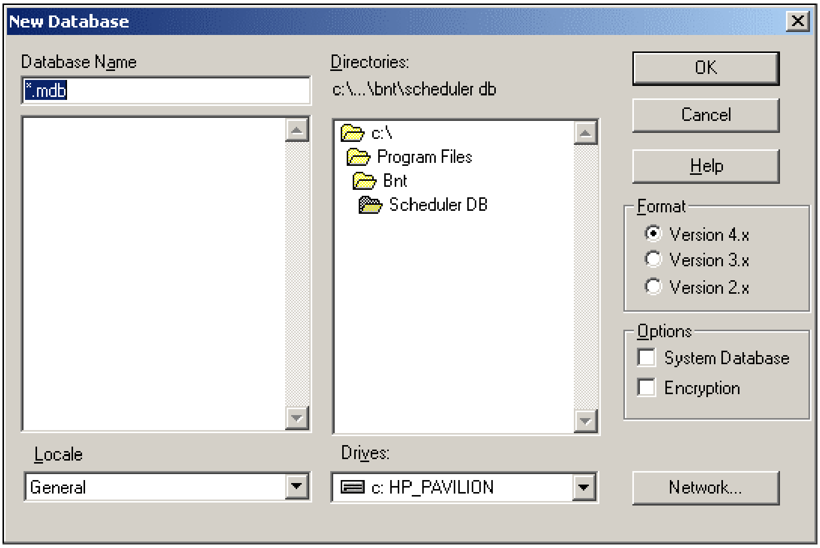
The first prompt in this section of the installation sequence is as follows:



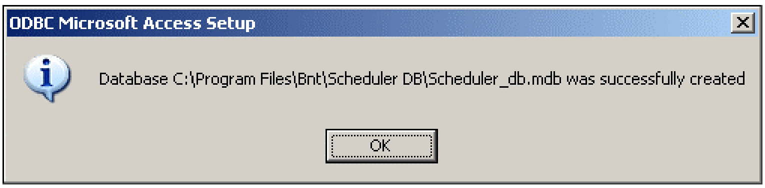
This window will remain on display as a reminder throughout this part of the installation sequence. It will first be accompanied by the window below:



As shown, the data source name and description have been entered already. Click the Create button in the Database area of this window. You will be prompted with this window:

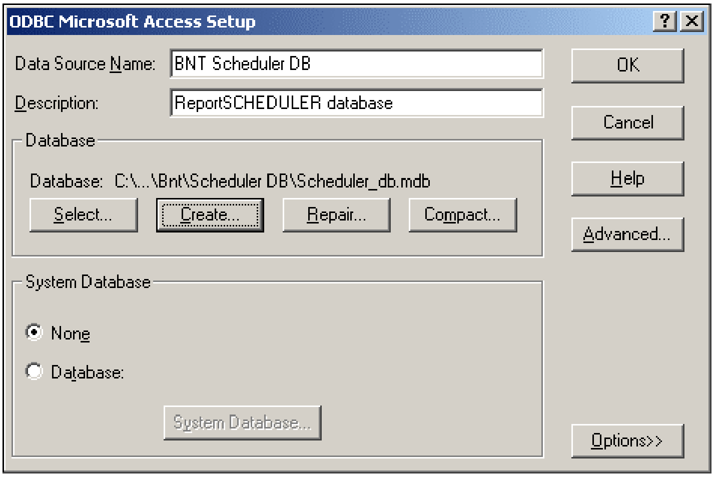


In the Database Name field enter a suitable filename for the database, such as Scheduler_db.mdb. Accept the default installation folder *x*:\Program Files\Bnt\Scheduler DB, and click OK. If no database with the same filename already exists, you will be sent a message telling you that one has been created according to your specifications; for example:



However, if a database with the same filename does exist, you will instead be prompted to confirm that you want to replace it.

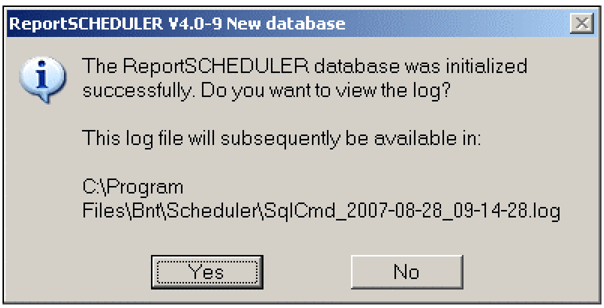
Click OK to return to the ODBC Microsoft Access Setup window with the database file path displayed in the Database area; for example:



Click OK to continue the installation sequence and initialize the database.

Completing the installation

When the ReportSCHEDULER database has been initialized successfully you will be prompted as follows:

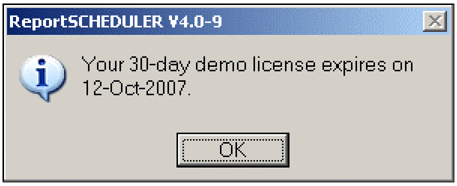


If you click the Yes button you will be shown the log in Notepad.

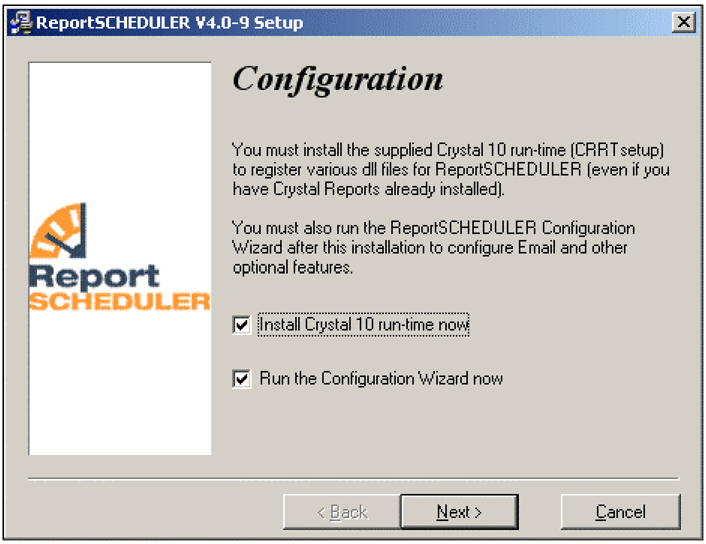
Note that you will be shown the log automatically if the system fails to initialize the database for any reason. You will need a copy of this log if you consult the BadgerNT Service Desk for help – as shown on the previous prompt window it is held in *x*:\Program Files\Bnt\Scheduler, with a filename in the format:

sqlcmd_*date_time*.log

The installation will automatically create a demo license for you and inform you of the expiry date; for example:



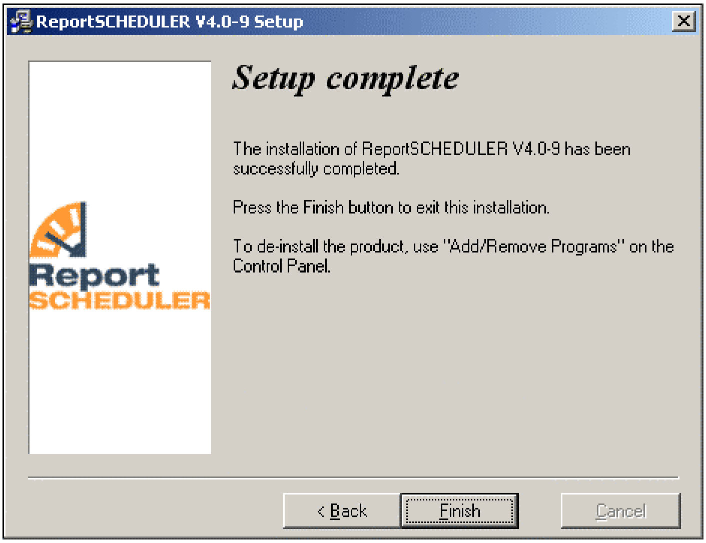
Click OK and the installation will then start up the ReportSCHEDULER services. Once all are up and running, you will be prompted as follows:



You can perform the operations described here immediately by leaving the checkboxes turned on and clicking the Next button. Alternatively, you can choose to do them later, in which case you should turn off the checkboxes before clicking the Next button.

- *Installing Crystal Reports run-time* on page 21 tells you how to set up the run-time version of Crystal Reports supplied with ReportSCHEDULER. You must do this even if you already have Crystal Reports installed.
- *Configuring ReportSCHEDULER* on page 23 gives details of running the Configuration wizard.

When you click the Next button you will be shown the final window in the sequence:



Click the Finish button and the installation process will terminate. If you turned on the checkboxes to install the run-time version of Crystal Reports 10, or to run the ReportSCHEDULER configuration wizard, you will be taken through the window sequences shown in the following chapters.

You may be advised to reboot your computer if you have updated any files that are currently in use.

3

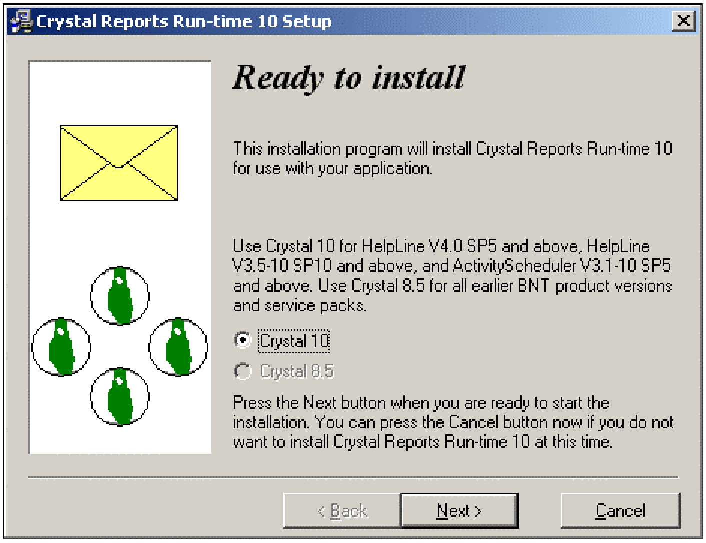
Installing Crystal Reports run-time

You can install the run-time version of the Crystal Reports package either as a continuation of the main installation sequence described in the previous chapter, or as a separate operation.

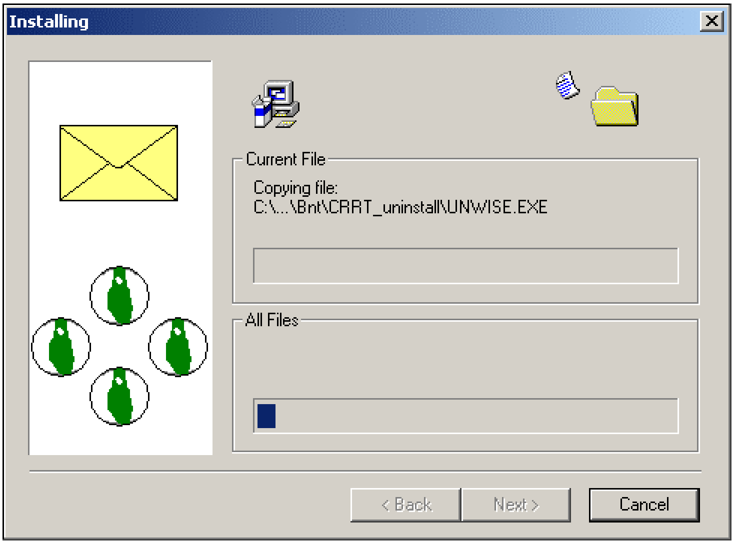
Note that you must install the run-time Crystal Reports, even if you have the full Crystal Reports already installed on your computer. In this case the product is simply configured for use with ReportSCHEDULER.

