Information Builders.

WebFOCUS

ReportCaster Development and Administration Manual
Version 5 Release 2

DN4500501.0103

Preface

This documentation describes ReportCaster, a scheduling and distribution application that centralizes the execution and distribution of WebFOCUS reports, the contents of URLs, and files. It is intended for ReportCaster developers and administrators. This documentation is part of the WebFOCUS documentation set.

How This Manual Is Organized

This manual includes the following chapters:

Chapter/Appendix		Contents
1	Introducing ReportCaster	Describes ReportCaster processing, Distribution Server features, and provides an introduction to the components that comprise the ReportCaster architecture.
2	Accessing the ReportCaster Development and Administration Interface and Enabling User Capabilities	Describes how to access the ReportCaster Development and Administration interface, and how to enable user capabilities for ReportCaster.
3	Creating and Maintaining a Distribution List	Describes how to create, edit, and delete a distribution list. It also describes ReportCaster's burst feature.
4	Creating and Maintaining a Schedule	Provides information about scheduling a WF Server Procedure, Managed Reporting (MR) Standard Report or My Report, URL, or File. Describes how to distribute scheduled output as an e-mail message, using FTP, to a printer, as a report in a Managed Reporting folder, or to the Report Library. It also describes how you can edit the properties of the schedule, delete the schedule, or run a log report to obtain information about the schedule.
5	Report Library	Describes the Report Library, an optional storage and retrieval facility for ReportCaster output.

Chapter/Appendix		Contents
6	ReportCaster Console	Describes the features of the ReportCaster Console, an interactive administrator's tool that may be used to maintain and view schedule and log information stored in the ReportCaster Repository
7	ReportCaster Security	Highlights issues that administrators and security professionals need to be aware of so that they can appropriately configure ReportCaster to achieve their security goals.
8	ReportCaster Server Configuration	Provides information about the ReportCaster Server Configuration tool and the parameters of the Distribution Server configuration file.
9	Maintenance Functions for a FOCUS Repository	Describes administrative functions that can be performed if you have configured ReportCaster with a FOCUS Repository.
A	ReportCaster Formats	Provides descriptions, suggested uses, and considerations about each ReportCaster output format.
B	ReportCaster Repository Reports and Tables	Provides information about how to run reports that enable you to retrieve information from the ReportCaster Repository. It also describes the contents and primary keys of each table within the repository.
C	Tips and Techniques for Coding a ReportCaster Report	Provides tips and techniques for developing WebFOCUS reports that meet the requirements for scheduling and distribution using ReportCaster.

Documentation Conventions

The following conventions apply throughout this manual:

Convention	Description
`THIS TYPEFACE` or `this typeface`	Denotes syntax that you must enter exactly as shown.
`this typeface`	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
`underscore`	Indicates a default setting.
this typeface	Represents a placeholder (or variable) in a text paragraph, a cross-reference, or an important term. It may also Indicate a button, menu item, or dialog box option you can click or select.
this typeface	Highlights a file name or command in a text paragraph that must be lowercase.
Key + Key	Indicates keys that you must press simultaneously.
`{ }`	Indicates two or three choices; type one of them, not the braces.
`[ ]`	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
`|`	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
`...`	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis points (…).
`.` `.` `.`	Indicates that there are (or could be) intervening or additional commands.

In this manual, the term Internet refers to corporate intranets as well as the Internet.

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Do you have questions about ReportCaster?

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 ReportCaster 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.

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. 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 also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

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 most effectively, be ready to provide the following information when you call:

- Your six-digit site code number (*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.
    - The server you are accessing, including release (for example, 4.2.1).

- The stored procedure (preferably with line numbers) or FOCUS commands being used in server access.
- The name of 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, WebFOCUS, 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 the code to access a single 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?

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Contents

CHAPTER 1

Introducing ReportCaster

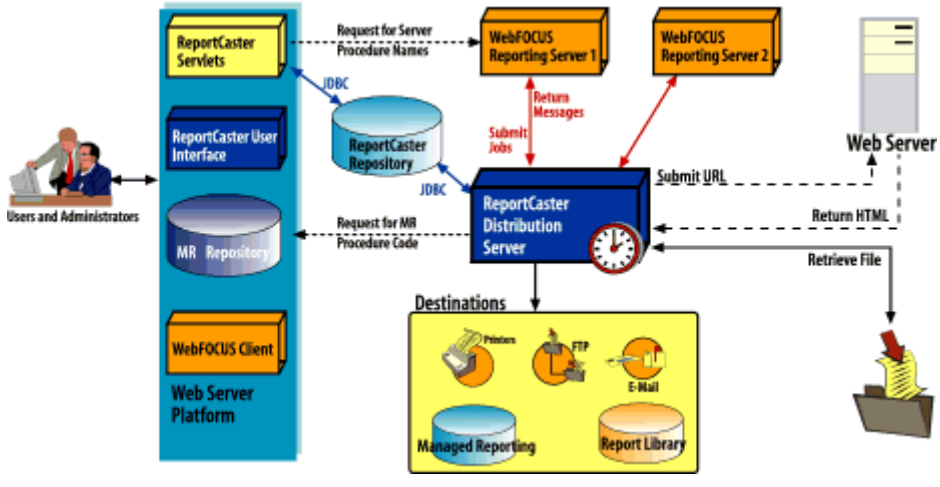
Topics:

- ReportCaster Processing
- ReportCaster Distribution Server Features
- ReportCaster Components

ReportCaster is a scheduling and distribution application that centralizes the execution and distribution of WebFOCUS reports, the contents of URLs, and files. ReportCaster supports multiple administrators and provides a single point of control for managing the information required to run an organization.

ReportCaster Processing

The following graphic shows the ReportCaster components and the processing that takes place when ReportCaster accesses an SQL repository to create and execute a scheduled job.



The ReportCaster Distribution Server is a Java application that governs the process of submitting, executing, and distributing a scheduled job. The Distribution Server can be installed on the same platform as the WebFOCUS Reporting Server and the WebFOCUS components (which reside on the Web server), or it can be installed on a different platform.

The WebFOCUS Reporting Server processes a scheduled request, retrieves the data, and returns the output to the Distribution Server, which formats the data and then distributes the output. ReportCaster can support multiple WebFOCUS Reporting Servers (specified in the ReportCaster Distribution Server configuration file), and one Managed Reporting Repository (defined by the MR_BASE_DIR setting in the WebFOCUS Client configuration file, cgivars.wfs).

Note: When ReportCaster is configured with a FOCUS repository, the WebFOCUS Reporting Server is configured with the FOCUS Database Server.

When you create a ReportCaster schedule, one of the properties of the schedule set by ReportCaster is the next run time (NEXTRUNTIME) for that schedule. The Distribution Server checks for schedules in the ReportCaster Repository that have a next run time less than or equal to the current time. The following steps describe what happens when the Distribution Server identifies a schedule to run:

1. The Distribution Server prioritizes the scheduled job with other schedules on the Distribution Server queue. When creating a schedule, there is a Priority parameter where you can specify a priority value from 1 to 5, where 1 is the highest priority and 5 is the lowest priority.The default priority value is 3. The Distribution Server queue sorts scheduled jobs by priority and then by time. If during a schedule cycle one or more jobs remain on the queue when the next schedule cycle begins, these jobs are reprioritized to include any new jobs entering the queue from the next cycle period.
2. When a session (thread) to the WebFOCUS Reporting Server is available, the Distribution Server dynamically extracts schedule, parameter, and alert information from the ReportCaster Repository. Additionally, WebFOCUS reports (WF Server Procedures, Standard Reports, and My Reports) are packaged for submission to the WebFOCUS Reporting Server. The connection made to the WebFOCUS Reporting Server depends on the Run Id parameter (for more information, see Chapter 7, *ReportCaster Security*). The number of concurrent threads available for job dispatching is controlled by the Maximum Thread parameter in the Distribution Server configuration file.
3. The user's scheduled job can be one of the following:
   - **WF Server procedure.** A -INCLUDE retrieves the procedure (FOCEXEC). The procedure must be accessible from the server path of the WebFOCUS Reporting Server.
   - **Managed Reporting procedure.** Calls the WebFOCUS Client and retrieves the procedure from the Managed Reporting Repository. The procedure can be a Standard Report or a My Report.
   - **Developer Studio procedure.** The procedure is retrieved from the Managed Reporting Repository on the Web server.
   - **URL.** ReportCaster can schedule a URL and distribute the content to specified recipients. To drill down on information within the URL, the links must have a fully-qualified path, or a defined root URI in the page.
   - **File.** ReportCaster can schedule the distribution of files to which the Distribution Server has read access. When scheduling a file, you must enter the fully-qualified path and file name (for example, *d:\reportcaster52\filename.doc*) of the file. For example, if you want to distribute the output from a Word document, you can distribute the static file to ReportCaster recipients.

The scheduled job includes variables (such as schedule ID, schedule procedure name, pre and post-processing procedures, the user ID (owner ID) that scheduled the job), distribution information, and parameter values.

4. The WebFOCUS Reporting Server runs the WF Server Procedures, Standard Reports, or My Reports and sends the output to the Distribution Server.
5. The Distribution Server distributes the output as an e-mail message, using FTP, to a printer, as a report in a Managed Reporting folder, or to the optional Report Library. For more information about the Report Library, see Chapter 5, *Report Library*.

   WF Server Procedures, Standard Reports, and My Reports support bursting. If you are distributing a bursted tabular report, the burst value is determined by the first BY field. If you are distributing a bursted graph report, the burst value is determined by the second BY field. The burst value is automatically determined by the internal matrix. The internal matrix is a memory area that stores each database field value and calculates values referenced by the TABLE or GRAPH request.

   For more information about bursting, see *Bursting a Report* in Chapter 3, *Creating and Maintaining a Distribution List*.
6. When the Distribution Server has distributed the output (or is unable to distribute the output), it then processes the log information and writes job information to the log tables in the ReportCaster Repository.
7. If notification is requested, the Distribution Server sends an e-mail notification.

Example Executing a Scheduled Job

In this example, the Distribution Server polls the BOTSCHED table every minute looking for scheduled jobs. However, note that ReportCaster enables administrators to change the polling interval for the Distribution Server using the Reader interval setting in the ReportCaster Server Configuration tool. You can specify an interval from 1 to 59 minutes.

1. At 9:01 A.M., you schedule a job with a start date/start time of today at 12:00 P.M. and an end date/end time of tomorrow at 3:00 P.M. The job is scheduled to run every two hours.
2. At 9:02 A.M., the Distribution Server reads all records from the BOTSCHED table with a NEXTRUNTIME equal to the current time. The job does not qualify since it has a start time of 12:00 P.M.
3. The Distribution Server polls the BOTSCHED table every minute thereafter, looking for jobs with a NEXTRUNTIME less than or equal to the current time.
4. At 12:00 P.M., the Distribution Server reads the BOTSCHED table. The job qualifies since its NEXTRUNTIME is equal to the current time. The job is put in the run queue and the Distribution Server updates its NEXTRUNTIME by two hours so that the NEXTRUNTIME is 2:00 P.M.

5. The Distribution Server polls the BOTSCHED table every minute thereafter, looking for jobs with a NEXTRUNTIME less than or equal to the current time.
6. At 2:00 P.M., the Distribution Server reads the BOTSCHED table. The job qualifies since its NEXTRUNTIME is equal to the current time. The job is put in the run queue and the Distribution Server updates its NEXTRUNTIME by two hours so that the NEXTRUNTIME is 4:00 P.M.
7. This process repeats itself. The job will run every two hours until 3:00 P.M. tomorrow. The last time the job will be put in the run queue is tomorrow at 2:00 P.M.

Time Zone Considerations With ReportCaster

Users who access ReportCaster remotely from a different time zone must schedule jobs using the time zone of the machine on which the Distribution Server is located. When viewing job schedules, the displayed date and time is from the time zone of the Distribution Server.

ReportCaster uses Sun's Java technology, which always adjusts for Daylight Savings time, regardless of Windows settings. If you are in an area that does not observe Daylight Savings time, scheduled jobs will run at the correct time. However, some internal files will add an hour to time stamps during this period. These files include the following:

- Distribution Server log and trace files.
- Report end time in the log record.
- Programs running on the Servlet Engine including servlet trace files.

ReportCaster Distribution Server Features

ReportCaster Administrator's should be aware of the following ReportCaster Distribution Server activities and features:

- Startup
- Recovery
- Scanback
- Configuration File

Distribution Server Startup

When the Distribution Server is started, it verifies that it can communicate with the following components:

- **ReportCaster Repository—**if the ReportCaster Repository is unavailable, the Distribution Server will retry connecting five times in one-minute intervals. If you are using a FOCUS repository, the ReportCaster Repository resides on the WebFOCUS Reporting Server. In this case, the Distribution Server will verify that it can communicate with the WebFOCUS Reporting Server.
- **WebFOCUS on the Web server—**the Distribution Server will stay active if the Web server is unavailable. Previously scheduled jobs will continue to run but no new scheduling will be possible.

If the Distribution Server cannot connect to the ReportCaster Repository, the Distribution Server does not start. To see whether the Distribution Server started successfully, you can check the following files:

- /ibi/reportcaster52/log/scheduler.log
- /ibi/reportcaster52/bin/schbkr.out (z/OS only)

Upon successful initialization, the Distribution Server checks for jobs that need to be recovered and jobs that need to run as specified by the Recovery and Scanback parameters.

Recovery

The purpose of the Recovery parameter is to recover jobs that were placed in the Distribution Server queue but whose next run time was not updated, possibly due to the Distribution Server or WebFOCUS Reporting Server being unavailable. You can activate the recovery feature by setting Recovery to ON in the ReportCaster Server configuration file.

When you create a schedule and the Recovery parameter is set to ON, the RECOVERY field for the schedule is set to N. When the schedule is placed in the run queue, the RECOVERY field is set to Y. This means that if the Distribution Server becomes unavailable while the job is still on the queue, ReportCaster will recover the job when the Distribution Server becomes available again. After the job is run and all log records have been written, the RECOVERY field is set back to N.

Note: Any job that is running because the Recovery parameter is set to ON runs only once. After the job is placed in the run queue, its NEXTRUNTIME is updated to the next time it should run after the current time. For example, if a job is scheduled to run hourly and the Distribution Server is unavailable for four hours, when the Distribution Server becomes available the job will run only once and will resume running on an hourly basis thereafter.

Reference

How Jobs Are Recovered

Scheduled jobs are recovered as follows:

1. When you start the Distribution Server, it checks for Recovery ON in the Distribution Server configuration file.
2. If Recovery is set to ON, the Distribution Server reads all records from the BOTSCHED table whose RECOVERY field is set to Y and places them in the run queue, regardless of schedule information and next run times.
3. The Distribution Server begins the process of polling and looking for jobs to run after having queued all the jobs whose RECOVERY field is set to Y.
4. After the scheduled job is placed in the run queue, its NEXTRUNTIME is updated to the next time it should run after the current time.

Note:

- If the Recovery parameter is set to OFF, the Distribution Server modifies all jobs in the BOTSCHED table with a RECOVERY field value of Y to N. This turns recovery off for all jobs.
- If the Recovery parameter is set back to ON, it is only activated for jobs whose NEXTRUNTIME is later than when the Recovery parameter is set back to ON.

