How do I Configure, Enable, and Schedule Reports?

Version 11
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The Basics

There are four core steps involved in the production and delivery of scheduled reports in Ad Hoc.

1. Configuration of the Scheduler Service
2. Enabling Scheduling for a Database
3. Configuration of the email server
4. Specifying a Schedule and User Subscriptions

The first three steps are accomplished using the Management Console. The fourth step is accomplished using the Ad Hoc interface. These steps must be performed in this order.

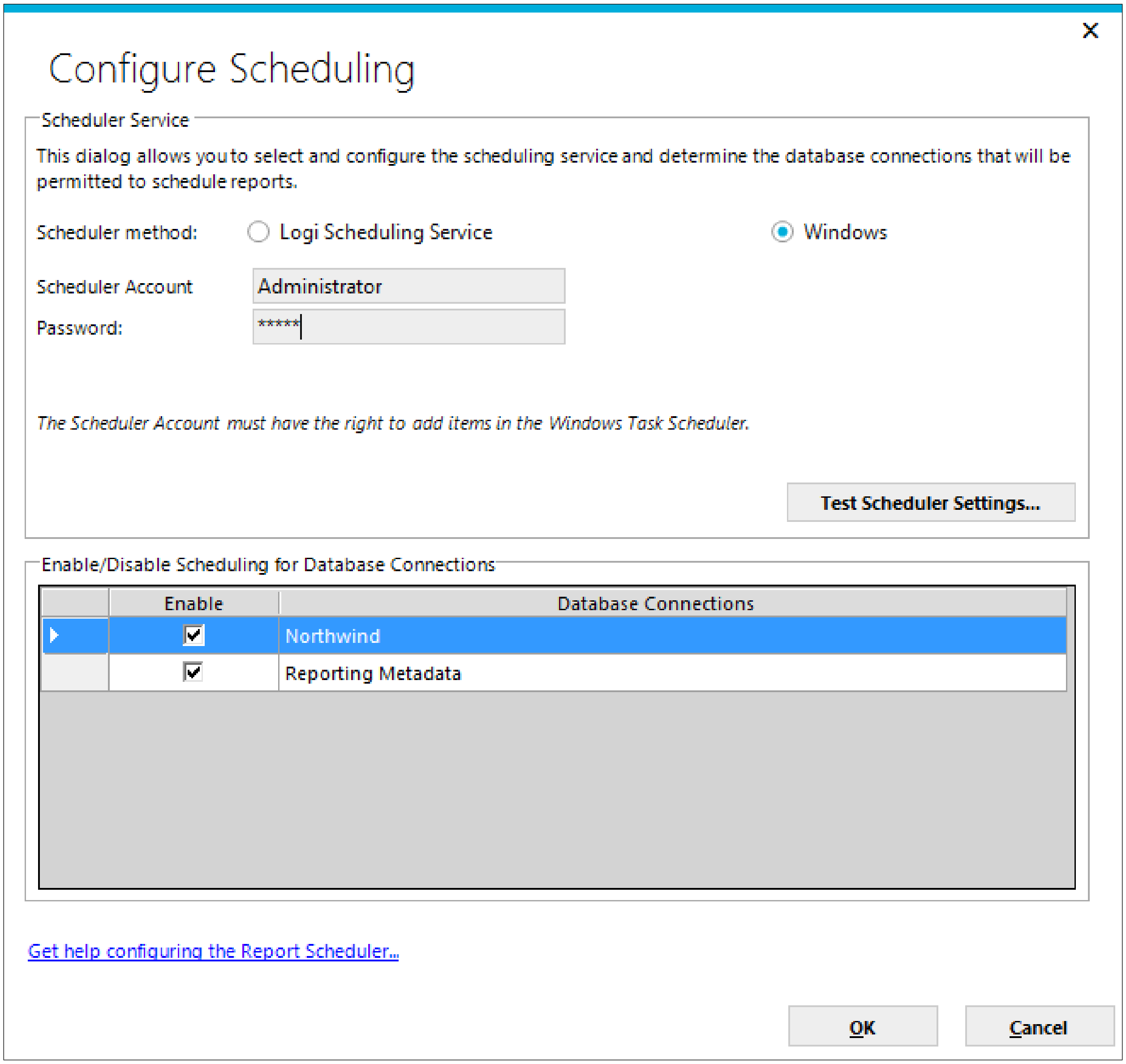
Configuration of the Delivery Tools

Scheduled reports are run, unattended, by either the Windows Task Scheduler or the Logi Ad Hoc Scheduling Service. For most users, this is simply a preference decision. For users where the Windows Task Scheduler is not an option, the Logi Ad Hoc Scheduler Service is the only choice.

