

How do I Configure, Enable, and Schedule Reports?



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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.

Configure Scheduling

Scheduler Service

This dialog allows you to select and configure the scheduling service and determine the database connections that will be permitted to schedule reports.

Scheduler method: Logi Scheduling Service Windows

Scheduler Account:

Password:

The Scheduler Account must have the right to add items in the Windows Task Scheduler.

Test Scheduler Settings...

Enable/Disable Scheduling for Database Connections

	Enable	Database Connections
	<input checked="" type="checkbox"/>	Northwind
	<input checked="" type="checkbox"/>	Reporting Metadata

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OK **Cancel**

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:

Configure Scheduling

Scheduler Service

This dialog allows you to select and configure the scheduling service and determine the database connections that will be permitted to schedule reports.

Scheduler method: Logi Scheduling Service Windows

Server Name: localhost

Password: myKey

Port Number: 56111

The Server Name must be the name of the server where the Logi Analytics Scheduler Service is installed and running. The Password and Port Number must match the ones defined in the service.

Test Scheduler Settings...

Enable/Disable Scheduling for Database Connections

	Enable	Database Connections
▶	<input checked="" type="checkbox"/>	Northwind
	<input checked="" type="checkbox"/>	Reporting Metadata

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OK **Cancel**

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.

	Enable	Database Connections
▶	<input checked="" type="checkbox"/>	Northwind
	<input checked="" type="checkbox"/>	Reporting Metadata

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.

X

Email Settings

This dialog allows you to identify an SMTP server and configure access to it. You can also configure the email notifications for each reporting database.

Email Server Settings

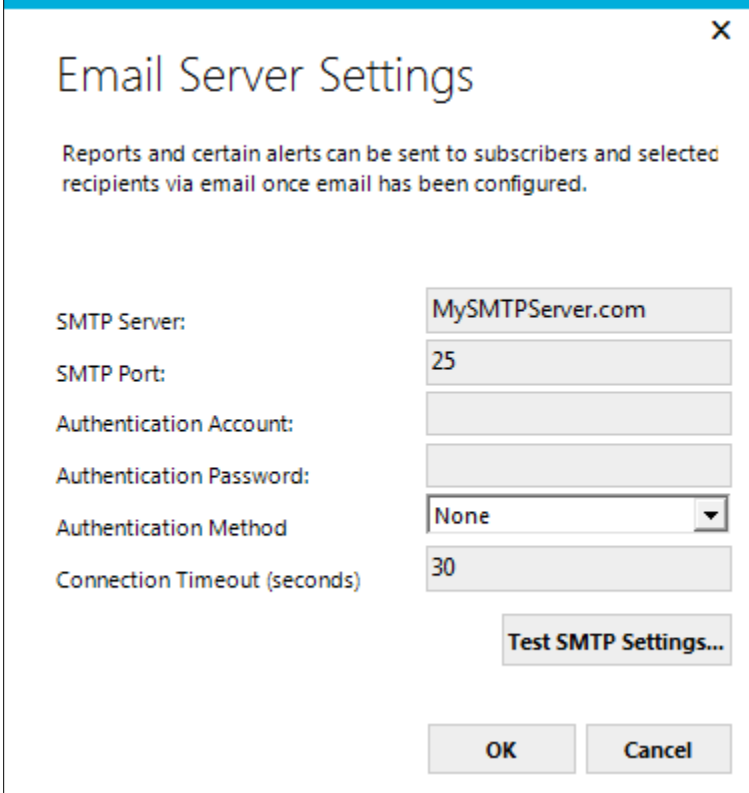
SMTP Server: MySMTPServer.com
 SMTP Port: 25
 Connection Timeout: 30

Database Specific Settings

Database	Email Messages	Email Templates
▶ Northwind	<div style="margin-bottom: 5px;">Subject: <input type="text" value="~ReportName"/></div> <div style="margin-bottom: 5px;">To: <input type="text" value="(Scheduled Report Subscriber)"/></div> <div style="margin-bottom: 5px;">From: <input type="text" value="11@11.com"/></div> <div style="margin-bottom: 5px;">CC: <input type="text"/></div> <div style="margin-bottom: 5px;">BCC: <input type="text"/></div> <div style="margin-top: 10px; font-size: x-small;"> Use the following token where needed in the Subject template: ~ReportName Will be replaced with report name. </div>	
Reporting Metadata		

[Get help with Email Configuration...](#)

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



The dialog box is titled "Email Server Settings" and has a close button (X) in the top right corner. Below the title is a descriptive sentence: "Reports and certain alerts can be sent to subscribers and selected recipients via email once email has been configured." The form contains several input fields and a dropdown menu:

- SMTP Server: MySMTPServer.com
- SMTP Port: 25
- Authentication Account: (empty text box)
- Authentication Password: (empty text box)
- Authentication Method: None (dropdown menu)
- Connection Timeout (seconds): 30

At the bottom of the form, there are three buttons: "Test SMTP Settings...", "OK", and "Cancel".

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.

Database Specific Settings

Database
Northwind
Reporting Metadata

Email Messages | Email Templates

Subject: ~ReportName

To: (Scheduled Report Subscriber)

From: 11@11.com

CC:

BCC:

Use the following token where needed in the Subject template:

- ~ReportName Will be replaced with report name.

Apply Changes

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 **More >** 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.

The screenshot shows a web interface for scheduling a report. The breadcrumb path is 'Personal Reports > Schedules > Schedule for 'Customers' Report'. The main heading is 'Task Scheduling'. Under this heading, there are three fields: 'Report Name' set to 'Customers', 'Output Format' set to 'HTML' (with a dropdown arrow), and 'Add to Archive' with an unchecked checkbox. Below this is the 'Scheduling Information' section, which includes: 'Schedule Task' set to 'Daily' (with a dropdown arrow), 'Start Time' set to '08 : 00' (with dropdown arrows for each part), 'Start Date' set to '3/27/2014' (with a calendar icon), and two unchecked checkboxes for 'End Date' and 'Repeat Task'. To the right of these fields is a larger grey box titled 'Schedule Task Daily' containing the text 'Every 1 day(s)' with a text input field containing the number '1'. At the bottom left of the dialog are two buttons: 'Save' (in blue) and 'Back' (in grey).

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.

Personal Reports > Schedules > **Subscribe to Report 'Customers'** ?

Report Name: Customers
Frequency: Daily
Schedule: At 8:00 AM every day
Last Run: 3/27/2014 8:00:46 AM
Next Run: 3/28/2014 8:00:00 AM

Subscribe / Unsubscribe Users

Subscribe

Unsubscribe

<input type="checkbox"/>	User	Email	Is Subscribed
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	jim	jim.user@logianalytics.com	

Back to Schedules

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.