SCANBACK

In certain instances, the Distribution Server may be unavailable for a period of time. During this time, no scheduled jobs can run. Under normal circumstances, when the Distribution Server becomes available, all jobs that were scheduled to run during the interval that the Distribution Server was down will now run. However, this may not be what you want if the Distribution Server has been down for a long period of time.

To address this situation, there is a parameter in the ReportCaster Distribution Server configuration file called Scanback. This parameter sets the number of days that the Distribution Server will look back to begin executing jobs. The Distribution Server will run only those jobs whose NEXTRUNTIME falls on or after 12:01 A.M. on the Scanback date.

If you do not specify a Scanback value in the configuration file, then all jobs with a NEXTRUNTIME before the current time are placed in the run queue.

Distribution Server Configuration File

ReportCaster Administrators can use the ReportCaster Server Configuration tool to navigate through and change the various parameter settings in the Distribution Server configuration file. For example, ReportCaster enables administrators to change the polling interval for the Distribution Server, and define access to multiple WebFOCUS Reporting Servers. For more information about this GUI configuration tool and the Distribution Server configuration file parameters, see Chapter 8, *ReportCaster Server Configuration*.

ReportCaster communication from the Distribution Server to the WebFOCUS Client supports only WebFOCUS Servlet configurations. WebFOCUS CGI and ISAPI configurations are not supported.

ReportCaster Components

ReportCaster consists of the following components:

ReportCaster Development and Administration Interface. The ReportCaster Development and Administration Interface uses Java™ Web Start technology. From this interface, you can:

- Create users and groups to provide ReportCaster capabilities for non-Managed Reporting users (when Managed Reporting is configured with ReportCaster, you must use the Managed Reporting User Administration tool to create and manage users and groups). For more information, see Chapter 2, *Accessing the ReportCaster Development and Administration Interface and Enabling User Capabilities*.
- Create and maintain a Distribution List.
- Create and maintain a schedule.
- Access the Library Access List and Library Management interfaces of the optional Report Library product.
- Track the status of a schedule.
- Access the ReportCaster Server configuration tool.

ReportCaster Scheduling Wizard and UAS Interface. The Managed Reporting Analytical User (formerly specified as a Java User) can create a schedule for a Managed Reporting My Report using the ReportCaster Scheduling Wizard, which may be accessed from the Business Intelligence Dashboard and Managed Reporting Domains environments. Once you have created the schedule, you can access the ReportCaster User Administration Services (UAS) Interface to edit the properties of the schedule, delete the schedule, or run a log report to obtain information about the schedule. Additionally, you can purge log records to conserve space in the log file. For more information about these redesigned interfaces, which use dynamic HTML technology, see the *ReportCaster End User's Manual*.

ReportCaster Console. The ReportCaster Console is a set of HTML pages and JavaServer Pages™ (JSP™) that enable ReportCaster Administrators to access run time information about ReportCaster. For more information about the ReportCaster Console, see Chapter 6, *ReportCaster Console*.

ReporCaster API. The ReportCaster API (for self-service users only) uses JavaServer Pages (JSP) technology, a Java™ servlet, or a Java application with JavaBeans™ components to create independent, customized environments that offer the features of ReportCaster. For detailed information about the ReportCaster API, see the *ReportCaster and Two-Way Email API for Self-Service Applications* manual, and the *WebFOCUS Summary of New Features* manual.

CHAPTER 2

Accessing the ReportCaster Development and Administration Interface and Enabling User Capabilities

Topics:

- Accessing the ReportCaster Development and Administration Interface
- Enabling User Capabilities for ReportCaster
- ReportCaster Development and Administration Interface Capabilities

The ReportCaster Development and Administration Interface enables you to perform all ReportCaster functions (see *ReportCaster Development and Administration Interface Capabilities* on page 2-13). However, you must first access ReportCaster with a specified set of user capabilities.

Accessing the ReportCaster Development and Administration Interface

ReportCaster is launched using Java™ Web Start technology, an application deployment solution that enables you to manage Web applications without using a browser.

You can access the ReportCaster Development and Administration Interface as follows:

- Managed Reporting users must click the Clock icon on the gray toolbar. No log on is necessary since your user ID has already been validated by Managed Reporting security.
- Developer Studio users who are working in the WebFOCUS Applications or Managed Reporting Repository tree components must click the Clock icon on the gray toolbar. No log on is necessary since your user ID has already been validated by Managed Reporting security.
- Non-Managed Reporting users must enter the following URL:

  ```
  http://hostname/rcaster/servlet/
  DSTRCServlet?IBIRC_function=CASTER_JNLP
  ```

  where:

  hostname

  Is the host name of the Distribution Server.

  The ReportCaster Signon page opens. Enter a valid ReportCaster user ID and password and then click *OK*.

The ReportCaster Development and Administration Interface opens and Java Web Start is launched. On each launch, Java Web Start checks the Web server to see if a new version of the application is available. If it is, Java Web Start automatically downloads and launches the latest version, ensuring that ReportCaster always runs using the latest version.

Enabling User Capabilities for ReportCaster

There are two ways of enabling user capabilities for ReportCaster:

- **Managed Reporting users** must be enabled for ReportCaster using the User Administration tool in Managed Reporting. For more information, see *Enabling ReportCaster Capabilities for Managed Reporting Users* on page 2-3.
- **Non-Managed Reporting users** must be enabled for ReportCaster using the User Administrator tool in the ReportCaster Development and Administration Interface. For more information, see *Enabling ReportCaster Capabilities for Non-Managed Reporting Users* on page 2-7.

Enabling ReportCaster Capabilities for Managed Reporting Users

To enable ReportCaster capabilities for Managed Reporting users, you must be both a ReportCaster Administrator and a Managed Reporting Administrator. If you have these user capabilities, you can use the Managed Reporting User Administration tool to add, change, or delete ReportCaster capabilities for Managed Reporting users (Administrators, Domain Admins, and Analytical users only).

Procedure How to Enable ReportCaster Capabilities for Managed Reporting Users

1. Log on to Managed Reporting as a Managed Reporting Administrator.
2. From Managed Reporting, click *User Administration*.

   The User Administration dialog box opens.
3. Select the Users tab.
4. Right-click the Users folder and click *New*.

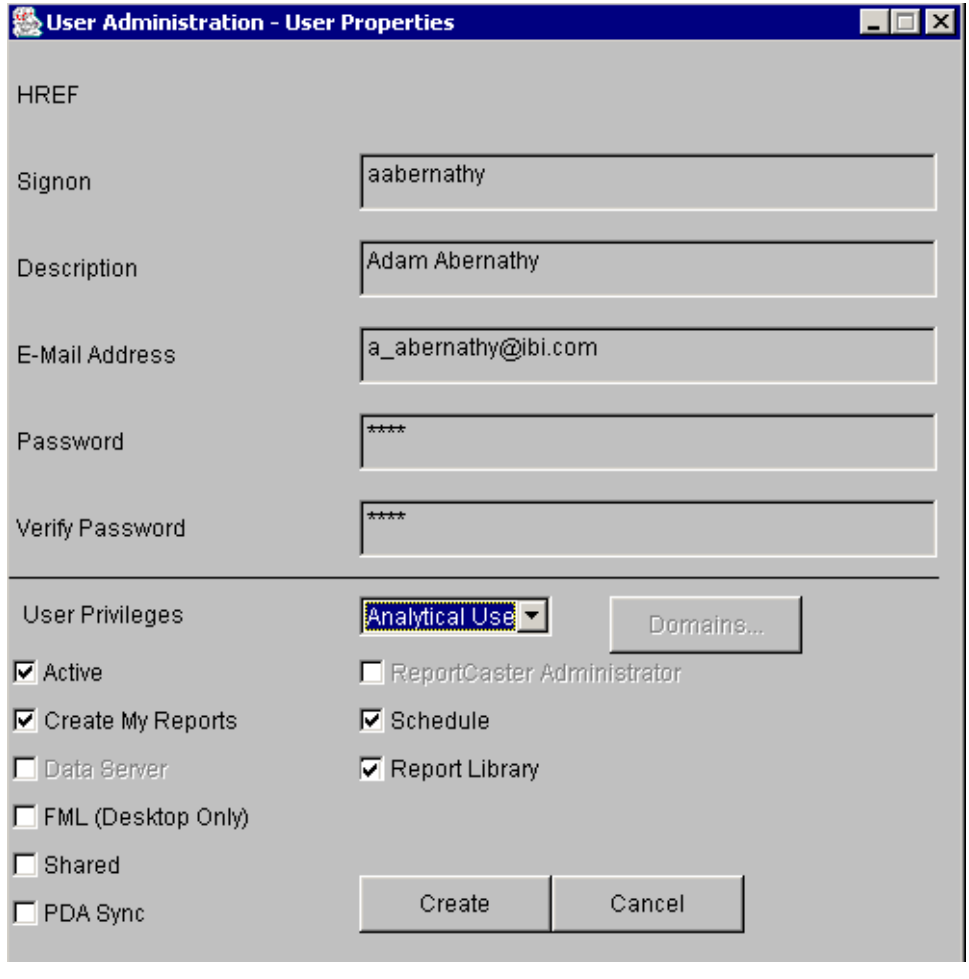
   The User Administration - User Properties dialog box opens.
5. Enter the user's signon name and a description for the user. The user's signon name is the name used at logon. This value may be a maximum of 48 characters.
6. Enter the user's e-mail address. The e-mail address is required only for the optional Report Library product.
7. Enter the password in the Password input box. This value may be a maximum of 48 characters.
8. Enter the password again in the Verify Password input box.

9. Select the User Privileges for the user. You can enable ReportCaster capabilities for the following user types:

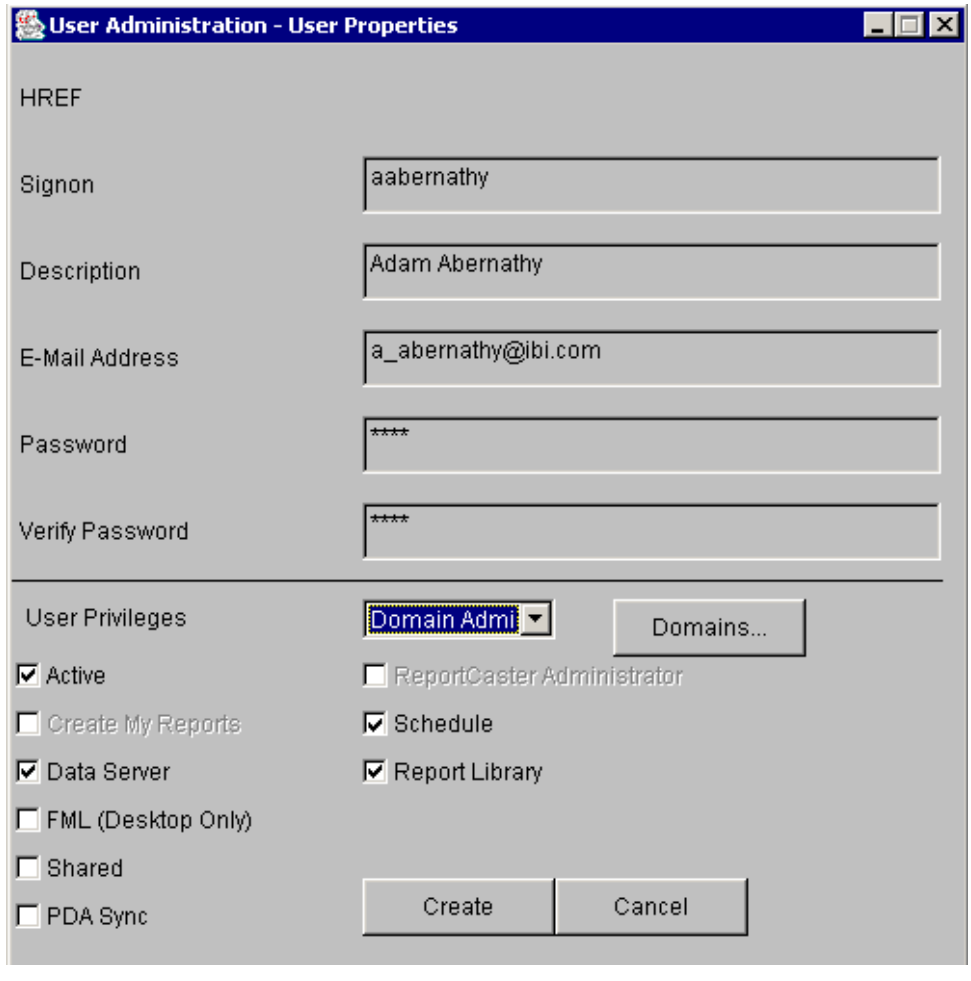
- **Analytical User.** You can select the *Schedule* and *Report Library* check boxes.

  The Schedule check box enables the user to create a schedule using the ReportCaster Scheduling Wizard (for more information, see the *ReportCaster End User's Manual*).

  The Report Library check box enables the user to view content in the optional Report Library to which they have been granted access. The user becomes a member of the public library directory and can be added to Library Access Lists.



- **Domain Admin.** You can select the *Schedule* and *Report Library* check boxes. The Schedule check box enables the user to schedule their own Standard Reports and My Reports, the contents of URLs, and files. The Report Library check box enables the user to view content in the Report Library to which they have been granted access. The user becomes a member of the public library directory and can be added to Library Access Lists.

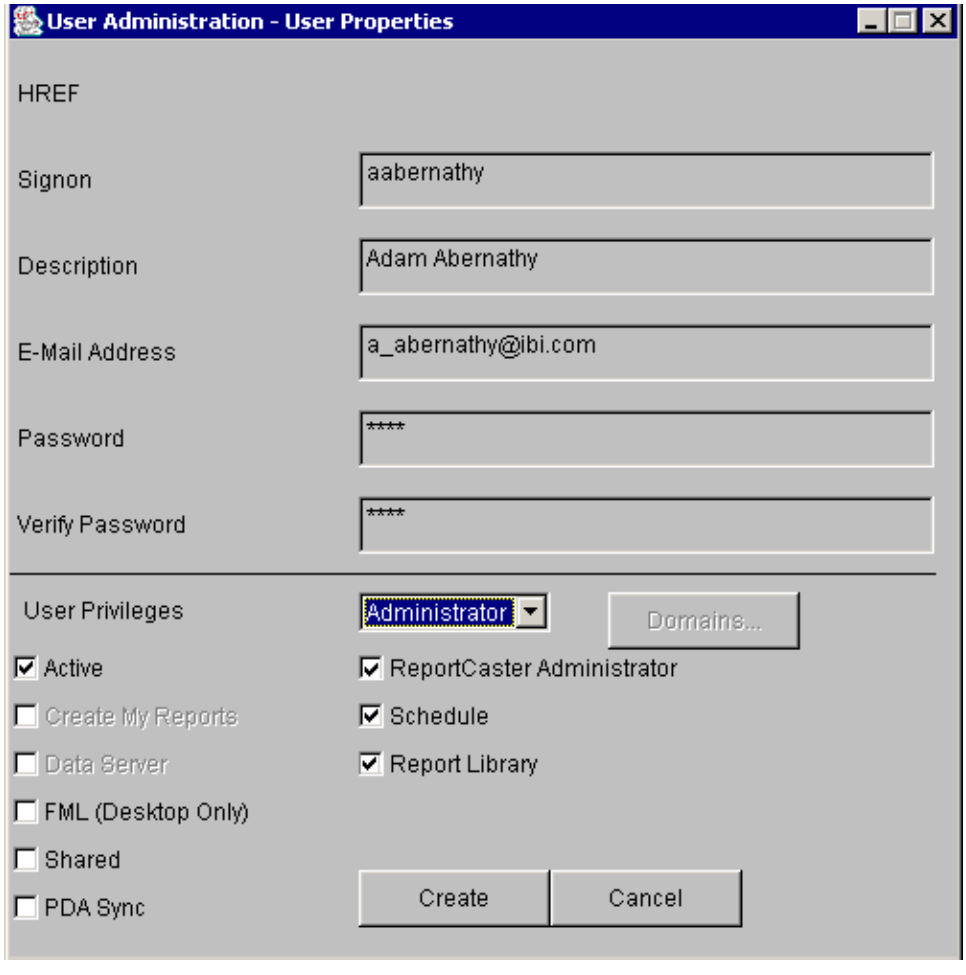


- **Administrator.** You can select the *Administrator*, *Schedule*, and *Report Library* check boxes.