The reports are delivered to the end user via email which requires access to an SMTP server.

Note:
The delivery configuration is specific to an instance of Ad Hoc. Each instance could be configured differently.

To configure the delivery tools, launch the Management Console and click on the **Instance Configuration** action group and the **Scheduling** action. The **Configure Scheduling** dialog will be presented.

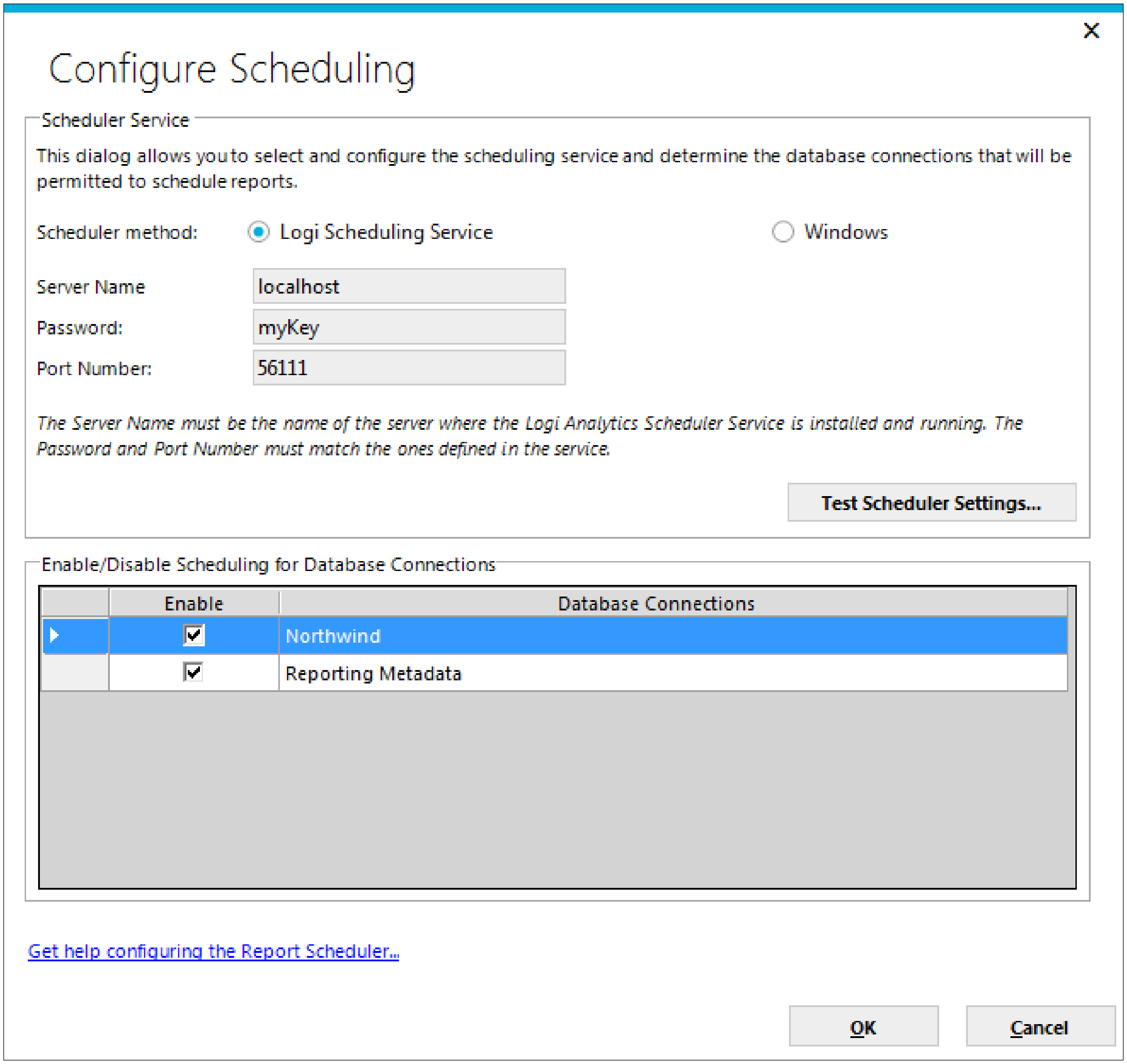


If the standard Windows Task Scheduler will be used to execute reports at scheduled times, highlight the **Windows** option and enter “administrator” credentials.