If you chose to proceed to the installation of the run-time version of Crystal Reports 10 as a continuation of the main installation sequence, you will be shown the window below once you have completed the installation of ReportSCHEDULER. To install it as a separate operation, find and run the downloaded file **CRRTSetup.exe**, which should be in your default \Temp folder.

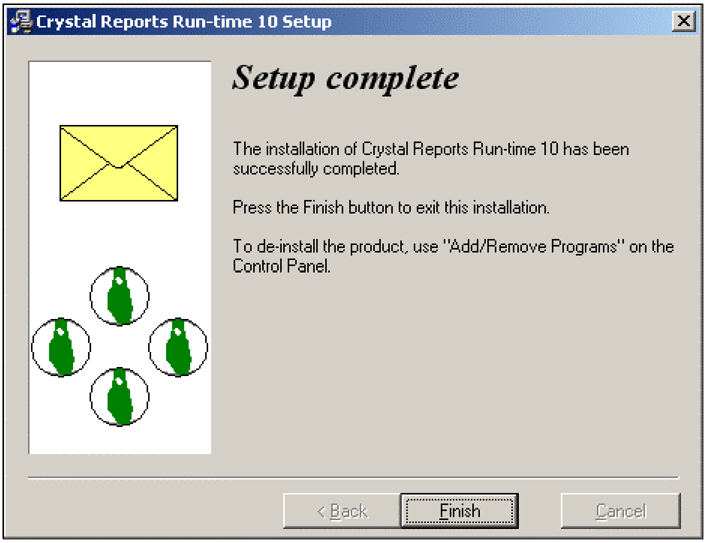
The first window that you will see looks like this:



Leave the Crystal 10 radio button turned on and click the Next button to continue. The installation will start and you will see the window below while it proceeds:



Once the installation has been completed you will be shown the window below:



Click the Finish button to complete the installation procedure.

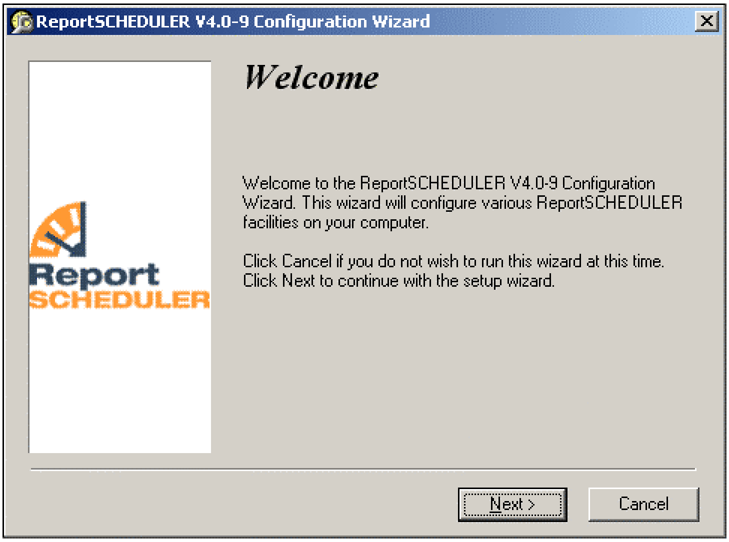
4

Configuring ReportSCHEDULER

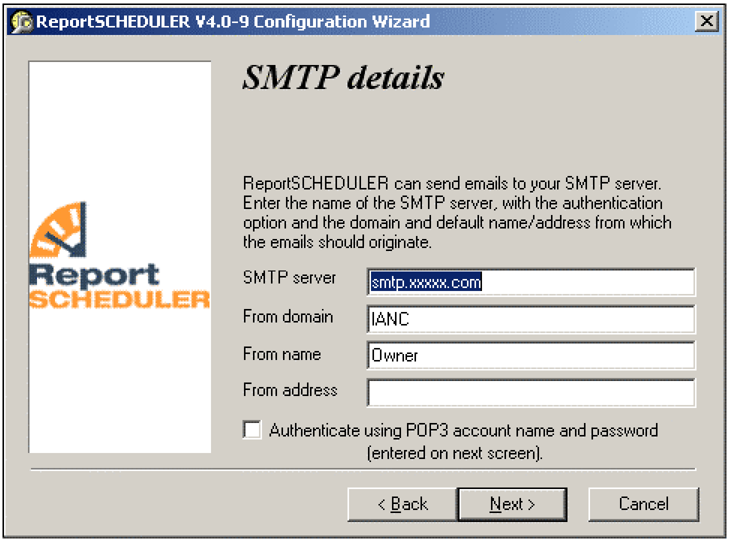
You configure the ReportSCHEDULER either as a continuation of the main installation sequence described earlier, or as a separate operation.

If you chose to proceed to the product configuration as a continuation of the main installation sequence, you will be shown the window below once you have completed the installation of ReportSCHEDULER and Crystal Reports, if specified. Alternatively, to configure or reconfigure the product in a separate operation, select **ReportSCHEDULER** from the All Programs list on the Start menu, then select **Configuration Wizard** from the resulting submenu.

The first window that you will see looks like this:



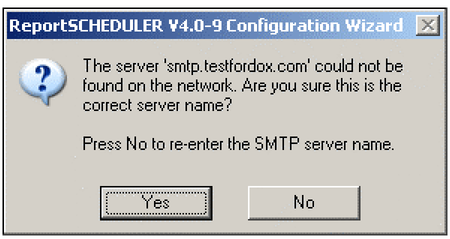
Click the Next button to display the first window in the sequence:



Enter details of the SMTP email server and mailbox as follows:

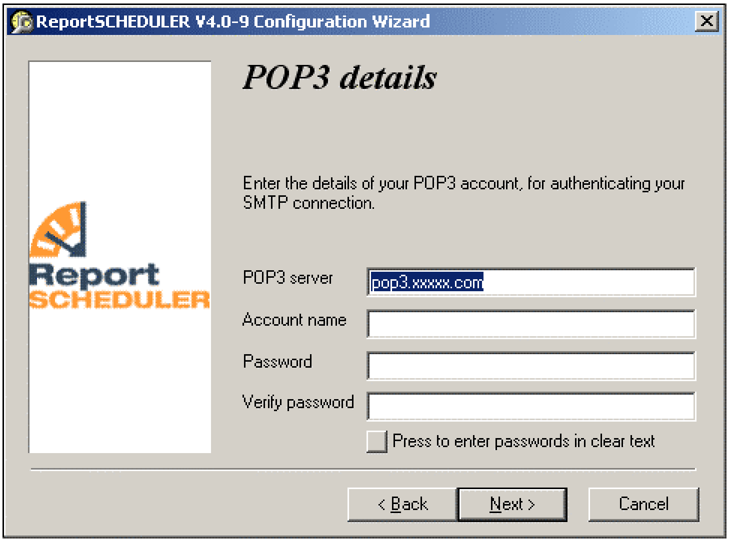
- In the SMTP Server field enter the name of your SMTP server for outgoing emails.
- In the From Domain field enter the name of the computer or domain from which emails should appear to originate
- In the From Name field enter a name that will be displayed as the sender of ReportSCHEDULER emails.
- In the From Address field enter the email address that will be treated as the sender of ReportSCHEDULER emails; for example, **reports@mycompany.com**.
- Turn on the “Authenticate …” checkbox if your SMTP email server requires authentication with a POP3 account.

When you click the Next button, ReportSCHEDULER will check the network to ensure the server exists, and will show you a message in this format if it cannot find it:



If the name is correct but the server is temporarily unavailable click Yes to continue; otherwise, click the No button to return and correct the server name.

If you turned on the Authenticate… checkbox on the previous window you will be asked for POP3 details on the next window:



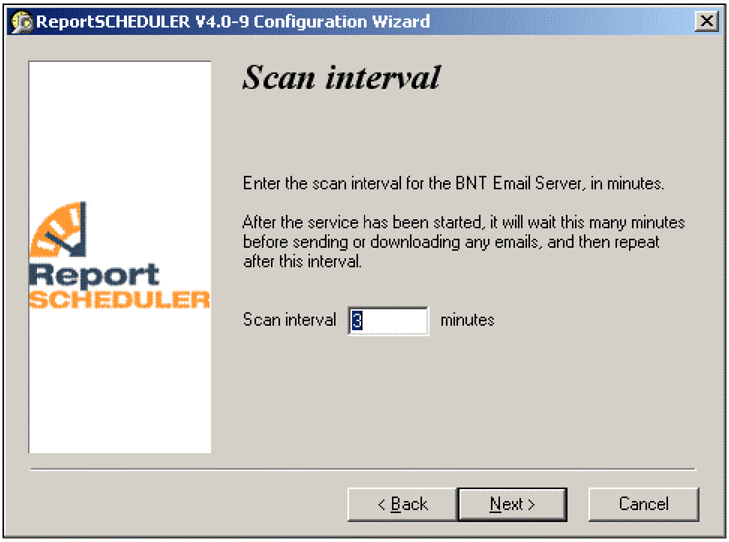
Enter details of the POP3 server and mailbox as follows:

- In the POP3 Server field enter the address of the POP3 server where your mailbox is located.
- In the Account Name field enter the name of your mail account on the server.
- In the Password field enter the password for the account, and repeat it in the Verify Password field.
- If you want to show the contents of the password fields in plain text, turn on the "Press to enter …" checkbox underneath – otherwise, if you leave this checkbox turned off, your password and its verification will be shown as a string of asterisks. Note that turning on this checkbox will automatically clear any text already entered in the password fields.

Click the Next button to continue. As on the previous window, ReportSCHEDULER will check the network to ensure that the server exists, and will prompt you to confirm it or to correct it if it cannot be found. Otherwise, you will see the window below:

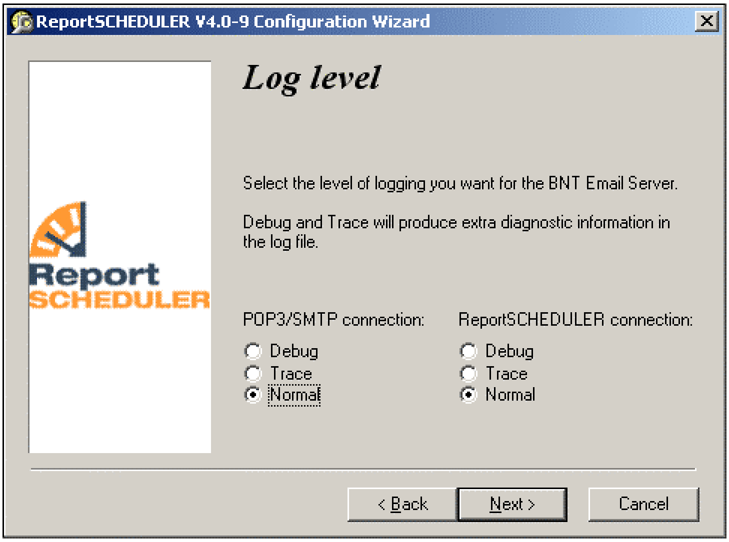
Turn on the radio button corresponding to the action to be taken on sent emails after they have been successfully transmitted. Click the Next button to proceed through the sequence:

The next window in the sequence has this format:



Either accept the default interval shown, or enter a new value as a number of minutes. Once started, the service will wait for this number of minutes before sending any emails, then repeat the scan periodically whenever the specified interval has elapsed.

