# Contents

**Preface**

- Documentation Conventions
- Related Publications
- Customer Support
- Information You Should Have
- User Feedback
- Information Builders Consulting and Training

**1. Using the Single Page Scheduling Tool**

- About the Single Page Scheduling Tool
- Creating a Schedule Using the Scheduling Tool
- Distribution Options in the Single Page Scheduling Tool
  - Distributing Scheduled Output Using E-mail in the Single Page Scheduling Tool
  - Distributing Scheduled Output to a Printer in the Single Page Scheduling Tool
  - Distributing Scheduled Output to MR in the Single Page Scheduling Tool
  - Distributing a Report to the Report Library in the Single Page Scheduling Tool
- Frequency Options in the Single Page Scheduling Tool
  - The Once Run Interval in the Single Page Scheduling Tool
  - The Minutes Run Interval in the Single Page Scheduling Tool
  - The Hourly Run Interval in the Single Page Scheduling Tool
  - The Daily Run Interval in the Single Page Scheduling Tool
  - The Weekly Run Interval in the Single Page Scheduling Tool
  - The Monthly Run Interval in the Single Page Scheduling Tool
  - The Yearly Run Interval in the Single Page Scheduling Tool
  - Applying a Secondary Run Interval in the Single Page Scheduling Tool
- Report Options
  - Report Formats
  - Report Parameters
Preface

This documentation describes the HTML User Interface of ReportCaster.

Documentation Enhancements

In Version 7 Release 7.03, the ReportCaster documentation was reorganized to align it with how the user accesses the product on the Bindows™ platform. The user can access three interfaces on the Bindows platform: ReportCaster Administration, ReportCaster Development, and ReportCaster Library Content. These three interfaces are now documented in two manuals. The ReportCaster Administration manual describes the ReportCaster Administration interface, and the ReportCaster Development and Library Content manual describes the ReportCaster Development and ReportCaster Library Content interfaces. Additionally, we moved legacy information into two other manuals, ReportCaster Administration Applet Version and ReportCaster HTML User Interface. This simplified documentation model streamlines the documentation and eliminates duplicate information.

How This Manual Is Organized

This manual includes the following chapters:

<table>
<thead>
<tr>
<th>Chapter/Appendix</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Using the Single Page Scheduling Tool</td>
<td>Explains how to use the single page Scheduling Tool to create a ReportCaster schedule.</td>
</tr>
<tr>
<td>2 Using the Scheduling Wizard</td>
<td>Describes how to schedule a report using the Scheduling Wizard.</td>
</tr>
<tr>
<td>3 Working With Distribution Lists in the HTML User Interface</td>
<td>Discusses how to create, edit, and delete a Distribution List using the HTML User Interface.</td>
</tr>
<tr>
<td>4 Maintaining a Schedule Using the HTML User Interface</td>
<td>Discusses how to edit the properties of a schedule, clone a schedule, delete a schedule, check the status of a schedule, or run a log report to obtain information about a schedule. Describes purging log records and how to create, update, and delete your Execution IDs.</td>
</tr>
</tbody>
</table>
Using the Report Library from the HTML Interface

Describes using the Report Library, a storage and retrieval facility for ReportCaster output, from the HTM Interface. Provides information about creating and maintaining Library Access Lists, and viewing Library Content.

### Documentation Conventions

The following table lists and describes the conventions that apply in this manual.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>THIS TYPEFACE</strong></td>
<td>Denotes syntax that you must enter exactly as shown.</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>this typeface</td>
<td></td>
</tr>
<tr>
<td><strong>underscore</strong></td>
<td>Indicates a default setting.</td>
</tr>
<tr>
<td><strong>this typeface</strong></td>
<td>Represents a placeholder (or variable), a cross-reference, or an important</td>
</tr>
<tr>
<td></td>
<td>term. It may also indicate a button, menu item, or dialog box option you</td>
</tr>
<tr>
<td></td>
<td>can click or select.</td>
</tr>
<tr>
<td><strong>this typeface</strong></td>
<td>Highlights a file name or command.</td>
</tr>
<tr>
<td>Key + Key</td>
<td>Indicates keys that you must press simultaneously.</td>
</tr>
<tr>
<td>{ }</td>
<td>Indicates two or three choices; type one of them, not the braces.</td>
</tr>
<tr>
<td>[ ]</td>
<td>Indicates a group of optional parameters. None are required, but you may</td>
</tr>
<tr>
<td></td>
<td>select one of them. Type only the parameter in the brackets, not the</td>
</tr>
<tr>
<td></td>
<td>brackets.</td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td>symbol.</td>
</tr>
<tr>
<td>...</td>
<td>Indicates that you can enter a parameter multiple times. Type only the</td>
</tr>
<tr>
<td></td>
<td>parameter, not the ellipsis points (...).</td>
</tr>
<tr>
<td>Convention</td>
<td>Description</td>
</tr>
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<td>------------</td>
<td>-------------</td>
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<td>.</td>
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<tr>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>.</td>
<td>Indicates that there are (or could be) intervening or additional commands.</td>
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</tbody>
</table>

**Related Publications**

To view a current listing of our publications and to place an order, visit our Technical Documentation Library, [http://documentation.informationbuilders.com](http://documentation.informationbuilders.com). You can also contact the Publications Order Department at (800) 969-4636.

**Customer Support**

Do you have any questions about this product?

Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing tips and techniques, [http://forums.informationbuilders.com/eve/forums](http://forums.informationbuilders.com/eve/forums).

You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our World Wide Web site, [http://www.informationbuilders.com](http://www.informationbuilders.com). It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of [www.informationbuilders.com](http://www.informationbuilders.com) also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

Call Information Builders Customer Support Service (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 a.m. and 8:00 p.m. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities and documentation. Please be ready to provide your six-digit site code number (xxxx.xx) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

**Information You Should Have**

To help our consultants answer your questions effectively, be prepared to provide the following information when you call:
Information You Should Have

- Your six-digit site code (xxxx.xx).

- Your WebFOCUS configuration:
  - The front-end you are using, including vendor and release.
  - The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
  - The software release.
  - Your server version and release. You can find this information using the Version option in the Web Console.

- The stored procedure (preferably with line numbers) or SQL statements being used in server access.

- The Master File and Access File.

- The exact nature of the problem:
  - Are the results or the format incorrect? Are the text or calculations missing or misplaced?
  - The error message and return code, if applicable.
  - Is this related to any other problem?

- Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?

- What release of the operating system are you using? Has it, your security system, communications protocol, or front-end software changed?

- Is this problem reproducible? If so, how?

- Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing just the code to access the data source?

- Do you have a trace file?

- How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?
User Feedback

In an effort to produce effective documentation, the Documentation Services staff welcomes your opinions regarding this manual. Please use the Reader Comments form at the end of this manual to communicate suggestions for improving this publication or to alert us to corrections. You can also use the Documentation Feedback form on our Web site, http://documentation.informationbuilders.com/feedback.asp.

Thank you, in advance, for your comments.

Information Builders Consulting and Training

Interested in training? Information Builders Education Department offers a wide variety of training courses for this and other Information Builders products.

For information on course descriptions, locations, and dates, or to register for classes, visit our World Wide Web site (http://www.informationbuilders.com) or call (800) 969-INFO to speak to an Education Representative.
If you configure ReportCaster to use the single page Scheduling Tool rather than the standard Scheduling tool, then use this section for details on creating ReportCaster schedules with the single page Scheduling tool.

Topics:
- About the Single Page Scheduling Tool
- Creating a Schedule Using the Scheduling Tool
- Distribution Options in the Single Page Scheduling Tool
- Frequency Options in the Single Page Scheduling Tool
- Report Options
- Notification Options in the Single Page Scheduling Tool
About the Single Page Scheduling Tool

The single page Scheduling Tool provides the full scheduling function of ReportCaster presented in a unified user interface. Using the Developer Studio HTML Composer Tool, you can add a schedule button to an HTML form that will open the ReportCaster single page Scheduling Tool. For details on adding the Schedule button to a form, see the Designing a User Interface for a Web Application With the HTML Composer manual. The single page Scheduling Tool also opens from the WebFOCUS Business Intelligence Dashboard when you right-click a report and select Schedule.

**Note:** Using this tool, you can only schedule Managed Reporting Standards Reports and My reports.

You can customize the Scheduling Tool user interface through the use of a template assigned to the Schedule button at development time. For example, you can set the form to omit certain sections, expand or collapse certain sections, assign default values to specific fields, control the contents of a drop-down list, and show check boxes checked or unchecked. The ReportCaster developer customizes the Scheduling Tool. If you are a ReportCaster developer, contact Information Builders Customer Support Services for information about customizing the Scheduling Tool.
The following image shows the Scheduling Tool user interface (using a template supplied by Information Builders).

The Scheduling Tool is partitioned into the following sections:

- **Distribution.** Provides a drop-down list of distribution methods and the corresponding distribution options. The Scheduling Tool template you select when creating the Schedule button can limit the choices in the Distribution drop-down list.

- **Frequency.** Provides the options related to the time interval to run the schedule.
- **Report Options.** Provides report options for the report format, burst option, execution ID and password, and report parameters.

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

- **Advanced.** Provides options to set the schedule priority level, and selections to enable or delete the schedule.

An asterisk indicates a required parameter.

When working in the Scheduling Tool, you can expand or collapse sections, as needed. The following image shows the Frequency and Report Options sections collapsed.
Creating a Schedule Using the Scheduling Tool

**How to:**
Create a Schedule

A report schedule directs the execution of a report. It defines the format that the report output will take and how, when, and where it will be distributed. All options associated with scheduling a report are available in the Scheduling Tool.

This section provides the overall procedure to create a new schedule for a report. Some steps in the procedure contain details on the associated options, while other steps direct you to a separate section that contains detailed descriptions of the options and additional information, such as tips in making a selection.

**Procedure: How to Create a Schedule**

1. Open the Scheduling Tool, as explained in *About the Single Page Scheduling Tool* on page 14.

2. In the Description field at the top of the tool, type a name for the schedule. This field is required.

3. In the Distribution section, select the method to distribute the report from the Distribute report by drop-down list. The distribution methods are:
   - Email
   - Printer
   - Managed Reporting
   - Report Library

   For options related to each distribution method, see *Distribution Options in the Single Page Scheduling Tool* on page 21.

4. Make the following selections in the Frequency section.
   - **a.** From the Run Interval drop-down list, select the time interval that the schedule will use to run the report.
     
     You can set the interval to run the schedule once, or every specified minutes, hours, days, weeks, months, or years.

   - **b.** From the Start Schedule options, select the date (from the drop-down calendar) and time you want the schedule to begin running.
**Note:** To change the time setting, select either the hour or minutes and use the arrows to increase or decrease the value.

c. If applicable, from the End Schedule options, select the date and time you want the schedule to stop running.

d. If applicable, from the Every option, use the up and down arrows to set the number of times you want the schedule to run for the selected interval, for example, three times each month.

e. Select the remaining options associated with the chosen run interval. For a description of the run interval options, see *Frequency Options in the Single Page Scheduling Tool* on page 33.

5. In the Report Options section:

a. Select the format of the report. The valid formats are AHTML, ALPHA, COM, COMMA, COMT, DFIX, DHTML, DOC, EXCEL, EXL2K TEMPLATE, EXL2K, EXL2K FORMULA, EXL2K PIVOT, EXL97, Flash, GIF, HTML, HTML ODP, JPEG, PDF, PNG, PPT, PPT Template, PS, SVG, TAB, TABT, VISDIS, WK1, WP, and XML. For information on these formats, see the *ReportCaster Administration* manual.

b. Select whether or not you want to burst the report.

c. If needed, change the value of an existing report parameter.

For details on changing a report parameter, see *Report Parameters* on page 43.

6. In the Notification section, select whether or not you want to send a notification when the schedule runs and under what conditions to send it. The notification options are:

- **Never.**
- **Always.** Send a notification each time the schedule runs.
- **On Error.** Only send a notification when there is an error running the schedule.

7. In the Advanced Options section, select the following options:

- **Priority Level for the Job.** Use the drop-down list to select the priority for running the job, with 1 being the highest priority and 5 the lowest priority. The default priority level is 3.

  The ReportCaster Distribution Server queue sorts scheduled jobs by priority and then by time. If multiple jobs share the same priority and time, ReportCaster arbitrarily schedules the jobs.

- **Enabled.** Select this option to activate the schedule to run.
8. To save the schedule, click Save at the top of the Scheduling Tool. The Scheduling Tool validates the fields and displays a status message in a separate window. If the schedule was created successfully, the following status message appears, as shown in the following image.

If the schedule was not created, the following message appears in a separate window:

Please enter valid information in all required fields.
An alert icon appears next to the field that is invalid, and the field name appears in red. The following image shows an invalid schedule with the Reply Address option appearing in red to indicate this value is missing.

Re-enter the information in the fields that have alerts and click Save.
Distribution Options in the Single Page Scheduling Tool

In this section:
- Distributing Scheduled Output Using E-mail in the Single Page Scheduling Tool
- Distributing Scheduled Output to a Printer in the Single Page Scheduling Tool
- Distributing Scheduled Output to MR in the Single Page Scheduling Tool
- Distributing a Report to the Report Library in the Single Page Scheduling Tool

The Distribution section of the Scheduling Tool provides the options available for distributing the scheduled report. You can distribute a report using one of the following methods:

- Email
- Printer
- Managed Reporting
- Report Library

This section describes the options available for each distribution method.

Distributing Scheduled Output Using E-mail in the Single Page Scheduling Tool

How to:
Distribute Scheduled Output Using E-mail

Reference:
E-Mail Distribution Examples

When you distribute a report through e-mail, you can include the report in the body of the e-mail (known as an inline e-mail message) or send it as an attachment. Distributing a report as an inline e-mail message is particularly useful when you distribute the report to mobile devices, fax machines, or through e-mail systems that do not support attachments. You can also distribute a report to a Fax machine, as explained later in this section.

Note:

- The availability of the inline message option when you create a schedule depends on the Inline Report Distribution setting in the ReportCaster Server Configuration tool.
- The display of a report that is distributed as an inline e-mail message can be affected by settings in the e-mail client.
The following image shows the e-mail distribution options in the Distribution Options section of the Scheduling Tool.

![Distribution Options in the Single Page Scheduling Tool](image)

**Procedure: How to Distribute Scheduled Output Using E-mail**

1. From the Distribute report by drop-down list, select *Email*.

2. From the drop-down list under Distribute report by, select the form of the e-mail address and type, or select the accompanying value in the text box next to the selection. The options are:

   - **Single Address.** The report will be sent to a single e-mail address. Type the e-mail address in the accompanying text box. ReportCaster cannot validate the e-mail address. An incorrect or unresolved address may not be noted in the log file. This depends upon the ability of the SMTP mail server to validate the e-mail address. The SMTP mail server returns undeliverable e-mail messages to the reply address you specify for the schedule.

   **Tip:**

   - You can specify multiple e-mail addresses within a Single Address. Separate each e-mail address with a comma or a semicolon. The e-mail addresses will appear in the To line of a single e-mail when you distribute the scheduled output. Each individual e-mail address can be a maximum of 130 characters according to the SMTP specification. The total maximum length of this field is 800 characters.
Additionally, you can use group mail lists (defined on your mail server) with the Single Address option. Group mail lists enable you to distribute a report or notification to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository. The format of the group mail list depends upon the mail server being used. For example, if you are using a Microsoft Exchange Server and your group mail list is defined as #group1, you would enter group1@listdomain in the Single Address field. If the group mail list contains a space within its name, it must be enclosed within quotation marks. For more information, see your mail server administrator.

**Distribution List.** The report will be sent to all e-mail addresses on the selected distribution list. Select a distribution list from the drop-down list, which is activated when you select the Distribution List option.

3. In the From field, type any value (for example, the name of the person creating the schedule). ReportCaster does not require this field, but your e-mail system may require it.

4. In the Reply Address, type a valid e-mail address. If recipients reply to the e-mail, their messages are sent to this address. If your e-mail system is unable to deliver the content, the undeliverable output message is also returned to this address. ReportCaster requires this field.

5. In the Subject field, type the text you want to appear in the e-mail subject line. ReportCaster does not require this information, but your e-mail system may need it. The value you entered in the schedule Description field becomes the default Subject value.

When creating a schedule, you can place multiple parameters and burst values from the scheduled procedure in an e-mail subject line. This enables the subject to be dynamically created in order to personalize e-mails to recipients. Parameters referenced in the subject line must be stored with the schedule information in the ReportCaster tables.

You must specify parameters in the format '&parmname' (where parmname is the name of the parameter). You must specify burst values using the syntax '%BURST'.

**Note:**

- The parameter name cannot be the name of an existing report procedure. You can specify an unlimited number of parameters.

- If you have multiple burst values in a Distribution List, only the first value sent to the ReportCaster Distribution Server is included in the subject.

For an example of specifying parameters and burst values in an e-mail subject line, see *E-Mail Distribution Examples* on page 24.
6. Specify whether or not you want the report to be sent as an e-mail attachment or within the body of the e-mail (inline) by selecting or clearing the Send Report as an Attachment option. (The availability of the inline option depends on your ReportCaster configuration.)

If you select the Send Report as an Attachment option, you can also:

a. Type a message to appear in the e-mail body.

b. Zip the attachment by selecting the Add the Reports to Zip File option. Provide a name for the file in the Zip File Name field.

Reference: E-Mail Distribution Examples

This section provides an example of using burst values and multiple parameters when sending the report in an e-mail, and distributing a report to a Fax machine using e-mail.

Example: Specifying Parameters and Burst Values in an E-mail Subject Field

The following schedule specifies burst values and multiple parameters in the e-mail subject line.

The following image shows an example of a resulting e-mail subject line.
Example: Distributing a Report to a Fax Machine Using E-mail

To distribute an inline e-mail message to a fax machine, you must register your e-mail address with a third-party e-mail distribution provider. The features offered by providers, (such as supported area codes and file formats), in addition to requirements on the structure of e-mail parameter values, may vary. It is important that you select a provider whose features are compatible with ReportCaster.

Note: You cannot distribute an e-mail attachment to a Fax machine.

The following example shows how to distribute a report directly to a fax machine. The e-mail address, john_doe@xyz.com, was registered with the e-mail distribution provider called *emfax.com*. During the processing of the request, ReportCaster generates the scheduled report output and then distributes it using the e-mail address of *emfax.com*. The reply address specified in ReportCaster is the registered e-mail address that is validated by *emfax.com*. If the e-mail address is valid, *emfax.com* distributes the report to the fax number 12129999999. The validation of the registered e-mail address is performed by *emfax.com*, not by ReportCaster.

Note: The syntax used in this illustration is specific to this example. The required syntax for your provider may be different.

The following image shows the Distribute section of the Scheduling Tool, which contains the name of the report to be distributed, fields, drop-down lists, and option buttons that enable you to specify the destination(s) for the scheduled report, and an e-mail address to which report recipients can reply.

1. From the Distribute report by drop-down list, select *Email*.
2. From the mail drop-down list, select *Single Address*. 

![Distribution section of Scheduling Tool](image-url)
In the accompanying text box, type the e-mail address to be used by the e-mail provider according to their requirements. In this example, it is `phone-number@emfax.com` or `12129999999@emfax.com` (where `emfax.com` is the name of your e-mail provider).

**Note:** You can also select a Distribution List. However, be sure to use the syntax required by your provider.

3. In the From field, type any value (for example, the name of the person creating the schedule). ReportCaster does not require this field, but your e-mail system or the e-mail provider may require it.

