

# Logi Ad Hoc Reporting Configuring Report Scheduling



Version 12  
July 2016

## The Basics

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

1. Configuring the scheduler service
2. Enabling scheduling for a database
3. Configuring 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 the order given.

## Configuration of the Delivery Tools

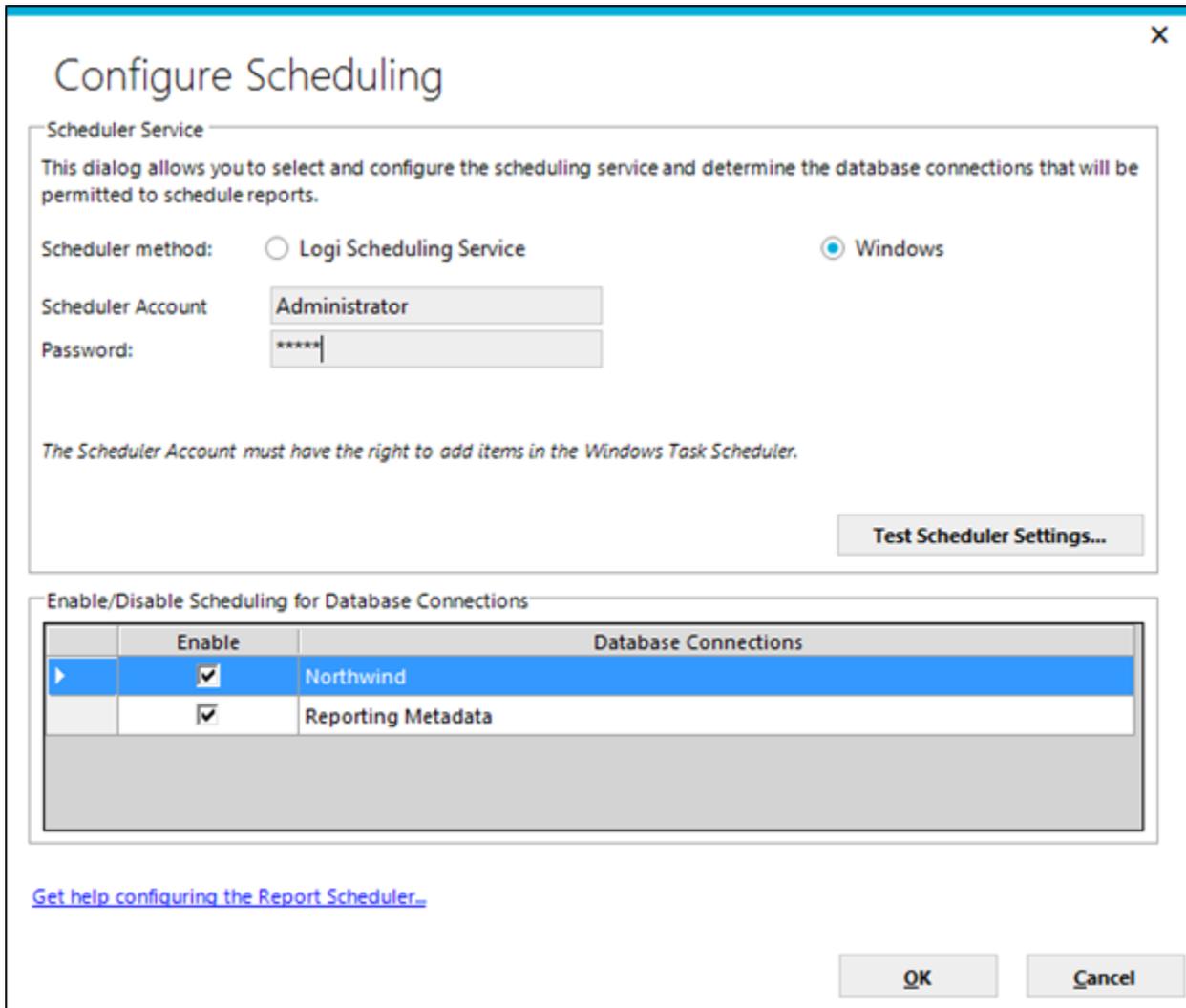
Scheduled reports are run, unattended, by either the Windows Task Scheduler or the Logi Ad Hoc Scheduling Service. For most users, the choice is simply a personal preference. For users for whom the Windows Task Scheduler is not an option, the Logi Ad Hoc Scheduler Service is the only choice.