Click the Next button to display the next window:

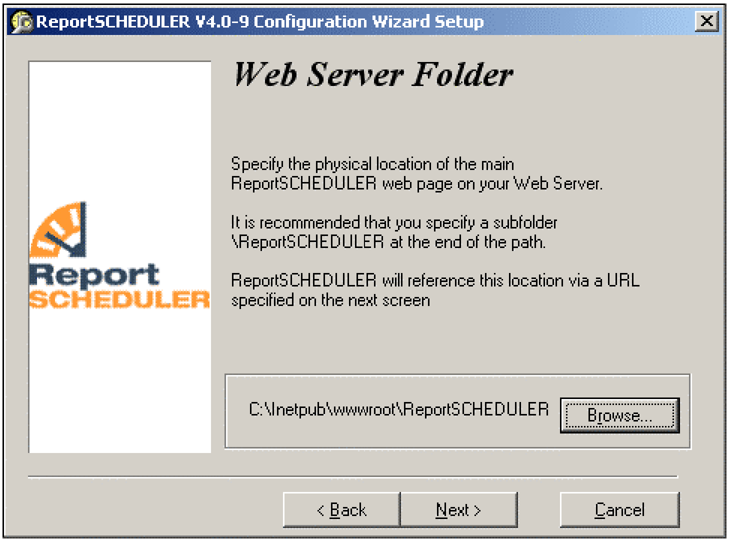


Specify the levels at which you want log messages to be generated within the Email Server:

- Normal should be sufficient unless you are diagnosing email problems:
- Turning on the Trace radio button will cause more information to be logged than when the Normal radio button is turned on
- Turning on the Debug radio button will cause the maximum amount of diagnostic information to be logged. Use this setting if your emailed reports are not sent correctly when you first set up ReportSCHEDULER.

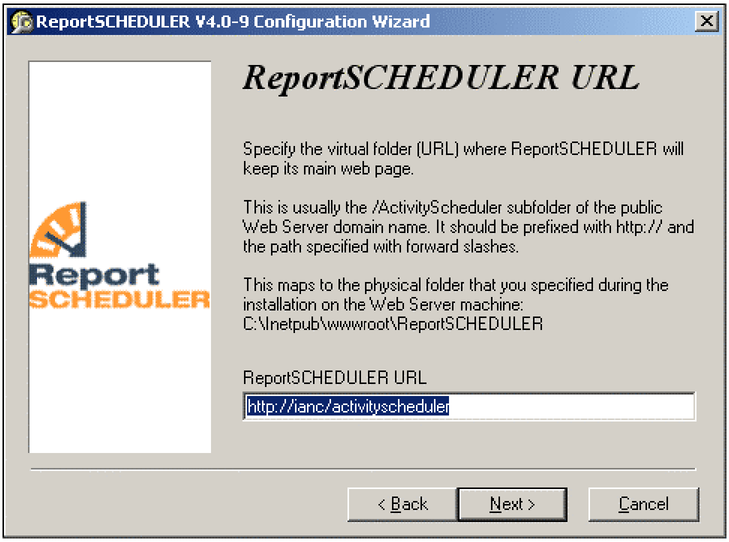
Click the Next button to continue.

If you have not upgraded to a full product license with the Web option, you will be taken directly to the Ready to Proceed window shown later in this chapter. However, if you have upgraded to a full product license with the Web option, you will first see the window shown below:



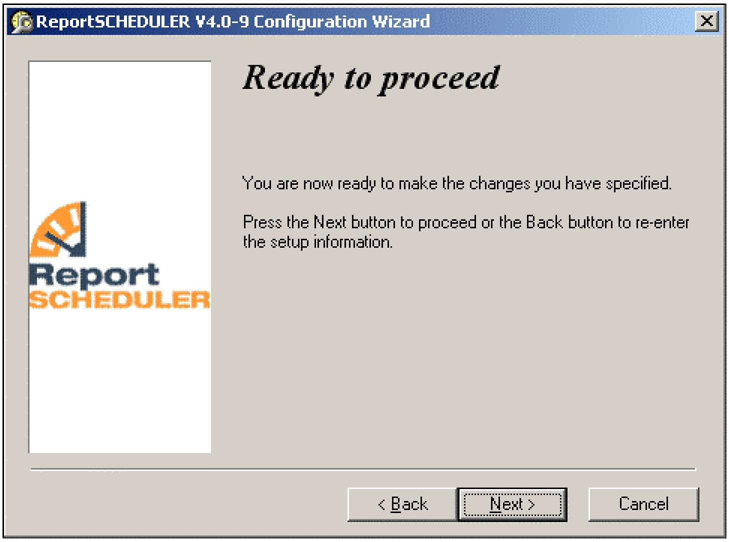
Note that you need an enabled Web server in IIS on your computer before you can use the web interface.

Accept the default value offered, unless asked to do otherwise by the BadgerNT Service Desk. When you click the Next button you will see the window below:



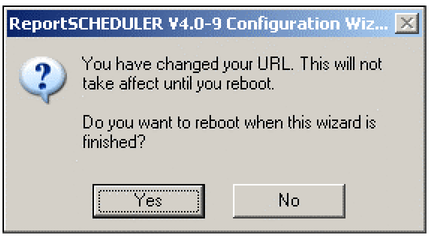
Again, unless advised otherwise by the BadgerNT Service Desk, accept the offered URL and click the Next button to proceed:

The penultimate window in the sequence is as shown below:

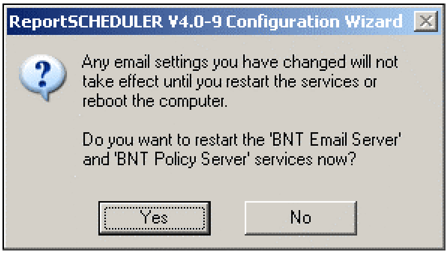


If you want to change any of the values that you have entered, click the Back button to return to the appropriate windows and make changes as necessary. When you are ready, return to the window above and click the Next button.

If you completed the Web Server Folder and ReportSCHEDULER URL windows as part of the configuration sequence, you will be prompted as follows:

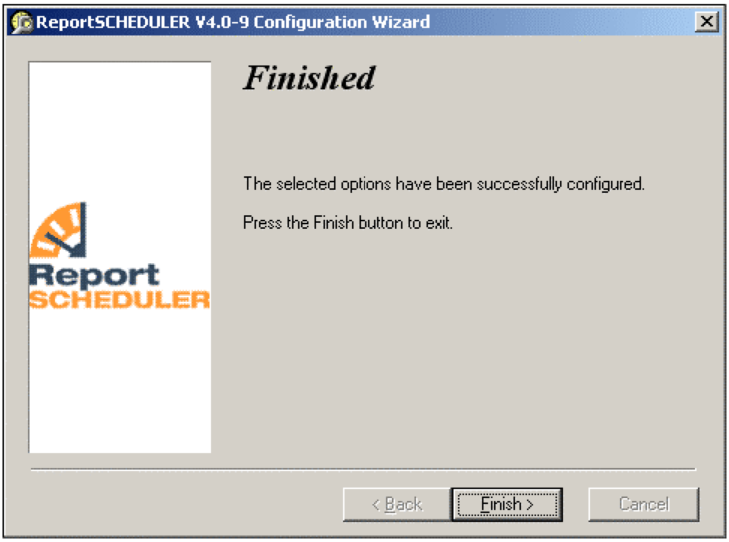


Click Yes if you want to reboot as soon as you have finished the configuration, or No if you would prefer to wait until a more convenient time. In both cases you will be prompted again:



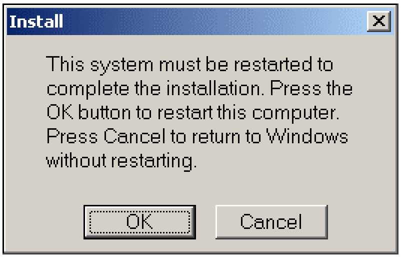
Click Yes if you want to restart these services now, or No if you intend to reboot soon, in which case all services will be restarted.

The final window has this format:



Click the Finish button to end the wizard.

If you performed the configuration as a continuation of the main installation sequence you will be prompted again:



Click OK if you want to reboot immediately, or Cancel if you would prefer to wait.

5

Using the Report Wizard

This chapter tells you how to run the Report Wizard to set up your Crystal Reports for use with ReportSCHEDULER.

Starting the Report Wizard

To start the Report Wizard, do either of the following:

- Click the Report Wizard icon on the desktop:

- Select **ReportSCHEDULER** from the All Programs list on the Start menu, then select the **Report Wizard** option from the resulting submenu.

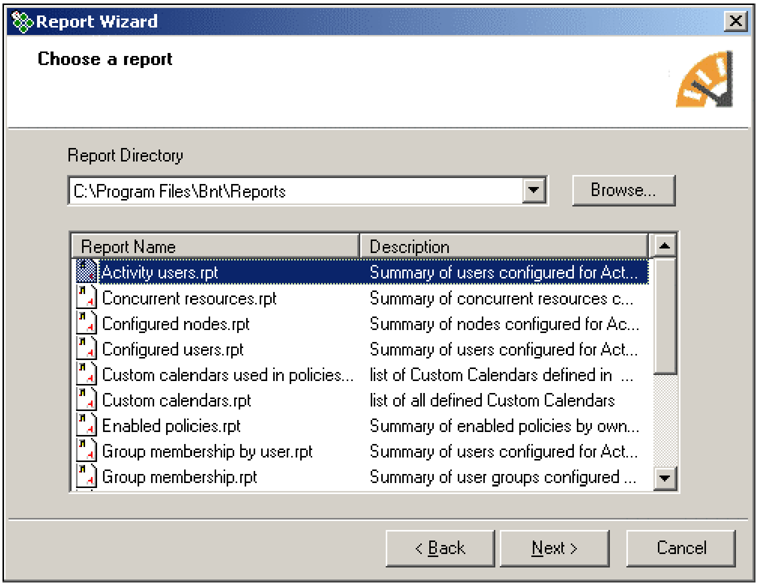
You can also start it from within the Policy Manager, as described in chapter 6.

In all cases you will first be shown a Welcome window:

Click the Next button to proceed through the wizard and perform the tasks listed here. As in similar wizards, you can use the Back button to return to earlier windows at any time before confirming the report production.

