

# Web Reports : Scheduling Reports

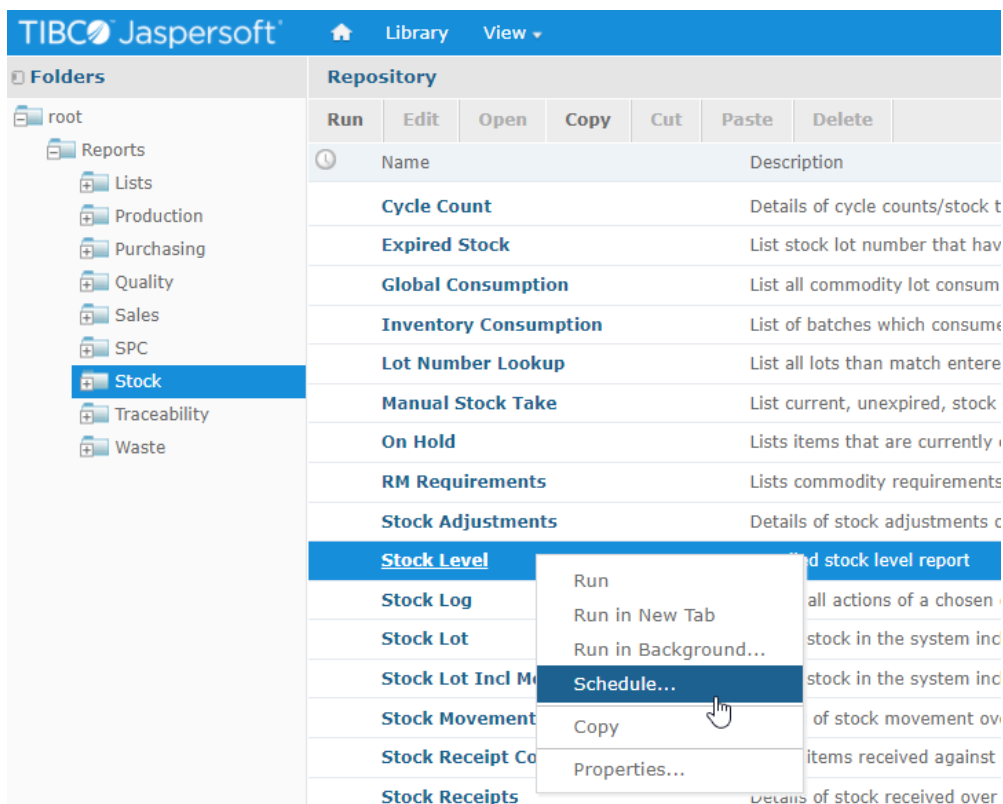
## Introduction

This document will detail how to create a schedule to automatically produce a web report and store the result on a PC or email it out to specific managers. This takes the burden of producing reports a specific time away from an operator freeing them up for other tasks. You are able to define all the parameters for a schedule report in the same way as if it were executed manually.

## Creating a schedule

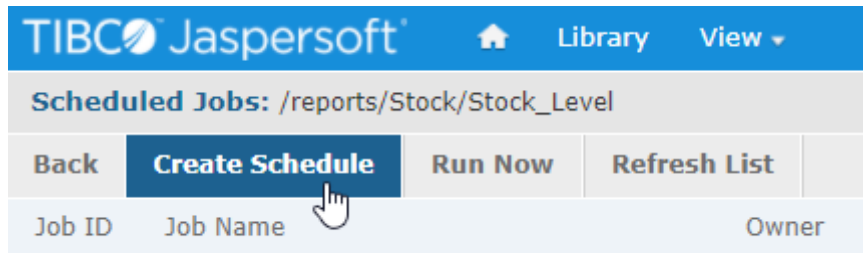
In this first example we shall assume the warehouse manager would like a stock level report showing what items have dropped below the re-order level so purchase orders can be raised where necessary, he would like the report to be generate at 6am every weekday.

Firstly, find the report you want to schedule and RIGHT click on it, in the context menu select ‘Schedule...’



This will display a screen with all the scheduled jobs for that report , you can schedule the same report to run several times e.g. once a week every Monday, once a week every Wednesday and once a week every Friday.