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 box will be displayed:

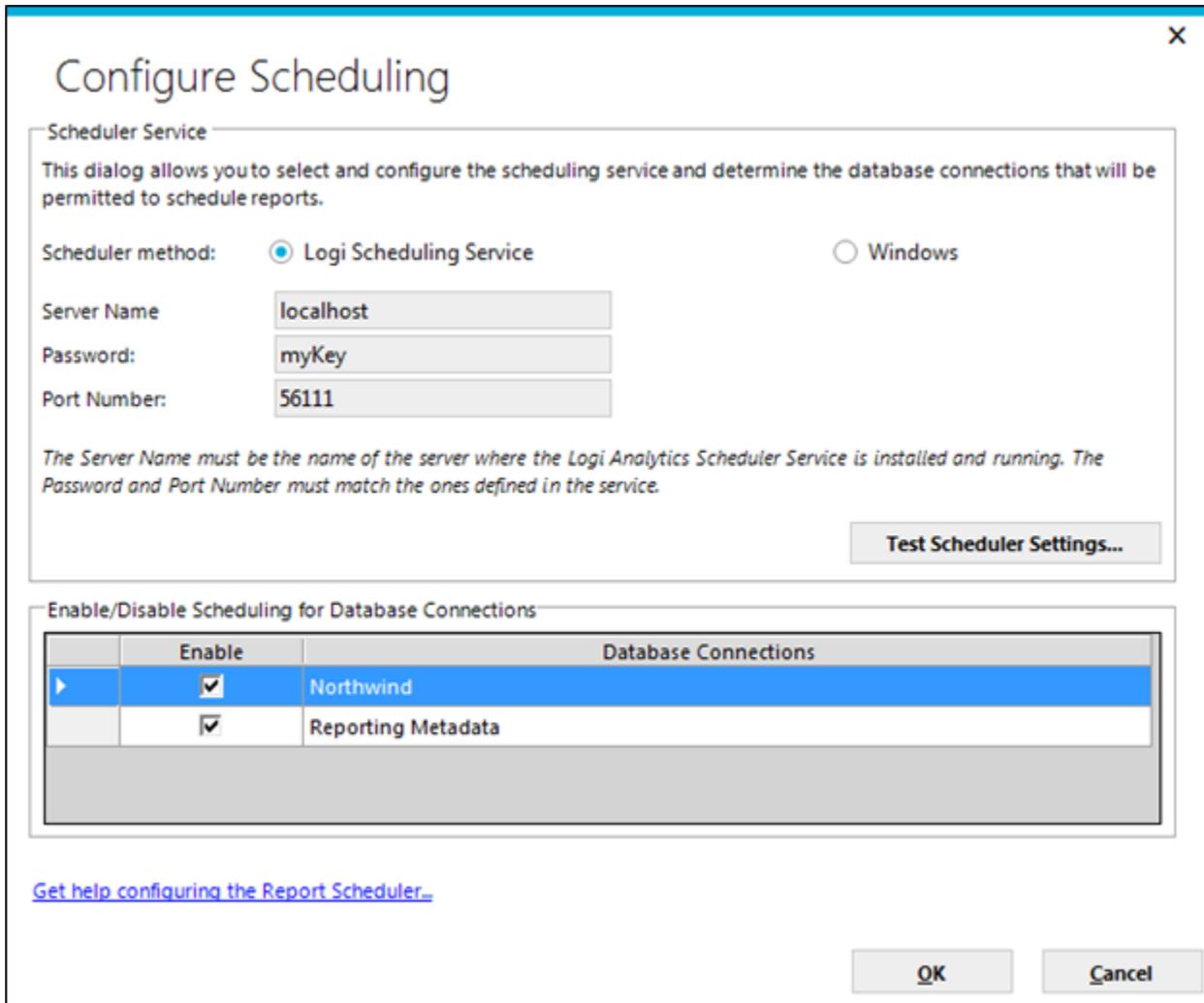


If the standard Windows Task Scheduler will be used to execute reports at scheduled times, select the **Windows** option and enter “administrator” credentials.

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

Click **OK** to save the information.

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



Enter the **Server Name** (the name of the server where the Logi Scheduler service was installed), the **Password**, and the **Port Number** defined when the service was configured.