  The Administrator check box specifies that the user is a ReportCaster Administrator.

  The Schedule check box enables the user to schedule all Task Types.

  The Report Library check box enables the administrator to view content in the optional Report Library to which they have been granted access. The administrator becomes a member of the public library directory and can be added to Library Access Lists.



Note: An Administrator that does not have Report Library capability can access the Library Management feature but cannot view content in the Report Library.

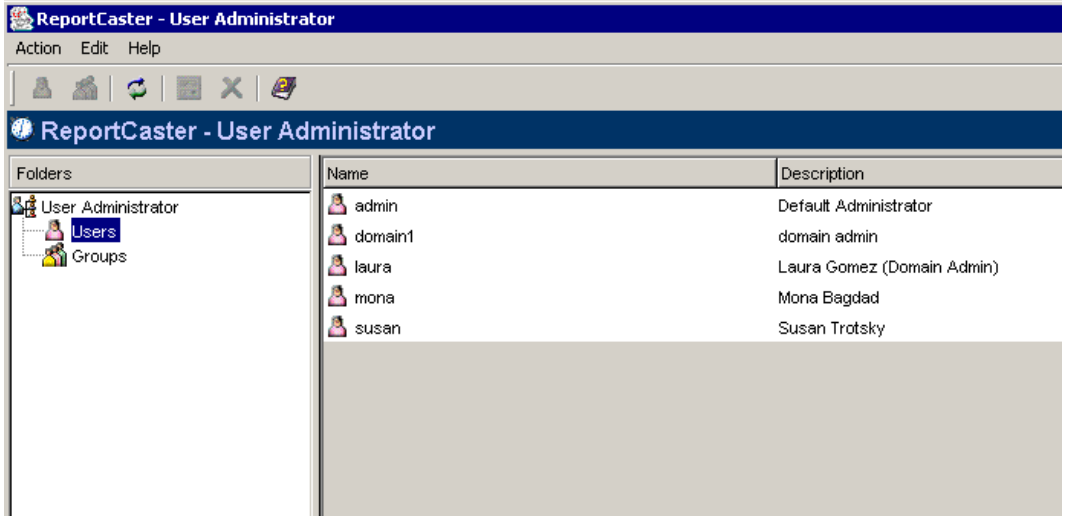
10. Click *Create* to add the user properties to the ReportCaster Repository tables.

Note: If you are licensed for Managed Reporting, ReportCaster capabilities must be enabled using the User Administration tool in Managed Reporting. If the privileges of a Managed Reporting user ID with ReportCaster capability are changed, or if a Managed Reporting user ID with ReportCaster capability is deleted using the Managed Reporting User Administration tool, then the changes are also made to the ReportCaster Repository tables. For more information about the Managed Reporting User Administration tool, see the *WebFOCUS Managed Reporting Development and Administration Web Browser Edition*.

Enabling ReportCaster Capabilities for Non-Managed Reporting Users

Non-Managed Reporting users must be enabled for ReportCaster using the User Administrator tool in the ReportCaster Development and Administration Interface.

To access the User Administrator tool, click the *User Administrator* link from the ReportCaster Development and Administration Interface. The ReportCaster - User Administrator window opens:



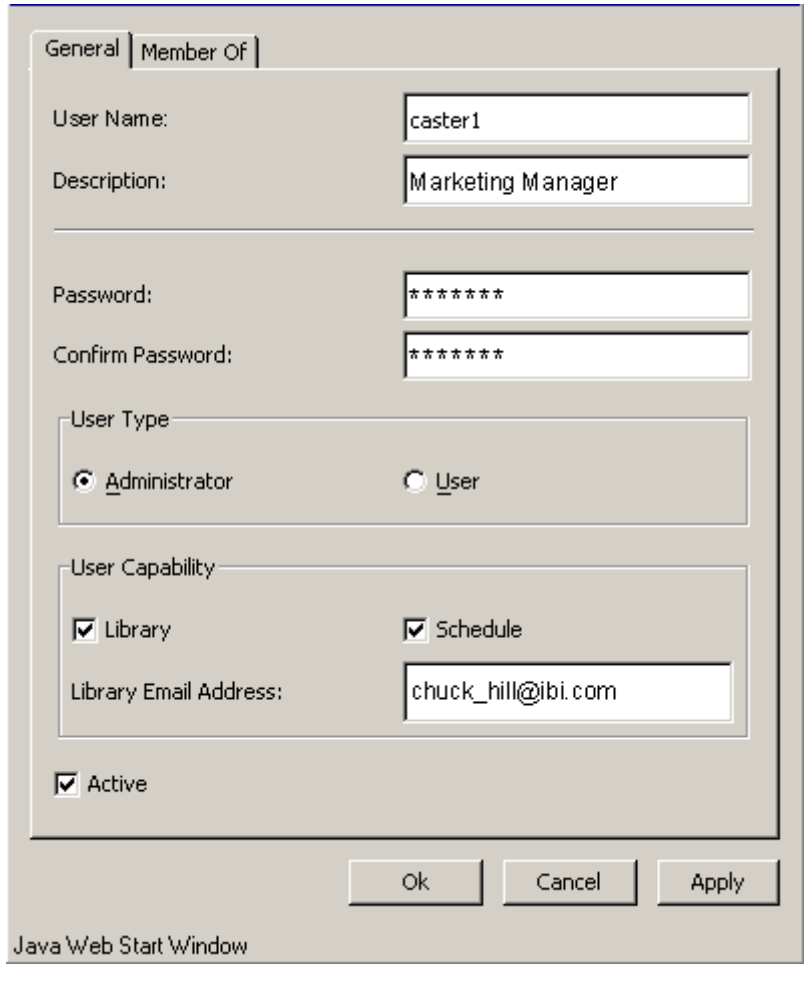
Within the User Administrator tool, you can perform the following administrative tasks:

- Create a new user. For more information, see *How to Create a New User* on page 2-8.
- Create a new group (for use in Library Access Lists in the Report Library). For more information, see *How to Create a New Group and Add Users to the Group* on page 2-10.
- Refresh the list of users and groups to include any newly created or updated users and groups.

- Edit the properties of a selected user or group. For more information, see *How to Edit the Properties of a User or Group* on page 2-11.
- Delete a selected user or group. For more information, see *How to Delete a User or Group* on page 2-12.

Procedure How to Create a New User

1. Click the *Create a New User* icon, or select *New User* from the Action menu. The New User window opens:



2. In the User Name field, enter the user ID. This is the owner ID for all schedules created by this user.
3. In the Description field, enter a description for the user.

4. In the Password field, enter the password for the user ID.
5. In the Confirm Password field, reenter the password.
6. In the User Type section, specify whether or not the user is a ReportCaster Administrator.
7. In the User Capability section, you can select the *Library* and *Schedule* check boxes.

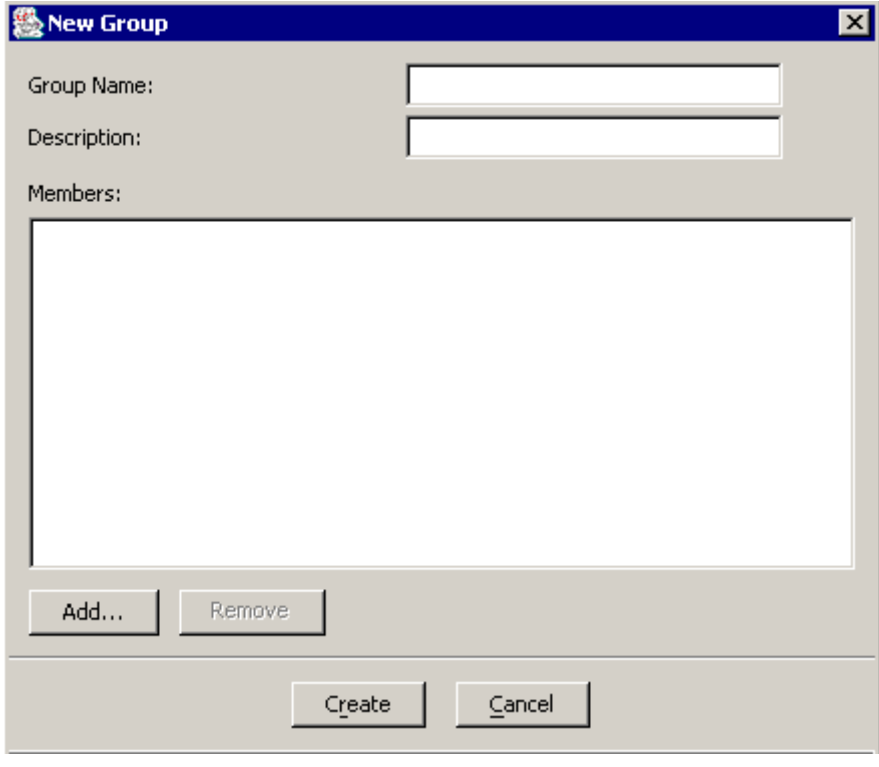
   The Library check box enables the user to view content in the optional Report Library to which they have been granted access. If the user is a ReportCaster Administrator, they can manage content in the Report Library. The user becomes a member of the public library directory and can be added to Library Access Lists.

   The Schedule check box enables the user to schedule WF Server Procedures, the contents of URLs, and files.
8. Enter the user's e-mail address. The e-mail address is required only for the optional Report Library product.
9. Specify whether the user ID is Active (the default) or Inactive. To make the user ID inactive, uncheck the *Active* check box.
10. Click *OK* to save the changes to the ReportCaster Repository tables.

Procedure How to Create a New Group and Add Users to the Group

Similar to creating a Distribution List, you can group users together to access information in the Report Library that is relevant to that group of users. Once a group has been created, it can be added to an Access List that specifies which groups and users can view scheduled output sent to the Report Library. For more information about Access Lists and the optional Report Library product, see Chapter 5, *Report Library*.

1. Click the *Create a New Group* icon, or select *New Group* from the Action menu. The New Group window opens:



2. In the Group Name field, type the name of the group.
3. In the Description field, type a description for the group.
4. To add user(s) to the group, click the *Add* button. The Select Users window opens.
5. Select the user(s) you want to add to the group.
6. Click *Create*.

Procedure How to Edit the Properties of a User or Group

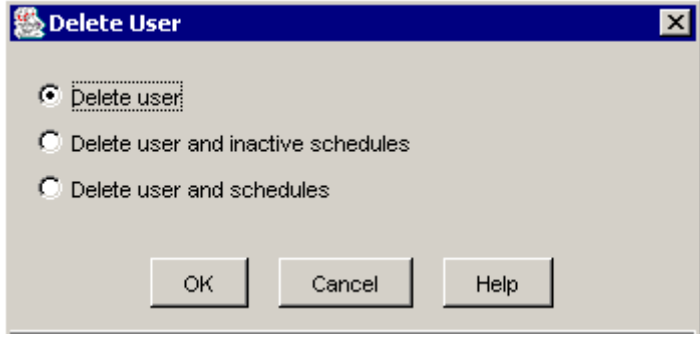
1. In the Folders frame on the left side of the ReportCaster - User Management window, select *Users* or *Groups*. Depending on your selection, all users or all groups display in the right frame of the ReportCaster - User Management window.
2. Perform one of the following:
   - Right-click the user or group whose properties you want to change, and then select *Properties*.
   - Select the user or group whose properties you want to change, and then click the Properties icon  from the gray toolbar.
   - Double-click the selected user or group whose properties you want to change.

   The Properties window opens.
3. If you are editing the properties of a user, make the necessary changes to the General tab. You can also click the Member Of tab to add or remove the user from a group.

   If you are editing the properties of a group, you may change the description of the group, and add or remove users from the group.
4. Once you have completed editing the properties of the user or group, click *OK* to save the changes to the ReportCaster Repository tables and exit the Properties window, or click *Apply* to save the changes to the ReportCaster Repository tables and remain in the Properties window for additional editing.

Procedure How to Delete a User or Group

1. In the Folders frame on the left side of the ReportCaster - User Management window, select *Users* or *Groups*. Depending on your selection, all users or all groups display in the right frame of the ReportCaster - User Management window.
2. Select the user or group that you want to delete and then click the Delete icon (which displays as a red X). You can also right-click the user or group and then select *Delete* from the drop-down menu.
3. The following window appears:

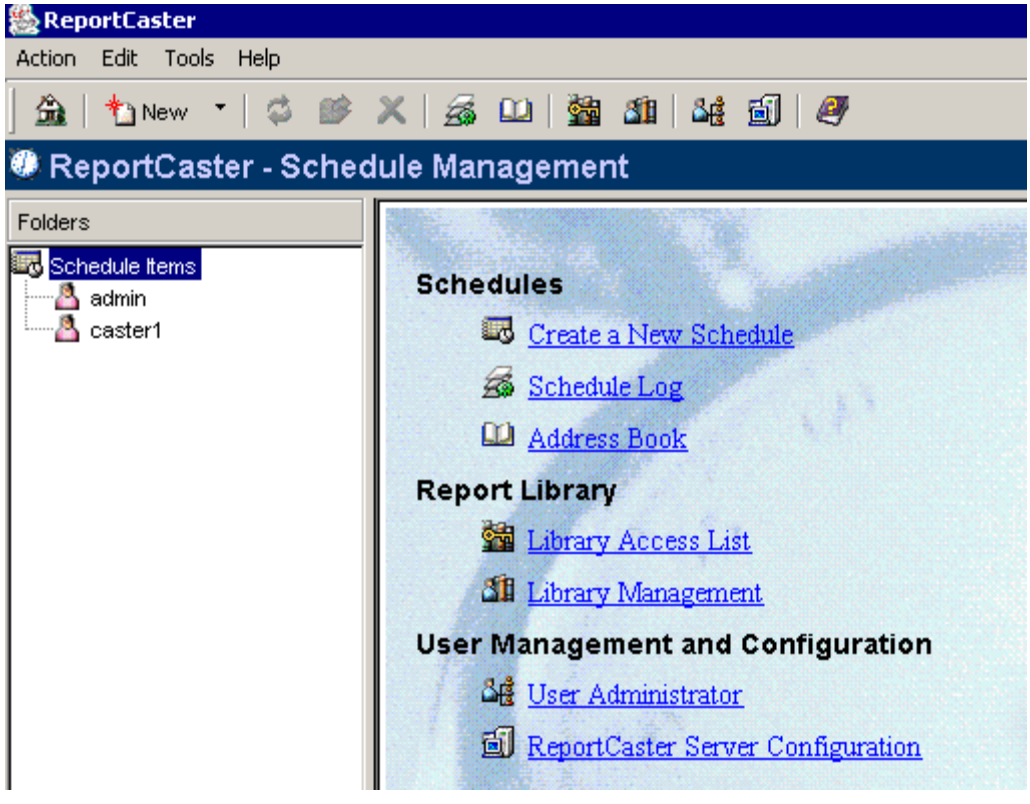


4. Select the applicable radio button and then click *OK* to save the changes to the ReportCaster Repository tables.

Tip: If you delete a user ID, you can use the Tools option in the ReportCaster Console to globally replace the user ID in schedules and Distribution Lists that contain the deleted user ID. For more information, see *Globally Replacing Field Values in the ReportCaster Repository* in Chapter 6, *ReportCaster Console*.