Click on the **Test Scheduler Settings…** button to verify that the supplied credentials permit a schedule to be created.

Click on the **OK** button to save the information in the *_Settings.lgx* file of the Ad Hoc instance.

If the Logi Ad Hoc Scheduling Service will be used, highlight the **Logi Scheduling Service** option and the **Configure Scheduling** dialog will display:



Enter the **Server Name** where the service was installed and the **Password** and **Port** defined when the service was configured.

Note: The **Password** and **Port** must match the values stored in the *_Settings.lgx* file of the Logi Ad Hoc Scheduler Service.

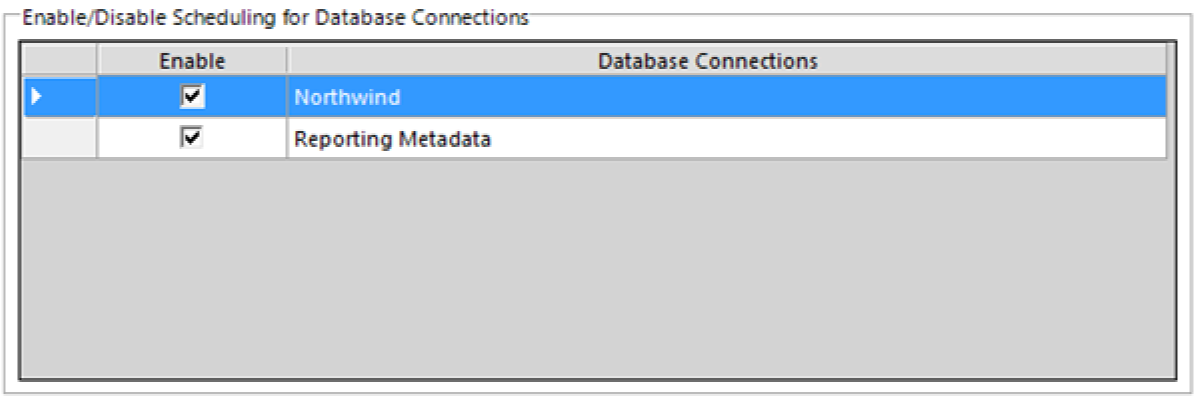
Click on the **Test Scheduler Settings…** button to verify that the supplied credentials permit a schedule to be created.

Click on the **OK** button to save the information in the *_Settings.lgx* file of the Ad Hoc instance.

Enabling Scheduling for a Database

The ability to schedule reports is enabled and configured at the database level. Each database connected to an instance of Ad Hoc is independent from every other database from a scheduling perspective.

As above, launch the Management Console and click on the **Instance Configuration** action group and the **Scheduling** action. The **Configure Scheduling** dialog will be presented. The *Enable/Disable Scheduling for Database Connections* panel is displayed at the bottom of the dialog.