Choosing the report and database

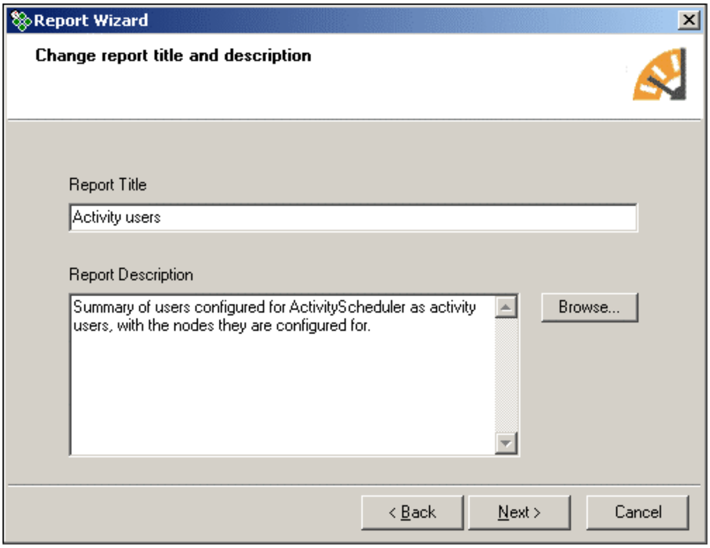
The report-selection window has this format:



The example above shows the supplied reports held in the main ReportSCHEDULER Reports folder. To view your own reports held in other folders, change the value of the Report Directory field by clicking the Browse button and then search for the relevant folders in the usual way. Once you have selected alternative folders in this way they can be accessed easily from this field's pull-down list.

See ***Reports provided with ReportSCHEDULER*** on page 47 for a list of supplied ReportSCHEDULER reports.

Click the line containing the report that you want to generate, then click the Next button to display the next window:

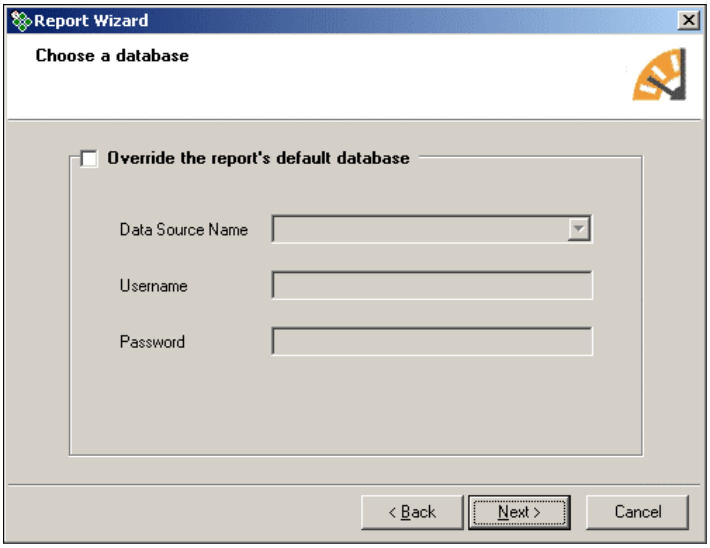


Complete this window as follows:

- In the Report Title field enter a text string that will appear as the window title whenever you preview the report; the default is the report's Title property. If you want to generate multiple reports from the same definition, but with different databases or different selection criteria, make sure that you give a unique Title to each instance.
- In the Report Description field enter any descriptive text that you want to link to the report. If you wish to import a description from a text file, click the Browse button to select the file.

The values that you enter in these two fields will appear in Crystal Reports that contain the ReportTitle and ReportComments fields, and will also be used when generating filenames and email messages in the Report Wizard.

Click the Next button to display the next window in the sequence:



If your report is designed for a specific single database, make sure the Override… checkbox is turned off and click the Next button to continue.

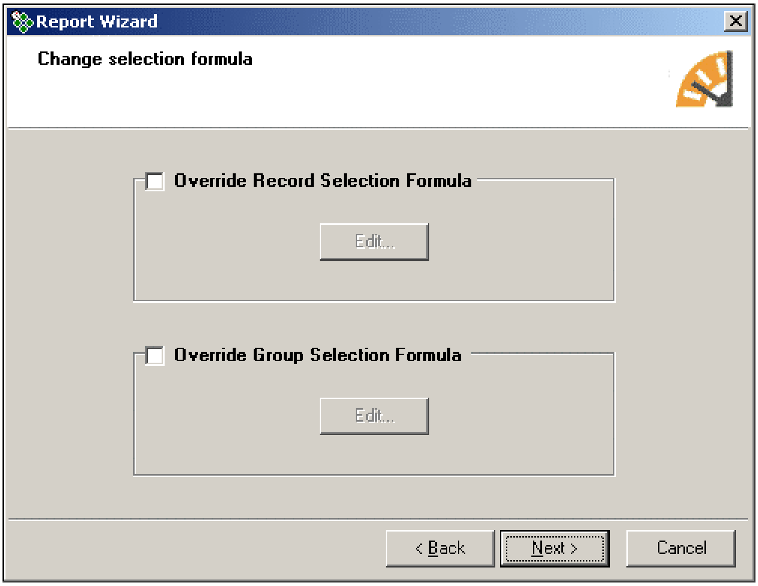
Otherwise, make sure this checkbox is turned on and complete the fields on this window as follows:

- Pull down the Data Source Name field and select the appropriate database.
- In the Username field enter the login user name for the database, as specified when the database was set up.
- In the Password field enter the password for the database.

For the supplied ReportSCHEDULER reports, the Override… checkbox should be turned off, unless you are using an Oracle or MSSQL database in which case you should turn it on and select the DSN **BNT Scheduler DB**.

Specifying data-selection criteria for the report

The next window in the sequence has this format:



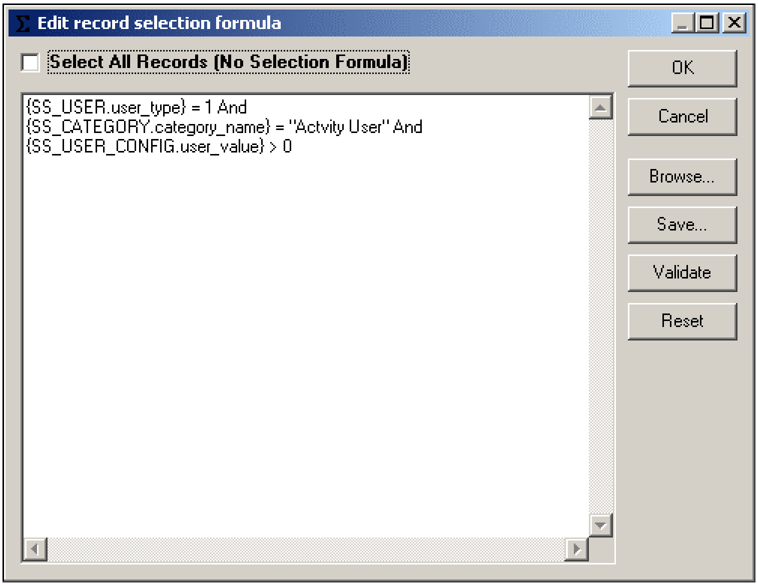
Each Crystal Report has selection criteria associated with it that determine the data to be included – these are defined in Crystal as the *Record Selection Formula* and the *Group Selection Formula*. Use this window if you wish to change these formulae:

- To change the formula that specifies record-selection criteria, turn on the Override Record Selection Formula checkbox. You will be shown the Edit Record Selection Formula window, as shown and explained in the next section. When you have specified your selection criteria you will return to the window above, with the upper Edit button enabled, to allow you to return to the editing window if you wish.
- To change the formula that specifies selection criteria for grouped data, turn on the Override Group Selection Formula checkbox. You will be shown the Edit Group Selection Formula window, which works in the same way as the Edit Record Selection Formula window shown in the next section. When you return to the window above, the lower Edit button will be enabled, to allow you to continue editing if you wish.

If you do not wish to change the default selection criteria defined for the report just click the Next button and proceed as described in ***Specifying the report output*** on page 39.

Editing selection formulae

The Edit Record Selection Formula window is shown below with an example formula; the Edit Group Selection Formula is identical in format:



Use these windows as follows:

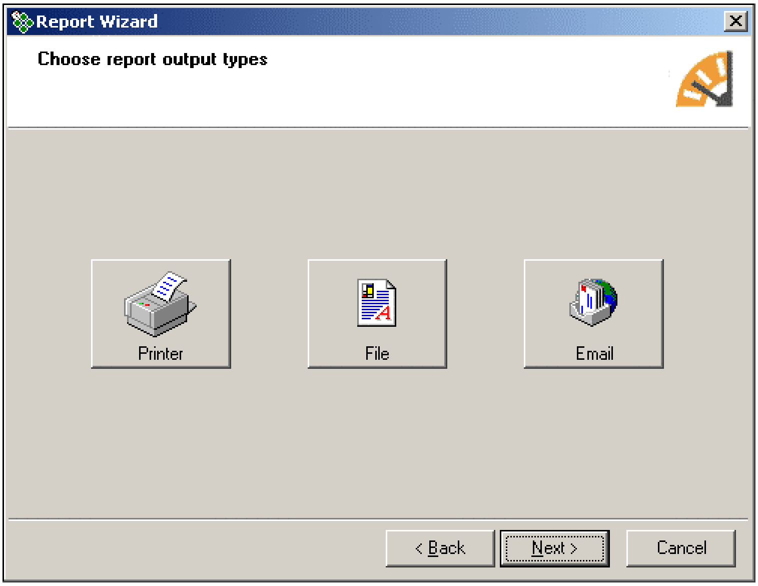
- To select all the records or groups in the database, turn on the Select All… checkbox at the top left.
- To change, replace, or add to any formula shown in the data-display area, edit it directly. The formula must contain one or more conditional SQL statements – if you do not know SQL consult your systems administrator or the designer of the Crystal Report.
- To import a predefined formula from a text file, click the Browse button and then search for the appropriate file in the usual way. Its contents will replace any statements shown in the data-display area of the window above.
- To validate the syntax of any new or changed SQL statements that have been included in the formula, click the Validate button. If any syntax errors are found, you will be told what they are – otherwise you will be told that your formula was validated successfully.
- To revert to the report's default selection formula, click the Reset button.

When you are satisfied with the changes that you have made, click the OK button to return to the Change Selection Formula window.

Click the Next button on the Change Selection Formula window to continue.