4. In the Reply Address field, type your registered e-mail address. If your e-mail system is unable to deliver the content, the undeliverable output message is returned to this address. ReportCaster requires this field.

5. In the Subject field, type the text you want to appear in the message subject line. ReportCaster does not require this information, but your e-mail system or e-mail provider may require it.

6. Continue selecting the remaining schedule options, then click Save to save the schedule.

### Distributing Scheduled Output to a Printer in the Single Page Scheduling Tool

**How to:**

Distribute Scheduled Output to a Printer

The report formats that support printing are DOC, PDF (when ReportCaster is configured to enable PDF printing and the printer has the appropriate driver), PS, and WP. The following image shows the printer distribution options in the Distribution Options section of the Scheduling Tool.

![Distribution Options](image)

**Procedure:** How to Distribute Scheduled Output to a Printer

1. From the Distribute report by drop-down list, select *Printer*.

2. From the drop-down list that appears under the Distribute report by option, select the form of the e-mail address and type or select the accompanying value in the text box next to the selection. The options are:
- **Single Printer.** Specify the printer using the following format.

  \[ \text{queue@printserver} \]

  where:

  \[ \text{queue} \]

  Is the name of the printer queue.

  \[ \text{printserver} \]

  Is the host name or IP address of the printer.

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

- **Distribution List.**

  The field next to Distribution List provides a drop-down list of all printer Distribution Lists that you own and all public printer Distribution Lists.

  **Note:** If the printer you specify is not recognized, the following message is recorded in the log file when the ReportCaster Distribution Server tries to distribute the report:

  ```
  Cannot connect to specified printer
  ```

### Distributing Scheduled Output to MR in the Single Page Scheduling Tool

**How to:**

Distribute Scheduled Output to Managed Reporting

If you are a ReportCaster administrator, you can schedule Standard Reports and My Reports for distribution to Managed Reporting. If you are an Analytical User, you can only schedule My Reports for distribution to Managed Reporting. The following image shows the Managed Reporting distribution options in the Distribution Options section of the Scheduling Tool.

```
||
|---|---|
| **Distribution** |  |
| Distribute report by: | Managed Reporting |
| Folder Name |  |
```
Tip: Information Builders recommends distributing scheduled output to the Report Library rather than to Managed Reporting. The Report Library includes secure access to library content, the ability to save multiple versions of the same output, and the ability to set an expiration date or keep a specified number of versions.

When you select the Managed Reporting distribution method, the report output is distributed to Managed Reporting as a Standard Report or a My Report. The report is available to other users who have access to the Domain.

ReportCaster performs the following tasks when you create a schedule to distribute output to the Managed Reporting Repository:

1. The WebFOCUS Reporting Server communicates to Managed Reporting using the HTTP protocol. The WebFOCUS Reporting Server sends a request to Managed Reporting to create a Standard Reports or My Reports group folder containing the report output.

2. The output is stored differently depending on where the report was scheduled:
   - If you scheduled the report in Standard Reports, ReportCaster creates a folder in Standard Reports within the same Domain. The report output is stored in the Domain /app directory.
   - If you created the report in My Reports, ReportCaster creates a folder in My Reports within the same Domain. The report output is stored in your directory in the Managed Reporting Repository. Since ReportCaster does not distinguish subfolders, it distributes the reports to the highest level folder regardless of the folder hierarchy within Managed Reporting.

Note: Multiple Managed Reporting reports are stored in the same folder if they both run at the same time. Information Builders recommends assigning each Managed Reporting report a different start time.

Procedure: How to Distribute Scheduled Output to Managed Reporting

1. From the Distribute report by drop-down list, select Managed Reporting.

2. In the Folder Name field, type a name for the folder on Managed Reporting to which you will distribute the output.
   This description must not exceed 90 characters.
Distributing a Report to the Report Library in the Single Page Scheduling Tool

**How to:**
Distribute a Report to the Report Library

**Reference:**
Considerations When Limiting Distribution to Values in an Access List

When distributing a report to the Report Library, you can send an e-mail informing users of its availability and provide the URL to the content in the library.

The Report Library provides secure access to library content and it enables you to save multiple versions of the same report output, set an expiration date, and keep a specified number of versions. When creating a schedule for a distribution to the library, you have the option to designate a category in the library where you want the report to reside. The Report Library is only available to ReportCaster users who have been granted library privileges.

**Note:** When a report is distributed to the Report Library, the Log Report will include the report ID and the report version number. This enables you to confirm which reports and report version were distributed to the Library.

The following image shows the Report Library distribution options in the Distribution Options section of the Scheduling Tool.

![Distribution Options](image)

**Procedure:** How to Distribute a Report to the Report Library

1. From the Distribute report by drop-down list, select *Library*.
2. Optionally, specify a Library category where the report will distribute.

**Note:** When you distribute a Standard Report or My Report to the Library, by default, the report is placed in a category named with the Managed Reporting domain name of the report.
Select the **Category in Library** option. The Category Library field and icon (to the right of the field) are activated. Click the Library category icon. The Library Categories dialog box opens, as shown in the following image.

```
Select a category from the Category List or create a new category by typing a name in
the **New Category Name** field.

Click **OK**. The Category in Library field displays your selection. If at this point you want
to change the new category name that you just created, open the Library Categories
dialog box, enter the new name, and click **OK**. The updated category name now appears
in the Category in Library field.
```

3. From the Access Type drop-down list, select one of the following options:
   - **Owner.** Only the Owner of the schedule has access to the report in the library. This
     is the default value.
   - **Public.** All users with access to the Report Library can view the report in the library.
   - **Access List.** Only the users or groups defined in the Access List, and the owner of
     the schedule, can view the report.

   **Note:** ReportCaster administrators can limit the Access Options that appear in the
   Access Type list.

4. If you select Access List as the Access Type, the Access List field is activated. In the
   Access List field, type an Access List name or select one from the drop-down list.

5. If you are distributing a burst report (as designated in the **Burst this Report** option located
   in the Report Options section of the Scheduling Tool) and you selected Access List as
   the Access Type, then you can select the **Limit Distribution to values in Access List** option.
This option stipulates that only the burst values specified in the selected Access List will be distributed to the Report Library. For more information, see Considerations When Limiting Distribution to Values in an Access List on page 32.

6. From the Expiration drop-down list, select one of the following options:

- **version(s)**. The Report Library stores the output for the top number of versions specified. For example, if you specify 3 versions and the current version is 7, then versions 7, 6, and 5 are stored in the library. However, if you delete version 6, then only versions 7 and 5 are stored in the library. If you then distribute version 8 to the library, only version 8 and 7 are stored in the library since version 6 was deleted and version 5 is not among the top 3 versions.

  Use the up and down arrows to select the number of versions.

- **Never Expire**. The report remains in the Report Library until it is manually deleted by the owner or ReportCaster administrator.

- **day(s)**. The Report Library stores the report for the number of day(s) specified. Use the up and down arrows to select the number of days.

- **week(s)**. The Report Library stores the report for the number of week(s) specified. Use the up and down arrows to select the number of weeks.

- **month(s)**. The Report Library stores the report for the number of month(s) specified. Use the up and down arrows to select the number of months.

- **year(s)**. The Report Library stores the report for the number of year(s) specified. Use the up and down arrows to select the number of years.

  **Note**: ReportCaster automatically purges expired reports one hour after the scheduled Log Purge Time. The default Log Purge Time is 1:00 A.M., therefore, the default library purge time is 2:00 A.M. each day.

7. Optionally, check the Compress Stored Report option to conserve repository space.

  **Note**: If you distribute a compressed report to the library, consider that this may impact end user response time in viewing the report. A compressed report must first be decompressed before it is sent to the user. You should weigh the benefits of saving repository space against the impact of the time it takes to retrieve a compressed report from the library.

8. Optionally, check the Send an Email after Report saved to Library option to send an e-mail message to users that have access rights to the report that it is available. The e-mail message also contains the URL to the report content in the Library.

  When you select this option, the following fields appear:
- **From.** This can be any value, for example, the name of the person creating the schedule. ReportCaster does not require this, but your e-mail system may require it.

- **Reply Address.** The e-mail address of the sender. This is a required field. If report recipients reply to the notification, their messages are sent to this address.

- **Subject.** The optional text that you want to appear in the e-mail subject line.

- **Message.** An optional message you want to appear in the body of the e-mail notification.

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**Reference:** Considerations When Limiting Distribution to Values in an Access List

When limiting Report Library distribution to values in an Access List, note the following:

- All other burst values not specified in the Access List are not distributed to the library.

- This option does not alter the running of the procedure or the retrieval of records from the data source, but simply filters the burst report sections returned from the WebFOCUS Reporting Server based on the burst values specified in the Access List.

- When the *Burst this Report* option is enabled and the *Limit distribution to values in Access List* option is not enabled, ReportCaster continues to distribute all burst report sections returned by the WebFOCUS Reporting Server to the Report Library.

- Upon saving the schedule, validation is performed to confirm that the schedule has the *Burst this Report* option enabled. If it has not been selected, a message appears reminding you that you must enable the *Burst this Report* option to limit distribution to values specified in an Access List, and the schedule options are redisplayed.

- The log file contains information specifying that the *Limit distribution to values in Access List* option was selected. A separate log entry appears for each Access List burst value specifying whether a report section for that burst value was distributed to the library.
You can schedule a report to run just once or repeatedly, for example, twice a week or the last Thursday of every month. This section describes the options available in the Scheduling Tool Frequency section when the schedule is set to the following run intervals:

- Once
- Minute(s)
- Hour(s)
- Day(s)
- Week(s)
- Month(s)
- Year(s)
- Custom

**Note:** ReportCaster administrators can define dates on which schedules cannot run or be set to run. These are known as schedule blackout dates.
The Once Run Interval in the Single Page Scheduling Tool

The Once option in the Run Interval drop-down list sets the job to execute immediately. You can modify the date or time if you do not want the schedule to run immediately. You can specify the date and time you want the schedule to run using the Start Schedule options, as shown in the following image.

To select a date, choose a date from the drop-down date calendar. To select a time, select either the hour or minutes and use the up and down arrows to increase or decrease the value.

The Minutes Run Interval in the Single Page Scheduling Tool

The Minute(s) option in the Run Interval drop-down list, sets the schedule to run every $n$ minutes.

In the Every minute(s) field, type or select the minutes interval (1 to 59), check the days of the week on which you want to run the schedule, and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. For example, the following schedule will run every thirty minutes on Mondays and Fridays beginning at noon May 16, 2008 and ending 6:00 PM October 30, 2010.

Tip: Selecting this option may affect system performance if you choose to run the schedule every five minutes or less. We recommend specifying a minimum of thirty minutes. The minute interval option is primarily useful for alert schedules.
The Hourly Run Interval in the Single Page Scheduling Tool

The Hour(s) option in the Run Interval drop-down list, sets the schedule to run every \( n \) hours. In the Every hour(s) field, type or select the hours interval (1 to 24), check the days of the week on which you want to run the schedule, and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. For example, the schedule shown in the following image will run every three hours on Mondays and Fridays beginning at noon May 16, 2008 and ending 6:00 PM October 30, 2010.

![Frequency](image)

The Daily Run Interval in the Single Page Scheduling Tool

The Day(s) option in the Run Interval drop-down list, sets the schedule to run every \( n \) days. In the Every day(s) field, type or select the days interval to run the schedule and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. For example, the schedule shown in the following image will run every five days beginning at noon May 16, 2008 and ending 6:00 PM October 30, 2010.

![Frequency](image)

You can also set a secondary run interval. For information about this setting, see Applying a Secondary Run Interval in the Single Page Scheduling Tool on page 39.
The Weekly Run Interval in the Single Page Scheduling Tool

The Week(s) option in the Run Interval drop-down list, sets the schedule to run every \( n \) weeks.

In the Every week(s) field, type or select the weekly interval to run the schedule, check the days of the week on which you want to run the schedule, and select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. The following schedule will run every two weeks on both Monday and Friday beginning at noon May 16, 2008 and ending 6:00 PM October 30, 2010.

![Frequency](image)

**Important:** When selecting the Week(s) interval, set the Start Schedule to the date of the first day (current or future) of the week you want the schedule to run. If you select the current date, then you must make sure that the Start Schedule time is later than the current time when you save the schedule. If the Start Schedule time is less than or equal to the current time, the calculation for the next run time results in the schedule not running on the current date.

You can also set a secondary run interval. For information about this setting, see *Applying a Secondary Run Interval in the Single Page Scheduling Tool* on page 39.

The Monthly Run Interval in the Single Page Scheduling Tool

The Month(s) option in the Run Interval drop-down list, sets the schedule to run every \( n \) months. You can then refine the monthly interval with one of the following options. Note that these options are mutually exclusive.

- Every first, second, third, fourth, or last \( n \) day of the week (where \( n \) is Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, or Sunday) every \( n \) months.
- Specific days every \( n \) months.
Also select the Start Schedule and End Schedule date and time to define the time period in which the schedule will run. The following image shows a schedule set to run on the first Monday of every month beginning at noon May 16, 2008 and ending 6:00 PM October 30, 2010.

The following image shows a schedule set to run on the 2nd, 9th, 16th, 23rd, and 30th of every month, regardless of the day of the week those dates fall on.

You can also select the Last Day of the Month option at the end of the calendar to run the schedule on the last day of the month.

**Note:** When selecting the Month(s) interval, set the Start Schedule to the date of the first day (current or future) of the month you want the schedule to run. If you select the current date, then you must make sure that the Start Schedule time is later than the current time when you save the schedule. If the Start Schedule time is less than or equal to the current time, the calculation for the next run time results in the schedule not running on the current date.

You can also set a secondary run interval. For information about this setting, see *Applying a Secondary Run Interval in the Single Page Scheduling Tool* on page 39.
The Yearly Run Interval in the Single Page Scheduling Tool

The Year(s) option in the Run Interval drop-down list, sets the schedule to run every \( n \) years during a specific time period. The following image shows a schedule set to run every two years beginning at noon May 16, 2008 and ending 6:00 PM October 30, 2010.

You can also set a secondary run interval. For information about this setting, see Applying a Secondary Run Interval in the Single Page Scheduling Tool on page 39.

The Custom Run Interval in the Single Page Scheduling Tool

The Custom option in the Run interval drop-down list enables you to select a set of dates that do not follow a specific pattern. For example, if you want to run a quarterly report on a different day of each quarter, then you can use the Custom run interval to set the schedule to run on dates such as, March 3 (Wednesday), June 4 (Friday), September 7 (Tuesday), and December 2 (Thursday).

The following image shows the Custom Run Interval options, which includes Start Schedule (initially set to the current date and time) and the End Schedule date and time options, the Custom calendar, and the Custom Date List node that appears in the right pane.
Define the time period in which the schedule will run by selecting the Start Schedule date and time, and the End Schedule date and time. Select the specific days on which to run the schedule by clicking on the day in the calendar. (Use the forward and back buttons at the top of the calendar to move through the months and years.) As you select a date, it appears in the Custom Date List. (If it does not already exist, a folder for the year and month of the date you select is created automatically under the Custom Date List node.) The following image shows an example of a selection of Custom dates in the calendar and the Custom Date List.

To remove a date from the list, click that date in the calendar. The date is no longer highlighted in the calendar and will not appear in the Custom Date List.

You can also set a secondary run interval. For information about this setting, see Applying a Secondary Run Interval in the Single Page Scheduling Tool on page 39.

**Applying a Secondary Run Interval in the Single Page Scheduling Tool**

The Apply secondary run interval option enables you to create a secondary run interval within the day the schedule runs. You can apply the secondary run interval every $n$ minutes or hours for a specified number of hours and minutes or until a specified time. This option is available for schedules that run every day(s), week(s), month(s), or year(s).

The secondary run interval will not be validated when the schedule is created. Instead, validation is performed every time the next run time of the schedule is calculated when running within the secondary run interval. The secondary run interval cannot exceed the next run time for the primary run interval. For example, a daily schedule cannot have a secondary run interval greater than Every 1 day(s). If a secondary run interval is scheduled to run after the next primary run interval of the schedule, the secondary run interval is stopped and an error message appears. This error message is also written to the log file.
When you select Apply a secondary run interval, the options related to this setting appear in the Frequency section. The following image shows an example of set secondary run interval options.

The Apply secondary run interval options are:

- **Every \( n \) minutes|hours.** Applies the secondary run interval every \( n \) minutes or hours (in this example every 10 minutes) within the day the schedule runs.

- **Until Time.** The time up until which the secondary run interval will be applied. In this example, the schedule will be rerun every 10 minutes until 4:00 P.M.

- **Lasts for \( n \) hour(s) \( n \) minute(s).** The duration, specified in hours and minutes, during which the secondary run interval will be applied. This option and the Until time option are mutually exclusive, so in this example, this option is inactive.

**Report Options**

This section describes the options available in the Report Options section of the Scheduling Tool. You can set these options to send the report in a specific format (for example, HTML, EXL2K, and so on), whether or not you want to burst the report and if so, the burst values the report will use, and specify parameter values to pass to the report when it runs.
The following image shows the Report Options section of the Scheduling Tool.

The burst feature enables you to break a report into sections and distribute relevant sections to individual users. To burst the report, select the Burst this Report check box. Burst values can be specified in a Distribution List.

The Save Report As option enables you to rename the schedule output to a more descriptive name. This is useful if you are distributing output in e-mail attachments.

In the Execution ID field, specify a valid ID that is authorized to execute procedures on the server running the report.

- If the Execution ID field is grayed out, it means that a default Execution ID and password have been specified within the ReportCaster configuration file.

- If the Execution ID field is not grayed out and blank, then type a valid ID that will connect to the Reporting Server to run the scheduled report, and assign a password by clicking Set Password. In the password dialog box, type a password and confirm the password, then click OK.

  **Note:** After you save the schedule, this execution ID is available from the Execution ID drop-down list for future scheduling.

- If the Execution ID field is not grayed out and contains an ID, then either use that ID, select a new ID from the drop-down list, or type a new valid ID and create a password.

  **Note:** You can change the password of a selected execution ID by clicking Set Password and typing a new password for the ID.
Report Formats

Select the format of the report from the Send the Report in this Format drop-down list of the Scheduling Tool, Report Options area.

Use the following guidelines when selecting a format:

- The report format specified in this field overrides the format statement in the procedure, except for specialized formats (EXL2K FORMULA, EXL2K PIVOT, EXL2K TEMPLATE, PPT TEMPLATE, DFIX). When a report uses a specialized format, the format selection in the report schedule must match that specified in the report.

- There are limitations on what formats are valid for certain options. For instance, not all formats are supported for bursting or printing.

  - The formats that support bursting are AHTML (except for FML reports), ALPHA, COM, COMMA, COMT, DHTML (except for FML reports), DFIX, DOC, EXL2K, EXL2K FORMULA, EXL2K TEMPLATE, EXL97, GIF, HTML and HTML ODP (except for FML reports), JPEG, PDF, PNG, PPT, PS, SVG, TAB, TABT, and WP.

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

  - When scheduling a procedure created using Graph Assistant or Advanced Graph Assistant and:
    - an image format (JPEG, GIF, PNG, SVG) was chosen as the output format, then you must select an image format as the schedule output.
    - the PDF/SVG or PDF/GIF format was chosen as the output format, then you must select PDF as the schedule output.

  - The HTML ODP format can only be distributed to the Report Library.

  - If the report is a Coordinated Compound PDF Report, then you can select any supported compound format (AHTML, DHTML, EXL2K, Flash, PDF, or PPT), but remember that not all of these formats support bursting.