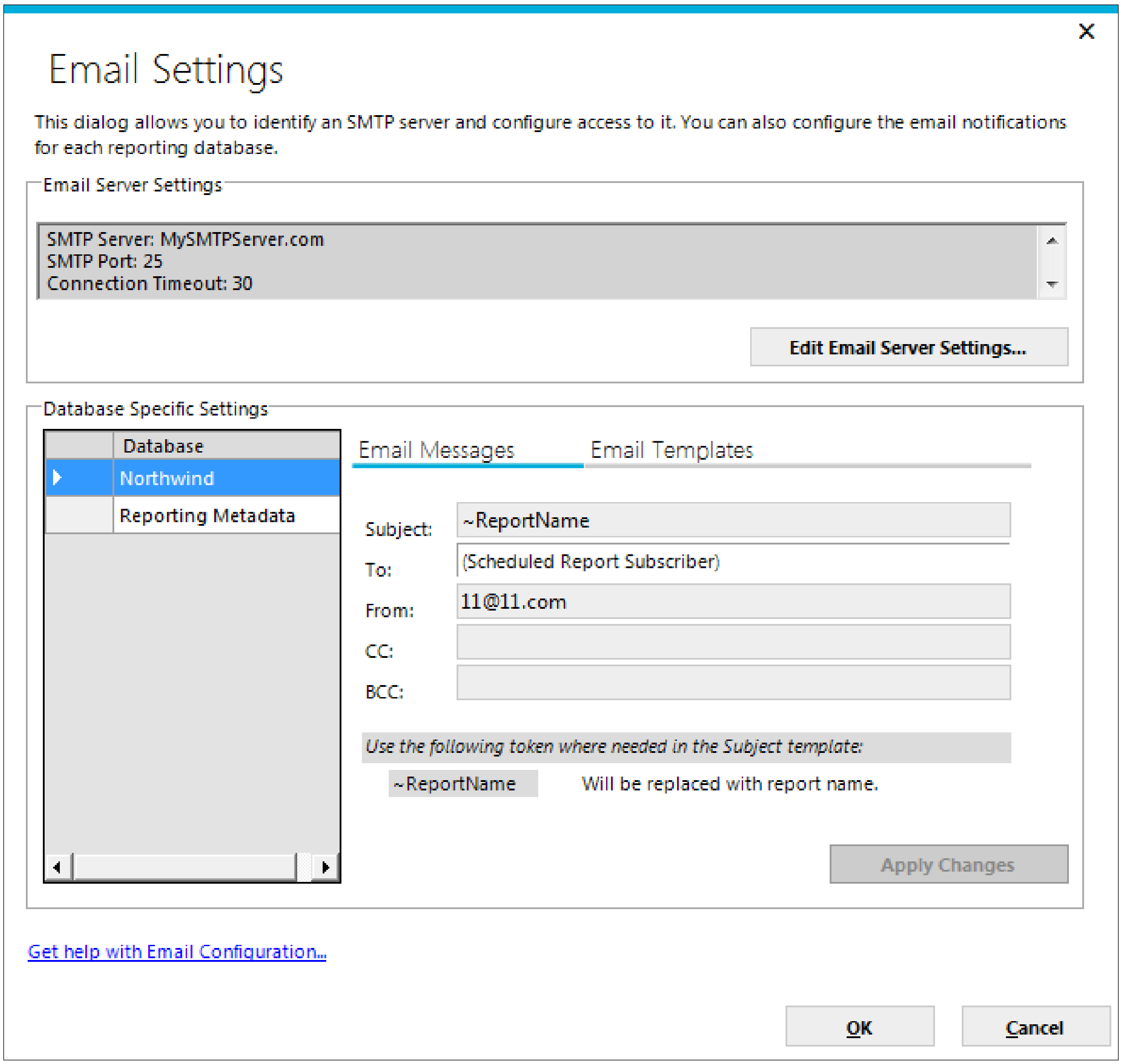
The panel will display a grid of **Database Connections** and corresponding **Enable** checkboxes. Click on the individual checkboxes to enable scheduling for the associated reporting database connection. Click on the **Enable** header to check or uncheck all of the checkboxes.

Click on the **OK** button to save the information in the *_Settings.lgx* file of the Ad Hoc instance.