Specifying the report output

The next window prompts you to specify how you want the report to be produced:

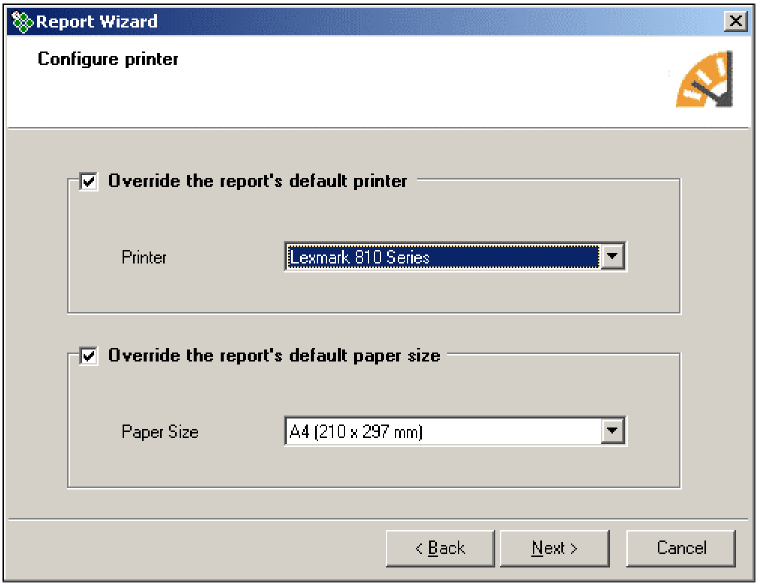


The buttons on this window act as checkboxes, and are highlighted/depressed when turned on – turning on the Email button will also turn on the File button. The windows that you see when you click the Next button depend on which buttons are turned on:

- Click the Printer button if you want a paper copy of the report, and complete the Configure Printer window shown in the next section.
- Click the File button if you want to save the report in a file, and complete the Configure File Output window shown in ***Saving a filed report*** on page 41.
- Click the Email button if you want the filed report to be attached to an email for distribution to selected users – see ***Sending a report by email*** on page 42 for details.

Producing a printed report

If you turned on the Printer button on the Choose Report Output Types window, you will be shown the window below when you click the Next button:



Use this window as follows:

- The device shown in the Printer field will be the default printer defined for the report.

  To change the printer, turn on the top Override… checkbox and pull down the Printer field to select the appropriate device.

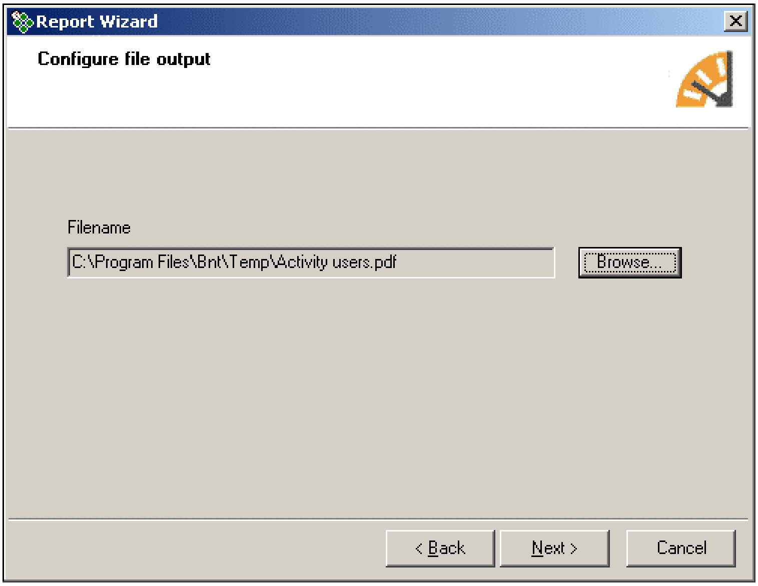
- The value shown in the Paper Size field will be the default size defined for the report.

  To change the paper size, turn on the bottom Override… checkbox and pull down the Paper Size field to select the appropriate paper size.

Click the Next button to continue through the sequence. If you have also asked for a filed copy of the report to be produced, the next windows will be as described in the following sections. Otherwise you will be shown the final window shown and explained in ***Completing the Report Wizard*** on page 44.

Saving a filed report

If you turned on the File button or the Email button on the Choose Report Output Types window, you will be shown the window below when you click the Next button:

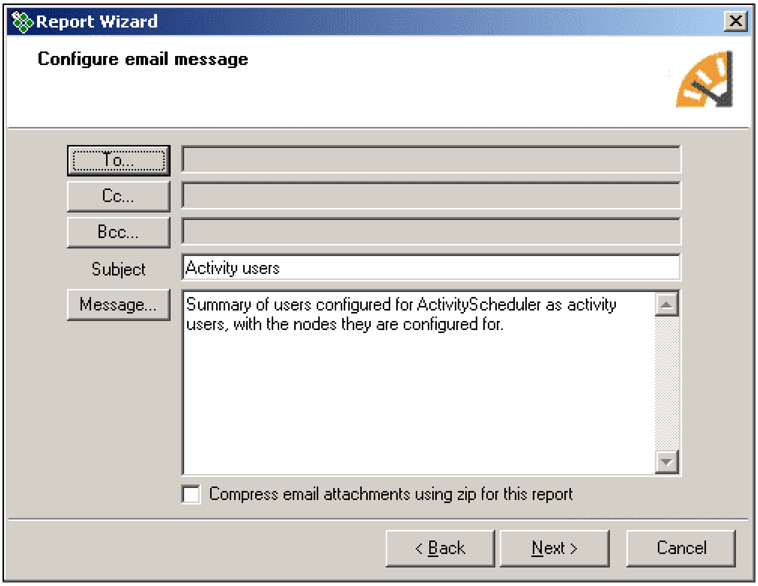


To change the file name, type, or location, either type in the file path directly in the Filename field or use the Browse button to locate and identify the new file.

Click the Next button to continue. If you chose to attach the filed report to an email you will be prompted as described in the next section; otherwise, you will reach the final window shown and explained in ***Completing the Report Wizard*** on page 44.

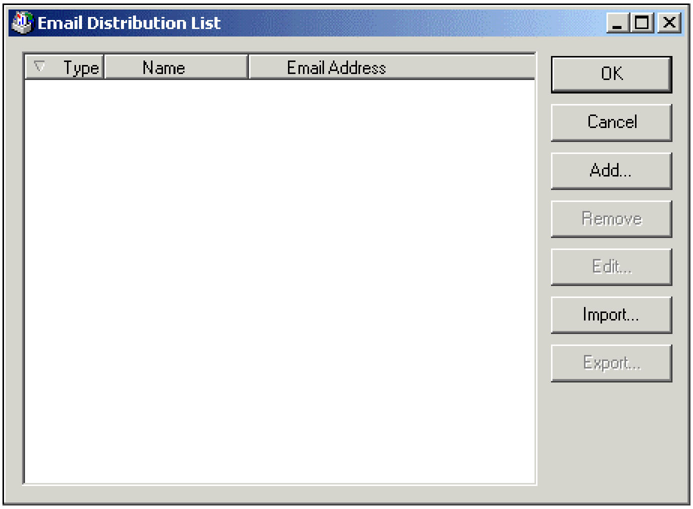
Sending a report by email

On the Choose Report Output Types window, make sure the File and Email buttons are turned on and click the Next button to display the window below:

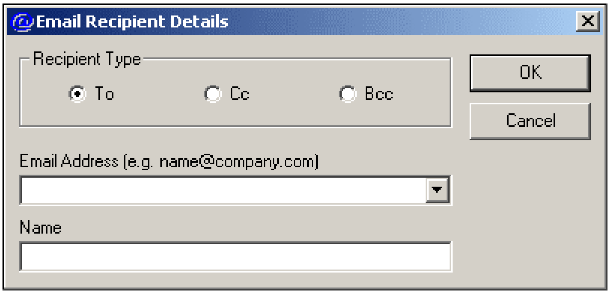


Complete this window as follows:

- If you click any of the To:, Cc:, and Bcc: buttons you will be prompted as shown:



Click the Add button to display this window:



Complete this window as follows:

- The Recipient Type radio button will be set according to the button that you pressed on the Configure Email Message window, but you may turn on any other radio button instead, as appropriate.
- In the Email Address field enter the complete email address of the recipient. Once you have specified email addresses here for sending reports, you can use the drop-down button to select them again.
- In the Name field enter the name of the recipient as it is to appear on the Email message.

Click OK to confirm the data that you have entered and return to the previous window. Repeat this process until you have specified all the recipients of original, copy, and blind copy versions of the email and its attachments.

Note that you can use the Import button to load addresses from a file, and the Export button to save the current list of addresses in a new file.

- When you return to the Configure Email Message window complete the remaining fields as follows:
  - In the Subject field enter any text that you wish to be shown as the subject of the email message that accompanies the attached report file.
  - In the Message data-entry area enter any explanatory text that you want to be sent together with the reports. You can import a message text from an existing file by clicking the Message button and then locating the file.
  - Turn on the bottom checkbox if you want any reports attached to emails to be compressed (zipped) automatically before transmission.

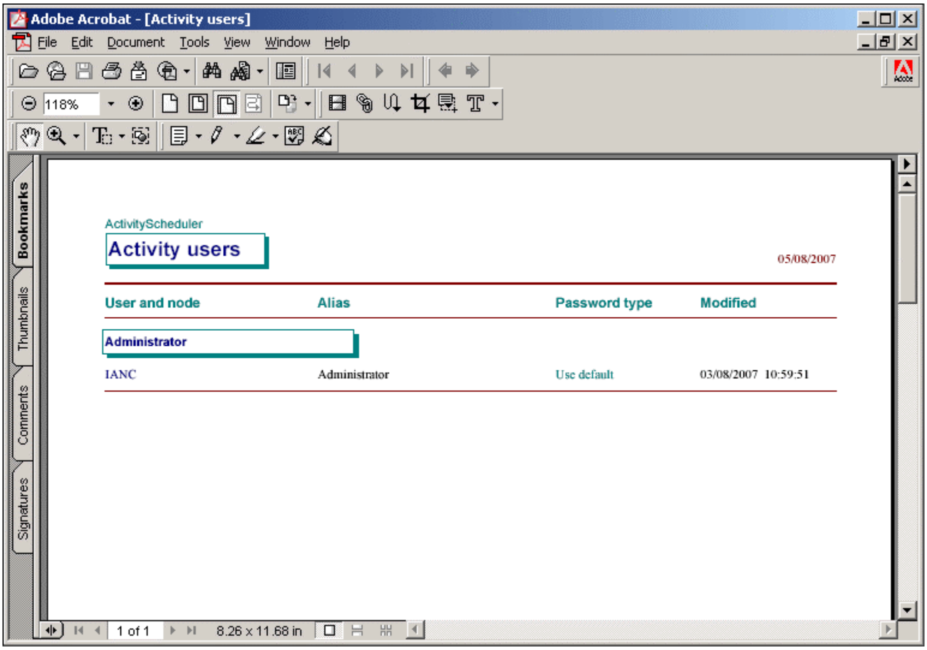
When you are satisfied with the data that you have entered, click the Next button to continue.

Completing the Report Wizard

Once you have supplied full information about the production of the report you will reach the final window in the sequence:

As shown, this window allows you to preview, run, or automate the report:

- Clicking the Preview button will display the report directly in PDF format; for example:

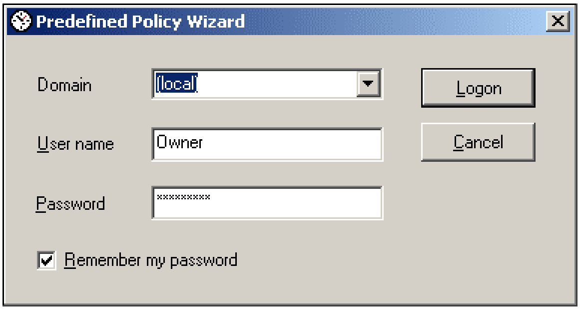


  You can see the underlying data for this report by paging through it, using the buttons in the tool bar above it.