  - When scheduling a chart or graph report, the available formats will depend on which tool created the report. When the report was created using:

    - Graph Assistant or Advanced Graph Assistant, then the available formats are GIF, JPEG, PDF, PNG, and SVG.

    - Report Assistant or InfoAssist, then the available formats are all formats except GIF, JPEG, PDF, PNG, and SVG.

    - Power Painter, then the available formats are AHTML, DHTML, EXL2K, EXL2K PIVOT, Flash, PDF, and PPT.
If the FEX was created using an editor, then all formats that the ReportCaster administrator set to appear in the formats option list will be available.

For detailed information about each format, see the ReportCaster Administration manual.

Report Parameters

**How to:**

- Define a Parameter Value in the Scheduling Tool
- Select Parameter Values From a List

If the report you are scheduling contains parameters, they are listed in the Report Options section of the Scheduling Tool. The following image shows the Report Options section for a report with parameters.

![Report Options](image)

The report parameter name automatically appears in the Parameter Name column. The value or possible values of the parameter available to you in the Reports Options section depends on the report procedure. The report procedure either assigns no value to a parameter, assigns a default value, or provides a selection of values from which you can choose.

The possible presentation of report parameters in the Report Options section are:

- No value, where you assign the value in the schedule.
- A default value.
- A static list of values from which you can select one value.
- A dynamic list (generated from the database the report is using) of values from which you can select one value.
- A static list of values from which you can select multiple values.
A dynamic list (generated from the database the report is using) of values from which you can select multiple values.

When you access the report Scheduling Tool, parameters with default values have no check mark next to their name and the default value listed in the Parameter Value column. Parameters that offer a choice of values have a check mark next to their name and the Parameter Value column remains blank until you select the value. The following image shows a parameter with a default value (REPORTNAME) and parameters that provide a choice of values (DEPARTMENT and Job Code).

To override a default value, check the box next to the parameter name, then click the name to open the Parameter Editor window, where you can enter another parameter value. For details on changing a parameter value, see How to Define a Parameter Value in the Scheduling Tool on page 44.

To create a new parameter for this schedule, click in the row next to the check box without a parameter name, as shown in the following image, and follow the instructions in How to Define a Parameter Value in the Scheduling Tool on page 44.

To select all parameters in the parameter list, check the box next to Parameter Name.

**Procedure:** How to Define a Parameter Value in the Scheduling Tool

To change a parameter default value, assign a new value to a report parameter, or create a new parameter:
1. In the Name column, click the parameter name that you want to assign a value to. To create a new parameter, click next to the check box without a name. The Parameter Editor window opens. The following image shows the editor for an existing parameter.

![Parameter Editor](image)

**Note:** If the parameter has a default value, it appears in the Value field.

The following image shows the editor for a new parameter.

![Parameter Editor](image)

2. If you are creating a new parameter, type a name for the parameter in the Description field.

3. Type a value for the parameter in the Value field.

4. Click OK.
The value appears in the Parameter Value column next to the parameter, as shown in the following image.

**Procedure: How to Select Parameter Values From a List**

Parameters with a grayed-out check mark next to the parameter name provide a list of values from which you can choose.

1. In the Name column, click the parameter name that you want to assign a value to.
2. From the Parameter Editor window, select the values you want, as follows. Use standard Windows methods to select individual or contiguous items.

   - From the single-select list, select the value for the parameter. The following image shows the Value drop-down list from which you can choose the value.
From the multi-select list, select either *No Selection* or one or more values, as shown in the following image.

![Parameter Editor](image1.png)

From the multi-select list, select one or more values, as shown in the following image.

![Parameter Editor](image2.png)

3. Click **OK**.
Notification Options in the Single Page Scheduling Tool

The Notification area of the Scheduling Tool provides the options to send a notification of the schedule status to specific e-mail recipients. You can send notification:

- **Never.** ReportCaster will not send a notification of the schedule status under any circumstances. This is the default value.
- **On Error.** The specified users are notified when errors are encountered while running the schedule. We recommend using the On Error notification option.
- **Always.** The specified users are always notified when the schedule runs.

**Setting On Error and Always Notification in the Single Page Scheduling Tool**

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

- **Type.** Select either a brief or detailed notification, as follows.
  - **Full Notification.** A full notification sends a complete log report as an e-mail attachment.
  - **Brief Notification.** A brief notification sends the ID and job description of a schedule, as well as messages about the schedule (such as, Completed Successfully).
  - **Full & Brief Notification.** Sends both types of notifications.

**Tip:** Information Builders recommend using the Brief Notification option when you are sending notification to devices that have limited memory, such as pagers and cell phones. If you want to notify multiple recipients, you can use group mail lists defined on your mail server provided that you append an at sign (@) followed by a valid domain.

- **Full Notification.** When the notification type is Full Notification or Full & Brief Notification, type the e-mail address to which you want a full notification sent. There is no syntax error checking for this field.
- **Brief Notification.** When the notification type is Brief Notification or Full & Brief Notification, type the e-mail address to which you want a full notification sent. There is no syntax error checking for this field.
- **Reply Address.** Type the e-mail address of the sender. If report recipients reply to the report sender, their messages are sent to this address. If your e-mail system is unable to deliver a report, the undeliverable report message is also returned to this address.
- **Subject.** Type the text you want to display in the subject line of the e-mail notification. There is a limit of 255 alphanumeric characters. By default, this field contains the report name and data and time stamp.

**Reference:** Notification and Log Information for Unavailable Options

When schedules with unavailable Task Types and/or distribution methods are not permitted to run, error notification is triggered. The full and brief notifications and the log report informs you that the ReportCaster administrator or the owner of the schedule must change the unavailable Task Types or distribution methods in the schedule.

When schedules with unavailable Task Types or distribution methods are permitted to run, normal job execution occurs and a message appears in the log report indicating that your ReportCaster administrator is allowing existing schedules using the unavailable Task Types or distribution methods to run.
Notification Options in the Single Page Scheduling Tool
As a Managed Reporting Analytical User, you can schedule Standard Reports or your own My Reports using the ReportCaster Scheduling tool. If you access ReportCaster from Managed Reporting, the scheduling tool is the ReportCaster Scheduling Wizard. This section described how to use the Scheduling Wizard to schedule a report.

Topics:
- Overview
- Schedule Options
- Report Information
- Report Parameters
- Distribution Options in the Scheduling Wizard
- Priority, Notification, and Zip File Options
- Running a Schedule Without Saving It
Overview

The Scheduling Wizard includes the following series of windows:

- **Schedule.** Specify when and how often to run the schedule. For more information, see *Schedule Options* on page 53.

- **Report Information.** Select the report format, whether or not to burst the report, and the Execution ID and password. For more information, see *Report Information* on page 60.

- **Distribution.** Select whether to distribute the report as an e-mail message, to a printer, as a report in a Managed Reporting folder, or to the Report Library. You must also select whether to distribute the report using a Distribution List, a Distribution File, or a single location. For more information, see *Distribution Options in the Scheduling Wizard* on page 71.

- **Settings.** Specify the priority level of the schedule and select notification options. For more information, see *Priority, Notification, and Zip File Options* on page 96.

**Note:**

- When selecting an option (for example, Send report as attachment), you must use the mouse or the arrow keys to navigate through the Scheduling Wizard. Do not use the Tab key.

- You cannot schedule alert reports using the Scheduling Wizard. To create an alert schedule, you must use the ReportCaster Development and Administration Interface.
Schedule Options

When you access the ReportCaster Scheduling Wizard, the Schedule window opens first.

In the Schedule window, shown in the following image, you will specify the job description, the run intervals, the date and time you want the schedule to run, and whether to enable or disable the schedule. You can select the schedule to run once or repeatedly on any day at any time.

![Create New Schedule - Microsoft Internet Explorer](image)

**Schedule**

- **Description**: 
- **Interval**:  
- **Schedule Job**: Every [ ] hour(s) on [ ]  
- **Date/Time**:  
  - **Start Date**: 10/20/2005  
  - **Start Time**: 12 [ ] 31 [ ] AM [ ]  
  - **End Date**: 10/17/2005  
  - **End Time**: 11 [ ] 59 [ ] AM [ ]  
- **Options**:  
  - Enabled: (Scheduled jobs run at specified time)  
  - Delete job if it is not scheduled to run again  

**Back**  **Next**  **Save**  **Run**  **Cancel**  **Help**
Procedure:  How to Specify Schedule Options

Specify the following information in the Schedule window:

1. In the Description field, type a descriptive name that identifies the schedule. After the schedule runs, the description appears in your list of schedules.

2. From the Schedule Job drop-down list, select how frequently you want the schedule to run. Possible values are:

   - **once.** If you want to run the schedule only once. By default, the schedule executes immediately. Modify the Start Date or Start Time if you do not want the schedule to run immediately.

   - **hour(s).** If you want to run the schedule every \( n \) hours. Type a range between 1 and 24 hours, and then check the days of the week on which you want to run the schedule.

   The following image shows the Schedule Job pane options set to run the scheduled job every three hours on Monday and Friday.

   ![Schedule Job: hour(s) every 3 hours on Monday and Friday](image)

   - **day(s).** If you want to run the schedule every \( n \) days.

   The following image shows the Schedule Job pane options set to run the scheduled job every five days.

   ![Schedule Job: day(s) every 5 days](image)

   - **week(s).** If you want to run the schedule every \( n \) weeks. Type a number that specifies how often you want to run the schedule (for example, every two weeks), and then check the days of the week on which you want to run the schedule.
The following image shows the Schedule Job pane options set to run the scheduled job every two weeks on both Monday and Friday.

Note: When selecting the week(s) interval, set the Start Date to the date of the first day (current or future) of the week you want the schedule to run. If you select the current date, then you must make sure that the schedule Start Time is later than the current time when you save the schedule. If the schedule Start Time is less than or equal to the current time, the calculation for the next run time results in the schedule not running on the current date.

Month(s). If you want to run the schedule every \( n \) months. You can select to schedule a job every \( n \)th day of the week every \( n \) months (for example, the first Monday every two months), or on specific days every \( n \) months.

The following image shows the Schedule Job pane options set to run the scheduled job on the first Monday of every month. Although other dates are selected on the calendar, they are inactive since the Day(s) and The \( n \)th day of the month(s) options are mutually exclusive.
The following image shows the Schedule Job pane options set to run the scheduled job on the 2nd, 9th, 16th, 23rd, and 30th every month. The schedule will not run on the first Monday of every month.

You can also click the **Last Day of the Month** option at the end of the calendar to run the schedule on the last day of the month.

**Note:** When selecting the Month(s) interval, set the Start Date to the date of the first day (current or future) of the month you want the schedule to run. If you select the current date, then you must make sure that the schedule Start Time is later than the current time when you save the schedule. If the schedule Start Time is less than or equal to the current time, the calculation for the next run time results in the schedule not running on the current date.

- **year(s).** If you want to run the schedule every \( n \) years.

The following image shows, in the Schedule Job pane, that the scheduled job will run every two years.

3. Optionally, select the **Apply secondary run interval** check box if you want to create a secondary run interval within the day the schedule runs. This option is only available for schedules that run every day(s), week(s), month(s), or year(s). For more information, see *Creating a Secondary Run Interval* on page 58.

4. In the Start Date field, specify the date on which you want the schedule to begin. You can type this value in the field using the format MM/DD/YYYY, or you can click the calendar and select the date. The default Start Date is the current date.
5. In the Start Time field, using the drop-down lists, specify the time you want the schedule to begin. The default Start Time is the current time. The start time applies only to the Start Date and does not apply to any date thereafter. If you select a time that is after the current time, the scheduled job is not run until the next instance of the Start Time that fits within the specifications of the schedule.

6. In the End Date field, specify the date on which you want the schedule to end. You can type this value in the field using the format MM/DD/YYYY, or you can click the calendar and then select the date. The default End Date is 12/31/2099. (Contact your ReportCaster administrator if you want another default End Date.) This field does not display for a schedule job that will only run once.

7. In the End Time field, using the drop-down lists, specify the time you want the schedule to end. The default End Time 11:59 PM. (Contact your ReportCaster administrator if you want another default End Time.) This field does not display for a schedule job that will only run once.

8. Uncheck the Enabled (Scheduled jobs run at specified time) check box if you want the schedule to be inactive.

9. Check Delete job if it is not scheduled to run again if you want the schedule to run once and not be stored in the ReportCaster Repository.

10. Click Next to continue scheduling the report:
   - If you selected the Apply secondary run interval check box, you are sent to the optional Apply secondary run interval window. For more information, see Creating a Secondary Run Interval on page 58.
   - If you did not select the Apply secondary run interval check box, you are sent to the Report Information window. For more information, see Report Information on page 60.
Creating a Secondary Run Interval

In the Apply secondary run interval window, you can optionally create a secondary run interval within the day the schedule runs. You can apply the secondary run interval every $n$ minutes or hours for a specified number of hours/minutes or until a specified time. This option is available for schedules that run every day(s), week(s), month(s), or year(s). The following image shows the secondary run interval options.
The Apply secondary run interval options are:

- **Every n minutes/hours.** Applies the secondary run interval every n minutes or hours (in this example every 10 minutes) within the day the schedule runs.

- **Until Time.** The time up until which the secondary run interval will be applied. In this example, the schedule will be rerun every 10 minutes until 4:00 P.M.

- **Lasts for n hour(s) n minute(s).** The duration, specified in hours/minutes, during which the secondary run interval will be applied. This option and the Until time option are mutually exclusive, so this option is inactive in this example.

**Note:**

- The secondary run interval will not be validated when the schedule is created. Instead, validation is performed every time the NEXTRUNTIME of the schedule is calculated when running within the secondary run interval. The secondary run interval cannot exceed the NEXTRUNTIME for the primary run interval. For example, a daily schedule cannot have a secondary run interval greater than Every 1 day(s). If you schedule a secondary run interval to run after the next primary run interval, the secondary run interval is stopped and an error message is displayed to the user and written to the log file.

To continue to the Report Information window, click Next. For more information, see Report Information on page 60.

- When a schedule is updated, the next run time is recalculated based only on the primary run interval. This means that if a schedule that includes a secondary run interval is updated before the secondary schedule is able to run, then the secondary run interval is ignored and the NEXTRUNTIME is calculated based on the primary interval.

For example, a schedule exists that is set to run daily at 2:00 PM with a secondary run interval of every 10 minutes from 2:00 PM to 3:00 PM. When the schedule runs at 2:00 PM, the NEXTRUNTIME is reset to run at 2:10, which honors the secondary run interval. If this schedule is updated at 2:03 PM, the NEXTRUNTIME is recalculated to be 2:00 PM the next day, rather than 2:10 PM on the current day.
After you have specified scheduling options, you must specify the Report Information.

The following image shows the Report Information window, which is where you specify the report format, whether to enable report bursting, and the Execution ID and password that is authorized to execute procedures on the server running the report.
Procedure: How to Specify Report Information Options

Specify the following report information:

1. From the Report Format drop-down list, select the report format. The default value is HTML.

Use the following guidelines when selecting a format:

- The report format specified in this field overrides the format statement in the procedure, except for specialized formats (EXL2K FORMULA, EXL2K PIVOT, EXL2K TEMPLATE, PPT TEMPLATE, DFIX). When a report uses a specialized format, the format selection in the report schedule must match that specified in the report.

- There are limitations on what formats are valid for certain options. For instance, not all formats are supported for bursting or printing.

- The formats that support bursting are AHTML (except for FML reports), ALPHA, COM, COMMA, COMT, DHTML (except for FML reports), DFIX, DOC, EXL2K, EXL2K FORMULA, EXL2K TEMPLATE, EXL97, GIF, HTML and HTML ODP (except for FML reports), JPEG, PDF, PNG, PPT, PS, SVG, TAB, TABT, and WP.

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

- When scheduling a procedure that was created using Graph Assistant or Advanced Graph Assistant and:
  - an image format (JPEG, GIF, PNG, SVG) was chosen as the output format, then you must select an image format as the schedule output.
  - the PDF/SVG or PDF/GIF format was chosen as the output format, then you must select PDF as the schedule output.

- The HTML ODP format can only be distributed to the Report Library.

- If the report is a Coordinated Compound PDF Report, then you can select any supported compound format (AHTML, DHTML, EXL2K, FLEX, PDF, or PPT), but keep in mind that not all of these formats support bursting.

ReportCaster administrators specify which report formats will appear in the Tasks tab. Contact your ReportCaster administrator for changes to the format selections.

For detailed information about each format, see ReportCaster Development and Library Content manual.
2. Optionally, if you want to burst the report, select the *Enable Report Bursting* check box. The burst feature enables you to break a report into sections and distribute the sections separately. Burst values can be specified in a Distribution List or Distribution File. For more information about bursting, see the *ReportCaster Development and Library Content* manual.

Even though a distribution list may specify burst values, they will be ignored unless you select this option to enable bursting.

3. Specify an Execution ID authorized to execute procedures on the server running the report.

- If the Execution ID field is grayed out, it means that a default Execution ID and password have been specified within the ReportCaster configuration file.

- If the Execution ID field is not grayed out and you are using an Execution ID that you previously used for a schedule, select the *Choose Security Information* option and the Execution ID from the drop-down list.

For example, the following image shows the *rcuser* Execution ID selected in the drop-down list in the Security Information pane.

![Security Information](image)

- If the Execution ID field is not grayed out and you are using a new Execution ID, select the *Enter the Execution Id and Password that will be used to connect to the WebFOCUS Reporting Server* option and type the Execution ID and password in the appropriate text boxes.

  **Note:** The Execution ID is added to the ReportCaster Repository and is viewable in the ReportCaster HTML User Interface.

4. To continue scheduling the report, click Next at the bottom of the Report Information window.

- If the report you are scheduling has parameters, the Report Parameters window opens. For more information, see *Report Parameters* on page 63.
If the report you are scheduling does not have parameters, the Distribution window opens. For more information, see *Distribution Options in the Scheduling Wizard* on page 71.

**Report Parameters**

**How to:**
Specify Parameter Values

**Reference:**
Considerations When Specifying Parameter Values

If the schedule you are creating has parameters, you must specify the parameter values in the Report Parameters window. Each parameter name and description are populated automatically, so you only need to specify the parameter values.

The following image shows an example of the Report Parameters window with a parameter named Store Name and a value of Web Sales.
**Procedure:**  How to Specify Parameter Values

To specify parameter values:

1. In the Value field, specify the parameter value(s) that correspond to each parameter within the report.

   **Note:** For more information about specifying parameter values for a procedure, see *Considerations When Specifying Parameter Values* on page 64.

2. To continue to the Distribution window, click Next. For more information, see *Distribution Options in the Scheduling Wizard* on page 71.

**Reference:** Considerations When Specifying Parameter Values

Consider the following when specifying parameter values for a procedure:

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

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

- ReportCaster performs field validation for numeric and alpha formats, and range value validation.

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

   **Note:**

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

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

   - As an alternate method of creating a dynamic selectable list of parameter values, use the schedule technique in the HTML Composer.

   - The Specify All Parameter Values check box is always enabled if there is any parameters available for the report (Standard Report, My Report, or WF Server Procedure). You can check or uncheck this option to quickly enable or disable the check boxes for each individual parameter. If the check box for an individual parameter is unchecked, the input field for the parameter value is disabled, the default parameter value(s) are displayed (but cannot be changed), and no parameter data is saved to the ReportCaster Repository.
ReportCaster will not prompt for variables with defaults set by the -DEFAULTH command. The purpose of the -DEFAULTH command is to enable you to assign amper variables a default value and not be dynamically prompted for that variable.