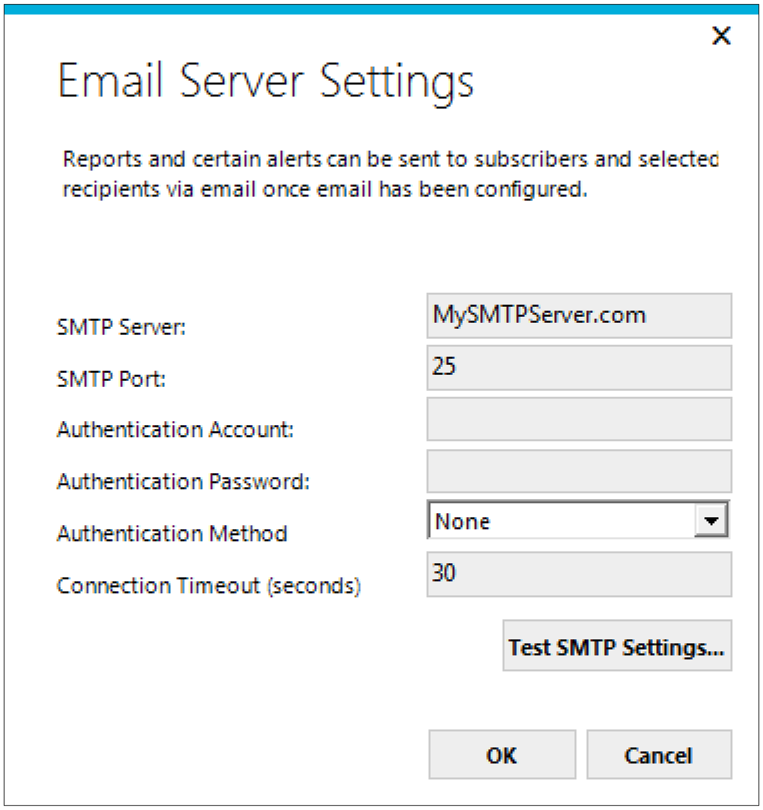
Configuration of the email server

Configuration of the Email delivery of scheduled reports requires configuration of both the SMTP server and the email templates. The **Email Settings** dialog allows the administrator to accomplish both tasks at one time.

Launch the Management Console and click on the **Instance Configuration** action group and the **Emailing** action. The **Email Settings** dialog will be presented.



To configure the SMTP server, click on the **Edit Email Server Settings** button to display the following dialog:



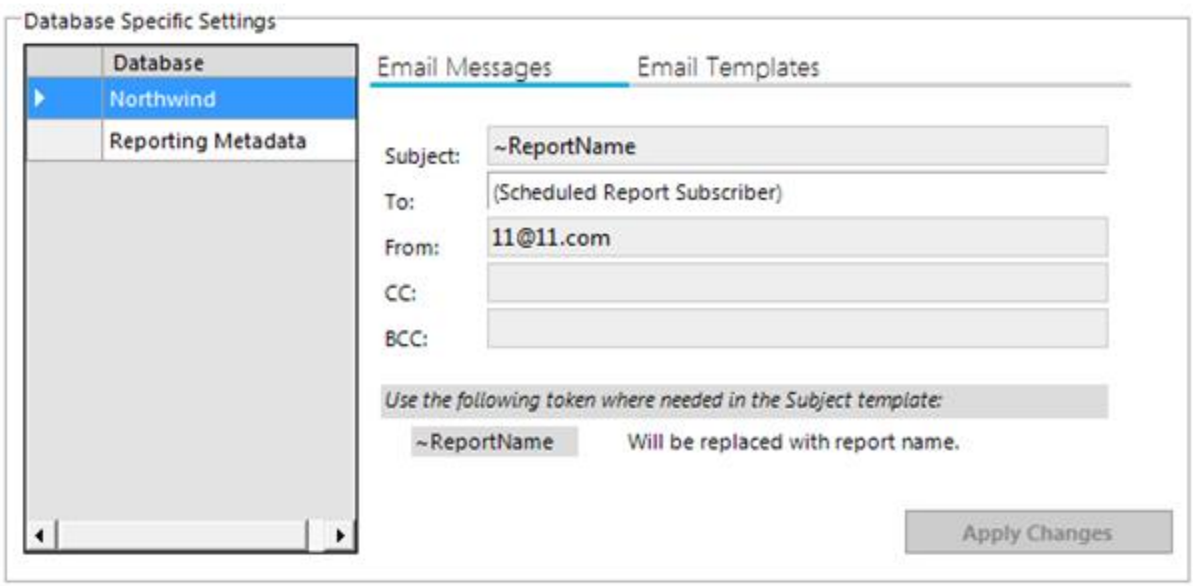
Enter the SMTP attributes.

Click on the **Test SMTP Settings…** button to verify that the attributes allow an email to be delivered.

Click on the **OK** button to temporarily save the attributes and dismiss the dialog.

The attributes and values will be displayed in the *Email Server Settings* panel of the **Email Settings** dialog.

The lower panel allows the administrator to set the scheduled report notification attributes. The only attribute that requires information to be specified is the From: value. The default values for the remaining attributes are sufficient to allow the proper delivery of email notifications.