ReportCaster Development and Administration Interface Capabilities

As a ReportCaster Administrator, you can perform the following functions using the ReportCaster Development and Administration Interface:



- Create and maintain ReportCaster users and groups for non-Managed Reporting users. For more information, see *Enabling ReportCaster Capabilities for Non-Managed Reporting Users* on page 2-7.
- Create and maintain a Distribution List. For more information, see Chapter 3, *Creating and Maintaining a Distribution List*.
- Create and maintain a schedule. For more information, see Chapter 4, *Creating and Maintaining a Schedule*.

- Access the Library Access List and Library Management interfaces of the optional Report Library product. For more information, see Chapter 5, *Report Library*.
- View a Job Process Log Report and maintain the log file. For more information, see Chapter 4, *Creating and Maintaining a Schedule*.
- Access the ReportCaster Distribution Server environment settings. For more information, see Chapter 8, *ReportCaster Server Configuration*.

CHAPTER 3

Creating and Maintaining a Distribution List

Topics:

- Accessing the Address Book Interface
- Creating a Distribution List
- Editing a Distribution List
- Deleting a Distribution List
- Bursting a Report

When creating a schedule, you can distribute scheduled output to a single recipient, or to several recipients. If you are creating a schedule to be distributed to several recipients, you may want to create a Distribution List consisting of multiple recipients. The Distribution List may then be assigned to any schedule.

You can create a Distribution List using the Address Book interface, or by specifying the recipients when creating the schedule. ReportCaster Administrators can edit or delete all Distribution Lists.

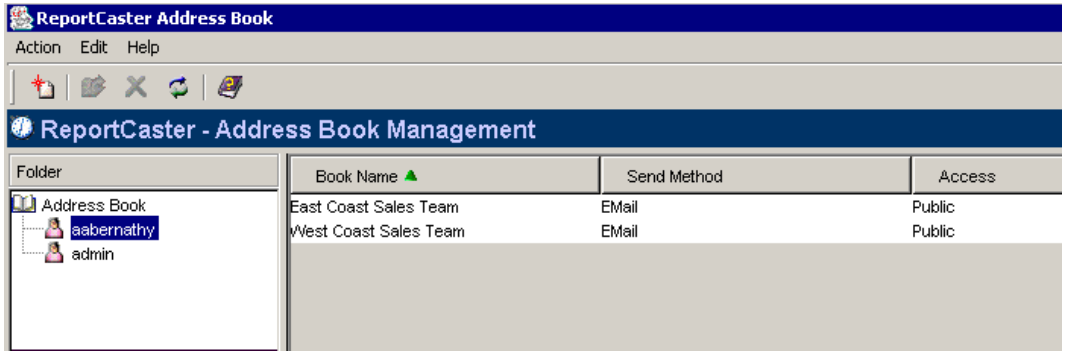
If the entire report you are scheduling is not relevant to those receiving it, you can specify sections of the report to be sent using the burst option. Each person on your Distribution List can receive different sections of the report depending on the individual burst values you specify.

If you are using the optional Report Library product, you must create an Access List instead of a Distribution List. For more information, see Chapter 5, *Report Library*.

Accessing the Address Book Interface

From the ReportCaster Development and Administration Interface, click the *Address Book* link.

The ReportCaster - Address Book Management window opens. If you select a user (for example, aabernathy), all Distribution Lists owned by the selected user appear:



Note: You can sort the Distribution Lists for each column by clicking on the column title (for example, Send Method). The default sort order is ascending.

From the ReportCaster - Address Book Management window, you can:

- Create a new Distribution List. For more information, see *Creating a Distribution List* on page 3-3.
- Edit the properties of a Distribution List. For more information, see *Editing a Distribution List* on page 3-8.
- Delete a Distribution List. For more information, see *Deleting a Distribution List* on page 3-10.
- Refresh the Address Book so that it contains the latest Distribution List information. Click the Refresh icon, select *Refresh* from the Action menu, or right-click a user and then select *Refresh*.
- Exit the Address Book interface by selecting *Exit* from the Action menu.
- Access the online Help file. Click the Help icon or select a topic from the Help menu.

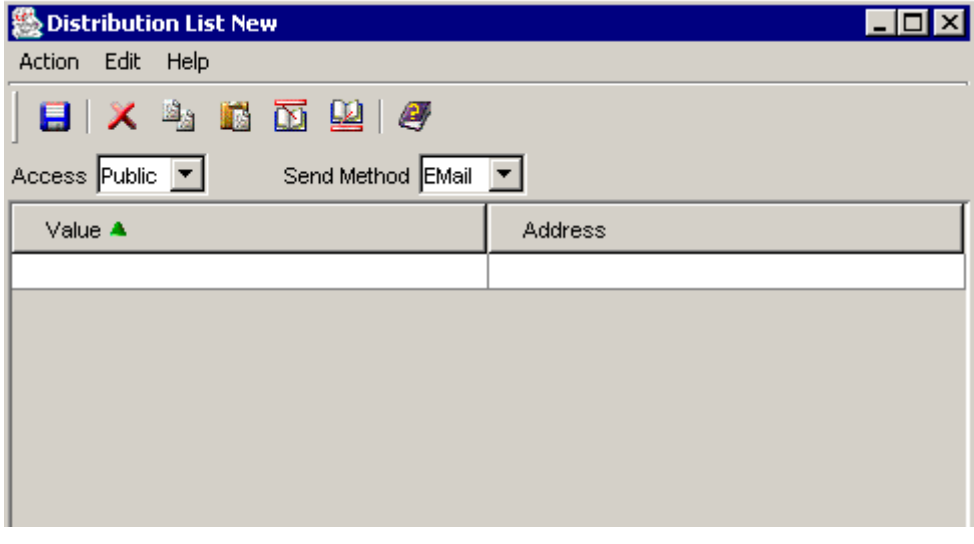
Creating a Distribution List

When you create a Distribution List, you specify public or private access, and optional burst values for reports. For more information about bursting, see *Bursting a Report* on page 3-11. Additionally, you must specify one of the following distribution methods:

- **E-mail.** A list of e-mail addresses that will receive ReportCaster content. For more information, see *How to Create an E-mail Distribution List* on page 3-3.
- **FTP.** A list of FTP file names that will receive ReportCaster content. For more information, see *How to Create an FTP Distribution List* on page 3-5.
- **Printer.** A list of printers that will receive ReportCaster content. For more information, see *How to Create a Printer Distribution List* on page 3-6, as well as *Considerations When Creating a Printer Distribution List* on page 3-7.

Procedure How to Create an E-mail Distribution List

1. From the ReportCaster - Address Book Management window, select the Create a New Distribution List icon , or select *New* from the Action menu. The Distribution List New window opens:



2. **Access.** 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.
3. **Send Method.** Select *EMail*. This is the default.

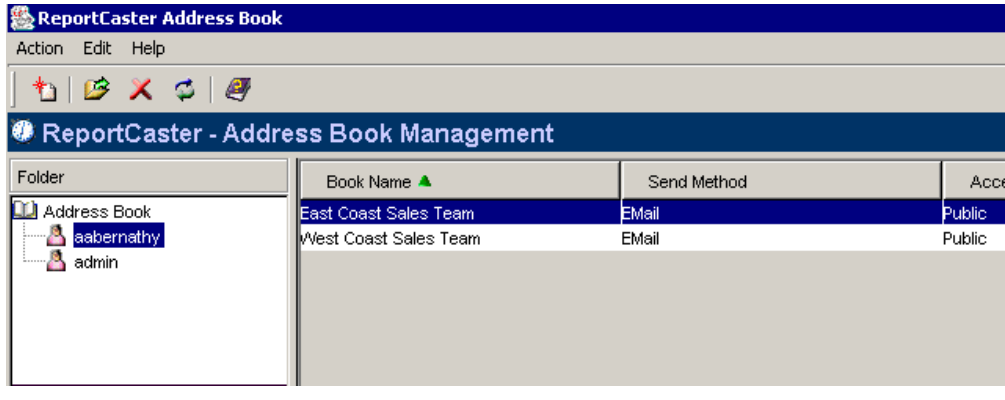
4. **Burst Value.** If you are bursting a report (WF Server Procedure, Managed Reporting Standard Report, or Managed Reporting My Report), specify individual sort values in the Burst Value field. This value may be a maximum of 75 characters.

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

   For more information about bursting a report, see *Bursting a Report* on page 3-11.

5. **Address.** Specify the e-mail addresses of the recipients. Be careful entering this information because there is no edit checking except for the @ sign. The maximum number of e-mail addresses you can specify in a Distribution List is 9999.

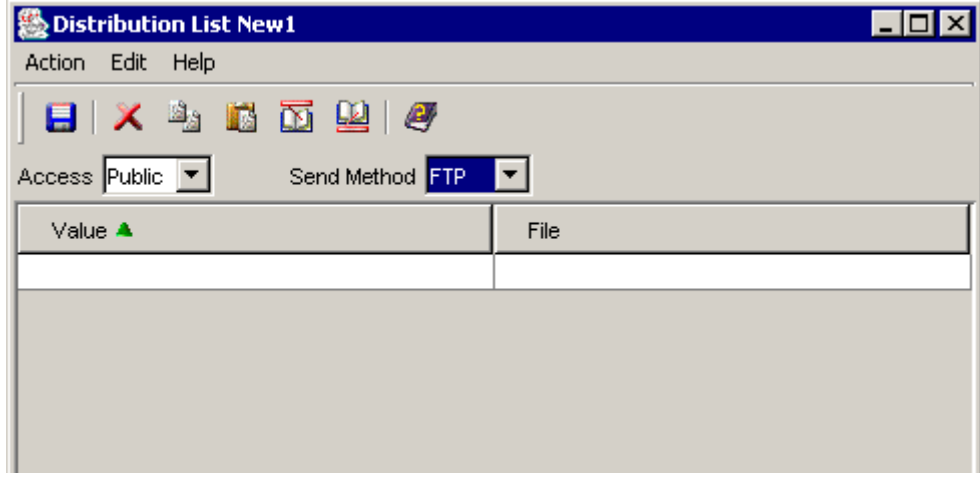
6. Click *Save* and specify a name for your Distribution List. The Distribution List appears in the Address Book with the name you specified (for example, East Coast Sales Team).



Tip: You can use group mail lists (defined on your mail server) with e-mail Distribution Lists. Group mail lists enable you to send output or notification to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository.

Procedure How to Create an FTP Distribution List

1. From the ReportCaster - Address Book Management window, select the Create a New Distribution List icon , or select *New* from the Action menu. The Distribution List New window opens:

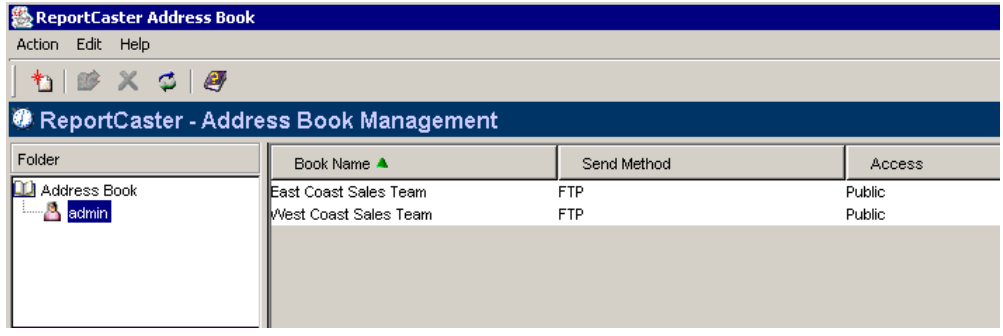


2. **Access.** Select *Public* (default) or *Private*. Only the owner and ReportCaster Administrators can view a Private Distribution List, whereas every ReportCaster user can view a Public Distribution List.
3. **Send Method.** Select *FTP* as from the drop-down list.
4. **Burst Value.** If you are bursting a report (WF Server Procedure, Managed Reporting Standard Report, or Managed Reporting My Report), specify individual sort values in the Burst Value field. This value may be a maximum of 75 characters.

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

   For more information about bursting a report, see *Bursting a Report* on page 3-11.
5. **File.** Specify the names of the FTP files that will hold the report (including the extension). The extension specified here should be appropriate for the format selected when creating the schedule. For example, if you selected Excel or EXL2K on a Windows platform, the file should be *drive:\directory\filename.xls*. The maximum number of FTP files you can specify in a Distribution List is 9999.

6. Click *Save* and specify a name for your Distribution List. The Distribution List appears in the Address Book with the name you specified (for example, East Coast Sales Team).

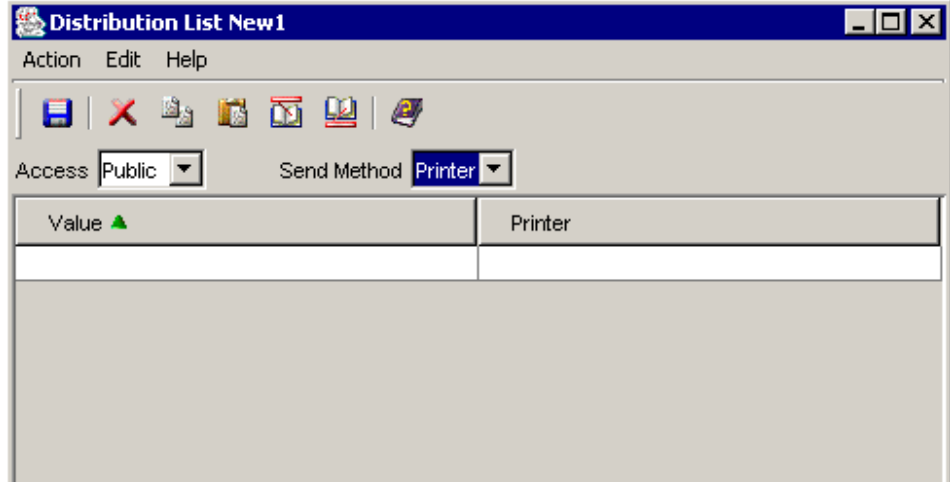


Note:

- When you use FTP to transfer Cascading Style Sheet (CSS) files from any platform to z/OS UNIX, the files must be in binary mode if the z/OS UNIX httpd.conf file contains the default MIME type of 8-bit for CSS files.
- For more information about considerations you should be aware of when creating burst values for an FTP Distribution List, see *Considerations When Distributing a Bursted Report Using FTP* on page 3-12.