When specifying parameters with special characters (for example, %, &, |):

If you are specifying the entire WHERE condition as the parameter value, you must enclose the value within two single quotation marks rather than a double quotation mark. For example: "WHERE CAR NOT LIKE MOTO%"

If you are only specifying a value as the parameter value, it is not necessary to enclose the parameter value within quotation marks. For example: O&DINFO

**Note:** You can only schedule saved procedures using ReportCaster. HTML forms cannot be scheduled using ReportCaster. Parameter prompting is not available in pre-processing or post-processing procedures. For more information about WebFOCUS auto prompting, see Coding a User Interface in the Developing Reporting Applications manual.

**Example:** Setting a Default Variable Parameter Value

**Tip:** Since ReportCaster requires considerations for special characters, we recommend using the syntax specified in the following examples.

The following procedure sets a default value of NY for the STATE (2-3 letters for US State) field, and a default value of Web Sales for the SNAME (Store Name) field. Note that there must be an ampersand in front of the field name in the -DEFAULT command for the amper variable(s) to contain a default attribute in ReportCaster.

```
-DEFAULT &STATE=NY
-DEFAULT &SNAME=Web Sales
TABLE FILE CENTORD
SUM QTY_IN_STOCK BY STATE BY SNAME BY PRODNAME
ON TABLE SUBHEAD
"Inventory Report"
WHERE STATE EQ '&STATE.2-3 letters for US State.'
WHERE SNAME EQ '&SNAME.Store Name.'
END
```
The following image shows the parameters for this procedure in the Report Parameters window. Note that a default parameter value of NY is displayed for the STATE field, and a default parameter value of Web Sales is displayed for the SNAME field:

![Report Parameters](image)

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

The following procedure provides a list of static values that are valid for the SNAME (Store Name) field.

```plaintext
-DEFAULT &STATE=NY
TABLE FILE CENTORD
SUM QTY_IN_STOCK BY STATE BY SNAME BY PRODNAME
ON TABLE SUBHEAD
"Inventory Report"
WHERE STATE EQ '&STATE.2-3 letters for US State.'
WHERE SNAME EQ '&SNAME.(eMart,TV City,Web Sales).Store Name.'
END
```
The following image shows the parameter values for the Store Name parameter as they appear in the Report Parameters window. You can select only one value from the Value drop-down list.

![Report Parameters](image)

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

The following procedure provides a list of values that are valid for the PRODNAME (Product Name) field. This list is dynamically populated with values from the CENTORD data source.

```
-DEFAULT &STATE=NY
TABLE FILE CENTORD
SUM QTY_IN_STOCK BY STATE BY SNAME BY PRODNAME
ON TABLE SUBHEAD
"Inventory Report"
WHERE STATE EQ '&STATE.2-3 letters for US State.'
WHERE SNAME EQ '&SNAME.(eMart,TV City,Web Sales).Store Name.'
WHERE PRODNAME EQ '&PRODNAME.(FIND PRODNAME IN CENTORD).Product Name.'
END
```
The following image shows parameter values for the Product Name parameter as they appear in the Report Parameters window. The Value drop-down list is dynamically populated using data in the CENTORD data source, and you can select only one value from the list.
**Example: Adding a Static Multi-Select List of Parameter Values**

The following procedure provides a list of static values that are valid for the SNAME (Store Name) field.

```
-DEFAULT &STATE=NY
TABLE FILE CENTORD
SUM QTY_IN_STOCK BY STATE BY SNAME BY PRODNAME
ON TABLE SUBHEAD
"Inventory Report"
WHERE STATE EQ '&STATE.2-3 letters for US State.'
WHERE SNAME EQ &SNAME.(OR(eMart, TV City, Web Sales)).Store Name.
END
```

The following image of the Report Parameters window shows the Store Name parameter and its Value drop-down list with multiple selections.
**Example:**  Adding a Dynamic Multi-Select List of Parameter Values

The following procedure provides a list of values that are valid for the PRODNAME (Product Name) field. This list is dynamically populated with values from the CENTORD data source.

```
-DEFAULT &STATE=NY
-DEFAULT &SNAME='TV City'
-DEFAULT &PRODNAME='''120 VHS-C Camcorder 40 X'''

TABLE FILE CENTORD
SUM QTY_IN_STOCK BY STATE BY SNAME BY PRODNAME
ON TABLE SUBHEAD
"Inventory Report"
WHERE STATE EQ '&STATE.2-3 letters for US State.'
WHERE SNAME EQ &SNAME.(OR(eMart,TV City,Web Sales)).Store Name.
WHERE PRODNAME EQ &PRODNAME.(OR(FIND PRODNAME IN CENTORD)).Product Name.
END
```

The following image shows the parameter values for the Product Name parameter as they appear in the Report Parameters window. You can select multiple values from the list or you can choose No Selection if you do not want to perform any data selection test on that field.
Important: When coding a dynamic multi-select list of parameter values using -DEFAULT syntax without storing parameter values in the ReportCaster Repository, use the -DEFAULT value as specified in the procedure. The scheduled request will fail if you do not specify three single quotation marks before and after the parameter value string.

Distribution Options in the Scheduling Wizard

In this section:

- Distributing a Report Using E-mail in the Scheduling Wizard
- Distributing a Report to a Printer in the Scheduling Wizard
- Distributing a Report to Managed Reporting in the Scheduling Wizard
- Distributing a Report to the Report Library in the Scheduling Wizard

The Distribution window enables you to select how you want to distribute scheduled report output. You can distribute the report using one of the following methods:

- **Email.** See *Distributing a Report Using E-mail in the Scheduling Wizard* on page 72.
- **Printer.** See *Distributing a Report to a Printer in the Scheduling Wizard* on page 85.
- **Managed Reporting.** See *Distributing a Report to Managed Reporting in the Scheduling Wizard* on page 87.
- **Library.** See *Distributing a Report to the Report Library in the Scheduling Wizard* on page 90.

**Note:** Using the ReportCaster Server Configuration tool, you can configure the distribution methods that appear in the Scheduling Wizard. If you want the Scheduling Wizard to display different distribution methods, contact your ReportCaster administrator.
Distributing a Report Using E-mail in the Scheduling Wizard

**How to:**

Distribute a Report Using E-mail

Retrieve E-mail Addresses for a Schedule Using Address Search

**Reference:**

Considerations When Distributing a Report Using E-mail

You can distribute a report as an e-mail attachment or within the body of an e-mail message (inline). Distributing a report as an inline e-mail message is particularly useful when the report is distributed to mobile devices, fax machines, or through e-mail systems that do not support attachments. For more information about distributing a report to a fax machine, see *Distributing a Report to a Fax Machine Using E-mail* on page 82.

**Note:**

- The availability of the inline message option when you create a schedule depends on the Inline Report Distribution setting in the ReportCaster Server Configuration tool. See the ReportCaster administrator to enable this option.

- The display of a report that is distributed as an inline e-mail message can be affected by settings in the e-mail client.

**Procedure:**  **How to Distribute a Report Using E-mail**

1. In the Distribution window, select *Email* from the Distribute Reports by drop-down list.
The following image shows the Distribute Reports by Email window, which contains options to specify the e-mail destination of the report, the reply address, and whether the report will be distributed as an e-mail attachment or within the body of an e-mail message (inline).

2. From the Mail Information drop-down list, select Single Address, Distribution File, or Distribution List.

**Note:** If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at symbol) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.

- **Single Address.** In the accompanying text box, type the e-mail address of the single recipient. ReportCaster cannot validate the e-mail address. An incorrect or unresolved address may not be noted in the log file. This depends upon the ability of the SMTP mail server to validate the e-mail address. The SMTP mail server returns undeliverable e-mail messages to the reply address you specify for the schedule.
Tip:

- You can specify multiple e-mail addresses within the Single Address option. Separate each e-mail address with a comma or a semicolon. The e-mail addresses will appear in the To line of a single e-mail when the scheduled output is distributed. Each individual e-mail address can be a maximum of 130 characters as per SMTP specification. The total maximum length of this field is 800 characters.

- Additionally, you can use group mail lists (defined on your mail server) with the Single Address option. Group mail lists enable you to distribute a report or notification to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository. The format of the group mail list is dependent upon the mail server being used. For example, if you are using a Microsoft Exchange Server and your group mail list is defined as #group1, you would enter group1@listdomain in the Single Address field. If the group mail list contains a space within its name, it must be enclosed within quotation marks. For more information, see your mail server administrator.

- You can retrieve e-mail addresses defined in an LDAP data source. For more information, see How to Retrieve E-mail Addresses for a Schedule Using Address Search on page 77.

**Distribution File.** In the accompanying text box, type the full path and file name of an external distribution file. The path and file must be accessible to the ReportCaster Distribution Server.

The external distribution contains comma-delimited records that specify e-mail addresses, burst values, and encryption information. Distribution Files can also be automatically deleted after a schedule runs. For information on Distribution Files, contact your ReportCaster administrator or see the ReportCaster Administration manual.

**Tip:** You can specify multiple e-mail addresses within a single record of an external distribution file. For more information, see the ReportCaster Development and Library Content manual.
Distribution List. The following image shows the Select Address drop-down list.

![Distribution List](image)

From the Select Address drop-down list, select a Distribution List. Note that this drop-down list displays all e-mail Distribution Lists that you are the owner of, and all public e-mail Distribution Lists. For more information about creating a Distribution List, see *Working With Distribution Lists in the HTML User Interface* on page 101.

3. In the From field, type any value (for example, the name of the person creating the schedule). ReportCaster does not require this field, but your e-mail system may require it.

4. In the Reply Address field, type a valid e-mail address. If recipients reply to the e-mail, their messages are sent to this address. If your e-mail system is unable to deliver the content, the undeliverable output message is also returned to this address. ReportCaster requires this field.

   **Tip:** You can retrieve e-mail addresses defined in an LDAP data source. For more details, see *How to Retrieve E-mail Addresses for a Schedule Using Address Search* on page 77.

5. In the Subject field, type the text you want to appear in the e-mail subject line. ReportCaster does not require this information, but your e-mail system may require it. If you do not type an entry in this field, the text that was entered in the schedule Description field will appear in the subject line of the e-mail.

   When creating a schedule, you can place multiple parameters and burst values from the scheduled procedure in an e-mail subject line. This enables the subject to be created dynamically in order to personalize e-mails to recipients. Parameters referenced in the subject line must be stored with the schedule information in the ReportCaster tables.

   Parameters must be specified in the format `&parmname` (where `parmname` is the name of the parameter). Burst values must be specified using the syntax `%BURST`.

   **Note:**

   - The parameter name cannot also be the name of an existing WebFOCUS procedure. You can specify an unlimited number of parameters.

   - If you have multiple burst values in a Distribution List, only the first value sent to the ReportCaster Distribution Server is included in the subject.

   For an example of specifying parameters and burst values in an e-mail subject line, see *Specifying Parameters and Burst Values in an E-mail Subject Line* on page 77.

6. In the Save As Report Name field, type a name for the report to be distributed.
By default, this value is populated as descname.ext, where descname is the descriptive name of the Managed Reporting procedure, and ext is the extension for the format you selected, for example, Regional Sales.htm. If the report is burst, it is distributed as Regional Sales_burstvalue.htm. If you decide to change the default value, and you specify an extension, be sure to specify the extension of the format you selected. If you do not specify an extension, ReportCaster automatically uses the extension of the format you selected. If you are distributing the report to the Report Library, the category name under which the report is stored is the domain name.

7. Specify whether you want to distribute the report as an e-mail attachment or within the body of the e-mail message (inline). (The availability of the inline option depends on your ReportCaster configuration.)

- If you want to distribute the report within the body of an e-mail message, select the Select report as inline message option.

  When distributing to PDA or Blackberry, check the capabilities of the device. If the device does not support attachments, use the inline option. Information Builders recommends using the WP format.

- If you want to distribute the report as an e-mail attachment, select the Send report as attachment option. If you want to send an optional message within the body of your e-mail, type the message in the Enter message for body of email text box. The message can contain a maximum of 256 characters.

8. To continue to the Settings window, click Next. For more information, see Priority, Notification, and Zip File Options on page 96.

Note: For information on the e-mail distribution method, see Considerations When Distributing a Report Using E-mail on page 84.
Example: Specifying Parameters and Burst Values in an E-mail Subject Line

The following image shows a schedule that specifies burst values and multiple parameters in the e-mail subject line.

This schedule will produce an e-mail similar to that shown in the following image.

Procedure: How to Retrieve E-mail Addresses for a Schedule Using Address Search

The Address Search options only appear if your ReportCaster administrator has set the Email LDAP Enabled parameter to YES in the ReportCaster Server Configuration tool. If the Address Search options do not appear, contact your ReportCaster administrator.

To retrieve e-mail addresses for a schedule using Address Search:

1. While creating or editing a schedule, click the Address Search icon that appears next to any e-mail address field.
The following image shows action buttons, input fields, and drop-down lists in the Address Search pane.

2. In the Search Pattern fields, type the search string. You can search using the following combinations:

- **Last Name** [Equals | Starts with | Ends with | Contains]
- **First Name** [Equals | Starts with | Ends with | Contains]
- **Email** [Equals | Starts with | Ends with | Contains]
For example, if you type S after the Last Name Starts with field, as shown in the following image, ReportCaster retrieves all last names that start with the letter S.

**Search pattern**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum retrieval</td>
<td>300</td>
</tr>
<tr>
<td>Last Name starts with</td>
<td>S</td>
</tr>
</tbody>
</table>

**Note:** By default, ReportCaster retrieves a maximum of 300 e-mail addresses. You can change this default value for the duration of your session. However, if you log out and log back in, the Address Search window displays the default value of 300. ReportCaster allows the retrieval of a maximum of 500 e-mail addresses. If you suspect your search will return more than 500 records, you should refine your search criteria.

3. Click **Search**. ReportCaster retrieves the specified names from the LDAP data source.
The following image shows retrieved search data under the Name and Email Address column headings in the Address Search pane.

4. Select an e-mail address you want to use in your schedule, and then click the field (for example, Reply) for which you want to insert the e-mail address. Repeat this process if you want to select multiple e-mail addresses.

**Note:**

- Alternatively, double-click an e-mail address to automatically insert it into the field for which you clicked the Address Search icon.

- If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at symbol) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.
The following image shows a highlighted data selection under the Name and Email Address column headings in the Address Search pane.

5. Click OK to insert the e-mail address(es) into your schedule.

The following image shows that the e-mail addresses have been added to the Reply Address field.
By default, ReportCaster separates multiple e-mail addresses with a comma. The e-mail addresses appear in the To line of a single e-mail when the scheduled output is distributed.

**Note:** Repeat these steps if you want to change your search criteria or insert additional e-mail addresses into your schedule. If you insert additional e-mail addresses while the original e-mail addresses are selected, the new e-mail addresses replace the old ones. If you position your cursor after the original e-mail addresses, the new e-mail addresses are appended to the old ones, separated by a comma. However, be aware that the maximum number of characters is 800 when inserting addresses.

**Example:** Distributing a Report to a Fax Machine Using E-mail

To distribute an inline e-mail message to a fax machine, you must register your e-mail address with a third-party e-mail distribution provider. The features offered by providers, (such as supported area codes and file formats), in addition to requirements on the structure of e-mail parameter values, may vary. It is important that you select a provider whose features are compatible with ReportCaster.

The following example shows how to distribute a report directly to a fax machine. The e-mail address, john_doe@ibi.com, was registered with the e-mail distribution provider called emfax.com. During the processing of the request, ReportCaster generates the scheduled report output and then distributes it using the e-mail address of emfax.com. The reply address specified in ReportCaster is the registered e-mail address that is validated by emfax.com. If the e-mail address is valid, emfax.com distributes the report to the fax number 12129999999. The validation of the registered e-mail address is performed by emfax.com, not by ReportCaster.

**Note:** The syntax used in this illustration is specific to this example. The required syntax for your provider may be different.

1. On the Distribution window, select Email from the Distribute Reports by drop-down list.
The following image shows the Distribute Reports by Email window, which contains fields, drop-down lists, and option buttons that enable you to specify the destination(s) for the scheduled report, an e-mail address to which report recipients can reply, the name of the report to be distributed, and whether you want to distribute the report as an e-mail attachment or inline within the body of an e-mail message.

2. From the Mail Information drop-down list, select **Single Address**.

   In the accompanying text box, type the e-mail address to be used by the e-mail provider according to their requirements. In this example, it is `phone-number@emfax.com` or `12129999999@emfax.com` (where `emfax.com` is the name of your e-mail provider).

   **Note:** You can also select a Distribution List or a Distribution File. However, be sure that you use the syntax required by your provider.
3. In the From field, type any value (for example, the name of the person creating the schedule). ReportCaster does not require this field, but your e-mail system or the e-mail provider may require it.

4. In the Reply Address field, type your registered e-mail address. If your e-mail system is unable to deliver the content, the undeliverable output message is returned to this address. ReportCaster requires this field.

5. In the Subject field, type the text you want to appear in the e-mail subject line. ReportCaster does not require this information, but your e-mail system or e-mail provider may require it.

6. In the Report Name field, type the name of the report to be distributed.

7. Select the Select report as inline message option button.

   **Note:** You cannot distribute an e-mail attachment to a fax machine.

8. To continue to the Settings window, click Next at the bottom of the Distribution window. For more information, see Priority, Notification, and Zip File Options on page 96.

**Reference:** Considerations When Distributing a Report Using E-mail

If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the section of the e-mail address following the at (@) sign) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients. The Distribution Server will not deliver output to an e-mail address whose domain is not on this list. Instead, the schedule will fail and an error message will be written to the ReportCaster log.

ReportCaster transfers e-mail asynchronously to your e-mail system. The delivery time depends upon your e-mail system.

**Exchange Mail Server Considerations:**

- If you do not see a From value that is specified in the schedule information for the e-mail you receive in the e-mail client inbox, then this is due to their mail server configuration. For more information on how to control this setting for a Microsoft Exchange Server, see the following URLs:
  - [http://support.microsoft.com/default.aspx?scid=kb;en-us;288635](http://support.microsoft.com/default.aspx?scid=kb;en-us;288635)
  - [http://support.microsoft.com/default.aspx?scid=kb;en-us;242301](http://support.microsoft.com/default.aspx?scid=kb;en-us;242301)

Alternatively, you can contact Microsoft customer support for assistance. If you are using a mail server other than a Microsoft Exchange Server, refer to the vendor documentation or contact their customer support for assistance.
When distributing a report to an Exchange Server, attachment names have a .txt extension added to WP and DOC format output. This occurs because WP and DOC formats are not mapped to a standard MIME type. The Exchange Server interprets WP and DOC output as a text/plain MIME type and adds the .txt extension to the end of the file name. For example, hold.wp.txt or hold.doc.txt.

Exchange Server individual recipient names (person@company.com) and Exchange Server-defined distribution lists (list@company.com) can be specified in ReportCaster Distribution Lists. However, Exchange Server user-defined distribution lists cannot be referenced in a ReportCaster Distribution List. They are defined internally on the users machine. The ReportCaster Distribution List is parsed by the Exchange Server and not by the mail client. Since a ReportCaster Distribution List is parsed by the Exchange Server, when an external server submits an Exchange Server distribution list, it must contain the proper prefix and the proper domain (which is prefaced by an at (@) sign). Consult your Exchange Server administrator for these values.