For each database in the list that is expected to have email delivery of scheduled reports:

1) Highlight the database.
2) Enter the **From**: address. This does not have to be an actual email address, but it does have to conform to address rules (e.g. Name@Company.com). Each scheduled report will be "sent" from this address.
3) Click on the **Apply Changes** button.

Click on the **OK** button to save all of the information in the *_Settings.lgx* file of the Ad Hoc instance.

Specifying a Schedule and User Subscriptions

Once the first three core steps have been completed properly, the Ad Hoc user interface should reflect the new configuration by presenting the **Schedule** option in the dropdown list of report actions. This is the entry point for scheduling reports.

There are two basic steps involved in scheduling a report; creation of the schedule and subscribing users.

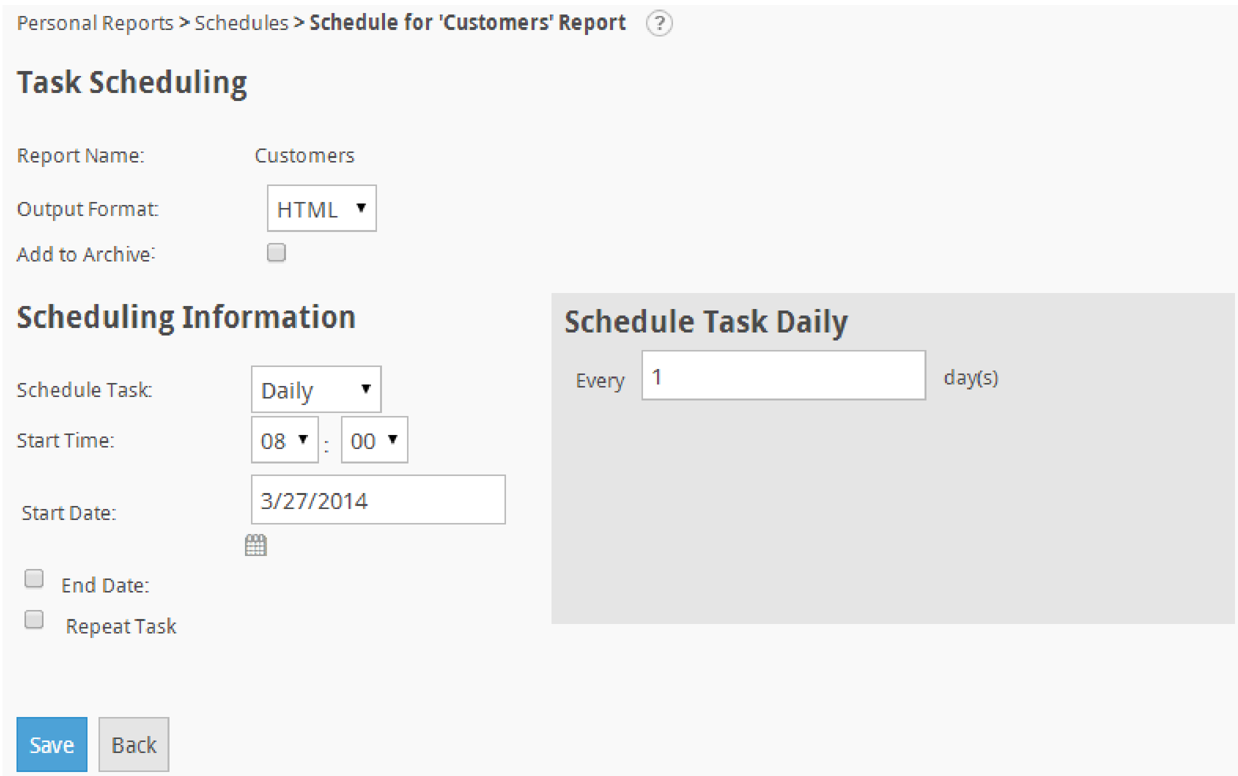
Note:
There are many options related to scheduling. Following is a basic description of how to schedule a simple report. For additional details, please review the System Administration Guide or the Report Design Guide.

Creation of the Schedule

To create a schedule for a report, in the Report List hover the mousepointer over the 

button and select the Schedule option from the dropdown list of possible actions for the report.

A dialog similar to the following image will be presented.