- Clicking the Run button will immediately generate the report as a printed, filed, or emailed copy, according to your earlier instructions.
- Clicking the Automate button will display the window sequence described in the next section.

Automating report production

When you click the Automate button on the previous window you will first be prompted to log on to ReportSCHEDULER as follows:



Complete this window as follows:

- If you are configured as a domain user, enter or select the domain name in the Domain field.
- The User name field will be preset to your Windows user name, but you may need to change this to the name configured in ReportSCHEDULER. The name that you enter must be configured for the selected domain, if any.
- If you have turned on the “Remember my password” checkbox in an earlier ReportSCHEDULER session, the Password field will show your ReportSCHEDULER password as a string of asterisks, and you can click the Logon button to proceed to the next window. Otherwise, type your password in the Password field.
- If you want the ReportSCHEDULER to remember your password the next time you log on, turn on the “Remember my password” checkbox. Naturally, this reduces your access security, and is only appropriate when you are satisfied that there are no consequent risks to the integrity of the system. In all other cases you should ensure that this checkbox is turned off.

When you click the Logon button the selected report will be enabled ready for use in the Policy Manager and you will be prompted as follows:

Click OK to conclude the Report Wizard session. Read the following chapters for details of scheduling, running and monitoring enabled policies.

Reports provided with ReportSCHEDULER

The list below names the Crystal Reports supplied with ReportSCHEDULER for reporting on its own database.

- Activity users
- Concurrent resources
- Configured nodes
- Configured users
- Custom calendars
- Custom calendars used in policies
- Enabled policies
- Group membership
- Group membership by user
- Policies due to run
- Policies with custom calendars
- Policy history
- Policy history with pie chart
- Policy last run status
- Policy runs by date
- Running policies

6

Using the Policy Manager

This chapter tells you how to log on to the Policy Manager and use it to run, schedule, and monitor your reports. If you have a full product license that includes the Web interface, an alternative version of the Policy Manager is available on the Web.

For a more detailed description of all the facilities available within the Policy Manager, consult the *ActivitySCHEDULER: GUI Policy Manager Guide* and the *ActivitySCHEDULER: Web Policy Manager Guide*.

Accessing the Policy Manager

The following sections tell you how to access the standard installed version of the Policy Manager, and also the Web version if you are licensed to do so.

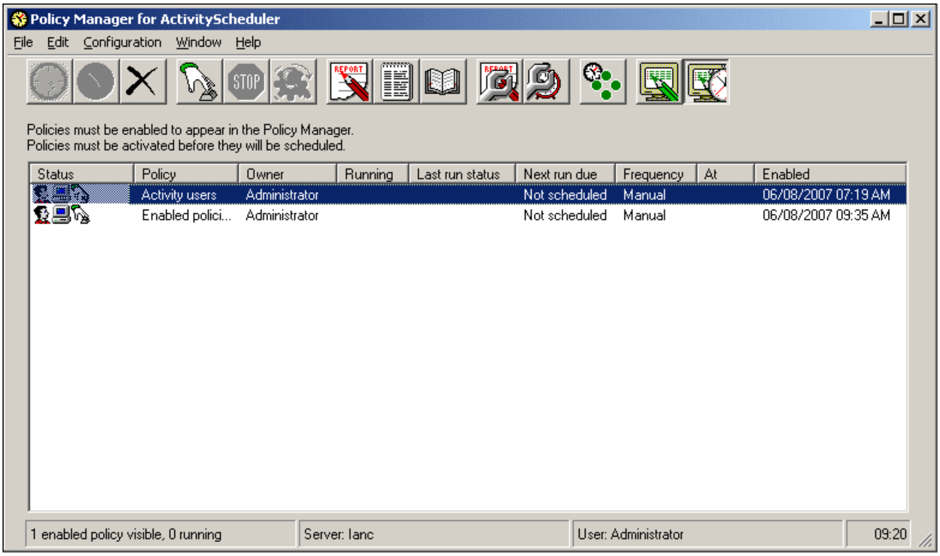
Accessing the installed Policy Manager

To start the ReportSCHEDULER Policy Manager double click its icon on the desktop:

Alternatively, you can select **ReportSCHEDULER** from the All Programs list on the Start menu, then select **Policy Manager** from the resulting submenu. In both cases you will be prompted to log on as when you enable reports in the Report Wizard (see ***Automating report production*** on page 46)

When you have successfully logged on you will see this product version window:

This will disappear after a few seconds to reveal the Policy Manager window; for example:



All your enabled reports will be shown as separate lines on this display, with the report title shown in the Policy column.

Later sections in this chapter tell you how to use this window to run, schedule, and monitor your report policies, and to perform various other related functions. As mentioned earlier, complete instructions for using the Policy Manager can be found in the *ActivitySCHEDULER: GUI Policy Manager Guide*.

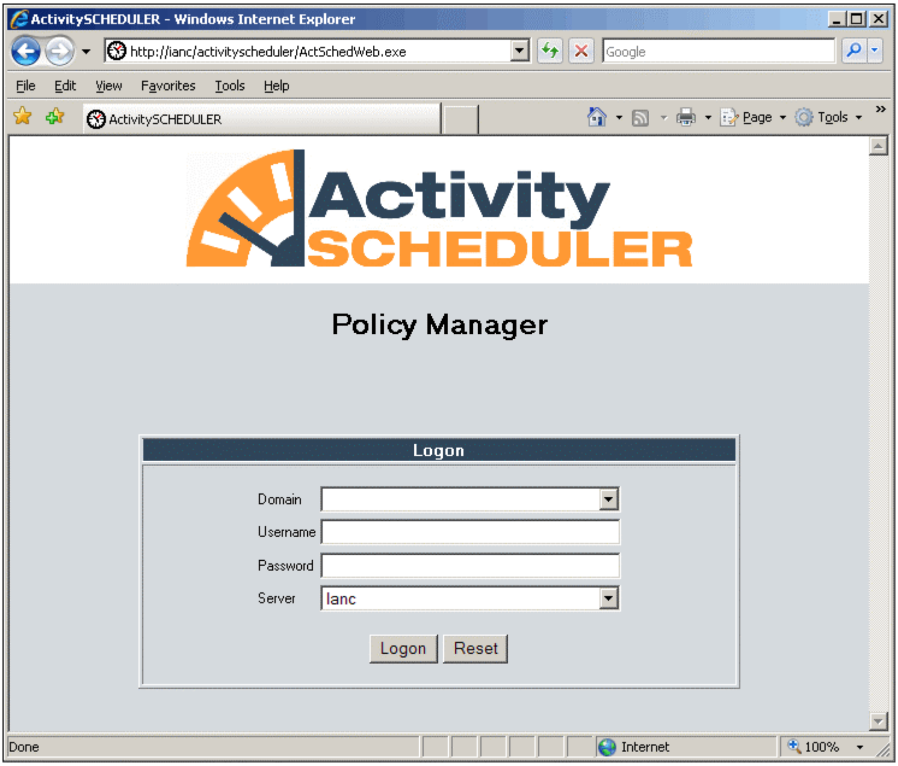
Accessing the Policy Manager on the Web

To view the Policy Manager on the Web, open your Internet browser and go to the page:

http://*webserver*/activityscheduler

where *webserver* is usually the name of the computer where you installed ReportSCHEDULER.

You will first be prompted to log on:

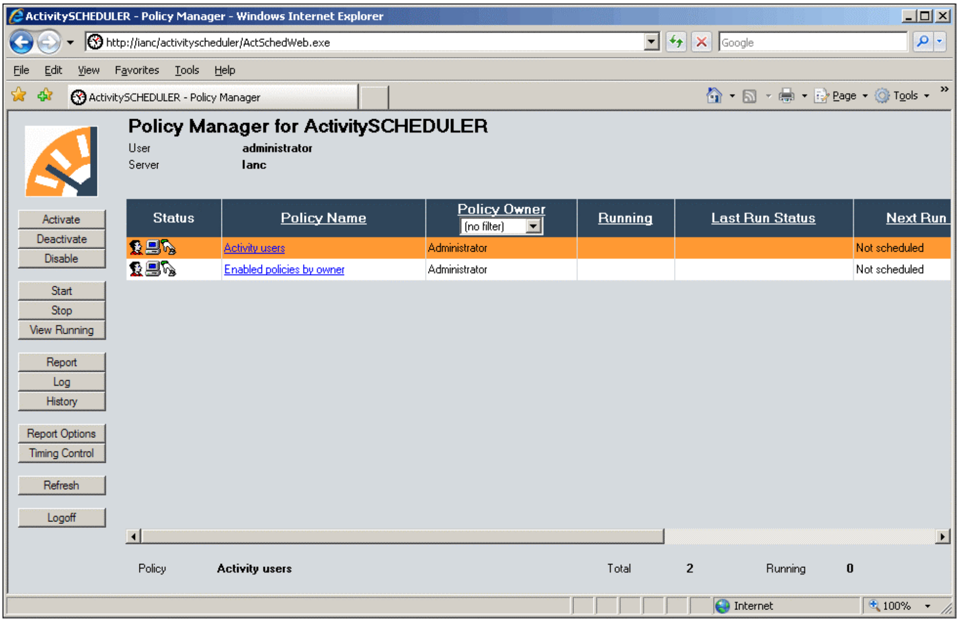


Complete this window as follows:

- If you are configured as a domain user, pull down the Domain field and select the domain name.
- Enter your ReportSCHEDULER user name in the Username field. This name must be configured for the selected domain, if any.
- Enter your password in the Password field.

- The Server field will default to the name of the default Web server , but you may pull down this field to select the name of a different computer if you have installed ReportSCHEDULER on multiple computers.

When you click the Logon button you will see the Policy Manager Web page; for example:



Use this page to run, schedule, and monitor reports, as described in the following sections.

Leaving the Policy Manager Web interface

To end a session on the Web Policy Manager, just click the Logoff button at the bottom left of the window. You will be asked to confirm that you want to log off from the application – when you do so you will be returned to the Logon window shown earlier.