**CC:Mail Considerations:**

When you distribute ReportCaster generated e-mail attachments greater than 20K in size to users of cc:Mail, cc:Mail renames the attachment textitm.txt, ignoring the file name and extension supplied by the user. This change affects DOC, HTML, and WP formats on UNIX and Windows platforms. However, despite the naming convention issue, the attachments contain the correct output and can be viewed if the attachment is saved to disk with the correct extension.

### Distributing a Report to a Printer in the Scheduling Wizard

**How to:**

Distribute a Report to a Printer

This section explains how to schedule a report to a printer. The report formats that support printing are DOC, PDF (when you configure ReportCaster to enable PDF printing and the printer has the appropriate driver), PS, and WP.

**Procedure:**  
**How to Distribute a Report to a Printer**

1. On the Distribution window, select *Printer* from the Distribute Reports by drop-down list.
2. From the Distribution Information drop-down list, select Single Printer or Distribution List.

- **Single Printer.** Specify the printer using the following format.

  \[ \text{queue}@\text{printserver} \]

  where:

  \[ \text{queue} \]

  Is the name of the printer queue.

  \[ \text{printserver} \]

  Is the host name or IP address of the printer.

  Although ReportCaster supports specifying only the host name (or IP address), we recommend that you specify both the printer queue and the host name (or IP address) when distributing ReportCaster output to a printer. ReportCaster differentiates between the printer queue and the printer host name (or IP address) when the at sign (@) is present as the separator. The maximum length of this field is 800 characters.
Distribution List. The following image shows the Select Address drop-down list.

From the Select Address drop-down list, select a Distribution List. Note that this drop-down list displays all printer Distribution Lists that you are the owner of, and all public printer Distribution Lists. For more information about creating a Distribution List, see Working With Distribution Lists in the HTML User Interface on page 101.

Note: If the printer you specify is unrecognized, the following message is recorded in the log file when the ReportCaster Distribution Server tries to distribute the report:

Cannot connect to specified printer

3. To continue to the Settings window, click Next at the bottom of the Distribution window. For more information, see Priority, Notification, and Zip File Options on page 96.

Distributing a Report to Managed Reporting in the Scheduling Wizard

How to:
Distribute a Report to Managed Reporting

Reference:
Considerations When Distributing a Report to Managed Reporting

Tip: Information Builders recommends distributing scheduled output to the Report Library rather than to Managed Reporting. The Report Library includes secure access to library content, the ability to save multiple versions of the same report output, and the ability to set an expiration date or keep a specified number of versions.

When you select the Managed Reporting distribution method, the report is distributed to Managed Reporting as a My Report. Therefore, you cannot distribute Standard Reports back to Managed Reporting. The report is available to other users who have access to the Domain. The report is stored in the user directory in the Managed Reporting Repository. Since ReportCaster does not distinguish subfolders, it distributes the reports to the highest level folder regardless of the folder hierarchy within Managed Reporting.

ReportCaster can be configured to distribute scheduled output to a new folder each time the schedule runs, or to distribute the output to the same folder each time it runs. If a new folder is created each time the schedule runs, the folders will have a time stamp to distinguish them. If a folder is reused each time the schedule runs, each output in the folder will have a time stamp.
**Procedure: How to Distribute a Report to Managed Reporting**

1. In the New Schedule Distribution window, select *Managed Reporting* from the Distribute Reports by drop-down list.

   The following image shows the Distribute Reports by Managed Reporting window, which contains the Folder Name field where you must specify the Managed Reporting folder name where you will distribute the report.

   ![Distribution Window](image)

2. In the Folder Name field, type the job description of the scheduled report. This entry must not exceed 90 characters.

   This is will be the name of the folder(s) in Managed Reporting that contain the output of the schedule when it runs.

3. To continue to the Settings window, click Next at the bottom of the Distribution window. For more information, see *Priority, Notification, and Zip File Options* on page 96.
Considerations When Distributing a Report to Managed Reporting

When distributing a report to Managed Reporting, consider the following:

- You cannot distribute Standard Reports back to Managed Reporting.
- Multiple Managed Reporting reports are distributed to the same folder if they both run at the same time. Information Builders recommends assigning each Managed Reporting report a different start time.
- The PostScript (PS) format is not supported for this distribution method.
- When ReportCaster is configured with a WebFOCUS Client on a z/OS UNIX Web server and a WebFOCUS Reporting Server on z/OS, Managed Reporting distribution is not supported for EXCEL or WK1 format. This limitation is due to an EBCDIC to ASCII translation problem. This problem does not occur when the WebFOCUS Client is installed on UNIX (AIX, HP-UX, Sun) or Windows platforms. We recommend using the EXL2K format instead.
- When distributing a report to Managed Reporting with a format of COMMA, the following information must be added to the /client76/wfs/etc/mime.wfs file to open the output in Excel:

  `<ADDTYPE> .csv  application/vnd.ms-excel binary yes yes no yes no`

- When distributing a report to Managed Reporting, you can only drill-down to another report if it is a procedure on the WebFOCUS Reporting Server. There is currently no support for drill-down functionality to Managed Reporting procedures.
- If you are distributing a large report to Managed Reporting, take into consideration the amount of memory configured on your Application Server. The report output returned to Managed Reporting will be stored in memory by the WebFOCUS Client (Servlet) and then written to the Managed Reporting Repository. If there is not enough memory available on your Application Server, the ReportCaster servlet trace file will contain the following message:

  `return code not found. See your application server trace for information.`

  The log report will include the following message:

  `Unable to distribute to Managed Reporting: return code not found`

  The problem can be resolved by one or more of the following ways:

  - Increase the memory available on your Application Server. Contact your ReportCaster administrator.
  - Modify your report so that it returns a smaller report or less output.
  - Limit the number of scheduled jobs distributing to Managed Reporting during the same time period.
Distributing a Report to the Report Library in the Scheduling Wizard

How to:
Distribute a Report to the Report Library

Reference:
Changing the Burst Option When Distributing to the Library
Considerations When Limiting Distribution to Values in an Access List

When you create a schedule, you can specify to distribute report output to the Report Library, a storage and retrieval facility. When distributing a report to the Report Library, you can send an e-mail informing users of its availability and provide the URL to the content in the library.

The Report Library includes secure access to library content, the ability to save multiple versions of the same report output, and the ability to set an expiration date or keep a specified number of versions. The Report Library is only available to ReportCaster users who have been granted library privileges.

Note: When a report is distributed to the Report Library, the Log Report will include the report ID and the report version number. This enables you to confirm which reports and report version were distributed to the Library.

For more information about the Report Library, see the ReportCaster Development and Library Content manual.

Procedure: How to Distribute a Report to the Report Library

1. In the New Schedule Distribution window, select Library from the Distribute Reports by drop-down list.
The following image shows the Distribute Reports by Library window, which contains fields, drop-down lists, and option buttons that enable you to specify which users can view the report in the library, and how long to store the report in the library. You can also optionally specify e-mail information to alert users with appropriate access rights that the report is available in the library, and provide direct access to the report.

2. Optionally, specify a category in the Library where the report will be distributed. To do this, select the Category in Library option and type the name of an existing or new Library category.

   **Note:** By default, the report is stored in the Library under a category that is named with the Managed Reporting domain of the report.

3. Optionally, select the **Send email after saving report to library** check box if you want to send an e-mail message to users with access rights to the content in the Report Library. Any user with access to this report receives this e-mail message, which contains the URL address needed to access the scheduled report output.
Note:

- ReportCaster administrators can limit to whom the Email for library option is available. For details, see Configuring ReportCaster the ReportCaster Administration manual.

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

Selecting the Send email after saving report to library check box activates the following fields:

- **From (optional).** This can be any value (for example, the name of the person creating the schedule). ReportCaster does not require this, but your e-mail system may require it.

- **Reply Address (required).** The e-mail address of the sender. If report recipients reply to the notification, their messages are sent to this address. If your e-mail system is unable to deliver a report, the undeliverable report message is also returned to this address.

- **Subject (optional).** Type the text you want to appear in the subject line of the e-mail message.

- **Enter message for body of email (optional).** Type an e-mail message in the text box. You can overwrite the default message.

**Note:** When a Managed Reporting report (Standard Report or My Report) is distributed to the Report Library and Public distribution is specified, the library e-mail is sent only to the Managed Reporting users authorized to access the Domain from which the report originated. For Access List distribution, there is no filtering or validation done for the library e-mail, as it is the responsibility of the Access List owner to maintain the list so that it only includes authorized users. Users who receive a library e-mail who are not authorized to view the report according to Managed Reporting security, cannot view the report in the library.

4. From the Access Options drop-down list, select one of the following option buttons to specify which users can view the report in the library. Depending on what you previously specified, these users may also receive an e-mail notification when the report is distributed to the library.

- **Owner.** Only the owner of the schedule has access to the report in the library. This is the default value.

- **Public.** All users with access to the Report Library can view the report in the library.
Access List. Only the users or groups defined in the Access List, and the owner of the schedule, can view the report.

For more information about creating a Library Access List, see the ReportCaster Development and Library Content manual.

Note: ReportCaster administrators can limit the Access Options that appear on the Distribution window. For details, see Configuring ReportCaster in the ReportCaster Administration manual.

5. Optionally, select the Limit distribution to values in Access List check box. When you select this check box, only the burst values specified in an Access List are distributed to the Report Library. This option is used in combination with the Enable Report Bursting option (located in the Report Information window) and is only enabled when the Access List option is selected. For more information, see Considerations When Limiting Distribution to Values in an Access List on page 95.

6. From the Expiration of Reports in Library drop-down list, select one of the following options:

- **Never Expire.** The report remains in the Report Library until it is manually deleted by the owner or ReportCaster administrator.

- **Expire after.** If you select this option, specify a number and then select one of the following options:
  - version(s). The Report Library stores the output for the top number of versions specified. For example, if you specify 3 versions and the current version is 7, then versions 7, 6, and 5 are stored in the library. However, if you delete version 6, then only versions 7 and 5 are stored in the library. If you then distribute version 8 to the library, only version 8 and 7 are stored in the library since version 6 was deleted and version 5 is not among the top 3 versions.
  - day(s). The Report Library stores the report for the number of day(s) specified.
  - week(s). The Report Library stores the report for the number of week(s) specified.
  - month(s). The Report Library stores the report for the number of month(s) specified.
  - year(s). The Report Library stores the report for the number of year(s) specified.

Note: ReportCaster automatically purges expired reports one hour after the scheduled Log Purge Time. The default Log Purge Time is 1:00 A.M., therefore, the default library purge time is 2:00 A.M. each day.

7. To continue to the Settings window, click Next at the bottom of the Distribution window. For more information, see Priority, Notification, and Zip File Options on page 96.
**Note:** When distributing a report to the Report Library, you can only drill-down to another report if it is a procedure on the WebFOCUS Reporting Server. Currently, no support exists for drill-down functionality to Managed Reporting procedures.

**Reference:** Changing the Burst Option When Distributing to the Library

Enabling or disabling the burst option in a schedule being distributed to the library is not recommended because burst and non-burst reports appear differently in the library. Rather than editing your schedule and changing this option, we recommend creating a new schedule, as follows:

1. Clone your existing library schedule (see Cloning a Schedule on page 117) and specify a unique name for the new schedule job description.

2. Edit the new schedule as follows:
   a. Select the *Enabled* check box to activate the schedule.
   b. Enable or disable the burst option, as needed.
   c. Click Save to save the schedule.

3. Optionally, delete the original schedule if it is no longer needed and evaluate whether you need the existing content in the library.

**Note:**

- When ReportCaster distributes the new schedule content to the library, a new folder is created for the library content. To delete the original folder in the library, you must delete all versions of the report within the folder.
If you disable the burst option for a burst schedule and you do not delete the content of the schedule in the library before making the change, the subsequent output will appear in a separate folder with the same report name as the burst report folder. The version numbering in the new folder picks up where the burst value versions ended. Version numbers will continue sequencing between burst and non-burst reports each time you enable and disable bursting. The following image shows an example of burst and non-burst versions of the same report in the Report Library.

![Library Reports Table]

**Considerations When Limiting Distribution to Values in an Access List**

When limiting Report Library distribution to values in an Access List, note the following:

- Burst values not specified in the Access List are not distributed to the library.
- This option does not alter the running of the procedure or the retrieval of records from the data source, but simply filters the burst report sections returned from the WebFOCUS Reporting Server based on the burst values specified in the Access List.

- When you enable the Enable Report Bursting option and the Limit distribution to values in Access List option is not enabled, ReportCaster continues to distribute all burst report sections returned by the WebFOCUS Reporting Server to the Report Library.

- Upon saving the schedule, validation is performed to confirm that the schedule has the Enable Report Bursting option enabled. If it has not been selected, a message appears reminding you that you must enable the Enable Report Bursting option to limit distribution to values specified in an Access List, and the schedule options are redisplayed.

- The log file contains information specifying that the Limit distribution to values in Access List option was selected. A separate log entry appears for each Access List burst value specifying whether a report section for that burst value was distributed to the library.
Priority, Notification, and Zip File Options

**How to:**
Specify Priority and Notification Options

**Reference:**
Notification and Log Information for Unavailable Options

After you have specified the distribution options and click Next, the Settings window opens. This window provides options to specify the priority level of the schedule, select notification options, and when the distribution is set to e-mail, determine if the report will be contained in a Zip file. The following image shows the priority level drop-down list and the notification options (the mail information fields related to notification), the Zip file option, and the action buttons that you can click to complete the schedule.
**Procedure:** How to Specify Priority and Notification Options

Specify the following information in the Settings window:

1. From the Priority Level for the Job drop-down list, select the priority for running the job. The highest priority is 1 and the lowest is 5. The default priority is 3. The ReportCaster Distribution Server queue sorts scheduled jobs by priority and then by the time the schedule is set to run. If multiple jobs share the same priority and time, ReportCaster arbitrarily schedules the jobs.

2. From the Notification will be sent out drop-down list, you can send notification of the schedule status to a specified e-mail address by selecting one of the following options:

   - **Never.** ReportCaster does not send notification of the schedule status under any circumstances. If you select Never, you can proceed to Step 7.

     The default value is Never. Contact your ReportCaster administrator if you want the Scheduling Wizard to display a different default value.

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

   - **Always.** The specified user is always notified when the schedule runs.

3. In the Reply Address field, type the e-mail address of the sender. If report recipients reply to the report sender, their messages are sent to this address. If your e-mail system is unable to deliver a report, the undeliverable report message is also returned to this address.

   **Note:** If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at (@) sign) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.

   **Tip:** You can retrieve e-mail addresses defined in an LDAP data source. For more details, see *How to Retrieve E-mail Addresses for a Schedule Using Address Search* on page 77.

4. In the Subject field, type the text you want to display in the e-mail subject line. There is a limit of 255 alphanumeric characters.

5. In the Brief Notification To field, type the e-mail address to which you want a brief notification sent. A brief notification sends the ID and job description of a schedule, as well as messages about the schedule (such as *Completed Successfully*). Note that there is no syntax error checking for this field.

   **Note:** If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at (@) sign) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.
Tip:

- We recommend using the Brief Notification option when you are sending notification to devices that have limited memory, such as pagers and cell phones. If you want to notify multiple recipients, you can use group mail lists defined on your mail server provided that you append an at (@) sign followed by a valid domain.

- You can retrieve e-mail addresses defined in an LDAP data source. For more information, see "How to Retrieve E-mail Addresses for a Schedule Using Address Search" on page 77.

6. In the Full Notification To field, type the e-mail address to which you want a full notification sent. A full notification sends a complete log report as an e-mail attachment. Note that there is no syntax error checking for this field.

Note: If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at (@) sign) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.

Tip:

- If you want to notify multiple recipients, you can use group mail lists defined on your mail server provided that you append an at (@) sign followed by a valid domain.

- You can retrieve e-mail addresses defined in an LDAP data source. For more information, see "How to Retrieve E-mail Addresses for a Schedule Using Address Search" on page 77.

7. If the distribution method is by e-mail, then you have the option to Zip the report output. To do this, select "Add Reports to Zip File", then type a name for the file in the Zip File Name field.

8. Click Save. The Created New Schedule Successfully message appears.

9. Click Close to complete the schedule and exit the Scheduling Wizard.

Reference: Notification and Log Information for Unavailable Options

When schedules with unavailable Task Types or distribution methods are not permitted to run, error notification is triggered and information is included in full and brief notifications and in the log report that your ReportCaster administrator or the owner of the schedule must change the unavailable Task Types or distribution methods in the schedule.

When schedules with unavailable Task Types or distribution methods are permitted to run, normal job execution occurs and a message appears in the log report indicating that your ReportCaster administrator is allowing existing schedules using the unavailable Task Types or distribution methods to run.
Running a Schedule Without Saving It

When creating a schedule using the Scheduling Wizard, you can dynamically run the schedule before saving it provided you specify all the required information. Clicking the Run button runs and distributes the report immediately but does not save the schedule. This option is useful for test purposes.

Optionally, you can enable Schedule or Schedule and Report tracing on a schedule-by-schedule basis when dynamically running the schedule on demand. When you run the schedule, the Schedule Trace setting specified in the configuration file appears along with options that enable you to change the setting for this particular schedule, as shown in the following image.

Select the trace option (for example, Schedule) for this schedule and click Yes. The following message appears:

```
Procedure ran successfully
```

Click Close.

Reference: Additional Scheduling Wizard Option Buttons

In addition to the Next and Save option buttons that must be used when creating and saving a schedule, you can select the following option buttons in the Scheduling Wizard:

- **Back.** Takes you to the previous window.
Running a Schedule Without Saving It

- **Cancel.** Cancels the schedule request.
- **Help.** Opens the online Help.
This section explains how to create and maintain Distribution Lists using the HTML User Interface. When creating a schedule, you can distribute report output to a single recipient or several recipients. If you are creating a schedule to be distributed to several recipients, you may want to create a Distribution List. You can assign a Distribution List consisting of multiple recipients to several schedules.

If the entire report is not relevant to those receiving it, you can specify sections of the report to be sent using the burst option. Each person on your Distribution List can receive different sections of the report depending on the individual burst values you specify.

If you are distributing to the Report Library, you must create an Access List instead of a Distribution List. For more information, see the ReportCaster Development and Library Content manual.

**Topics:**
- Accessing the Distribution or Address Book List Interface
- Creating a Distribution or Address Book List
- Editing a Distribution List
- Deleting a Distribution List
Accessing the Distribution or Address Book List Interface

A Distribution List is an easy way to distribute reports or content to multiple recipients by citing a list that contains the individual recipients. You can create a series of lists to target specific groups of people in an organization. You can reuse Distribution and Address Book Lists as often as needed. Additionally, you can assign Distribution and Address Book Lists to multiple schedules.

From the ReportCaster HTML User Interface, click the Distribution List option. All Distribution Lists to which you have access (public lists and your own private lists) appear. Each Distribution List contains columns specifying its properties. Sorting is available for each column by clicking the column heading. In addition, the interface includes toolbar icons that enable you to perform tasks on each Distribution List.

The following image shows the Distribution List pane of the ReportCaster HTML User Interface, with the available options and data fields.

From the Distribution List pane and the Address Book tab, you can:

- Create a new Distribution List. For more information, see Creating a Distribution or Address Book List on page 103.
- Edit the properties of a Distribution List. For more information, see Editing a Distribution List on page 110.
- Delete a Distribution List. For more information, see Deleting a Distribution List on page 111.
- Refresh the window so that it contains the latest Distribution List information.
- Open the online Help.
Creating a Distribution or Address Book List

**How to:**
Create a Distribution List
Retrieve E-mail Addresses for a Distribution List Using Address Search

**Reference:**
Considerations When Creating a Printer Distribution List

When you create a Distribution List, you specify the name of the Distribution List, the distribution method (e-mail or printer), the destinations to which the report is distributed, the optional burst values, and whether public or private access is applied.