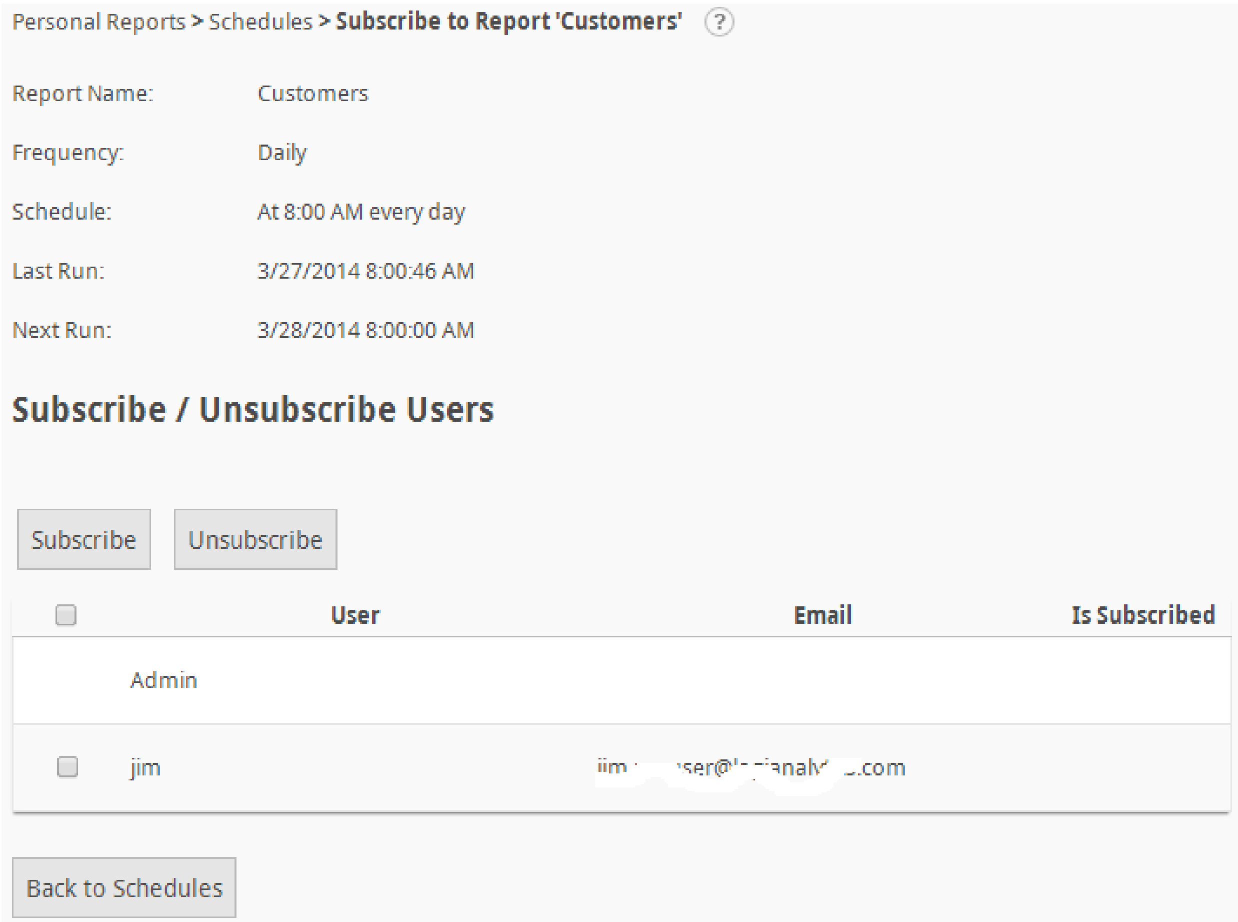


Enter the **Output Format** and the **Scheduling Information** and click the **Save** button to record your settings.

Each schedule has **Actions** available from a dropdown list shown when the mousepointer hovers over the icon for the schedule.

Subscribing Users

To specify the subscribers for this scheduled report, select the **Change Subscription** option from the dropdown list of **Actions**. The list of potential subscribers will be presented.



Click on the checkbox(s) for the users that are the intended recipients of this scheduled report and click on the **Subscribe** button. The subscriber information will be saved, the subscriber dialog will be dismissed and the list of schedules for the report will be presented.

Note:
Only users with defined email addresses can be subscribed to a report.