Note: The Password and Port Number must match the values stored in the Logi Ad Hoc Scheduler Service’s settings file.

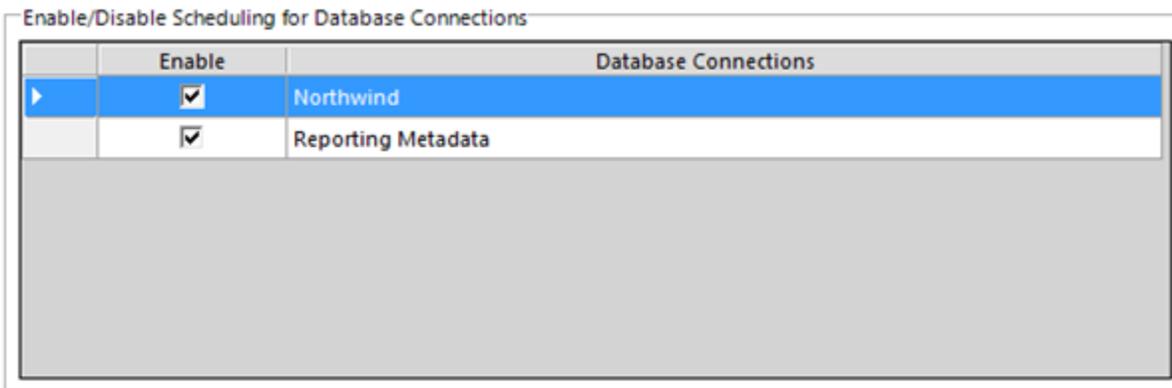
Click **Test Scheduler Settings...** to verify that the supplied credentials permit a schedule to be created.

Click **OK** to save the information.

## Enabling Scheduling for a Database

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

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



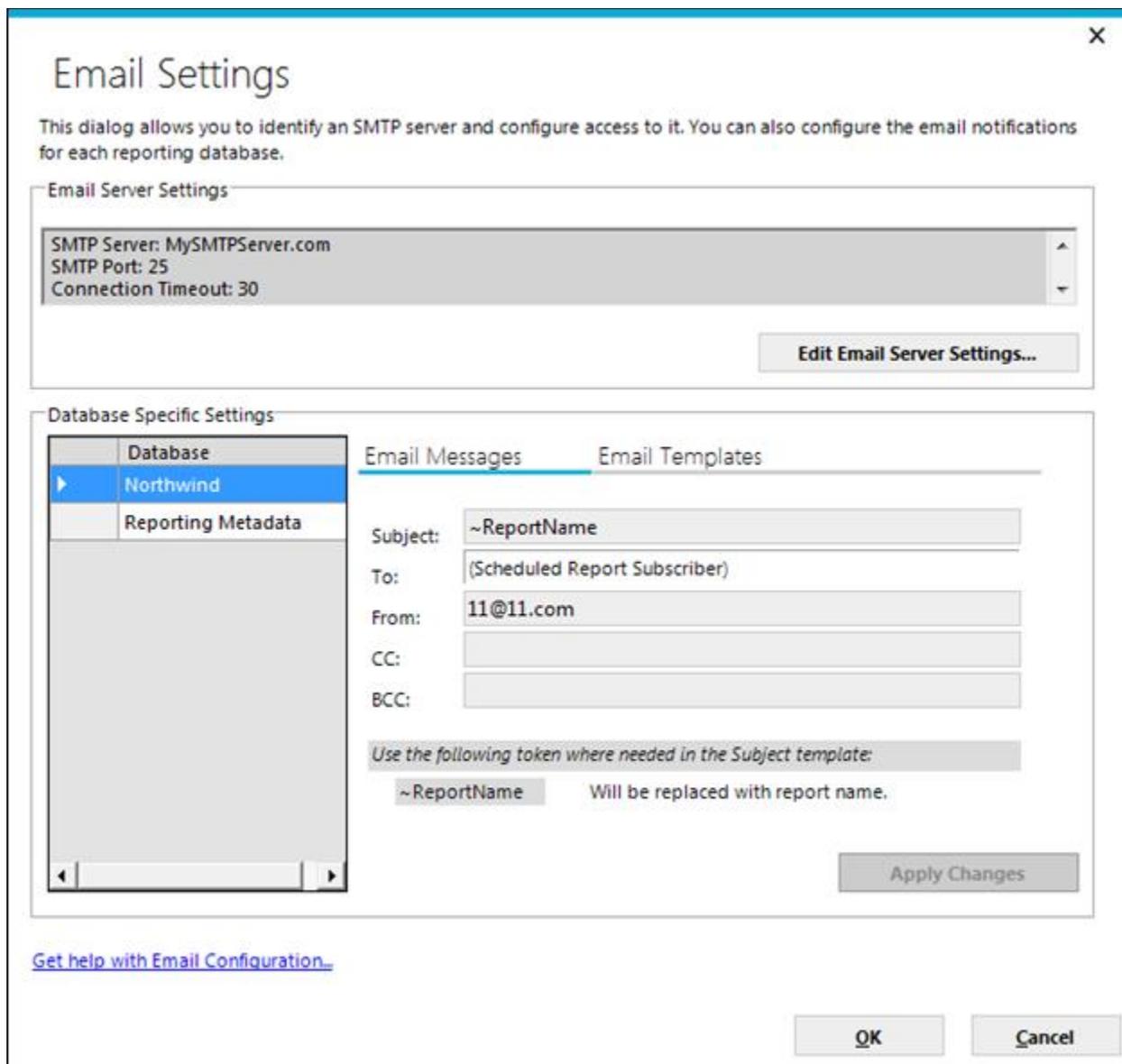
The panel will display a grid of database connections and corresponding enabling checkboxes. Click the individual checkboxes to enable scheduling for the desired reporting database connections. Click the *Enable* column header to check or uncheck all of the checkboxes at once.