Running a report manually

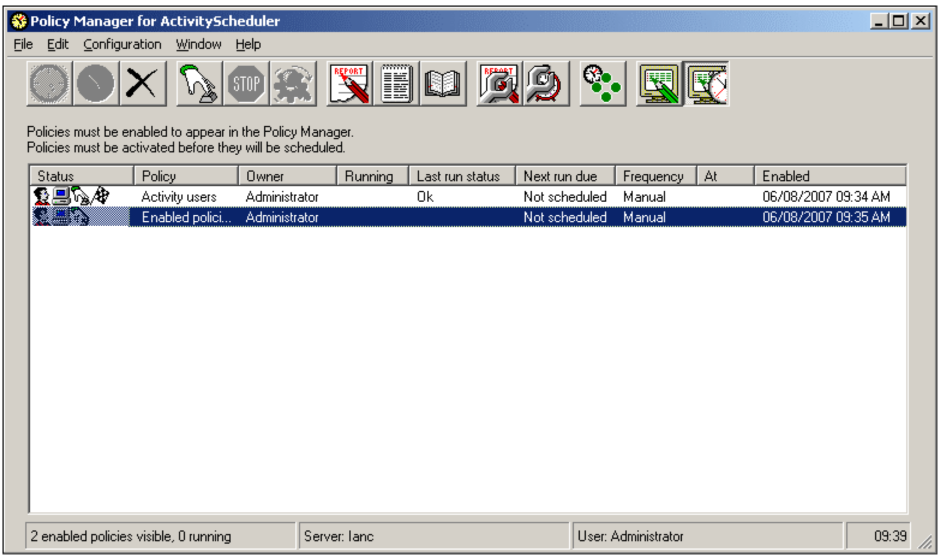
When you use the Report Wizard to generate Crystal Reports and prepare them for scheduling, they are enabled but inactive, and appear as such in the list on the window shown above. You can run such reports manually, as described here, or create a schedule for them as described in the next section.

To start an inactive report policy, click on the appropriate line then do one of the following:

- Click the  icon in the tool bar.
- Select the **Start now** option from the context menu on the right mouse button.
- On the Web interface click the **Start** button on the left

You will be prompted as follows:

Click Yes to do so, and the entries on the relevant line will soon show that the report is running. Once the report has been produced these entries should confirm its success, for example:



Stopping a running report

To interrupt a running report, do one of the following:

- Click the  icon in the tool bar.
- Select the **Stop running policy** option from the context menu on the right mouse button.
- On the Web interface click the **Stop** button on the left

You will be prompted to confirm the interruption: click Yes to do so and close the running report tidily.

Disabling a report

Disabling a report will remove it from the Policy Manager; you can add it again later by running the Report Wizard.

To disable an inactive report, click on the relevant line and then do one of the following:

- Click the  icon in the tool bar.
- Select the **Disable** option from the context menu.
- On the Web interface click the **Disable** button on the left

You will be asked to confirm that you want to disable the chosen report and remove it from the list. Click the Yes button to delete the line from the list.

Note: If you disable a report you will permanently lose all its history details. Disabling a report does not delete the associated Crystal Report definition file

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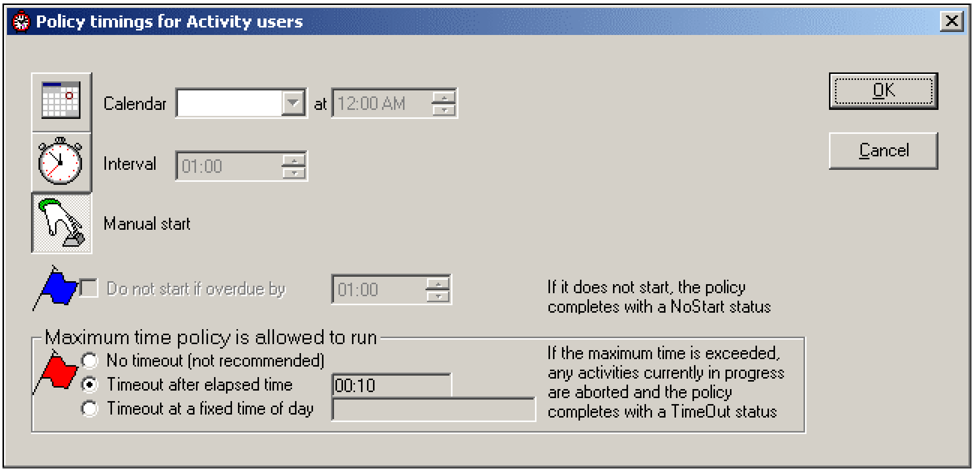
Scheduling and activating a report

To create a running schedule for a report, right-click on the appropriate line in the list and select the **Edit timing controls** option from the context menu.

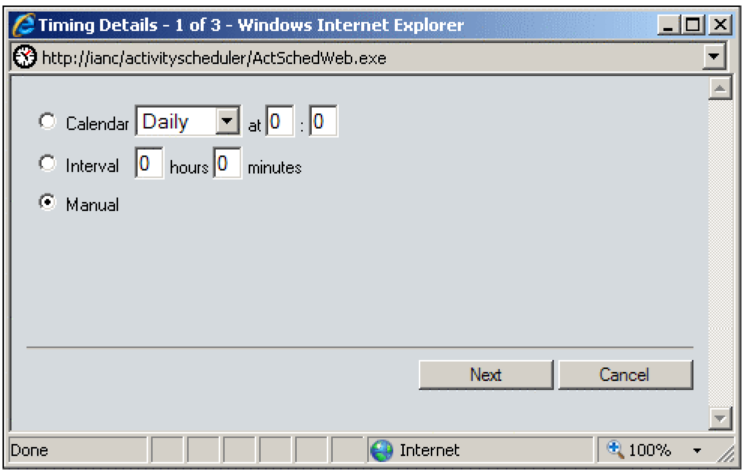
Alternatively, you can click the  icon in the tool bar, or select **Policy timing controls** from the **Edit** pull-down menu.

On the Web interface click the **Timing Control** button on the left

In the installed Policy Manager you will be shown a window in this format:



In the Web interface the corresponding window looks like this:

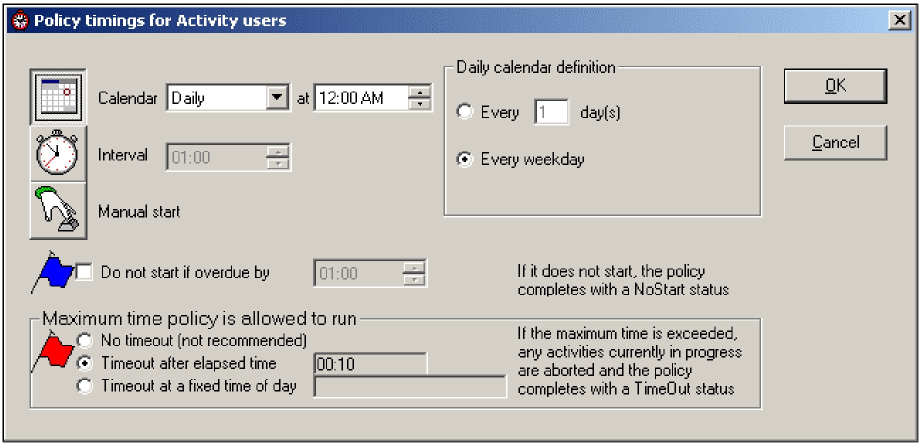


This is the first in a sequence of wizard-style windows that supply the same functions as the Policy Timings window, as described below. Click Next after completing each window.

The following list tells you how to use the Policy Timings window. Note that any changes you make here will be lost if the report is re-enabled in the Report Wizard.

- Click the  icon if you want the report to run at a fixed time of day on a regular schedule. The equivalent on the Web interface is the **Calendar** radio button.

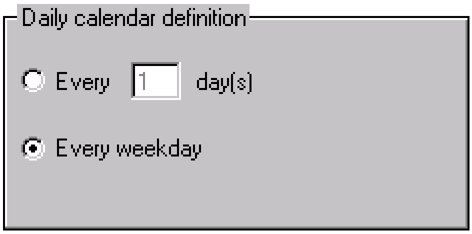
  The window will change as shown:



  Pull down the Calendar field to select a basic frequency at which it will be run: Daily, Weekly, Monthly, Yearly, or Custom. Enter the time of day in the field alongside, in the standard *hh:mm* format.

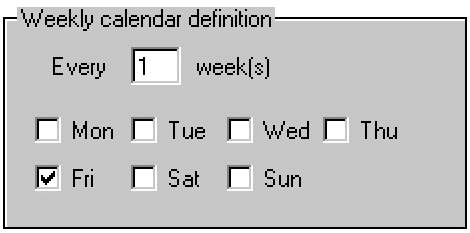
The contents of the calendar-definition area on the right will vary according to the type of calendar selected, as described below. Note that in the Web interface calendar definitions are shown on a subsequent Web page.

– If you select a Daily calendar, the calendar-definition area or Web page will show the Daily Calendar Definition; for example:



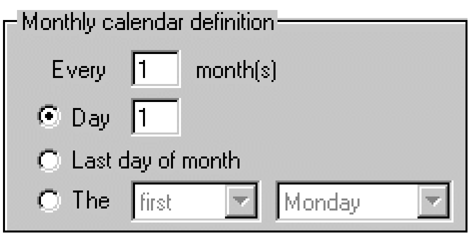
This allows you to specify that the report should be run on every nth day, or on every weekday from Monday to Friday, by turning on the appropriate radio button in the "Daily calendar definition" area of the window above. If you turn on the top radio button, you must specify the daily frequency n in the Every…Day field.

– If you select a Weekly calendar, the calendar-definition area or Web page will show the Weekly Calendar Definition; for example:



Enter the weekly frequency in the top field, and turn on the checkboxes beneath it to indicate on which days in the week the report should be run.

– If you select a Monthly calendar, the calendar-definition area or Web page will show the Monthly Calendar Definition; for example:

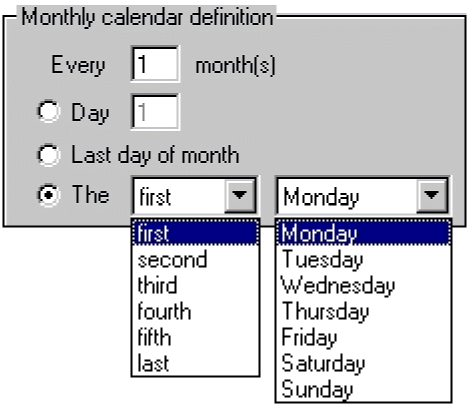


Enter the monthly frequency in the top field and use the radio buttons to specify whether you want to run the report on a particular date in the month, or on the last day in the month, or on a particular weekday (such as the second Thursday).

If you turn on the top radio button, enter the date within the month in the Day field. If you enter a number that is higher than the number of days in any month, the count will continue into the next month, so the 31st of February will be interpreted as the 2nd or 3rd of March.

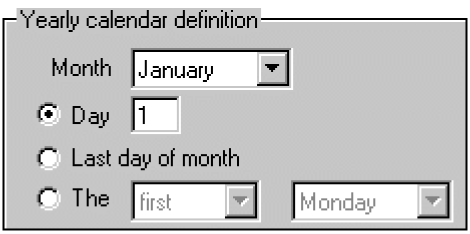
If you turn on the middle radio button, the report will run on the last day in the month.

If you turn on the bottom radio button, you should pull down the fields alongside to specify the weekday on which the report should be run:



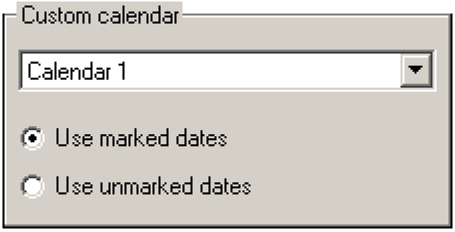
If the day you choose lies beyond the end of any month, the count is continued into the next month, so the fifth Monday in February will normally be interpreted as the first Monday in March.