To start a new schedule click on the ‘Create Schedule’ button near the top left hand corner:



## Schedule

This will open the first of four pages used to define the report schedule, the first screen is all about when a report will start and how often it will recur.

## Schedule Start

The first details required is when will the report initially run, the options are immediately or at a specific date and time, for this example we will specify a date of Monday 26<sup>th</sup> October 2020 at 06:00 (note : it is important to set the start date in the future otherwise the schedule will never commence). The Time Zone will normally default to the local time zone and can be left as is.

Schedule For: /reports/Stock/Stock\_Level

---

**Schedule Start**

Start Date:

Immediately  
 On Specific Date:

2020-10-26 06:00

Time Zone: Europe/London - Greenwich Mean Time

**Recurrence:**

Recurrence Type: None

Oct 2020

Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Time: 06:00

Hour:

Minute:

Second:

Now Close

## Recurrence

Next we need to tell the reporting engine how often we want the report to be produced, the options are ‘None’ where the report will run once at the date and time specified above, ‘Simple’ when you can specify how often the report runs by defining how many minutes/hours/days/weeks pass before the report is executed again, or ‘Calendar’ where you can specify which months/days/hours/minutes the report should run. In this example we shall use the calendar a specify the report should run every month, Monday through to Friday (because the initial report has set to run at 06:00 then every recurrence will also run at 06:00):

### Recurrence:

Recurrence Type:

Months:  
 Every Month  
 Selected Months:

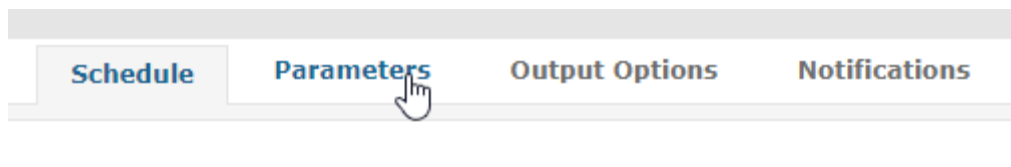
Days:  
 Every Day  
 Selected Days:  
  
  
  
  
  
  
  
 Dates in Month:  
  
Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

Times:  
Hours (required):  
  
Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17  
Minutes (required):  
  
Enter 0, 15, 30, 45 to run every 1/4 hour

As we have defined recurrence start date we can also define an end date, also you can select holiday dates when the report will not be required to run (at the time of writing only holiday days available to exclude are New Years Day).

## Parameters

The next screen will define the parameters used on the report, select ‘Parameters’ near top right hand corner.



This screen will look exactly the same as the input dialog when you run the report manually. just select the input you would normally setup, these inputs will be retained and used again when the report recurs:

Schedule For: /reports/Stock/Stock\_Level

---

Show Commodities  
 Show Batch Formulas  
 Show Product Formulas  
 Show Packaging

From Commodity (Optional)  
---

To Commodity (Optional)  
---

Select Commodity Group (Optional)  
---

From Stock Location (Optional)  
---

To Stock Location (Optional)  
---

Exclude Negative Quantities  
 Only Show Items To Be Re-Ordered  
 Exclude Zero Re-Order Levels  
 Exclude Expired Stock  
 Exclude Stock In Deleted Locations  
 Hide Commodities with 'No Stock Available'

Where datafield2 contains  
\_\_\_\_\_

In this example the stock level report will show all commodities and packaging that has dropped below re-order levels.

**IMPORTANT** if you schedule a report that requires a date range input then please read appendix A which details how to use relative dates, you should not specify exact dates, say from 1<sup>st</sup> August 2020 until 2<sup>nd</sup> August 2020 because the next time the report recurs it will still use the 1<sup>st</sup> until the 2<sup>nd</sup> and just produce exactly the same report.

## Output Options

The next screen helps define the format of the report and where it will be stored on the system, select 'Output Options' from the top right hand corner.