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

1. From the Distribution List pane, click **New**.
   
The following image shows the available options, input fields, and drop-down lists in the Distribution List pane.

   ![Distribution List Pane](image)

2. In the Distribution List field, specify a name for your Distribution List (for example, Sales Team).

3. From the Access drop-down list, select **Public** (default) or **Private**.
Only the owner and ReportCaster administrators can view a Private Distribution List, whereas every ReportCaster user can view a Public Distribution List.

4. From the Distribution Method drop-down list, select Email (default) or Printer.

5. If you are bursting a report, specify individual sort values in the Burst Value field. The burst value is case-sensitive, has a maximum of 75 characters, and, when used with keywords, can contain wild cards and Java regular expressions.

The burst value for a tabular report is the first BY field, which is the primary sort field. The burst value for a graph report is the second BY field. The burst value specified must exist in the data source that the scheduled job reports against.

For more information, see the ReportCaster Development and Library Content manual.

6. In the Destination field, specify the destinations to which the report is distributed:

- If you selected Email as the distribution method, type the e-mail addresses of the recipients (for example, chuck_hill@ibi.com). Be careful typing this information because there is no edit checking.

  **Note:** If the Email Delivery, Restrict Email Domains option is set to yes in the ReportCaster Server Configuration tool, then only those e-mail domains (the portion of the e-mail address following the at symbol) listed in Allowed Email Domains (also in the Server Configuration tool) are valid e-mail recipients.

- If you selected Printer as the distribution method, specify the printer using the following format

  queue@printserver

  where:

  **queue**
  
  Is the name of the printer queue.

  **printserver**
  
  Is the host name or IP address of the printer.

  Although ReportCaster supports specifying only the host name (or IP address), we recommend that you specify both the printer queue and the host name (or IP address) when distributing ReportCaster output to a printer. ReportCaster differentiates between the printer queue and the printer host name (or IP address) when the at sign (@) is present as the separator.

  You can specify a maximum of 800 characters within a single Destination line.
Note:

- If you specify burst values, be sure to match the specified e-mail or printer destinations with the appropriate burst values.
- The maximum number of e-mail addresses or printers you can specify in a Distribution List is 9999.
- If you are specifying more than ten e-mail addresses or printers in your Distribution List, click Insert to insert additional rows.
- You can specify multiple e-mail addresses within a single Destination field. For more information, see the ReportCaster Development and Library Content manual.
- You can retrieve e-mail addresses defined in an LDAP data source. For more information, see How to Retrieve E-mail Addresses for a Distribution List Using Address Search on page 105.
- For more information about creating a printer Distribution List, see Considerations When Creating a Printer Distribution List on page 109.

7. Click Save to save the Distribution List and return to the Distribution List pane.

The following image shows that the Distribution List you created (Sales Team) is added to the list of available Distribution Lists.

<table>
<thead>
<tr>
<th>Distribution List</th>
<th>Access</th>
<th>Distribution Method</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Analysts</td>
<td>Public</td>
<td>Email</td>
<td>rcanalytical</td>
</tr>
<tr>
<td>Sales Team</td>
<td>Public</td>
<td>Email</td>
<td>rcanalytical</td>
</tr>
</tbody>
</table>

Procedure: How to Retrieve E-mail Addresses for a Distribution List Using Address Search

The Address Search options appear automatically if your ReportCaster administrator has set the Email LDAP Enabled parameter to YES in the ReportCaster Server Configuration tool. If the Address Search options do not appear, contact your ReportCaster administrator.
The following image shows the Address Search pane that appears to the right of the Distribution List pane while creating or editing a Distribution List.

1. Type the search string. You can search using the following combinations:
   - Last Name [Equals | Starts with | Ends with | Contains]
   - First Name [Equals | Starts with | Ends with | Contains]
   - Email [Equals | Starts with | Ends with | Contains]

   For example, if you type S after the Last Name Starts with field, as shown in the following image, ReportCaster retrieves last names that start with the letter S. The Address Search pane also contains action buttons, input fields, and drop-down lists.

   **Search pattern**
   - Maximum retrieval: 300
   - Last Name [Starts with] S
   - Search

   **Note:** By default, ReportCaster retrieves a maximum of 300 e-mail addresses. You can change this default value for the duration of your session. However, if you log out and log back in, the Address Search pane displays the default value of 300. ReportCaster enables the retrieval of a maximum of 500 e-mail addresses. If you suspect your search will return more than 500 records, you should refine your search criteria.

2. Click Search.

   ReportCaster retrieves the specified names from the LDAP data source.
The following image shows retrieved search data under the Name and Email Address column headings in the Address Search pane.

3. Select an e-mail address you want to use in your Distribution List.
The following image shows a highlighted data selection under the Name and Email Address column headings in the Address Search pane.

4. Click Insert to insert the e-mail address into your Distribution List.

   **Note:** Alternatively, you can double-click an e-mail address to automatically insert it into your Distribution List.

5. Repeat Step 3 and Step 4 if you want to select and insert additional e-mail addresses into your Distribution List.
The following image shows selected Email Address data transferred from the Address Search pane on the right to the Distribution List pane on the left.

By default, ReportCaster separates multiple e-mail addresses with a comma. The e-mail addresses appear in the To line of a single e-mail when the scheduled output is distributed.

**Note:** Repeat these steps if you want to change your search criteria or insert additional e-mail addresses into your Distribution List. If you insert additional e-mail addresses while the original e-mail addresses are selected, the new e-mail addresses replace the old ones. If your cursor is positioned after the original e-mail addresses, the new e-mail addresses are appended to the old ones, separated by a comma. However, be aware that the maximum number of characters is 800 when inserting addresses.

**Reference:** **Considerations When Creating a Printer Distribution List**

When printing on Windows and UNIX, ReportCaster uses the lp (line printer) protocol, which runs on top of TCP/IP to communicate to printers. lp printing with the Novell Client is not supported. For printing on z/OS, ReportCaster uses the lpr (line printer remote) UNIX command, which has special options on the mainframe for sysout dest and class.

When creating a printer Distribution List on z/OS, the printer should be a SYSOUT class (such as A) routed to a printer. For example, you can indicate that scheduled report output be distributed to a specific network printer by typing the following printer identification

```
A DEST printserver
```

where:

```
A
```

Is the SYSOUT class to be assigned to a network printer.
Editing a Distribution List

**How to:**
Edit a Distribution List

From the Distribution List pane in the ReportCaster HTML User Interface, you can edit your own previously created Distribution Lists at any time by performing the following steps.

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

1. Select the Distribution List you want to edit.
   
The following image shows a selected Distribution List named Sales Team.

   ![Distribution List Table]

2. Click **Open**.
   
The following image shows the properties of the selected Distribution List.

   ![Distribution List Properties]

3. You can perform the following functions:

   ```plaintext
   joe_smith@ibi.com
   chuck_hill@ibi.com
   ```
Copy the Distribution List by changing its name. The original Distribution List remains unaltered.

Change the values of already existing entries. For example, you can make the Distribution List Private instead of Public or you can change the destinations.

Insert additional Burst values and Destinations by clicking Insert. A new row appears where your cursor is positioned, enabling you to insert additional entries.

Delete Burst Values and Destinations by selecting the row and clicking Delete.

4. After you have made the necessary changes to your Distribution List, click Save to save the changes.

Deleting a Distribution List

How to: Delete a Distribution List

From the Distribution List pane in the ReportCaster HTML User Interface, you can delete your own Distribution Lists at any time by performing the following steps.

Procedure: How to Delete a Distribution List

1. Select the Distribution List you want to delete.

The following image shows a selected Distribution List named Sales Team.

<table>
<thead>
<tr>
<th>Distribution List</th>
<th>Access</th>
<th>Distribution Method</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Analyst</td>
<td>Public</td>
<td>Email</td>
<td>rcanalytical</td>
</tr>
<tr>
<td>Sales Team</td>
<td>Public</td>
<td>Email</td>
<td>rcanalytical</td>
</tr>
</tbody>
</table>

2. Click Delete. A message appears asking for confirmation to delete the list. Click OK to delete the Distribution List.
Deleting a Distribution List
Maintaining a Schedule Using the HTML User Interface

The ReportCaster Interface, accessed from either Dashboard (select Tools, then ReportCaster) or the WebFOCUS Welcome Page (ReportCaster Development), provides the same functionality as the ReportCaster HTML User Interface with a different look and feel. This section explains the options and features of maintaining a schedule from the ReportCaster HTML User Interface perspective. The options and features also work with the current ReportCaster Interface.

Both interfaces provide access to your existing schedules and enables you to edit the properties of a schedule, clone a schedule, delete a schedule, or run a log report to obtain information about a schedule. Additionally, you can purge log records to conserve space in the log file, view the dates on which you cannot run or set schedules to run and check the status of your scheduled jobs. Finally, you can create, update, and delete Execution IDs.

Topics:
- About the Schedules Interface
- Editing a Schedule in the HTML User Interface
- Cloning a Schedule
- Deleting a Schedule
- Viewing a Log Report
- Purging the Log File
- Schedule Blackout Dates
- Checking the Status of a Scheduled Job
- Creating, Updating, and Deleting an Execution ID
About the Schedules Interface

As a Managed Reporting user with ReportCaster scheduling privileges, you can access the HTML User Interface, where you can perform various maintenance functions on the schedules that you created. The ReportCaster HTML User Interface is available from the Business Intelligence Dashboard and Managed Reporting. For instruction on accessing this interface, see the ReportCaster Development and Library Content manual.

Once you are in the ReportCaster HTML User Interface, click the Schedules option. A list of all the scheduled jobs you have created appears in the interface. The following image shows how each scheduled job contains information displayed under column headings for Schedule Id, Description, Next Run Time, Method, Distribution, and Active. The window includes toolbar icons that enables you to perform functions on each scheduled job. Sorting is available for each column by clicking the column heading.

From the Schedules window, you can:

- Open the Scheduling Wizard to edit the properties of a selected schedule. For more information, see Editing a Schedule in the HTML User Interface on page 115.
- View a log report for one or more selected schedules. For more information, see Viewing a Log Report on page 120.
- Delete one or more selected schedules. For more information, see Deleting a Schedule on page 119.
- Purge log file information for one or more selected schedules or for all schedules in your list. For more information, see Purging the Log File on page 125.
- Clone a selected schedule. For more information Cloning a Schedule on page 117.
- Run one or more selected schedules.
- Refresh the current schedule list with any newly created schedules.
- Open the online Help.
**Note:** When you select a schedule in the ReportCaster HTML User Interface, the Open, Log, Delete, and Clone options are enabled. As an alternative to selecting items in the toolbar, you can use Alt+O for Open, Alt+L for Log, Alt+D for Delete, and Alt+C for Clone.

**Editing a Schedule in the HTML User Interface**

**How to:**
Edit a Schedule

**Reference:**
Considerations When Editing a Schedule

From the Schedule window in the ReportCaster HTML User Interface, you can edit your own previously created schedules at any time using the following procedure.

**Procedure:** How to Edit a Schedule

1. In the Schedules window, select the schedule you want to edit.
   
   The following image shows the Schedules window with a schedule named Sales selected.

2. Click Open or double-click the schedule.
The Scheduling Wizard opens to the Schedule window, as shown in the following image. The Schedule window contains all of the information that was previously entered for the Sales schedule.

3. Make the changes to the schedule.

   For more information about navigating through the Scheduling Wizard, see Using the Scheduling Wizard on page 51.

4. Click Save.

**Reference: Considerations When Editing a Schedule**

The following are considerations when editing a schedule using the Scheduling Wizard:

- You can only access a schedule created using the ReportCaster Development and Administration Interface (Java Swing applet-based) if it is a Managed Reporting schedule (Standard Report or My Report) containing a single Task. Otherwise, you will receive a message informing you that you cannot open the schedule.
If a schedule already exists and your ReportCaster administrator changes the available options, the existing schedule runs as previously defined, regardless of the changes. However, if you attempt to specify unavailable options (Task Types, distribution methods, report formats, or Library Distribution Options) when editing a schedule, a message is displayed informing you that the options available for scheduling have been changed by your ReportCaster administrator. Information is then displayed that describes the change(s) that you must make for the schedule to use available options. You cannot save changes to the schedule until the schedule uses available options. In addition, you cannot open a Custom Run Interval with this tool.

If you selected once for the run interval, the schedule runs immediately unless you change the Start Time to a time later than the current time. All other run intervals run at the next run time of the schedule.

If you want your selected schedule(s) to run immediately, click Run. A new schedule ID is created for the job. Be advised that this results in multiple entries in the Report Library for scheduled output distributed to the library.

Cloning a Schedule

**How to:**
Clone a Schedule

From the Schedules window in the ReportCaster HTML User Interface, you can clone your own previously created schedules at any time using the following procedure.

**Procedure: How to Clone a Schedule**

1. In the Schedules window, select the schedule you want to clone.
   
   The following image shows the Sales schedule selected in the Schedules window.

2. Click **Clone**.
The following image shows the Clone selected schedule – Web Page Dialog box that opens, prompting you to type a new description for the cloned schedule.

3. Type a new schedule description (for example, Southern Territory Sales) and click OK.

The following image shows the new cloned schedule in the Schedules window. Note that the cloned schedule is disabled by default, as specified in the Next Run Time column.

4. To enable the schedule, perform the following steps:
   
   a. Edit the schedule by clicking Open or by double-clicking the schedule.
      
      The Edit Schedule window opens, displaying the Schedule tab.
   
   b. Check the Enabled check box.
   
   c. Make any other changes you want to the schedule and then click Save.
      
      The Updated Schedule Successfully message appears.
   
   d. Click Close to return to the Schedules window in the ReportCaster HTML User Interface.
   
   e. Click Refresh.
The following image shows that the Southern Territory Sales schedule is active in the Schedules window. If the only change you made was setting the schedule to enabled, it contains the same properties as the Sales schedule from which it was cloned.

### Deleting a Schedule

#### How to:

Delete a Schedule

From the Schedules window in the ReportCaster HTML User Interface, you can delete your own schedules at any time using the following procedure.

**Procedure: How to Delete a Schedule**

1. In the Schedules window, select the schedule(s) you want to delete.

   **Note:** To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface.

The following image shows the Sales and East Coast Sale schedules selected in the Schedules window.
2. Click Delete. A message appears asking for confirmation to delete the selected schedule(s).

3. Click OK to delete the schedule(s).

**Viewing a Log Report**

**How to:**
View a Log Report

**Reference:**
&Echo and -TYPE Support in Log Reports
Considerations When Viewing a Log Report
Troubleshooting ReportCaster Log Reports

To access information about the date, time, execution status, and recipients of a distributed report job, use the Log icon. The Log icon enables you to run a log report that contains information about a distributed job, such as whether or not the job executed successfully, when the report output was distributed, in what format the report output was sent, and the method of distribution. Log reports are stylized HTML format, and appear in a separate browser window. You can search, print, or save the log report.

**Procedure: How to View a Log Report**

From the Schedules window in the ReportCaster HTML User Interface, you can view one or more log reports for a schedule by performing the following steps:

1. In the Schedules window, select the schedule(s) for which you want to view the log report(s).

   **Note:** To select multiple schedules, use the Shift key and Control (Ctrl) key as in a standard Windows interface.

   The following image shows the East Coast Sales and Sales schedules selected in the Schedules window.

2. Click Log.
The following image shows the ReportCaster Web Page Dialog box that opens, with the Selected Schedule check box active and checked and the Last Executed option selected.

To switch from the schedule you selected to viewing information about all of your schedules, uncheck the Selected Schedule check box. If you want to change your selection criteria, click Cancel and select another schedule from the list.

3. Select one of the following options:

- **Last Executed.** Produces a log report containing the most currently run process for the selected schedule(s) or for all schedules (if you did not select a schedule). This is the default option.

- **All Executed.** Produces a log report containing all run processes for the selected schedule(s) or for all schedules (if you did not select a schedule).

- **Date Executed.** Activates the Start Date and Start Time fields.

If you have selected the Date Executed option, proceed to the following step. Otherwise, proceed to Step 6.

4. In the Start Date field, specify the date on which you want the log report to begin. The report displays all processes for the selected schedule (or schedules) that were run on or after the specified Start Date. You can select a Start Date from the pop-up calendar, or you can accept the default Start Date, which is the current date.

5. In the Start Time field, specify a start time for the Start Date by using the drop-down lists. The default value for the Start Time is 1:00 AM.

6. Click OK to view the log report.

**Example:** Reading a Log Report

The log report displays information according to your specifications in a separate browser window. One log record is produced for each scheduled job run in the specified time frame. The following image provides an example of a typical log report.

If you chose to view log reports for multiple schedules, the Job Process Log Report contains a log record for each schedule you selected. The following images shows an example of a log report for multiple schedules.
The log report first lists the job description for the record, which is the unique description identifier that you specified when you created the schedule. Underneath the Job Description, the left column of the log report includes the following information:

- **User.** ReportCaster user ID, indicating the owner of the schedule.
- **Procedure.** Unique key generated by ReportCaster that identifies a specific execution of a scheduled job.
- **Schedule ID.** Unique key generated by ReportCaster that was assigned to the job when it was scheduled.
- **Start Time.** Date and time the job started running.
- **End Time.** Date and time the job finished running.

In the second column, the log report specifies messages consisting of the following:

- General information, such as the method of distribution for a particular job (for example, e-mail distribution).
- Processing information, indicating that the request started, distribution was successful, and the request was completed. Processing information also includes reasons why a request failed, such as the unavailability of a data source.

**Reference:** &ECHO and -TYPE Support in Log Reports

Values from &ECHO variables and -TYPE commands in WebFOCUS procedures appear in log reports. The &ECHO variable displays command lines as they execute in order to test and debug procedures. The -TYPE command enables you to comment and evaluate your code for informational and debugging purposes. For example, if the following procedure is scheduled using ReportCaster, it may produce a log report similar to the example that follows this procedure.

```plaintext
-SET &ECHO=ALL;
-TYPE Country Sales and Growth
-TYPE Parameter RATE is passed into report to forecast potential sales growth
TABLE FILE CAR
HEADING
"Sales Growth Forecast using Rate: &RATE "
SUM SALES AS 'Sales'
COMPUTE GROWTH/D12.2 = (SALES * &RATE) + SALES; AS 'Sales, Forecast'
BY COUNTRY AS 'Country'
END
```
The following image shows an example of the log report.

**Job Process Log Report**

<table>
<thead>
<tr>
<th>Job Description:</th>
<th>Sample of &amp;ECHO and -TYPE in Log Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>medium</td>
</tr>
<tr>
<td>Procedure</td>
<td>Jlweb35geo03</td>
</tr>
<tr>
<td>Schedule ID</td>
<td>90k039a02b0</td>
</tr>
<tr>
<td>Start Time</td>
<td>2004-05-05 02:08:01</td>
</tr>
<tr>
<td>End Time</td>
<td>2004-05-05 02:08:02</td>
</tr>
</tbody>
</table>

- Starting worker thread
- Starting task: Scheduled FEX with &ECHO and -TYPE
- Task type: MRE Standard Report
- Procedure name: salesgrowth
- Executing function:
  - -TYPE Country Sales and Growth
  - Country Sales and Growth
  - -TYPE Parameter RATE is passed into report to forecast potential sales growth
    - Parameter RATE is passed into report to forecast potential sales growth

**TABLE FILE CAR
HEADING
"Sales Growth Forecast using Rate: .05 "
SUM SALES AS Sales
COMPUTE GROWTH12 = (SALES * .05)+ SALES, AS Sales, Forecast
BY COUNTRY AS Country
END
SET DISTRIBUTES-OFF
0 HOLDING HTML FILE ON PC DISK ...
Task finished
salesgrowth.htm distributed to check_hall@ibm.com
salesgrowth.htm distributed to casey_barnes@ibm.com

**Note:** For more information about &ECHO variables, see *Testing and Debugging a Dialogue Manager Procedure* in the *Developing Reporting Applications* manual.