Procedure How to Create a Printer Distribution List

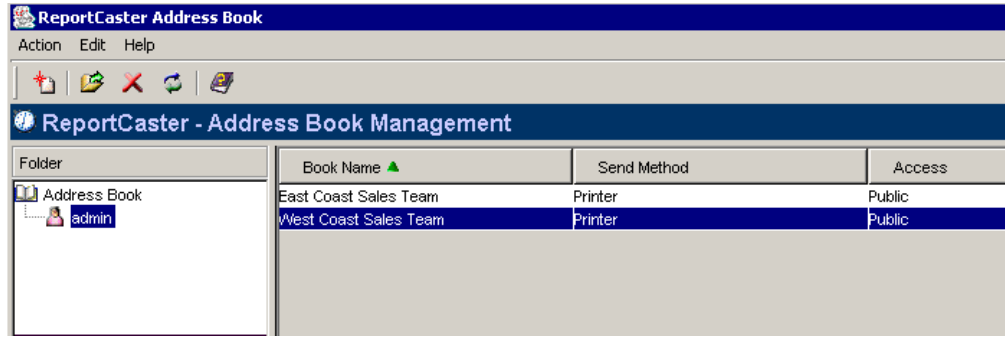
1. From the ReportCaster - Address Book Management window, select the Create a New Distribution List icon , or select *New* from the Action menu. The Distribution List New window opens:



2. **Access.** *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.
3. **Send Method.** Select *Printer* from the drop-down list.
4. **Burst Value.** If you are bursting a report (WF Server Procedure, Managed Reporting Standard Report, or Managed Reporting My Report), specify individual sort values in the Burst Value field. This value may be a maximum of 75 characters.

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

   For more information about bursting a report, see *Bursting a Report* on page 3-11.
5. **Printer.** Specify the printer server location and printer name to which you want to send the report. The printer you select must be accessible by the Distribution Server.
6. Click *Save* and specify a name for your Distribution List. The Distribution List appears in the Address Book with the name you specified (for example, East Coast Sales Team).



Reference Considerations When Creating a Printer Distribution List

When creating a Distribution List, be aware of the following platform-specific considerations:

Windows:

- The target printer must be defined as a network printer available on the Windows system on which the Distribution Server is installed.
- If your site uses a Novell NetWare network, the Windows server that contains the Distribution Server must have Novell Client 32 installed.
- Information Builders recommends using the PS or DOC format instead of the WP format when printing from a Windows machine.

UNIX:

Contact your UNIX Administrator for a list of defined printers. An administrator can generate a list of defined printers by using the following UNIX command:

```
lpstat -t
```

z/OS:

The printer should be a SYSOUT class (such as A) that has been routed to a printer. For example, you can indicate that scheduled report output be distributed to a specific network printer by entering the following printer identification

```
A DEST IBIVM.P24E2
```

where:

A

Is the SYSOUT class to be assigned to a network printer.

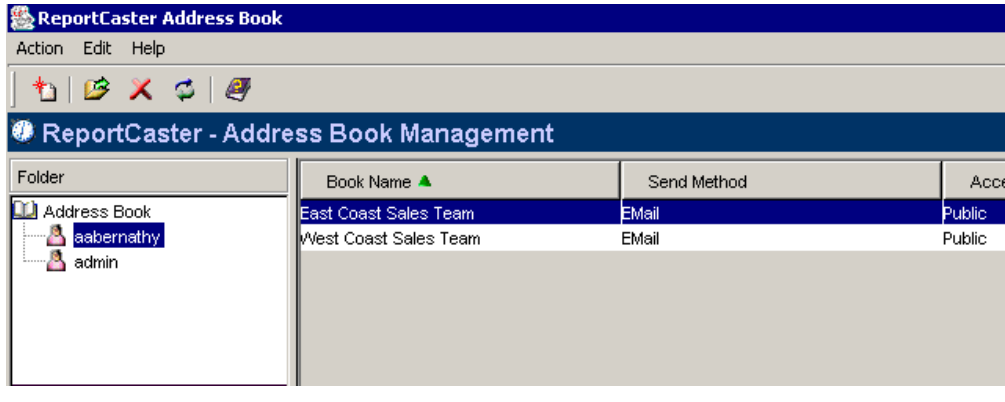
IBIVM.P24E2

Is the printer location and name.

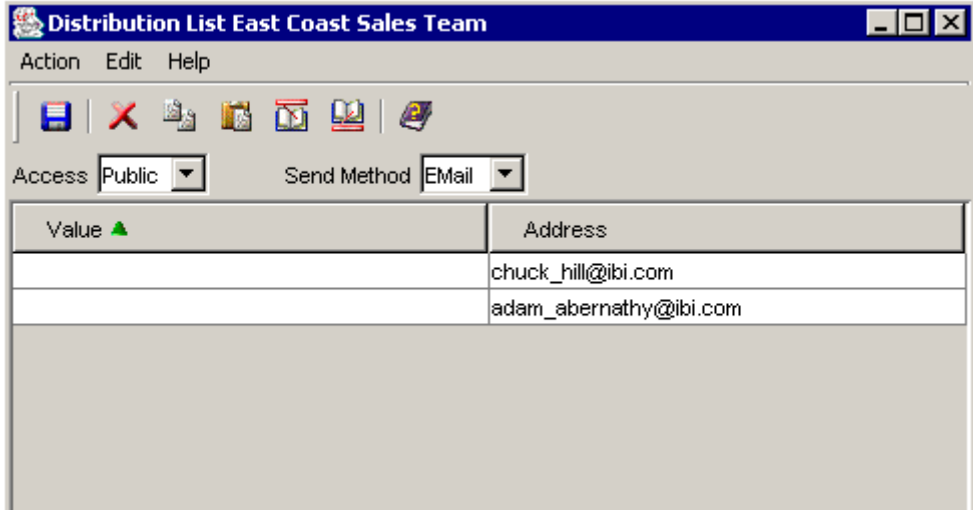
Editing a Distribution List

If you are the ReportCaster Administrator, you can edit an existing Distribution List at any time by performing the following steps:

1. From the ReportCaster - Address Book Management window, select the user who owns the Distribution List you want to edit. The right frame of the interface displays the Distribution Lists owned by the selected user, the send method for each Distribution List (EMail, FTP, Printer), and the access of each Distribution List (Public or Private).
2. Select the Distribution List you want to edit (for example, East Coast Sales Team):



3. Double-click the list, click the Open icon , or select *Open* from the Edit menu. The following window opens displaying the properties of the Distribution List:



4. From this window, you can perform the following functions:

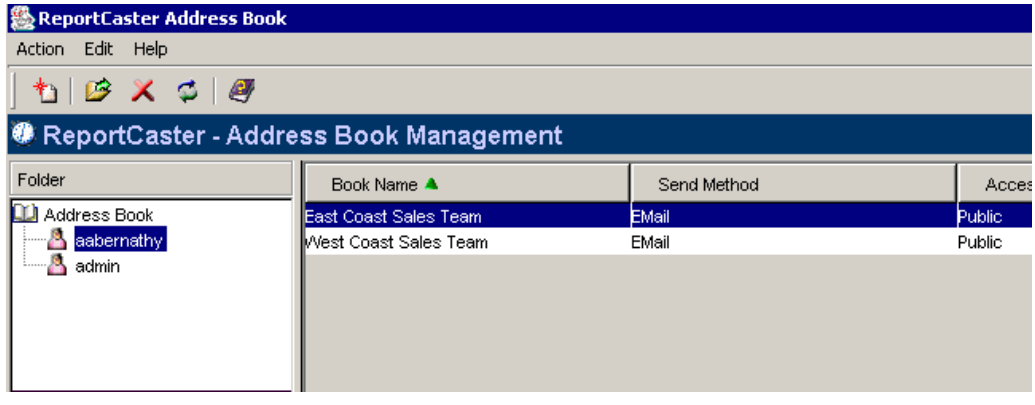
- Change the values of already existing entries. For example, you can make the Distribution List Private instead of Public, or you can change the Email, FTP, or Printer destinations.
- Insert additional burst values and destinations by clicking the Insert Below icon, or by selecting *Insert Below* from the Edit menu. A new row appears below where your cursor is positioned, enabling you to insert additional entries.
- Copy and paste burst values and destinations from one row to another. Select the row you want to copy and either click the Copy the select and put it on the clipboard icon, or select *Copy* from the Edit menu. Next, place the cursor where you want to paste the contents and then either click the Insert Clipboard contents icon, or select *Paste* from the Edit menu.
- Delete burst values and destinations by either selecting the row and clicking the Delete icon, or by selecting the row and then selecting *Delete* from the Edit menu.
- Click the Insert Above icon, or select Insert Above from the Edit menu, to insert additional burst values and destinations above where your cursor is positioned.

5. Once you have completed making the necessary changes, perform one of the following:
   - If you do not want to rename the Distribution List, click the Save icon, or select *Save* from the Action menu.
   - If you want to rename the Distribution List, click the Save As icon, or select *Save As* from the Action menu. This will save the list as a new Distribution List without changing the contents of the original Distribution List.

Deleting a Distribution List

If you are the ReportCaster Administrator, you can delete an existing Distribution List at any time by performing the following steps:

1. From the ReportCaster - Address Book Management window, select the user who owns the Distribution List you want to delete. The right frame of the interface displays the Distribution Lists owned by the selected user, the send method for each Distribution List (EMail, FTP, Printer), and the access of each Distribution List (Public or Private).
2. Select the Distribution List you want to delete (for example, East Coast Sales Team):



3. Click the Delete icon  or select *Delete* from the Edit menu. A message appears asking if you are sure that you want to delete the list.
4. Click *Yes* to confirm that you want to delete the Distribution List.

Bursting a Report

Instead of distributing an entire report, you can use ReportCaster's burst feature to break a report into sections to be distributed separately. Bursting enables you to target relevant sections of a report to individual users. Each report section is saved as a separate file.

WF Server Procedures, Standard Reports, and My Reports support bursting. If you are distributing a bursted tabular report, the burst value is determined by the first BY field. If you are distributing a bursted graph report, the burst value is determined by the second BY field. The burst value is automatically determined by the internal matrix, which is a memory area that stores each database field value and calculates values referenced by the TABLE or GRAPH request.

You can send several report sections to one recipient by specifying that recipient's destination (e-mail addresses, FTP files, or printers) for each section you want to send. You can send several report sections to one destination, or you can send one report section to several destinations. The burst values you specify in the Distribution List must exist in the data source you are reporting against.

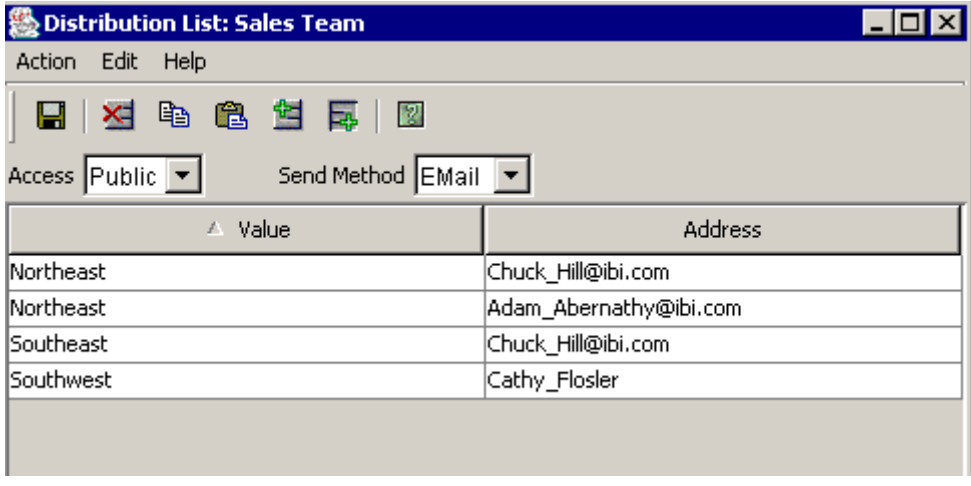
Note: If you want to burst a report, you must select the *Enable Report Bursting* check box when you create a Task within a schedule. The burst values specified in the Burst Value column in the Distribution List window are ignored unless the Task specifies to burst the report. For more information, see Chapter 4, *Creating and Maintaining a Schedule*.

Example Bursting a Sales Report

Suppose that you want to send a weekly sales report to sales representatives in several offices across the country. You want to send your report as an e-mail attachment. The report you are distributing contains information about sales branches throughout the entire country. However, individual sales representatives are affected only by the sales in their region. Assuming that you will specify to burst the report when you create the schedule, create a Distribution List to send only the relevant regional sales information to each representative.

The following sample screen shows how you specify burst values when creating a Distribution List. Using the report's primary sort field values for the sales report (Northeast, Southeast, and Southwest), each representative's e-mail address is associated with the corresponding report data, which is the only part of the sales report that is relevant for that user. For example, since Adam Abernathy needs only the data that corresponds to the Northeast branch, the sort value that corresponds to that data in the report (Northeast) is listed in the Burst Value column on the line opposite his e-mail address.

Chuck Hill is a sales representative who works in both the Northeast and Southeast regions. Since he requires data regarding both the Northeast and Southeast regions, his e-mail address is listed twice, and the burst value for each region is specified on separate lines opposite his address. This is how you can send multiple sections of a bursted report to a single recipient.



Reference Considerations When Distributing a Bursted Report Using FTP

When distributing a bursted report using FTP, be aware of the following considerations:

- When using a format of HTML, PDF, or EXL2K, an index page for the bursted report output is generated.
- The index page for FTP distribution will only contain the burst values specified in the distribution list. The report output is distributed only for the specified burst values.
- The index page links for bursted report output distributed using FTP are incorrect when specifying BASEURL in the scheduled procedure. This is because ReportCaster does not parse and evaluate the procedure code of the scheduled job. Move the distributed files to the BASEURL directory, or specify the fully-qualified directory path of the distributed output in the index page.

- On z/OS platforms, bursted report output distributed using FTP is created in sequential data sets having the following qualifiers:
  - **High-level Qualifier:** The user ID specified for the FTP Server.
  - **Additional Qualifiers:** Location value in the Distribution tab, and file(s) supplied in a Distribution List.

  To send bursted output to a partitioned data set, specify an existing partitioned data set as Location and specify member names, without extensions, in the Distribution List's File column. For example, *highlevelqualilfier.location.file*.
- On z/OS platforms, do not use an index name that is the same as the data (input) file from which you are reporting. If you specify an index name that is the same as the DDNAME in the DYNAM for your data file, the data file is overwritten with the report output.

CHAPTER 4

Creating and Maintaining a Schedule

Topics:

- Schedule Tab
- Creating a Task
- Specifying Distribution Options
- Specifying Optional and Notification Settings for a Schedule
- Maintaining a Schedule
- Tracking a Schedule Using the Schedule Log Option

ReportCaster can schedule a WF Server Procedure, Managed Reporting Standard Report or My Report, the contents of a URL, or a file. You can distribute scheduled output as an e-mail message, using FTP, to a printer, as a report in a Managed Reporting folder, or to the optional Report Library. To create a schedule, you must supply information in the following tabs:

Schedule. Specify when and how often to run the schedule. For more information, see *Schedule Tab* on page 4-2.