Click **OK** to save the information.

## Configuring an Email Server

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

Launch the Management Console and click the **Instance Configuration** action group and the **Emailing** action. The **Email Settings** dialog box will be displayed:



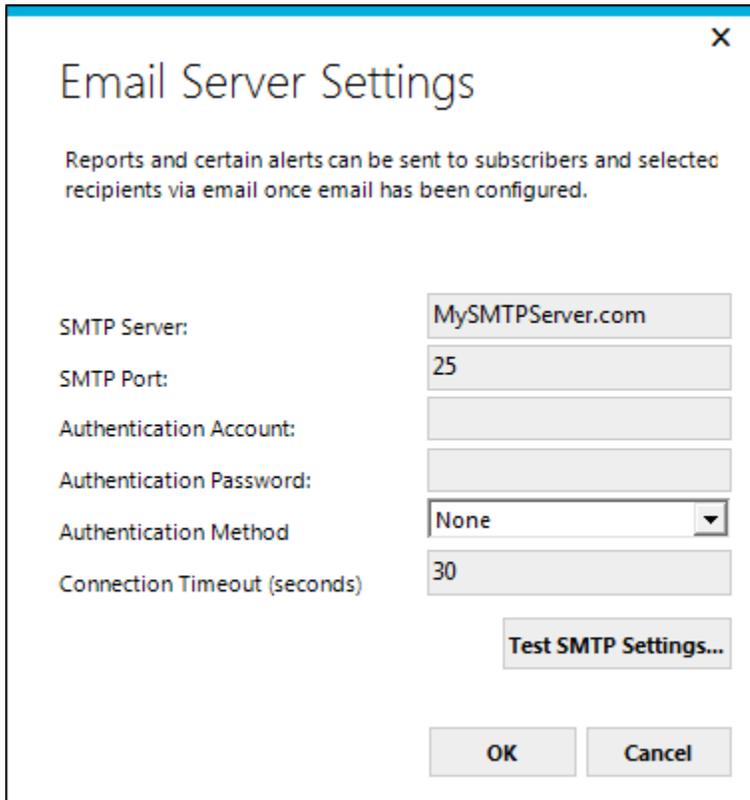
The screenshot shows the 'Email Settings' dialog box. It has a title bar with a close button (X). Below the title is a brief description: 'This dialog allows you to identify an SMTP server and configure access to it. You can also configure the email notifications for each reporting database.'