**Reference:** Considerations When Viewing a Log Report

When viewing a log report, be aware of the following considerations.

**Task and Report Names:**

The ReportCaster Log references Managed Reporting folders and FEXes by their names and not their descriptions.

**E-mail Addresses:**

ReportCaster cannot validate e-mail addresses since e-mail validation is performed by the mail server. The log report will include any e-mail addresses validated by the mail server and returned to ReportCaster.
**Burst Reports:**

- If a valid burst value is omitted in a Distribution List, Distribution File, or Dynamic Address List, ReportCaster treats the blank value as if it is a valid burst value, and no entries indicating a blank burst value appear in the log file. This will significantly reduce the size of the log file, particularly when the database contains many values for the primary field and only a small subset of those values are burst.

- If a burst value is specified in a Distribution List, Distribution File, or Dynamic Address List and it is not found in the database, the following message appears in the log file:

  Burst Value: value is not in the database.

- When a report is successfully burst, the log file will include the following message for each burst value:

  FILE filename SUCCESSFULLY DISTRIBUTED TO destination FOR burst value.

**Unavailable Options:**

When schedules with unavailable Task Types or distribution methods are not permitted to run, error notification is triggered and information is included in full and brief notifications and in the log report that your ReportCaster administrator or the owner of the schedule must change the unavailable Task Types or distribution methods in the schedule.

When schedules with unavailable Task Types or distribution methods are permitted to run, normal job execution occurs and a message appears in the log report indicating that your ReportCaster administrator is allowing existing schedules using the unavailable Task Types or distribution methods to run.

**Reference:**  **Troubleshooting ReportCaster Log Reports**

If you do not receive a log report because there is an insufficient amount of memory available, this may be because the report is too large or you have too many windows open. Information Builders recommends closing all windows and attempting to run the log report again. If you are still unsuccessful, rerun a schedule that successfully created a log report. If you are successful in running the log report, this confirms that the original log report that did not run was too large to be processed. Contact your ReportCaster administrator to help you troubleshoot this issue.

**Purging the Log File**

The log file accumulates information and can become difficult to navigate. Information Builders recommends that you periodically purge log records to conserve space.

ReportCaster administrators configure the number of days in which the log files will automatically be purged. To find out how long your log reports will be available, see your ReportCaster administrator.
You can purge the log file in one of two ways:

- **Purge log file information for specific schedules.** Select one or more schedules and then click Purge.

  The Purge Log Web Page Dialog box opens with the Selected Schedule check box active and checked, and the Delete Items through check box inactive and unchecked, as shown in the following image.

  ![Purge Log -- Web Page Dialog](image)

  To switch from purging the selected schedule(s) to purging all schedules, uncheck the Selected Schedule check box.

- **Purge log file information for all schedules.** Without selecting a schedule, click Purge.

  The Purge Log Web Page Dialog box opens.

  The Purge Log Web Page Dialog box opens with the Selected Schedule check box inactive and unchecked, and the Delete Items through check box active and checked, as shown in the following image.

  ![Purge Log -- Web Page Dialog](image)

  Selecting the Delete Items through check box activates the End Date field, where you can specify the date through which you want to purge the log records. The default value for the End Date is the current date. To change the End Date, click the calendar to the right of the End Date field.
The Calendar Web Page Dialog box opens, as shown in the following image. In this dialog box, select the month and year of the End Date using drop-down lists, and a day by clicking a day on the calendar.

![Calendar Web Page Dialog](image)

Click OK to purge the log file, or click Cancel to cancel the purge request.  

**Note:** To verify that the specified log files have been deleted, you can run a log report again to note the new log output. The deletion of log files is immediate.

### Schedule Blackout Dates

**Reference:**  
Schedule Behavior for Blackout Dates

Schedule blackout dates are those dates on which schedules will not run and cannot be set to run. As a ReportCaster user, you can view schedule blackout dates that have been set for all users (global dates) and those set for the groups to which you belong. Only ReportCaster administrators and Managed Reporting Group administrators can define, update, and delete schedule blackout dates.
To view schedule blackout dates, click the **Blackout Dates** option in the ReportCaster HTML User Interface. The Schedule Blackout Dates interface opens to a calendar of the current year. The group drop-down list in the top left corner provides a list of groups to which you belong and includes a Global selection. This interface initially opens to the Global group and global blackout dates shaded in gray. An example of the Schedule Blackout Dates interface is shown in the following image.

![Schedule Blackout Dates Calendar](image-url)
To view the schedule blackout dates for a particular group, select that group from the drop-down list. The calendar refreshes and in addition to the global blackout dates, it displays the group blackout dates in yellow. The following image shows a partial calendar of Schedule Blackout Dates interface for a selected group. For the month of April, it shows group blackout dates on the 23rd and 24th, and global blackout dates on the 25th through the 27th. Schedules cannot be run or set to run on these dates.

You can change the year using the arrows at the top right corner of the screen. Click **Refresh** to load the latest blackout dates. Dates only appear as available or unavailable.

Click **Close** to exit the HTML User Interface.

**Reference:** **Schedule Behavior for Blackout Dates**

Blackout dates are enforced during schedule creation and at run time:

- When creating or editing one of the date fields in a schedule, ReportCaster dynamically checks the first upcoming date on which the schedule will run to ensure that this date has not been blacked out. If there is a conflict with the date, an error message appears and the schedule cannot be saved until the conflict is resolved by either changing the schedule date or by not blacking out the date.

- At run time, each schedule is checked against the list of blackout dates. If a blackout date has been defined for the scheduled date, the schedule will not run. If you enable notification, a notification is distributed indicating that the schedule did not run because of a defined blackout date.
Note: Schedule blackout dates for a specific user include the global blackout dates and the blackout dates assigned to the group(s) to which the user belongs.

Checking the Status of a Scheduled Job

From the ReportCaster HTML User Interface, click the Status menu option to generate a list of your scheduled jobs that are in the ReportCaster Distribution Server queue.

The following image shows how each scheduled job contains information displayed under column headings for Schedule Id, Description, Priority, Start Time, Owner, and Status. Sorting is available for each column by clicking the column heading.

The Status column contains one of the following values:

- **Run.** The scheduled job is currently running.

- **Queue.** The scheduled job is waiting for a thread to become available to run the request.

After you have generated a status list of scheduled jobs, you can:

- Select a scheduled job with a status of Queue and click Remove. The schedule is removed from the queue if it is still in the queue, and the Status list is refreshed.

- Select a scheduled job with a status of Queue to enable the Update Priority button. In the New Priority field, you can change the priority of the scheduled job using the drop-down list. Click Update Priority to change the priority of the scheduled job if it is still in the queue.

- Click Refresh to refresh the current list of schedules to show any new jobs that are in the ReportCaster Distribution Server queue. You can automate this process by selecting a value (for example, 10 Seconds) from the Auto Refresh drop-down list.

- Click Help to open the online Help.
Creating, Updating, and Deleting an Execution ID

**How to:**
Generate a List of Execution IDs
Create a New Execution ID
Change an Execution ID and Password
Delete an Execution ID

An Execution ID is a valid user ID that is used to run a schedule on a specified server. When an Execution ID is created, changed, or deleted on a server, it must also be created, changed, or deleted in the ReportCaster Repository tables using ReportCaster. Similarly, when the password for an Execution ID is changed on the server, the password for that Execution ID must also be changed in the ReportCaster Repository tables. Exceptions are when Execution credentials are Trusted.

**Procedure: How to Generate a List of Execution IDs**

From the ReportCaster HTML User Interface, click the **Execution ID** menu option to generate a list of your Execution IDs defined to ReportCaster.

The following image shows a list of Execution IDs. The list includes the Execution ID, the Server Name where the Execution ID is authorized to run schedules, the Server Type (for example, WebFOCUS Server), and the Owner of the Execution ID for that server.

<table>
<thead>
<tr>
<th>Execution ID</th>
<th>Server Name</th>
<th>Server Type</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>caster</td>
<td>EDASERVE</td>
<td>WebFOCUS Server</td>
<td>admin</td>
</tr>
<tr>
<td>admin</td>
<td>EDASERVE</td>
<td>WebFOCUS Server</td>
<td>admin</td>
</tr>
</tbody>
</table>

**Note:** Execution IDs appear when the Run Id Type setting for that server is set to User. For Trusted servers, only the Execution ID can be changed.

After you have generated a list of Execution IDs, you can:

- Click **New** to create a new Execution ID.
- Select an Execution ID and click **Open** to optionally change the Execution ID for a specific server, or change the password of the Execution ID.
- Select an Execution ID and click **Delete** to delete the Execution ID from the ReportCaster Repository tables.
Creating, Updating, and Deleting an Execution ID

- Click Refresh to refresh the current list with any newly created Execution IDs.
- Click Help to open the online Help.

**Note:** When you create, change, or delete an Execution ID it updates the ReportCaster Repository tables so that they are synchronized with the specified server. However, the credentials of the user ID on the server itself remain unchanged.

**Procedure: How to Create a New Execution ID**

To create a new Execution ID:

1. Click the Execution ID menu option.
2. Click New.

The following image shows the ReportCaster Web Page Dialog box that opens, which contains fields that enable you to create a new Execution ID and password, and assign the ID and password to a server.

![ReportCaster -- Web Page Dialog](image)

3. Specify the following parameters:
   a. **Execution ID.** Type a valid user ID for the server.
   b. **Server Name.** From the Server Name drop-down list, select the name of a WebFOCUS Reporting Server that will be used to run schedules.
   c. **Password.** Type the password of the user ID. Note that you are not creating this password on the specified server, but are entering the existing password into the ReportCaster Repository.
   d. **Confirm Password.** Retype the password.
4. Click OK to create the Execution ID in the ReportCaster Repository table or click Cancel to cancel the request.

**Procedure: How to Change an Execution ID and Password**

1. Click the Execution ID menu option to generate a list of your Execution IDs.
2. Select the Execution ID whose properties you want to change (for example, caster). This activates the Open icon.
3. Click Open.

The following image shows the ReportCaster Web Page Dialog box that opens, which contains fields that enable you to change the Execution ID, the Execution ID password, or both.

![ReportCaster Web Page Dialog Box](image)

4. Optionally, specify the following information:
   
   a. **Execution ID.** Enter a value for the Execution ID. This should be an already existing and valid Execution ID. This Execution ID globally replaces the old Execution ID for all schedules on the specified server.

   b. **Password.** Enter the password for the Execution ID. This password must match the current password for this user ID on the server that appears in the Server Name field.

   c. **Confirm Password.** Reenter the password.

   Changing the password using ReportCaster does not change the password on the specified server.
5. Click OK to change the Execution ID or password values in the ReportCaster Repository tables. A message appears confirming that the values have been changed.

Procedure: How to Delete an Execution ID

To delete an Execution ID

1. Click the Execution ID menu option to generate a list of your Execution IDs.
2. Select the Execution ID you want to delete.
3. Click Delete. A message appears asking for confirmation to delete the selected Execution ID.
4. Click OK.

After the Execution ID is deleted, a scheduled job that requires this Execution ID on the specified server is not run unless the schedule is modified to use a valid Execution ID. If you modify the Execution credentials for a single schedule that specifies the deleted Execution ID, ReportCaster makes this modification for all schedules that specify the deleted Execution ID.
When you create a schedule, you have the option to distribute the scheduled output to the ReportCaster Report Library, a storage and retrieval facility. When you choose this option, you can configure the schedule to send an e-mail notification of the distribution that includes the URL to the report in the library.

You can also create and use Library Access Lists, which can associate with specific schedules to define the users and groups that can access the schedule output when it is distributed to the Library.
About the Report Library

The Report Library provides secure access to its content, the ability to save multiple versions of the same output, and the ability to set an expiration date and control the number of versions kept in the library. The Library Watch List provides a way to easily track and view reports of interest. You can create Library Access lists to define specific users and groups enabled to view the output of specified schedules distributed to the Report Library.

The Report Library is available only to ReportCaster users who have been granted access to the library by an administrator. You can also create Access Lists that define users and groups that you want to view your distributions to the library.

Creating and Maintaining a Library Access List

An Access List defines the users and groups that are allowed to view the output of specified schedules distributed to the Report Library. After you create the Access List, it can be used as often as needed. Each Access List is created as a private list that is known only by ReportCaster administrators and the user who created it.

Creating and Maintaining a Library Access List in the HTML User Interface

<table>
<thead>
<tr>
<th>How to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a New Library Access List</td>
</tr>
<tr>
<td>Edit and Delete a Library Access List</td>
</tr>
</tbody>
</table>

This section describes how to create and maintain a Library Access List using the legacy HTML User Interfaces and is provided for your convenience in the case that your configuration of ReportCaster uses this interface as the default.

Procedure: How to Create a New Library Access List

1. From the ReportCaster HTML User Interface, click the Access List option. For instruction on accessing the ReportCaster HTML User Interface, see the ReportCaster Development and Library Content manual.

   All Access Lists you have created appear, along with a description for each Access List.

   **Note:** In the ReportCaster HTML User Interface, even when logged on as an administrator you can only view Access Lists that you own. To view all Access Lists, use the ReportCaster Development and Administration Interface.
The following image shows all of the Access Lists you created in the Access List window. Each Access List displays information under column headings for Access List Name and Description. The window includes toolbar icons that enable you to perform functions on each Access List. Sorting is available for each column by clicking the column heading.

2. Click New.

The following image shows an expanded Access List window containing fields that enable you to type a List Name, Description, and Burst Value for the Access List. In addition, there are options where you can select the users or groups to be added to the Access List, and options for deleting burst values and members from the Access List.

3. Type the following information:
   a. In the List Name field, type the name of the Library Access List.
   b. In the Description field, type a description that can be used to identify the list.
c. In the Burst Value field, type an optional burst value. This value is case-sensitive.

4. Add groups and users to the Access List.

**To add groups to the Access List:**

In the Group List field, select the group or groups you want to add to the Access List (for example, Analyticals), and then click **Insert Group**. This populates the Burst Value (if applicable), Member, and Type fields at the bottom of the window. Note that only groups that have been granted access to content in the Report Library appear in the Group List. All members of the group will have access.

**To add users to the Access List:**

In the Group List field, select the group from which you want to add users to the Access List, and then click **Get User**. This populates the User List field with the users from the specified group. In the User List field, select the user or users you want to add to the Access List (for example, rcanalytical), and then click **Insert User**. This populates the Burst Value (if applicable), Member, and Type fields at the bottom of the window.

**Note:** To delete a group or user from the Access List, select that group or user and then click **Delete the selected rows**.

5. Click **Save** to save the Access List.

**Procedure: How to Edit and Delete a Library Access List**

From the Access List window in the ReportCaster HTML User Interface, you can edit or delete your own previously created Access Lists at any time by performing the following steps:

1. Select the Access List you want to edit or delete.

   The following image shows a selected row of data for the Sales Team in the Access List window.

   ![Image showing the Access List window with a selected row for Sales Team]

2. Perform one of the following actions:
   - To edit the Access List, click **Open**.
To delete the Access List, click *Delete*.

3. Perform one of the following actions:
   - If you are editing the Access List, make the necessary changes and click *Save*. Note that if you rename the Access List, the original Access List remains unaltered.
   - If you are deleting the Access List, a message appears asking to confirm that you want to delete the Access List. Click *OK* to delete the Access List.

**Accessing the Report Library**

The Report Library interface provides access to the library content that you have permission to view. In addition to viewing content, you can delete content from the library, and put items on the Library Watch List. The Library Watch List interface, accessed through a tab in the Report Library interface, enables you to track and focus on content that is of special interest to you.

There are several ways to access the Report Library interface:

- From the e-mail notification sent when a scheduled job runs. E-mail notification is an option available to you when creating a schedule with output to be distributed to the Report Library. This notification is sent to all recipients with access rights to the content and contains the URL needed to access the content in the Report Library. If you receive such an e-mail, open the e-mail and click the link to the library content. When the logon window opens, type your ReportCaster user ID and password. After a successful logon, you are sent directly to the specified output within the Library Content interface. Note that there is a link back to the Library Content interface that enables you to view additional content to which you have access in the library.

- From Managed Reporting Domains environment, click the *Report Library* icon on the toolbar.

- From the Business Intelligence Dashboard, select *Library* from the Tools drop-down list. (You can also add the Report Library Interface to a Dashboard Content page.)

- From a browser by typing the following URL:

  \[ \text{http://hostname[:port]/rc_context_root/library/liblogon.jsp} \]

  where:

  \[ \text{hostname[:port]} \]

  Is the host name and optional port number (specified only if you are not using the default port number) of the Application Server where the ReportCaster Web application is deployed.
rc_context_root
Is the site customized context root for the ReportCaster Web application deployed on your Application Server. rcaster is the default value.

When the Report Library logon page opens, type your ReportCaster user ID and password. After a successful logon, you can view all content to which you have access in the Report Library.

From the WebFOCUS Welcome page, click the Report Library Content option.

From the WebFOCUS Welcome page, click the ReportCaster, Report Library Content option.

The WebFOCUS Welcome page is located at the following URL:

http://hostname[:port]/wf_context_root/welcome.jsp

where:

hostname[:port]
Is the host name and optional port number (specified only if you are not using the default port number) where the WebFOCUS Web application is deployed.

wf_context_root
Is the site-customized context root for the WebFOCUS Web application deployed on your Application Server. The default value is ibi_apps.

Note: The Report Library option to change your password for the ReportCaster user ID should not be used when ReportCaster is configured with Managed Reporting. This is because this option only updates the password in the ReportCaster Repository and not the Managed Reporting Repository. If this option is used, the user must also use the Managed Reporting change password option to update the password in the Managed Reporting Repository.

The Report Library interface, shown in the following image, includes two tabs:

Library Reports, which provides access to all content in the library that you have permission to view. For more information, see Viewing Library Content on page 142.
Watch List, which provides easy access to the latest version of reports that you have chosen to track. For details on the Watch List, see *Using the Library Watch List* on page 153.
Viewing Library Content

**In this section:**
Viewing On-demand Paging Reports

**How to:**
View Content in the Report Library

The Report Library interface Library Reports tab opens the Library Reports interface, which provides access to all content in the library that you have permission to view. The Library Reports interface, shown in the following image, displays the Library Reports navigation tree in the left pane and the details of the selected item in the right pane.

![Report Library Interface](image)

**Note:** Whether you are a ReportCaster administrator or an end user, you can only view reports that you own, that are public, or that are protected by an Access List of which you are a member.

Reports are stored in the library under categories that you designate when creating a schedule. (If a category is not specified when creating a schedule for either a Standard Report or My Report, then the domain name under which the Standard Report or My Report was created in Managed Reporting is used as the category in the Report Library.) The top of the navigation tree in the left pane is titled All Reports, and when expanded, displays the categories under which your reports reside as branches of the tree. This information also appears in the right pane. Categories and reports are listed alphabetically.