Tasks. Depending on your distribution method, you can select any combination of Tasks (for example, a Standard Report, a My Report, and a file) to be scheduled. For more information, see *Creating a Task* on page 4-7.

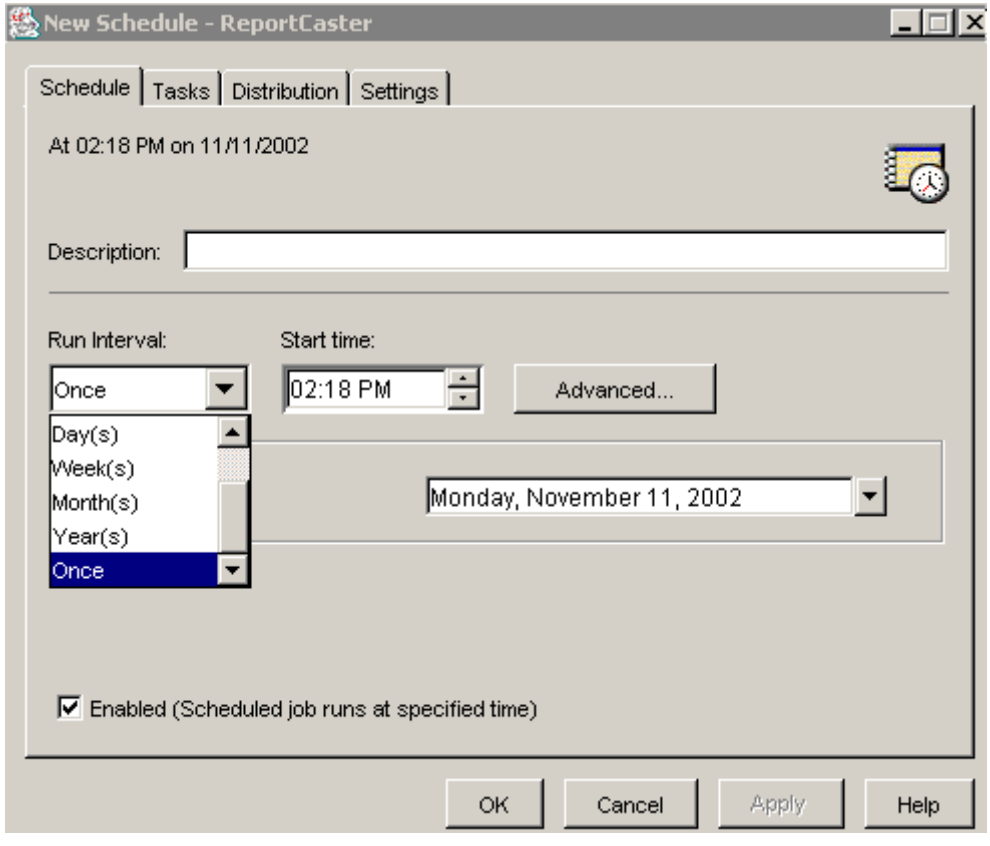
Distribution. Select whether to distribute scheduled output as an e-mail message, using FTP, to a printer, as a report in a Managed Reporting folder, or to the Report Library. You must also select whether to distribute the output using a Distribution List, distribution file name, single location, or by creating a dynamic address list. For more information, see *Specifying Distribution Options* on page 4-27.

Settings. Specify the priority level of the schedule, notification options, and whether or not to zip the scheduled output. For more information, see *Specifying Optional and Notification Settings for a Schedule* on page 4-50.

Once you have created the schedule, you can edit the properties of the schedule, delete the schedule, or run a log report to obtain information about the schedule. You can also purge log records to conserve space in the log file.

Schedule Tab

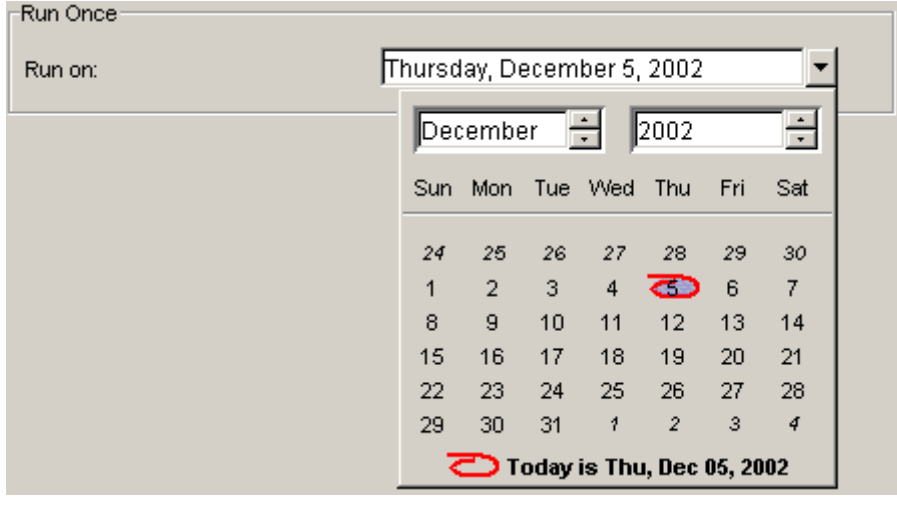
When you access the ReportCaster Development and Administration Interface, click the *Create a New Schedule* link to access the New Schedule - ReportCaster window. The Schedule tab is the first to display:



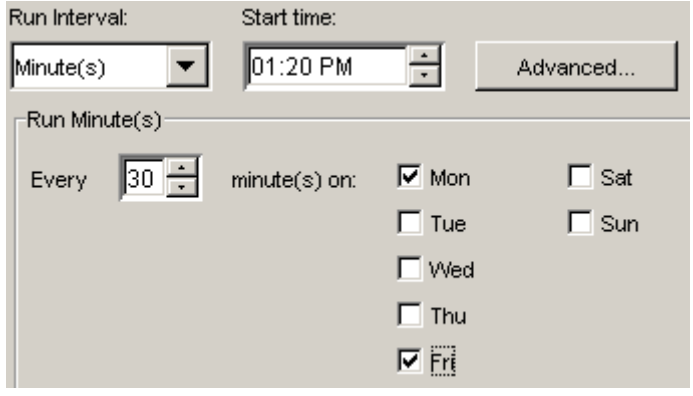
In the Schedule tab, specify the job description, the intervals, and the date and time you want the schedule to run. You can select to have the schedule run once or repeatedly on any day at any time. Uncheck the *Enabled* check box if you want the schedule to be inactive.

Enter the following information to create a new schedule or modify an existing schedule:

1. **Description.** Enter a descriptive name for the schedule. This name will identify the schedule. After the schedule has run, the description appears in your list of schedules.
2. **Run Interval.** From the 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 job will execute immediately. Only modify the date or time if you do not want the schedule to run immediately. You can specify the date on which you want the schedule to run by either typing the date directly in the Run on field, or by selecting a date from the drop-down calendar.

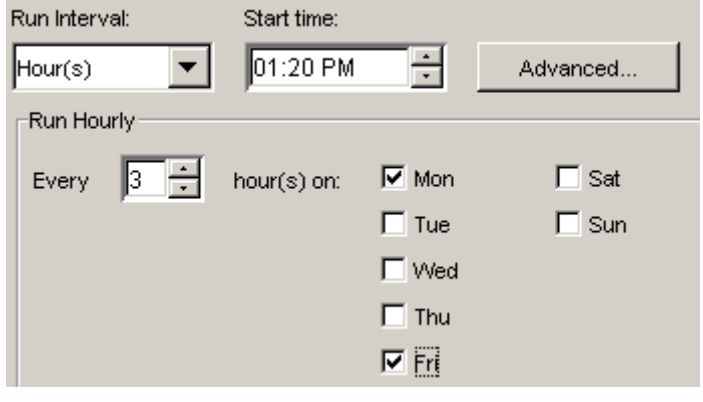


- **Minutes.** If you want to run the schedule every *n* minutes. Select a range between 1 and 59 minutes, and check the days of the week on which you want to run the schedule. For example, the following schedule will run every 30 minutes on Monday and Friday:

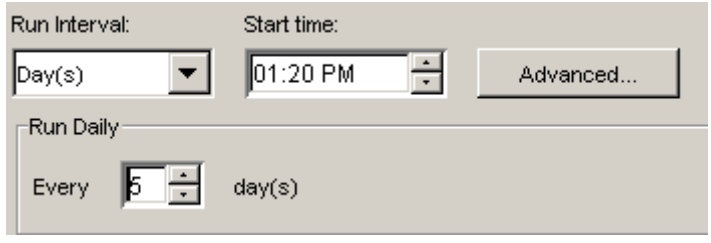


Note: Selecting this option may affect system performance if you choose to run the schedule every 5 minutes or less. Information Builders recommends specifying a minimum of 30 minutes. The minute interval option is primarily useful for alert schedules.

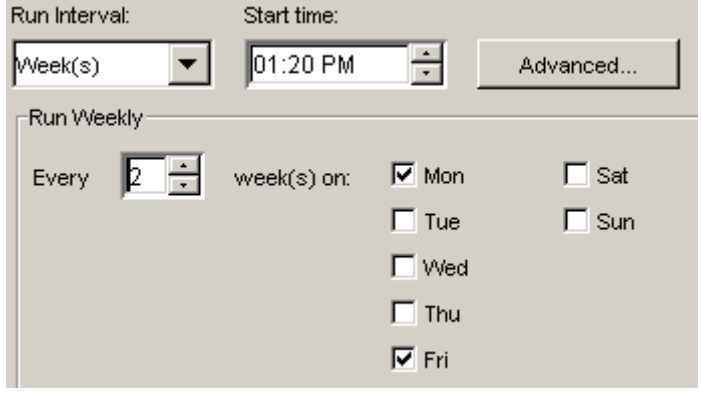
- **Hours.** If you want to run the schedule every *n* hours. Select a range between 1 and 24 hours, and check the days of the week on which you want to run the schedule. For example, the following schedule will run every 3 hours on Monday and Friday:



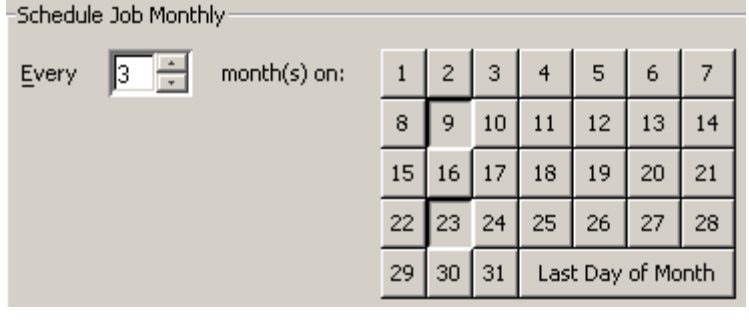
- **Days.** If you want to run the schedule every *n* days. The following schedule will run every 5 days:



- **Weeks.** If you want to run the schedule every *n* weeks. Select how often you want to run the schedule (for example, every 2 weeks), and check the days of the week on which you want to run the schedule. The following schedule will run every two weeks on both Monday and Friday:

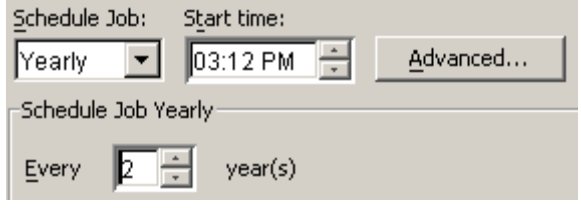


- **Months.** If you want to run the schedule every *n* months. Select how often you want to run the schedule (for example, every 3 months), and click the days of the month on which you want to run the schedule. The following schedule will run every three months on the 9th and the 23rd:



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.

- **Years.** If you want to run the schedule every *n* years. In the following schedule, the schedule will run every 2 years:



Click *Advanced* if you want to specify a start date other than the current date.

3. **Start Time.** Specify the time you want the schedule to begin. Select any time component (hour or minute or AM/PM) and click the up or down arrow to the right of the box. You can also place the cursor at the beginning of any time component and then type the new value over the old value. The default start time is the current time. It 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 will not run until the next instance of the start time that fits within the schedule's specifications.

Changing Default Values for a Schedule Using the Advanced Tab

The Advanced tab contains all default values for a schedule. Click *Advanced* within the Schedule tab to change the default values for the following options:

- **Start Date.** Specify the date on which you want the schedule to begin using the drop-down calendar. The default Start Date is the current date.
- **End Date.** Specify the date on which you want the schedule to end using the drop-down calendar. The default End Date is December 31, 2099.
- **End Time.** Specify the time you want the schedule to end. Select any time component (hour or minute or AM/PM) and click the up or down arrow to the right of the box. You can also place the cursor at the beginning of any time component and then type the new value over the old value. The default End Time is 11:59 PM.
- **Delete the job if it is not scheduled to run again.** Check this option if you want the schedule to run once and not be stored in the ReportCaster Repository.

Click the Tasks tab to continue creating the schedule. For more information, see *Creating a Task* on page 4-7.

Creating a Task

When creating a schedule, you must create a Task (report, URL, or file) that will be distributed by ReportCaster. If you are distributing scheduled output using the e-mail or printer distribution methods, you can create multiple Tasks within a single schedule.

You can create the following types of Tasks:

- **WF Server Procedure.** Schedules the distribution of a WebFOCUS report that resides on a specified WebFOCUS Reporting Server. For more information about scheduling a WF Server Procedure Task, see *How to Create a WF Server Procedure Task* on page 4-9.
- **Standard Report.** Schedules the distribution of a WebFOCUS report that resides in a Managed Reporting Standard Reports folder. For more information about scheduling a Standard Report Task, see *How to Create a Managed Reporting Task* on page 4-12.
- **My Report.** Schedules the distribution of a WebFOCUS report that resides in a Managed Reporting My Reports folder. For more information about scheduling a My Report Task, see *How to Create a Managed Reporting Task* on page 4-12.
- **URL.** Schedules the contents of a URL to specified recipients. The contents of a URL may be distributed through e-mail, using FTP, to a printer, or to the optional Report Library. To drill-down on the information within the contents of the URL, the links must have a fully-qualified path, or a defined root URI in the page. When performing a drill down, the most current information is retrieved since all drill downs are executed in real time. For more information about scheduling a URL Task, see *How to Create a URL Task* on page 4-18.
- **File.** Schedules the distribution of a file to which the Distribution Server has read access. When scheduling a file, you must enter the fully-qualified path and file name (for example, *d:\reportcaster52\filename.doc*) of the file. For example, if you want to distribute a Word document, you can send the static file to ReportCaster recipients. For more information about scheduling a File Task, see *How to Create a File Task* on page 4-22.

The options for creating a Task differ depending on the Task type. For more information about these options, see the specific procedure for each Task type.

Bursting Guidelines and Limitations When Creating a Task

When creating a Task, you can specify to burst a report. Bursting enables you to target relevant sections of a report to individual users. Each section is saved as a separate file.

WF Server Procedures, Standard Reports, and My Reports support bursting. If you are distributing a bursted tabular report, the burst value is determined by the first BY field. If you are distributing a bursted graph report, the burst value is determined by the second BY field. The burst value is automatically determined by the internal matrix. The internal matrix is a memory area that stores each database field value and calculates values referenced by the TABLE or GRAPH request.