– If you select a Yearly calendar the calendar-definition area or Web page will show the Yearly Calendar Definition; for example:



Pull down the Month field to select the month in which the report should run. Use the other fields and radio buttons to specify the day in the month when the report should run, in the same way as for the monthly calendar explained above.

– If you select a Custom calendar the calendar-definition area or Web page will show the Custom Calendar; for example:



Pull down the top field to select the named calendar that you want to use, and turn on the appropriate radio button to indicate whether you want the report to run on marked or unmarked dates.

See the *ActivityScheduler: Configuration Guide* for information about defining named calendars.

- Click the  icon if you want the report to be run at regular fixed intervals during the day, and enter the time interval between runs in the Interval field, using the *hh:mm* format. The equivalent on the Web interface is the **Interval** radio button

  When a report is run in this mode, if any run is delayed by the length of the specified interval or more, then the next run is skipped. This is also the case if the report is still running when the next run is due.

- Click the  icon if you want the report to be run only when it is started manually. The equivalent on the Web interface is the **Manual** radio button
- Turn on the checkbox labeled "Do not start if overdue by" if you want any scheduled report run to be canceled if it is significantly delayed. Enter the limiting delay in the field provided alongside. If you have specified that the report should be run at fixed intervals, make sure that the limiting delay is less than the fixed interval.
- Use the radio buttons in the box labeled "Maximum time policy is allowed to run" to specify report time-out details:

  Turn on the No Timeout radio button to accept the default timeout period, which is ten minutes. This should usually be adequate for report generation.

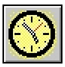
  Any report that is timed out is automatically given the value "Timeout" in the Last Run Status column on the Policy Manager window.

When you have finished entering and amending values, click the OK button to save it and clear the window. You will be reminded as shown:

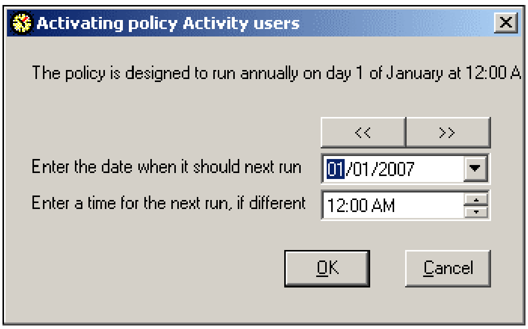
The appropriate fields on the line will show the effects of your changes.

Activating a report

Once you have set the timing controls for a report you can then activate it, and it will then be run on your defined schedule. To activate a report, click on the appropriate line in the list and then do one of the following:

- Click the  icon in the Policy Manager tool bar.
- Select the Activate option from the context menu
- On the Web interface click the **Activate** button on the left

You will be prompted by a window in this format:



Enter the date and time of the next run, as instructed:

- You can use the << and >> buttons to move backwards or forwards through the scheduled run dates and times.
- You can pull down the date field to display a calendar from which you can select the required date. This function is not available in the Web interface.
- You can use the spin buttons (or the + and – keys) on the time field to increase or decrease the hours and minutes figures separately – use the mouse to highlight the figure to be changed. This function is not available in the Web interface.
- Alternatively, you can just overtype the values shown.

Click OK to change the selected report's status to in the Status field, and display details of its next run in the Next Run Due field.

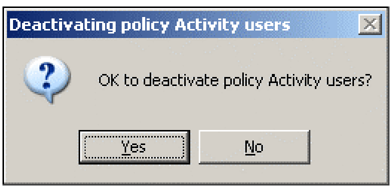
Deactivating a report

Deactivating a report will stop it from running on its defined schedule, but it will still be available for running manually or rescheduling at a later time.

To deactivate a report, first click on the line representing that report on the Policy Manager window, then do one of the following:

- Click the icon on the tool bar.
- Select the **Deactivate** option from the context menu.
- On the Web interface click the **Deactivate** button on the left

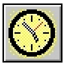
You will be prompted to confirm that you want to deactivate the report; for example:



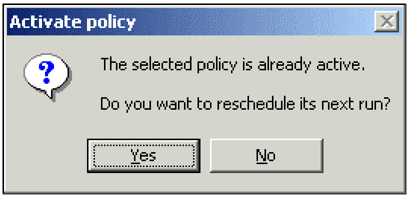
Click OK to do so: the report status will revert to in the Status field, and the Next Run Due field will change to Not Scheduled.

Rescheduling the next run of an active report

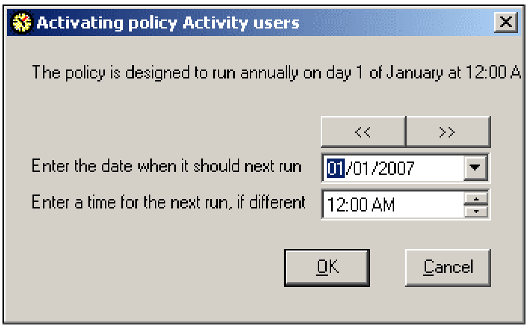
To reschedule the next run of a report that is already shown as active, click on the appropriate line in the Policy Manager list and then do one of the following:

- Click the  icon on the tool bar.
- Select the **Activate** option from the context menu.
- On the Web interface click the **Activate** button on the left

You will be prompted as follows:



Click Yes if you want to change the schedule details of the report's next run:



Change the date and time of the next report run, as necessary, then click OK to confirm your changes and clear this window. The relevant line on the Policy Manager window will show the new data.

Running the Report Wizard from within the Policy Manager

To start the Report Wizard from the Policy Manager either select the **Report Wizard** option from the **File** pull-down menu or click the Report Wizard icon in the toolbar:

There is no equivalent function in the Web interface.

Managing and monitoring report runs

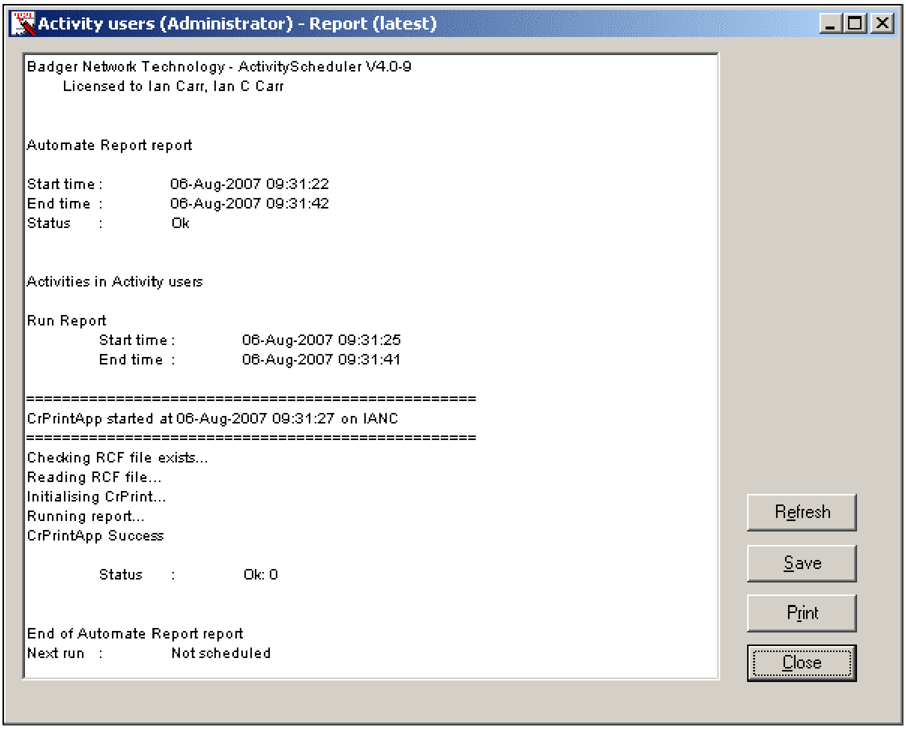
Viewing a Policy Report

To view the automatic Policy Report on a run (not the actual Crystal Report itself), select the appropriate Crystal Report from the list on the Policy Manager window and do one of the following:

- Click the 

icon in the tool bar.
- Select the **View latest report** option from the context menu.
- On the Web interface click the **Report** button on the left.

The Policy Report window has this format:

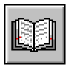


Use the buttons offered on this window as follows:

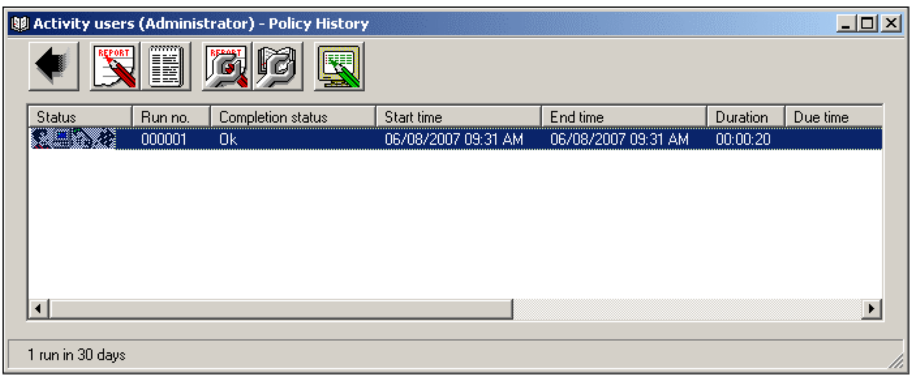
- Click the Refresh button to update the report if the run was still in progress and has now completed.
- Click the Save button to save the report to a text file: you will be prompted to supply the location and name of the file where the report will be stored. This button is not available in the Web interface.
- Click the Print button to print a copy of the report, via the standard Windows print mechanism. This button is not available in the Web interface.
- Click Close to discard the Report window and return to the Policy Manager window.

Viewing the history of a report

If you want to view a window that gives details of previous runs of a report, do any of the following:

- Click an appropriate line then click the  icon in the tool bar.
- Click an appropriate line then select the **View policy history** option from the context menu.
- Double click the entry line for a report that is not currently running. This option is not available in the Web interface
- On the Web interface click the **History** button on the left

You will be shown the Policy History on a window in this format:



This window summarizes previous runs of the report, telling you the following for each previous run:

- The Status column shows the same symbols as are used on the main Policy Manager window, to tell you the report type, the way the run was started, and its exit status. If the report run is still in progress the flag symbol will be absent and the  symbol will be shown instead.
- The unique number associated with the report run.
- The explanation of the exit status for the run.
- The dates and times that the run started and finished, and its total duration.
- For scheduled runs, the date and time that the run was scheduled to start, plus any delay in its actual start.
- The date and time that the next run in sequence was due to start.
- For manually started runs, the user who instigated the run.
- The date and time that the report was enabled. This allows you to see when the policy definition was changed between runs.

You use the  button on the Policy History window to change the number of report runs that are retained in the History – the equivalent in the Web interface is the **History Options** button on the Policy History Web page. Select the number of runs, days, weeks or months that the history should be kept.

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