## Output File Options

This section lets you specify the file name of the created report, the time zone it will run in (usually left to the local time zone, the locale or language the report will be create in, the file format (we recommend PDF) and whether newly create reports should overwrite older reports or whether the file name should include a date and time to make them unique:

### Output File Options

File name (required):

Description:

Time Zone:

Output Locale:

Formats:

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> CSV               | <input type="checkbox"/> HTML           | <input type="checkbox"/> RTF              |
| <input type="checkbox"/> DOCX              | <input type="checkbox"/> ODS            | <input type="checkbox"/> XLSX             |
| <input type="checkbox"/> Excel (Paginated) | <input type="checkbox"/> ODT            | <input type="checkbox"/> XLSX (Paginated) |
| <input type="checkbox"/> Excel             | <input checked="" type="checkbox"/> PDF | <input type="checkbox"/> PPTX             |

File Handling:

- Overwrite Files
- Sequential File Names by Timestamp

Timestamp Pattern:

## Output Destination

The second section of this screen helps define when the report can be permanently stored on the system, you can select none, one or more options. These options include:

## Output To Repository

This will store the report output alone side the list of reports you can run in the regular screen you are familiar with. This option is not recommended as a recurring report will soon fill up the screen making it hard to find reports that you wish to run manually.

## Output To Host File System

This option allows you to specify a drive letter and folder where the reports can be stored for later examination e.g. '[D:\Scheduled](#) Report Output\Stock\Stock Level'. If this option is disabled please read Appendix B to change the configuration of web reports to enable this

## Output To FTP Server

Similar to the above this allows the report to be stored on a separate PC on the local or even remote network. Please talk to your IT department about whether an FTP server is available to you.

### Output Destination

Output To Repository

Output To Host File System

Output To FTP Server

Server Address:

Port:  Transfer Protocol:

Directory:

Username:  Password:

If you simply wish to email a resulting report then you can decide to not select any of these options and simply send out the report on email, see the following section.

## Notifications

The fourth and final screen is accessible by clicking the 'Notifications' text in the top right hand corner, this screen lets you define who receives a copy of the report via email if you wish, it can also send a notification as to whether the report has run successfully or not to a reporting administrator.

### Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:

- Include reports as repository links in email body
- Include report files as attachments
- Include report files as ZIP attachment
- Include HTML report in email body
- Do not send emails for empty reports

The left hand half of the screen lets you define who you wish to send the report to (along with anyone you wish to CC or BCC) together with the subject on the email and any text you wish to write in the body of the email.

There are also options to send a link to the repository copy of the report (no recommended), include the output as an attachment (recommended), attach a ZIPped copy of the report as an attachment, if the report output is in HTML then include the output in the body of the report and choose not to send an email out if there was nothing to report upon.

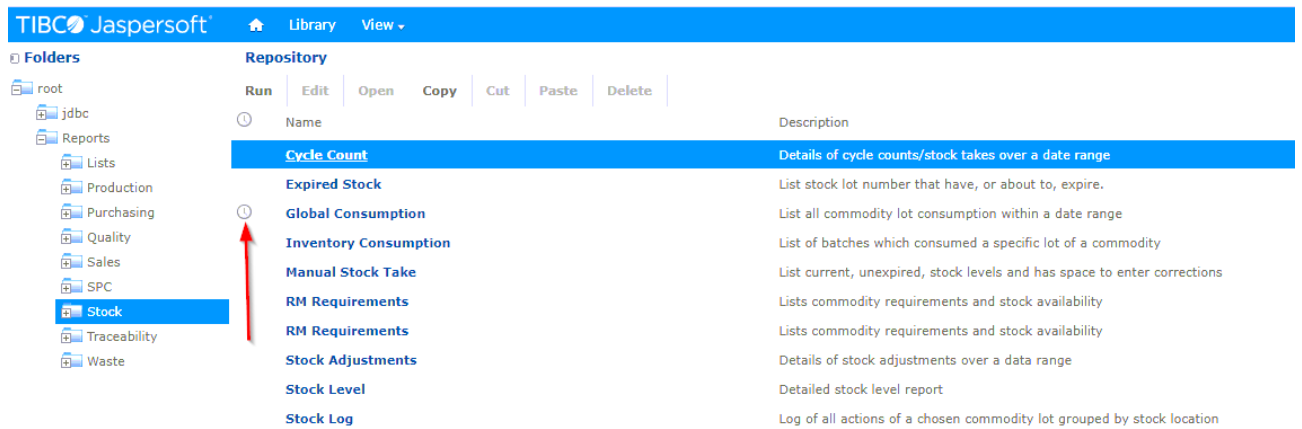
The right hand half of the screen is used to define who to send an email to notifying them of whether the report ran successfully or nor (and it not then why not), these options should be used to send to a report administrator if you have one.