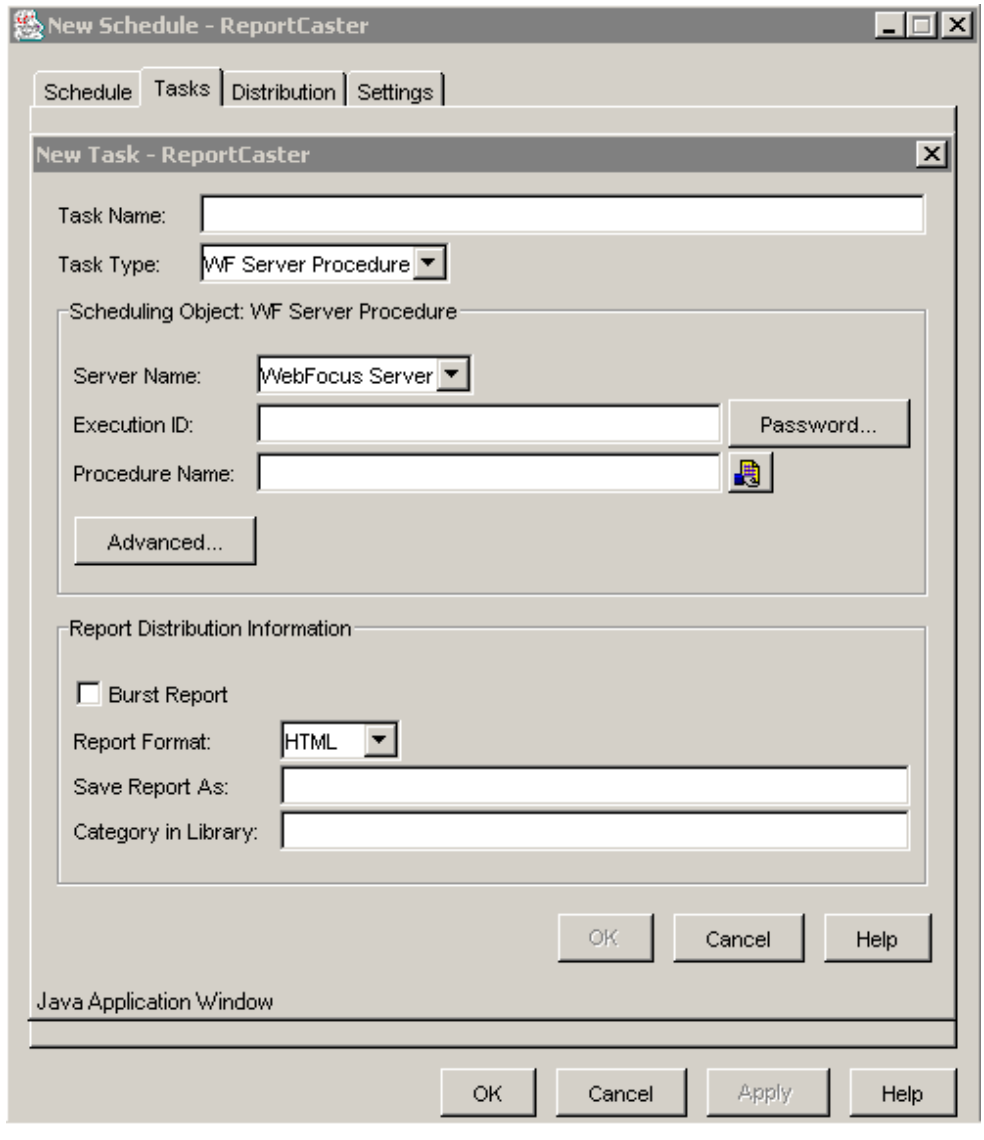
The following are guidelines and limitations that apply to ReportCaster's burst feature:

- **Formats** - DOC, EXL2K, EXCL97, EXL2K FORMULA, GIF, HTML, and PDF support bursting. Each bursted section of the report will be named *burstvalue.format* (for example, Northeast.pdf).
- **ACROSS command** - This command is not evaluated as a primary sort field. To burst a report, you must also include a BY field. Bursting will occur on the BY field.
- **FML reports** - Bursting an FML report is not supported since there is no BY field.
- **Compound Reports** - Cannot be burst.
- **TABLEF** - No internal sort processing is performed. The specification of a BY field requires that the data already be sorted in the data source.
- **ON TABLE SUBHEAD/ON TABLE SUBFOOT** - Creates a SUBHEAD for only the first page of the report, and a SUBFOOT for only the last page of the report. When bursting a report, the SUBHEAD and SUBFOOT should occur for each sort break. Therefore, specify the primary sort field in place of TABLE in the ON command. For example:

  ```
  ON primarysortfield SUBHEAD
  ```

Procedure How to Create a WF Server Procedure Task

1. From the New Schedule - ReportCaster window, click the Tasks tab. The New Task - ReportCaster window opens with a Task Type of WF Server Procedure:



2. **Task Name.** Enter a name that describes this Task (for example, Sales Report).
3. **Server Name.** Select the server from which you want to select the report from the drop-down list.

4. **Execution ID.** Enter an Execution ID that is authorized to execute procedures on the server specified in step 3.

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

   If the Execution ID field is not grayed out, and you entered an Execution ID, perform the following steps:

   a. Click *Password*. The Password dialog box opens.

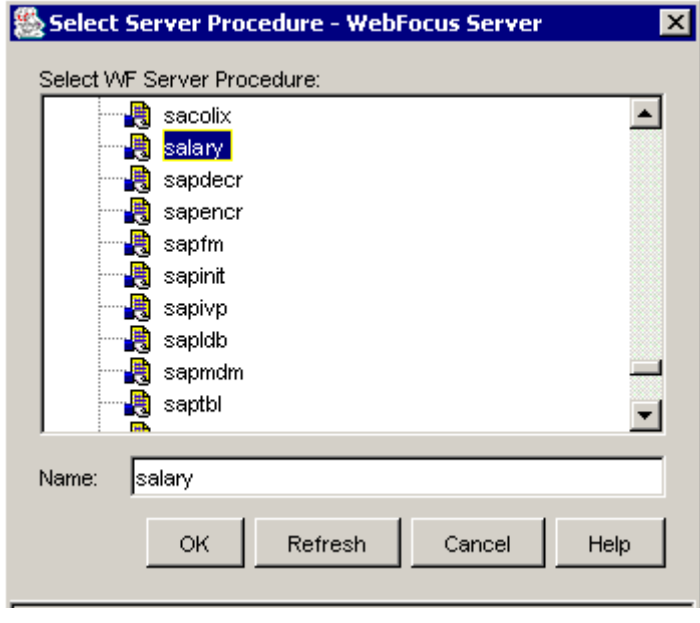
   b. Enter the password for the Execution ID.

   c. Confirm the password for the Execution ID.

   d. Click *OK* to return to the Tasks tab.

5. Click the Choose WF Server Procedure button  to select a WF Server Procedure to schedule.

   The Select WF Server Procedure window opens:



6. Select the WF Server Procedure (for example, salary) and then click *OK* to return to the Tasks tab.

7. **Advanced.** If your report has parameters or you want to schedule pre- or post-processing procedures, click *Advanced*. For more information, see *How to Specify Parameters and Schedule Pre- and Post-Processing Procedures* on page 4-24.

8. **Burst Report.** If you want to burst the report, select the *Burst Report* check box. The burst feature enables you to break a report into sections and distribute the sections separately. Burst values may be specified in a Distribution List, distribution file, or by creating a dynamic address list. For more information about bursting, see *Bursting Guidelines and Limitations When Creating a Task* on page 4-8, and *Bursting a Report* in Chapter 3, *Creating and Maintaining a Distribution List*.

9. **Report Format.** Select the report format from the drop-down list. HTML is the default.

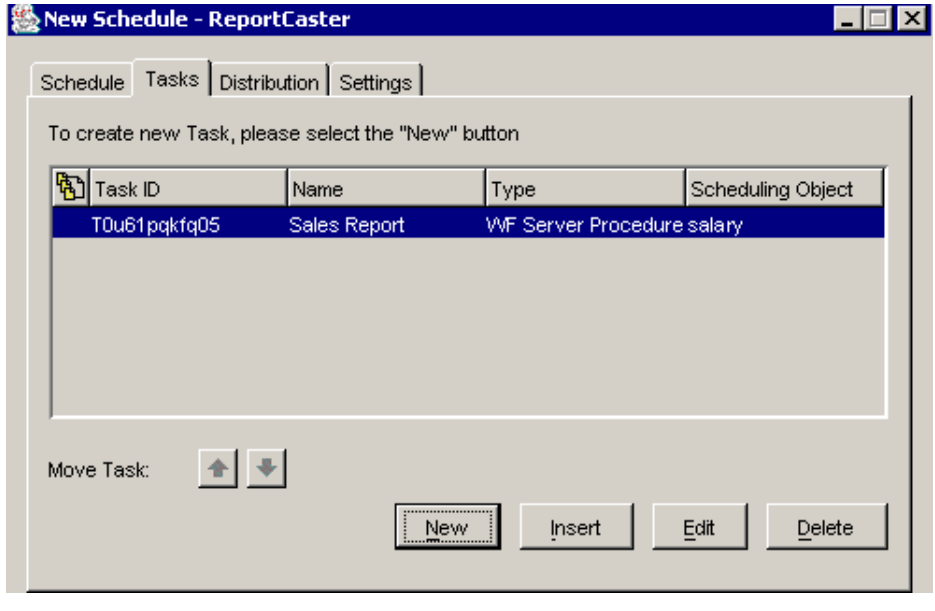
   There are limitations on what formats are valid for certain options. Not all formats are supported for bursting or for printing. If your report contains a format statement (for example, FORMAT PDF), be sure to select the same report format in ReportCaster. The report format specified in this field overrides the format statement in the procedure.

   For detailed information about each format, see Appendix A, *ReportCaster Formats*.

10. **Save Report As.** Enter a name for the report to be distributed. For example, you might call this report salary. If you selected HTML as the format, this report will be distributed as salary.htm.

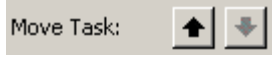
11. **Category in Library.** Leave this field blank unless you are distributing to the Report Library (this is specified in the Distribution tab). If you are distributing to the Report Library, this is a required field, and the value you enter here (for example, Employee Information) is the category name under which the report (in this case salary.htm) will be stored.

12. Click *OK*. The Task ID, Task Name, Type of procedure, and Scheduling Object (procedure name) of the Task display as follows:



13. Click the Distribution tab to specify distribution options (see *Specifying Distribution Options* on page 4-27), or optionally select one of the following options:

    - **New.** Schedule another Task within your schedule. Follow the steps outlined in the appropriate procedure for the Task type you want to schedule. You can only create multiple Tasks when using the e-mail or printer distribution methods.
    - **Insert.** Enables you to schedule another Task within your schedule. The newly created Task will appear where your cursor is positioned.
    - **Edit.** Edit a selected Task within your current schedule.
    - **Delete.** Delete a selected Task within your current schedule.

    Note: You can also move the position of a Task within the window by clicking the following up or down arrows 

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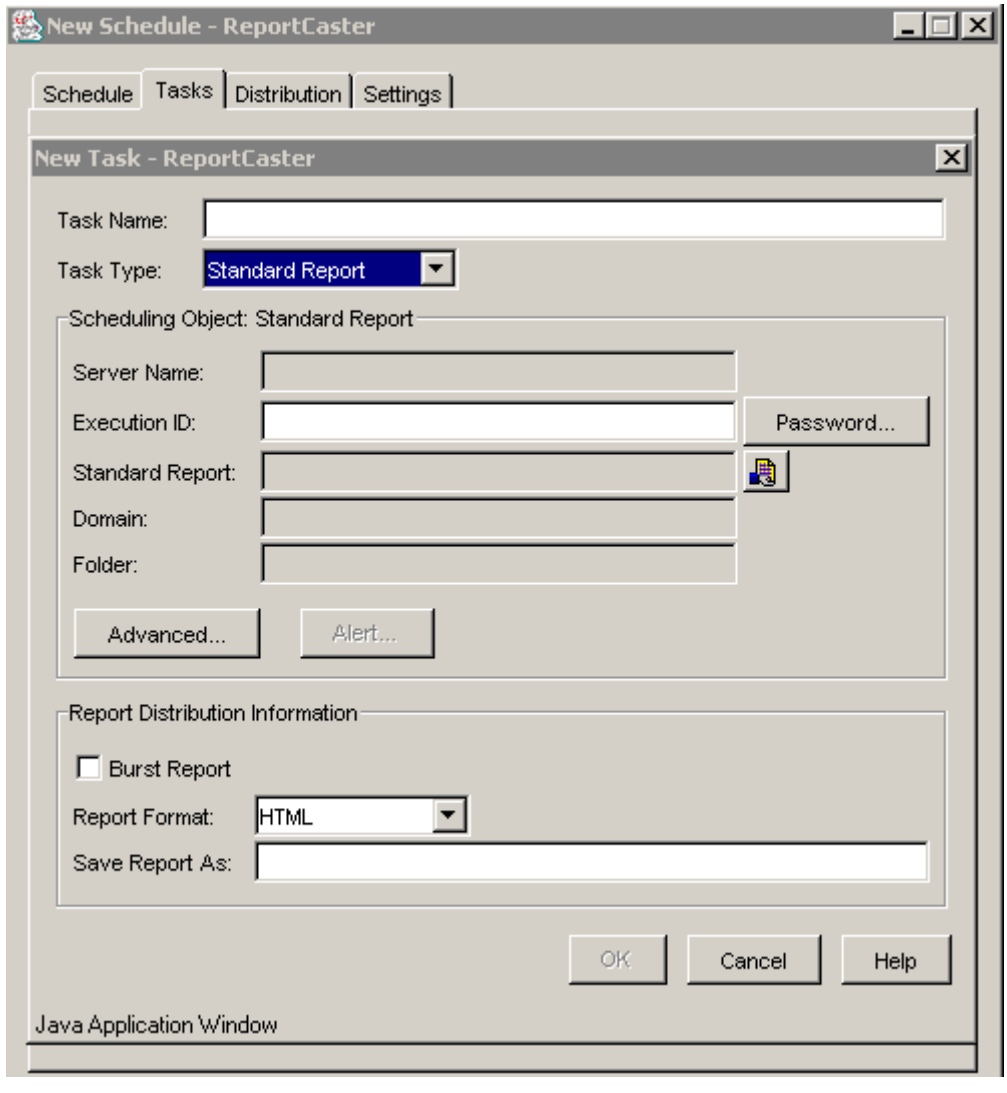
Procedure How to Create a Managed Reporting Task

The options for creating a Managed Reporting Standard Report Task or a My Report Task are the same. The following procedure shows how to create a Standard Report Task. If you are scheduling a My Report Task, replace Standard Report with My Report in the procedure.

1. From the New Schedule - ReportCaster window, click the *Tasks* tab. The New Task - ReportCaster window opens.
2. **Task Name.** Enter a name that describes this Task (for example, Sales Report).

3. **Task Type.** Select *Standard Report* from the drop-down list. The following options appear for a Standard Report:



4. **Execution ID.** Enter an Execution ID that is authorized to execute procedures on the server running the report.