The dialog is divided into two main sections:

- Email Server Settings:** This section contains a text area with the following text: 'SMTP Server: MySMTPServer.com', 'SMTP Port: 25', and 'Connection Timeout: 30'. Below this text area is a button labeled 'Edit Email Server Settings...'.
- Database Specific Settings:** This section features a tree view on the left with 'Northwind' selected under the 'Database' category. To the right of the tree view are two tabs: 'Email Messages' (which is active) and 'Email Templates'. Under the 'Email Messages' tab, there are several input fields:
  - Subject:** ~ReportName
  - To:** (Scheduled Report Subscriber)
  - From:** 11@11.com
  - CC:** (empty)
  - BCC:** (empty)
 Below these fields is a text box containing the instruction: 'Use the following token where needed in the Subject template:'. Underneath this instruction is a list of tokens: '~ReportName' followed by the text 'Will be replaced with report name.'

At the bottom right of the 'Database Specific Settings' section is an 'Apply Changes' button. At the very bottom of the dialog are three buttons: 'Get help with Email Configuration...' (a link), 'OK', and 'Cancel'.

To configure an SMTP server, click **Edit Email Server Settings...** to display the following dialog box:



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

- SMTP Server: Text input field containing "MySMTPServer.com"
- SMTP Port: Text input field containing "25"
- Authentication Account: Text input field (empty)
- Authentication Password: Text input field (empty)
- Authentication Method: Dropdown menu with "None" selected
- Connection Timeout (seconds): Text input field containing "30"
- Test SMTP Settings...: Button
- OK: Button
- Cancel: Button

Enter the SMTP attributes.

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

Click **OK** to temporarily save the attributes and close the dialog box.

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

The lower *Database Specific Settings* panel allows you 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	Email Messages
▶ Northwind	<p>Subject: <input type="text" value="~ReportName"/></p> <p>To: <input type="text" value="(Scheduled Report Subscriber)"/></p> <p>From: <input type="text" value="11@11.com"/></p> <p>CC: <input type="text"/></p> <p>BCC: <input type="text"/></p> <p>Use the following token where needed in the Subject template:</p> <p><input type="text" value="~ReportName"/> Will be replaced with report name.</p> <p style="text-align: right;"><input type="button" value="Apply Changes"/></p>
Reporting Metadata	

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

- 1) Select the database (the row will be highlighted, as shown above).
- 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 **Apply Changes**.

Click **OK** to save all of the information.

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## 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. The following is a basic description of how to schedule a simple report. For additional details, please see the *System Administration Guide* or the *Report Design Guide*.

### **Creating the Schedule**

To create a schedule for a report, hover your mouse cursor over the More icon in the Report List and select the *Schedule* option from the drop-down list actions. The Task Scheduling page will be displayed:

Personal Reports   Shared Reports   All Reports

Personal Reports > Schedules > **Schedule for 'Order Details Report' Report** ?

### Task Scheduling

Report Name: Order Details Report

Output Format: HTML

### Scheduling Information

Schedule Task: Daily

Start Time: 08 : 00

Start Date: 7/27/2016

End Date:

Repeat Task

#### Schedule Task Daily

Every 1 day(s)

Save   Back

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

A page will be displayed that enumerates the schedules in a grid:

Personal Reports

Shared Reports

All Reports

Global Rep

Personal Reports > **Schedules for 'Order Details Report' Report** ?

Add

Delete

<input type="checkbox"/>	<b>Frequency</b>	<b>Schedule</b>	<b>Actions</b>
<input type="checkbox"/>	Daily	At 8:00 AM every day Last Run Time: Never Next Run Time: 7/28/2016 8:00:00 AM	>

Back to Reports List

Each schedule has **Actions** available from a drop-down list shown when the mouse pointer hovers over the  icon for the schedule.

## Subscribing Users

To specify the subscribers for this scheduled report, select the **Change Subscription** option from the drop-down list of **Actions**. The list of potential subscribers will be displayed:

Personal Reports
Shared Reports
All Reports
Global Re

Personal Reports > Schedules > **Subscribe to Report 'Order Details Report'** ?

Report Name: Order Details Report

Frequency: Daily

Schedule: At 8:00 AM every day

Last Run: Never

Next Run: 7/28/2016 8:00:00 AM

### Subscribe / Unsubscribe Users

Subscribe
Unsubscribe

<input type="checkbox"/>	User	Email	Is Subscribed
<input type="checkbox"/>	BSmithson	BSmithson@BisonProducts.com	X

Back to Schedules

Select users to receive this report by checking their checkboxes and click **Subscribe**. The subscriber information will be saved, the subscriber dialog box will be dismissed, and the list of schedules for the report will be displayed.

**Note:**

Remember that only users with defined email addresses in their profiles can be subscribed to receive a report.