Please note if you wish to email resultant reports you will need to define an email address and password which the reports will be sent **FROM** (see Appendix C).

Once all of the options have been set up click on ‘Save’ in the bottom left hand corner to add the schedule to the list on the very first screen.

## Amending a schedule

There are times when you may wish to amend a scheduled report, either to change the day/time a report is scheduled, add more email recipients or change the reporting parameters. This is simple to do, just find the report you have previously scheduled and click on the clock face to the right of the report name:



This will then display a list of all the schedules you have assigned to this report (normally there would be only one), to amend the schedule click on the pencil on the right hand side and then work through the screen as described above when creating a new schedule:



Of if you want to stop the scheduled report completely you can delete it by clicking on the bin icon on the right hand side.



## Appendix A : Using Relative Dates

Where a report asks for a date and/or time range it is now possible to use key words rather than using a specific date selected from a calendar. When scheduling a report to run automatically on a frequent basis it is vital that you use these keywords rather specifying dates as the report would continue to use the specified dates and repeat the same report each time it executed.

The keywords and the meanings are as follows:

	From (all times are 00:00:00)	To (all times are 23:59:59)
DAY	Current day	Current day
WEEK	Monday	Sunday
MONTH	First day of current month	Last day of current month
QUARTER	First day of current quarter. Note: quarters are defined as 1 <sup>st</sup> January - 31 <sup>st</sup> March 1 <sup>st</sup> April - 30 <sup>th</sup> June 1 <sup>st</sup> July - 30 <sup>th</sup> September 1 <sup>st</sup> October - 31 <sup>st</sup> December	Last day of current quarter
SEMI	First day of current half of year. Note: semis are defined as 1 <sup>st</sup> January - 30 <sup>th</sup> June 1 <sup>st</sup> July - 31 <sup>st</sup> December	Last day of current half of the year
YEAR	1 <sup>st</sup> January	31 <sup>st</sup> December

You are able to add or subtract from keywords to move the relative dates back into the past or into the future, i.e. DAY-1 = yesterday, MONTH+1 = next month

Some useful examples:

From DAY to DAY will return all of today's figures from 00:00:00 to 23:59:59.

From DAY-1 to DAY-1 will return all of yesterday's figures.

From WEEK to DAY will return all figures for the week so far (starting from Monday night/morning)

From MONTH-1 to MONTH-1 returns all of last month's figures.

From YEAR to DAY returns all the figures year to date.

## Appendix B : Enabling Output To Host File System

By default this option is disabled for security reasons, to enable this option you will need to edit the following file:

<JasperServer install directory>/apache-tomcat/webapps/jasperserver/WEB-INF/applicaitonContext.xml

Change the setting enableSaveToHostFS from false to true:

```
<property name="enableSaveToHostFS" value="true"/>
```

Once updated restart the jasperTomcat Windows service.

## Appendix C : Setting up email address to send reports from

There are two files that need to be modified with a text editor to allow you to automatically email scheduled reports

<JasperServer install directory>/apache-tomcat/webapps/jasperserver/WEB-INF/

- js.quartz.properties
- applicationContext-report-scheduling.xml

js.quartz.properties – update the below section

```
report.scheduler.mail.sender.host=smtp.gmail.com  
report.scheduler.mail.sender.username=username (ex. username@gmail.com)  
report.scheduler.mail.sender.password=p@$word  
report.scheduler.mail.sender.from=email@gmail.com  
report.scheduler.mail.sender.protocol=smtp  
report.scheduler.mail.sender.port=587
```

applicationContext-report-scheduling.xml – update the below section

```
<props>  
<prop key="mail.smtp.auth">true</prop>  
<prop key="mail.smtp.starttls.enable">true</prop>  
</props>
```

Once updated restart the jasperTomcat Windows service.