Each category folder contains report folders for that category, and each report folder contains the versions of the report generated by the report schedule. The report folder name is the same as the description given to the schedule that generated the report. If the report is burst, the report folder contains a folder for each burst value and the report versions reside in those folders.
In the Library Reports interface, select an item in the left pane to see the contents and information about that item in the right pane. When you select a category folder, a list of reports in the category appears in the right pane. When you select a report folder, all versions of that report that are currently in the library appear in the right pane. When you select a report version in the left pane, the actual report appears in the right pane.

The Library Reports interface toolbar contains Open, Delete, Refresh, Subscribe, Unsubscribe, and Help action icons. These icons are available when the action is appropriate for the item you select.

**Procedure: How to View Content in the Report Library**

1. In the navigation pane, expand the category folder and select the report folder.

   The right pane displays a list of report folders that appear under that category. The following image shows an example of a selected category (RegionalReports) and the summary information for the reports (Order_NEW, Reg12_Returns, and others) that appear under that category.

   ![Report Library Image](image)

   The category folder summary information includes:

   - **Description.** The name of the report, which is the name of the schedule.
   - **Owner.** The user ID that created the report schedule.
   - **Burst.** Indicates if the report is burst. Yes (Y) or no (N).
- **Access List.** Reflects the Library access selection in the report schedule, as follows:
  - The name of the Library Access List that is applied to the report.
  - An asterisk (*), which indicates the report is public (anyone with access to the library has access to the report).
  - Blank, which indicates that only the owner of the schedule has access to the report.

- **Last Version.** The latest version of the report in the library, for example, 3.

- **Last Execution.** The date and time of the last schedule execution and distribution. The date format is YYYYMMDD, where YYYY is the 4-digit year, MM is the month, DD is the day of the month. The time format is HHMM, where HH is the hour and MM is the minute, followed by either AM or PM.

**Note:** You can sort the columns in ascending or descending order by clicking the column heading.
2. To view summary information for a report, select the report folder of interest. Summary information for that report appears in the right pane, including a list of the existing versions of the report.

The following image shows an example of a report (Order_NEW) selected in the navigation pane and the list of its five versions in the right pane.

The report summary information includes:

- **Version.** The version number of the report.

- **Execution Time.** The date and time that the schedule ran that version of the report. The date format is YYYYMMDD, where YYYY is the 4-digit year, MM is the month, DD is the day of the month. The time format is HHMM, where HH is the hour and MM is the minute, followed by either AM or PM.

- **Expiration.** The expiration setting of the report.

- **Size.** The size (in bytes) of the report. If the report is compressed, this is the size of the report before compression.

- **Format.** The format of the report, for example, HTML.

- **Compressed Size.** The size (in bytes) of the compressed report, if applicable. This field is empty if the report is not compressed.

If a report is burst, the report folder contains a separate folder for each burst value.

In the following image, the left pane shows that the Sales_PRD report folder contains the folders for each report burst on the product code value (for example, R1019, R1020, and so on), while the right pane provides summary information about these burst reports.
The burst report summary information includes:

- **Value.** The burst value of the report.

- **Last Version.** The last version of the report that was distributed to the library.

- **Last Execution.** The date and time that the schedule ran the last version of the report for that burst value. The date format is YYYYMMDD, where YYYY is the 4-digit year, MM is the month, DD is the day of the month. The time format is HHMM, where HH is the hour and MM is the minute, followed by either AM or PM.
Select a burst report folder in the left pane to display report summary information of the versions for that burst value in the right pane, as shown in the following image. This is the same report summary information that is displayed for any report folder.

3. To view the contents of a report, use one of the following methods:
   - In the left pane, under the report folder, select the version of interest. The report appears in the right pane.
   - In the right pane, double-click the version of the report. The report appears in the right pane.
   - In the right pane, highlight the version of the report and click the Open icon in the Library Reports toolbar. The report opens in a separate window.

The following image is an example of a report (version 2 of Order_NEW) displayed in the right pane.
Viewing On-demand Paging Reports

The Report Library On-demand Paging feature enables you to view a report one page at a
time from the Library while the Web server holds the remaining pages and feeds them at
your request. This feature is useful for large reports because it decreases the amount of
time you must wait before you can begin viewing the report.

On-demand Paging reports open from the Library inside the WebFOCUS Viewer. This tool
provides the framework to view report pages and enables you to search for specific pages
or information in the report.

To enable the On-demand Paging feature, reports must be distributed in the On-demand
Paging format (HTML ODP). You must select HTML ODP as the format when creating a
schedule for a report to be distributed in the On-demand Paging format. HTML ODP is available
as a format when Library is selected for distribution.

Note: When HTML ODP is selected as the format, the Distribution Server adds SET
WEBVIEWTARG=OFF to the procedure to control the behavior of the frames in the Library.
SET WEBVIEWTARG does not override ON TABLE SET WEBVIEWTARG. Therefore, the scheduled
procedure should not contain an ON TABLE SET WEBVIEWTARG statement.

You can open an On-demand Paging report inside the Report Library or in a separate window,
as follows:

- To open the report in the right Library pane, use one of the following methods:
  - In the left navigation pane, click the version of the report you want to view.
  - In the right Library pane, double click the version of the report you want to view.

- To open the report in a separate window, use one of the following methods:
  - In the left navigation pane, right-click the version you want to view and select Open
    from the drop-down list.
  - In the right Library pane, select the version you want to view and click the Open icon
    in the Library toolbar.
The following image is an example of an On-demand Paging report opened with the WebFOCUS Viewer in the Library pane.

The WebFOCUS Viewer control panel, shown in the following image, appears at the bottom of the WebFOCUS Viewer.

The controls enable you to:

- Display a specific page. Type a page number in the Page field and press Enter, or click the Go To icon next to the Page field and type in a page number. The following image shows the Page field and icon in the control panel.

- Display the previous or next page in a sequence by clicking the Previous and Next arrows shown in the following image.
Display the first or last page of the report by clicking the First Page or Last Page arrows shown in the following image.

Download the entire report to the browser as a single document by clicking the All Pages icon shown in the following image.

Close the WebFOCUS Viewer by clicking the Close icon shown in the following image.

Search in an On-demand Paging Report

How to:
Search in an On-demand Paging Report

The Viewer Control Panel contains controls that offer several ways to search your report. Using the Viewer search controls, you can select a string of information, such as a phrase that occurs in your report or a group of numbers, and search for each occurrence of that string. You can further customize your search by matching capitalization of words exactly (a case-sensitive search) or by controlling the direction of your search (either forward or backward from your starting point in the report). Use these controls to search your report:

- To perform a case-sensitive search, click the Match Case icon shown in the following image.

- To search backward in a report, click the Search Backward icon shown in the following image.

- To locate a specific string, type the string you want to search for in the search field and click the Find icon, which appears to the right of the search field. The following image shows the search field and Find icon.
Procedure: How to Search in an On-demand Paging Report

1. Enter the string in the Search input box.

2. Click Match Case if you want to perform a case-sensitive search.
   Notice that the WebFOCUS Viewer displays the Match Case button with a red line across it to indicate that it is active.

3. To begin your search, click:
   a. Search Backward to search for the string from the current page back to the first page.
   or
   b. Find to search from the current page to the end of your report.
   The WebFOCUS Viewer searches the report and underlines the first occurrence of the string.

4. Click Find again to search for another occurrence of the string.

Example: Using the Viewer Control Panel to Search

You want to use the Viewer Control Panel to navigate a long report called Coffee Sales to find occurrences of the string "Kona," a type of coffee that you sell. After you run the report, WebFOCUS displays the first page of the report in the Viewer.
1. To search for sales of Kona, type Kona in the input box and click *Find*, as shown in the following image.
The WebFOCUS Viewer returns your report with the first occurrence of your search string underlined, as shown in the following image.

2. Click *Find* again to locate the next occurrence of Kona.

**Using the Library Watch List**

The Library Watch List provides a way to easily track reports and focus on information that is of interest to you. You can add any report in the library that is accessible to you to the Watch List, whether or not you own it. When you add (subscribe) a report to the Watch List, you are notified by e-mail whenever a new version of that report is distributed to the library. The e-mail notification includes the report job description and a link to the report in the Library. Only the latest version of the report is available in the Watch List interface. While all versions, including the latest, are available to you in the Library Reports interface, the Watch List gives you quick access to the most current report without having to search through the entire library content.

The Watch List interface toolbar contains Open, Delete, Refresh, Subscribe, Unsubscribe, and Help action icons. These icons are available when the action is appropriate for the item you select.

When using the Library Watch List, you can add reports to and delete reports from the Watch List, view summary information about a report, and view the current version of the report.
To add a report to the Watch List:

- In the Library Reports interface, right-click the report folder that contains the report you want to add to the Watch List and select *Subscribe* from the drop-down list, as shown in the following image, or click the Subscribe icon located in the Report Library toolbar.

![Report Library Interface](image)

You can only subscribe the report folder to the Watch List, and not a category folder. The plus sign in the Subscribe icon is activated, as shown in the following image, when you select a folder that can be subscribed.

![Library Content and Watch List Interface](image)
If a report is burst, you can only subscribe the report for an individual burst value and not the entire report. The following image shows a burst value report (R1019) that is selected for subscription to the Watch List.

- The report is moved to the Watch List interface, as shown in the following image. Notice that only the most current version of the report appears in the Watch List.

In addition, the Library Reports interface shows a binocular icon as part of the report folder to indicate it is on the Watch List, as shown in the following image.
To see summary information about the reports in the Watch List, select All Reports in the left pane. The following information about the Watch List reports appears in the right pane:

- **Description.** The name of the report, which is the name of the schedule.
- **Owner.** The user ID that created the schedule.
- **Access List.** This field reflects the Library access selection in the schedule, as follows:
  - The name of the Library Access List that is applied to the schedule.
  - An asterisk (*), which indicates the report is public (anyone with access to the library has access to the report).
  - Blank, which indicates that only the owner of the schedule has access to the report.
- **Last Version.** The latest version of the report in the library, for example, 4 of 4.
- **Last Execution.** The date and time of the last schedule execution and distribution. The date format is YYYYMMDD, where YYYY is the 4-digit year, MM is the month, DD is the day of the month. The time format is HHMM, where HH is the hour and MM is the minute, followed by either AM or PM.

To view the contents of a report, select the report in the left pane and the report content appears in the right pane. The following image shows an example of a report in the Watch List.
To remove a report from the Watch List, do one of the following:

- In the Watch List interface, right-click the report in the left pane and select Unsubscribe. Click Refresh to clear the report icon from the Watch List interface.

- In the Library Reports interface, right-click the report (which includes a binocular icon to indicate it is on the Watch List) and select Unsubscribe. The Watch List no longer contains this report.

- In either the Library Reports interface or the Watch List interface, click the Unsubscribe icon located in the Report Library toolbar.

**Deleting Content From the Library**

To delete content from the library, you must be in the Library Reports interface. You cannot delete library content while in the Watch List interface. You can only delete content that you own.

**Note:** In the Library Reports interface, you can only delete the content that you own, whether you are a ReportCaster administrator or an end user. However, the ReportCaster administrator can delete library content through the Library Management tool. For more information on this tool, see the ReportCaster Administration manual.

The delete option (available from the right-click drop-down list or from the Delete icon in the toolbar) is only available for reports that you own, and for those items that can be deleted. For example, you cannot delete a report folder until you delete all of the content (report versions) under that folder.

When you delete a version of a report, ReportCaster does not renumber the remaining versions. For example, if there are six versions of a report and you delete versions 1, 2, and 4, the remaining versions are 3, 5, and 6, and the next version of this report to be distributed to the library will be version 7.

**Note:** A category remains in the Report Library until all versions of the report (or reports) in that category and the schedule (or schedules) that created the report (or reports) are deleted. If you delete all versions of the report (or reports) but do not delete the schedule (or schedules) that created the report (or reports), then the category will remain in the library.

When you delete a report that is on the Watch List, the Watch List interface still contains the report icon in the left pane, but rather than the report, a document icon with a red X appears in the right pane. This reminds you that a report is still on the Watch List even though there is no content currently available, and it also makes you aware of reports that you do not own that have been deleted.
Searching for Library Content

The Report Library provides the ability to search for content using the Google search engine. Contact your ReportCaster administrator about enabling this feature, after which you can use the Google search engine to locate content stored in the Library.

The Search for input box appears in the upper right corner of the screen, as shown in the following image.

Input your search string and click Search (or press Enter). The following image shows a search for instances of the word "SALES" throughout the Report Library.
A separate browser window opens displaying links to the most relevant reports containing the search string. The following image is an example of a browser window that shows the most relevant result from a search on the word "SALES". The search result also includes information such as the report format, the machine on which the report resides, the version, and the date the report was indexed and inserted into the library. Note that relevance is determined by Google's own proprietary ordering, and that you can also sort by date. Only links containing reports you are authorized to view appear. The Google search results do not include page or result counts since the Report Library uses the Google Search Appliance in its secured form. You can further narrow down your search by adding elements to your string, for example, searching "SALES BY" rather than "SALES".

In order to show you the most relevant results, we have omitted some entries very similar to the 1 already displayed. If you like, you can repeat the search with the omitted results included.
Click the repeat the search with the omitted results included link to display more results on the page, as shown in the following image.
Click the link of the report you want to view, for example, Product Category. The report is displayed, as shown in the following image.

**Century Corp Sales Analysis**

<table>
<thead>
<tr>
<th>Sales by Category</th>
<th>Sales Across Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product Category</strong></td>
<td><strong>Line Total</strong></td>
</tr>
<tr>
<td>CD Players</td>
<td>$40,694,863.53</td>
</tr>
<tr>
<td>Camcorders</td>
<td>$333,854,927.32</td>
</tr>
<tr>
<td>Cameras</td>
<td>$9,718,752.55</td>
</tr>
<tr>
<td>DVD</td>
<td>$33,982,674.89</td>
</tr>
<tr>
<td>Digital Tape Recorders</td>
<td>$38,773,229.69</td>
</tr>
<tr>
<td>FDA Devices</td>
<td>$233,967,566.49</td>
</tr>
<tr>
<td>VCRs</td>
<td>$23,801,009.34</td>
</tr>
</tbody>
</table>

4003FY | CD Players | $132,033.36 |
| Camcorders | $1,113,934.82 |
| Cameras | $887,873.02 |
| DVD | $780,499.32 |
| Digital Tape Recorders | $331,872.50 |
| FDA Devices | $2,114,648.66 |

**PDF Drill Through Support**

The PDF Drill Through feature enables Report Library users to move from a summary report to a detail report, both of which are packaged together in a single PDF compound report. Drill Through functionality is similar to Drill Down functionality except Drill Through reports are static. A PDF document is produced that contains the summary report plus a detail report, with the detail report containing all the detail data for all the line items in the summary report. Clicking a Drill Through hyperlink navigates internally within the PDF file; no additional reports are run. The PDF file can be distributed to the library using ReportCaster, and when opened with Adobe Acrobat Reader, retains its full Drill Through functionality.

For more information about the PDF Drill Through feature, see *Creating a PDF Compound Report With Drill Through Links* in the Creating Reports With WebFOCUS Language manual.
Index

-TYPE commands 123
&ECHO variables 123

A
Access Lists 136, 137, 138
   creating 137
   deleting 138
   editing 138
Address Search option 77, 105
   distribution lists 105
   schedules 77
amper auto-prompting in ReportCaster 65, 66, 67, 69, 70
   adding a dynamic multi-select list of values 70
   adding a dynamic single-select list of values 67
   adding a static multi-select list of values 69
   adding a static single-select list of values 66
   setting default variables 65
Apply secondary run interval window 58
applying a secondary run interval 58

B
blackout dates for schedules 127
burst values 24, 77, 104
   specifying in an e-mail subject line 24, 77
bursting reports
   enable report bursting option 62
   limiting burst values distributed to the Library 93

case sensitive searches 150, 151
cc mail considerations 84
cloning schedules 117
creating a distribution list 103
creating a schedule 51
creating a secondary run interval 58

default variable values in ReportCaster 65
deleting a distribution list 111
deleting a schedule 119
deleting Report Library content 157
distributing reports 25, 71, 72, 73, 77, 82, 86, 87, 88, 90, 91, 109, 135
   accessing an LDAP Address Book 77
   by e-mail 25, 72, 73, 82, 135
   by fax 25, 82
   to Managed Reporting 87, 88
   to printers 86, 109
   to the Report Library 90, 91
distribution files 25, 74, 82, 86
distribution lists 101, 102, 103, 105, 109, 110, 111, 120
   accessing an LDAP Address Book 105
   creating 103, 109
   deleting 111
   editing 110, 120
distribution options 71
Distribution tab 71
Drill Through feature 161
dynamic multi-select list of values in ReportCaster 70
dynamic single-select list of values in ReportCaster 67
dynamically running a schedule on demand 99

E

e-mail 25, 72, 82, 84
  attachments 25, 82
  inline reports 25, 82
editing a distribution list 110
editing a schedule 115, 116
editing a schedule with unavailable options 117
Exchange Mail Server considerations 84
Execution IDs 62, 131, 132, 133, 134
  changing 133
  creating 132
  deleting 134
  generating a list of 131
external distribution files 25, 74, 82, 86

F

faxing reports 25, 82

G

Google Search in Report Library 158

H

HTML User Interface 113

I

inline e-mail reports 25, 82

L

LDAP integration 77, 105
Library Access Lists 136, 137, 138
  creating 137
  deleting 138
  editing 138
Library Content interface 139, 142
limiting burst values distributed to the Library 93
limiting burst values distributed to the Report Library 32
log files 123, 125
  purging 125
log reports 120, 122, 123, 124, 125
  considerations 124
  reading 122
  troubleshooting 125
  viewing 120

M

maintaining a schedule 114
Managed Reporting 87, 88

N

notification and log information for unavailable options 98, 125
notification options 96
O

On-demand Paging reports 148

P

parameter prompting enhancement 64
parameters 24, 43, 63, 77
  specifying in an e-mail subject line 24, 77
  specifying values in a report 43, 63
PDF Drill Through 161
printers 109
  distributing reports to 109
purging log files 125

R

Report Information window 60
Report Library 90, 91, 135, 136, 139, 142, 143, 157, 158
  Access Lists for 136
  deleting content from 157
  searching for content 158
  viewing content in 139, 142, 143
report parameters 43, 63
Report Parameters window 43, 63
ReportCaster HTML User Interface 113
ReportCaster Scheduling Wizard 51, 53
reports 51, 71, 86, 87, 101, 120, 150, 151
  distributing 71, 86, 87
  scheduling 51
  searching for 150, 151
  tracking 120
retrieving e-mail addresses using Address Search
  77, 105
run interval options 53
running a schedule 99

S

schedule blackout dates 127
schedule subintervals 58
schedules 51, 53, 114, 115, 116, 117, 119, 130
  checking status 130
  cloning 117
  creating 51, 53
  deleting 119
  editing 115, 116
  maintaining 114
Scheduling Wizard 51, 53
searching for Library content 158
secondary run intervals 58
Settings window 96
specifying report parameters 43, 63
static multi-select list of values in ReportCaster 69
static single-select list of values in ReportCaster 66
Status option 130

U

unavailable options in ReportCaster 98, 117, 125
using Google search in the Report Library 158

V

Viewer Control Panel
  case sensitive searches 151
  searching reports 151
Index

W

Watch List 153

Z

z/OS UNIX system 88, 109
zipping e-mail distribution 96
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Email:________________________________________________________________
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