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

If the Execution ID field is not grayed out, and you entered an Execution ID, perform the following steps:

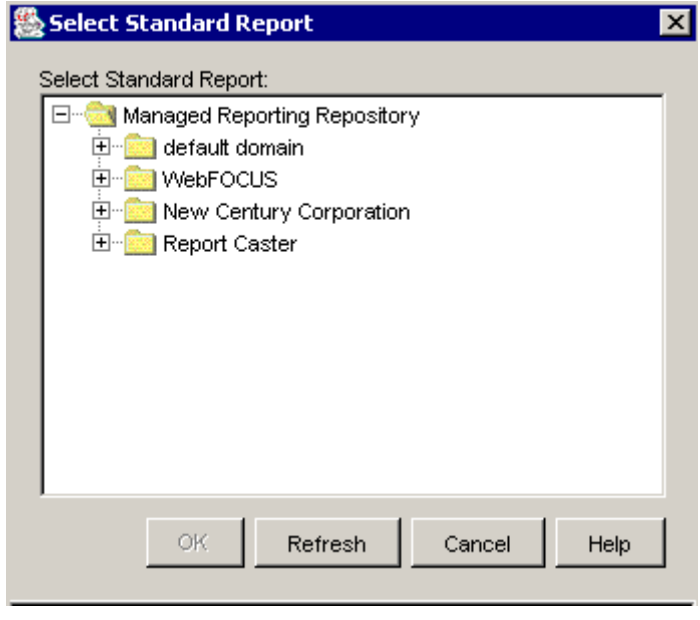
a. Click *Password*. The Password dialog box opens.

b. Enter the password for the Execution ID.

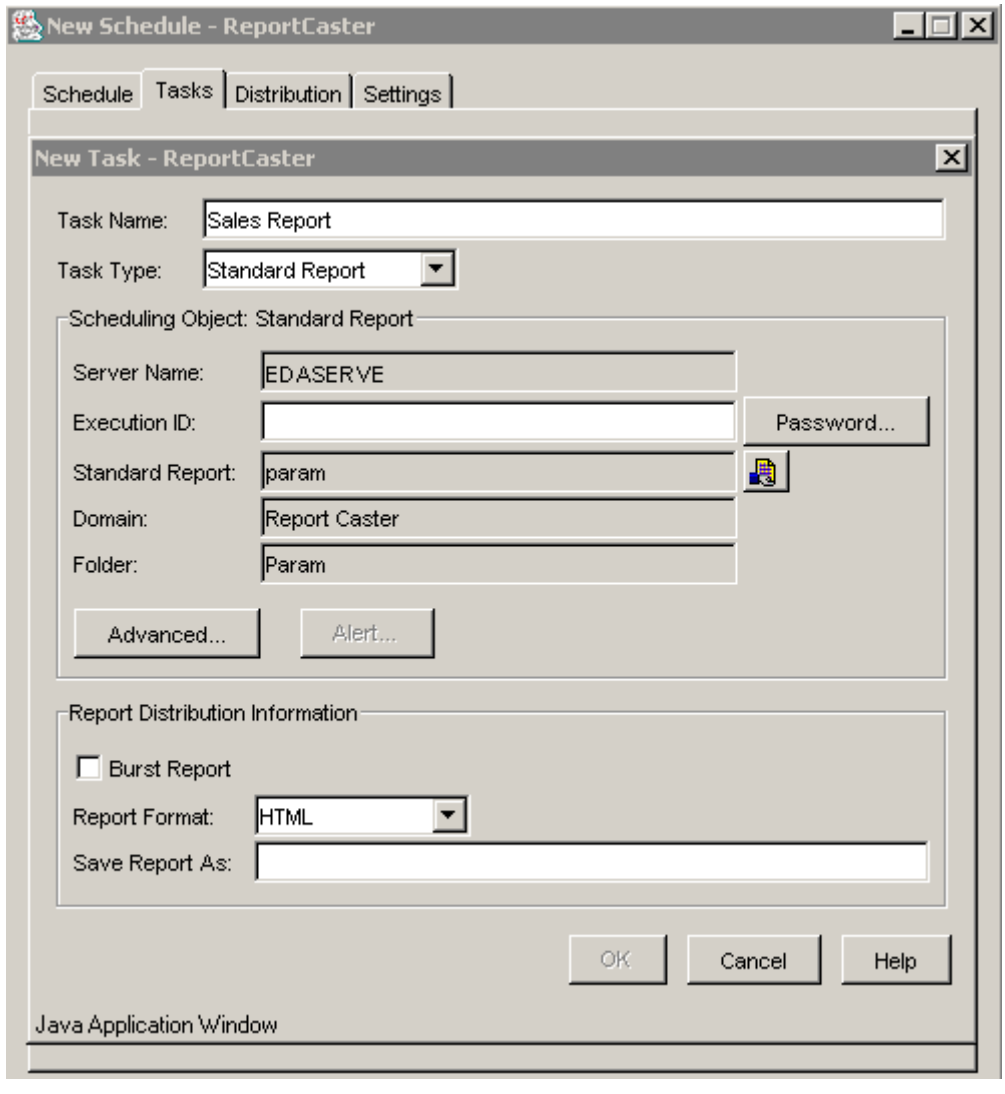
c. Confirm the password for the Execution ID.

d. Click *OK* to return to the Tasks tab.

5. Click the Choose Report icon  to select a Standard Report to schedule. The Managed Reporting Repository opens:

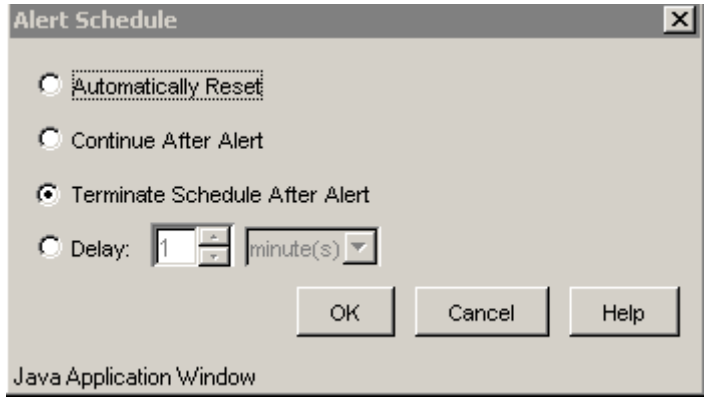


6. Click the Domain folder (for example, Report Caster) that contains the Standard Report you want to schedule. Select the report (for example, param) and then click *OK*. This populates the Server Name, Standard Report, Domain, and Folder fields as follows:



7. **Advanced.** If your report has parameters or you want to schedule pre- or post-processing procedures, click *Advanced*. For more information, see *How to Specify Parameters and Schedule Pre- and Post-Processing Procedures* on page 4-24.

8. **Alert.** If you are scheduling an alert (Standard Reports only), the Alert button will be activated. To specify alert schedule options, click *Alert*:



You can select one of the following options:

- **Automatically Reset.** After the alert is triggered, reactivate the alert when the condition is no longer true. The system will keep checking the condition after the alert has been triggered. As soon as the condition is no longer true, it will reactivate the alert.
- **Continue After Alert.** After the alert has been triggered, reactivate the alert immediately.
- **Terminate Schedule After Alert.** Deactivate the schedule after the alert is triggered. This is the default.
- **Delay.** Restart the alert after a specified period. You can specify to restart the alert after a maximum of 99 minute(s), day(s), hour(s), week(s), month(s), or year(s).

Click *OK* to return to the Tasks tab.

9. **Burst.** If you want to burst the report, select the *Burst Report* check box. The burst feature enables you to break a report into sections and distribute the sections separately. Burst values may be specified in a Distribution List, distribution file, or by creating a dynamic address list. For more information about bursting, see *Bursting Guidelines and Limitations When Creating a Task* on page 4-8, and *Bursting a Report* in Chapter 3, *Creating and Maintaining a Distribution List*.

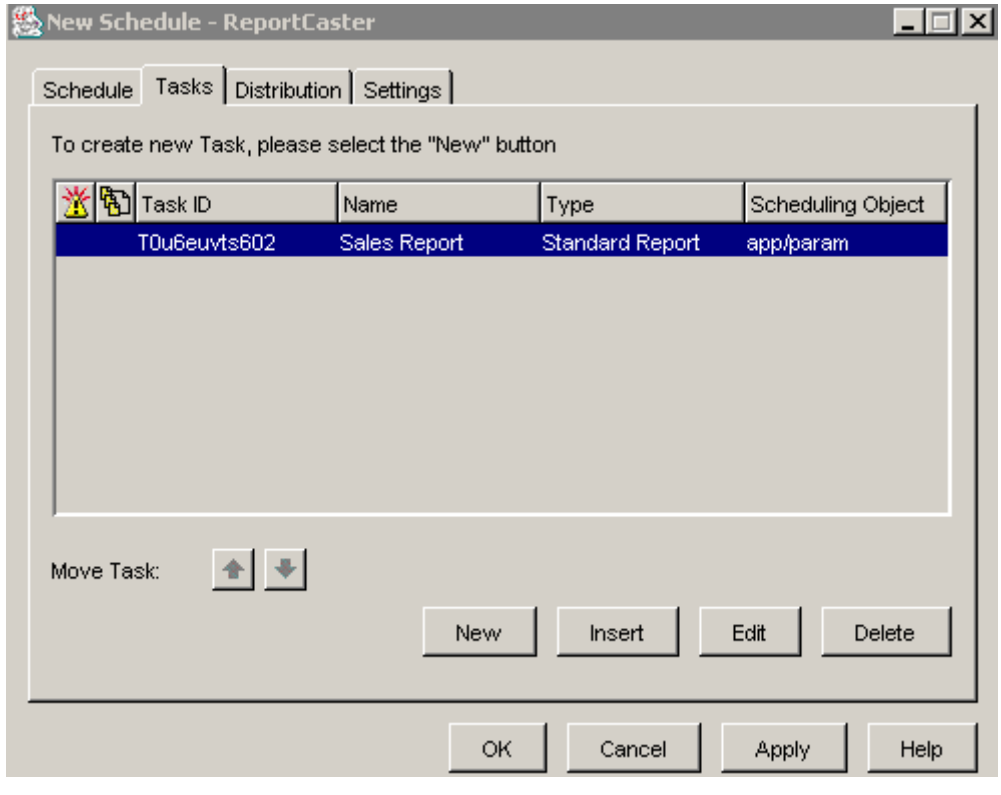
10. **Report Format.** Select the report format from the drop-down list. HTML is the default.

    There are limitations on what formats are valid for certain options. Not all formats are supported for bursting or for printing. If your report contains a format statement (for example, FORMAT PDF), be sure to select the same report format in ReportCaster. The report format specified in this field overrides the format statement in the procedure.

    For detailed information about each format, see Appendix A, *ReportCaster Formats*.

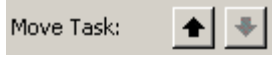
11. **Save Report As.** Enter a name for the report to be distributed. For example, you might call this report param. If you selected HTML as the format, this report will be distributed as param.htm. If you are distributing the report to the Report Library the category name under which the report (in this case param.htm) will be stored is the domain name.

12. Click *OK*. The Task ID, Task Name, Type of procedure, and Scheduling Object (procedure name) of the Task display as follows:



13. Click the Distribution tab to specify distribution options (see *Specifying Distribution Options* on page 4-27), or optionally select one of the following options:

    - **New.** Schedule another Task within your schedule. Follow the steps outlined in the appropriate procedure for the Task type you want to schedule. You can only create multiple Tasks when using the e-mail or printer distribution methods.
    - **Insert.** Enables you to schedule another Task within your schedule. The newly created Task will appear where your cursor is positioned.
    - **Edit.** Edit a selected Task within your current schedule.
    - **Delete.** Delete a selected Task within your current schedule.

    Note: You can also move the position of a Task within the window by clicking the following up or down arrows 

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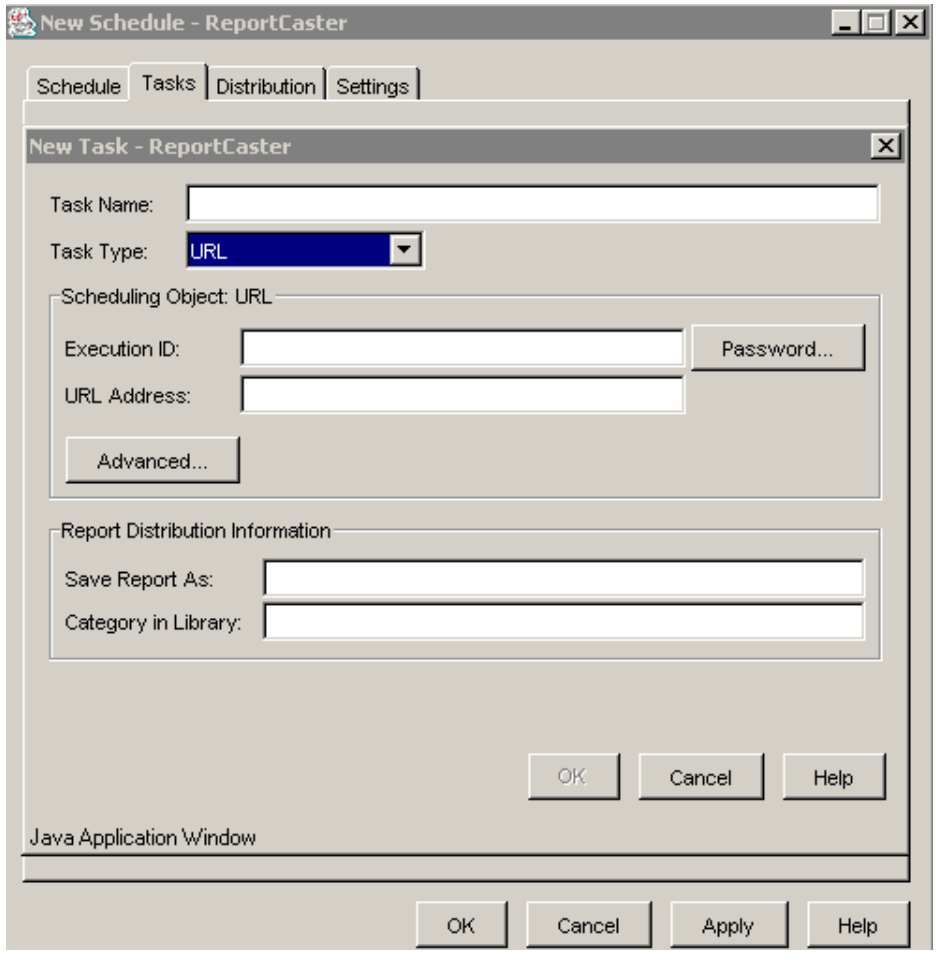
Procedure How to Create a URL Task

1. From the New Schedule - ReportCaster window, click the Tasks tab. The New Task - ReportCaster window opens.
2. **Task Name.** Enter a name that describes this Task.

3. **Task Type.** Select *URL* from the drop-down menu. The following options appear:



4. **Execution ID.** Optionally, enter an Execution ID that is authorized to execute a URL on a secured Web server.

   a. Click *Password*. The Password dialog box opens.

   b. Enter the password for the Execution ID.

   c. Confirm the password for the Execution ID.

   d. Click *OK* to return to the Tasks tab.

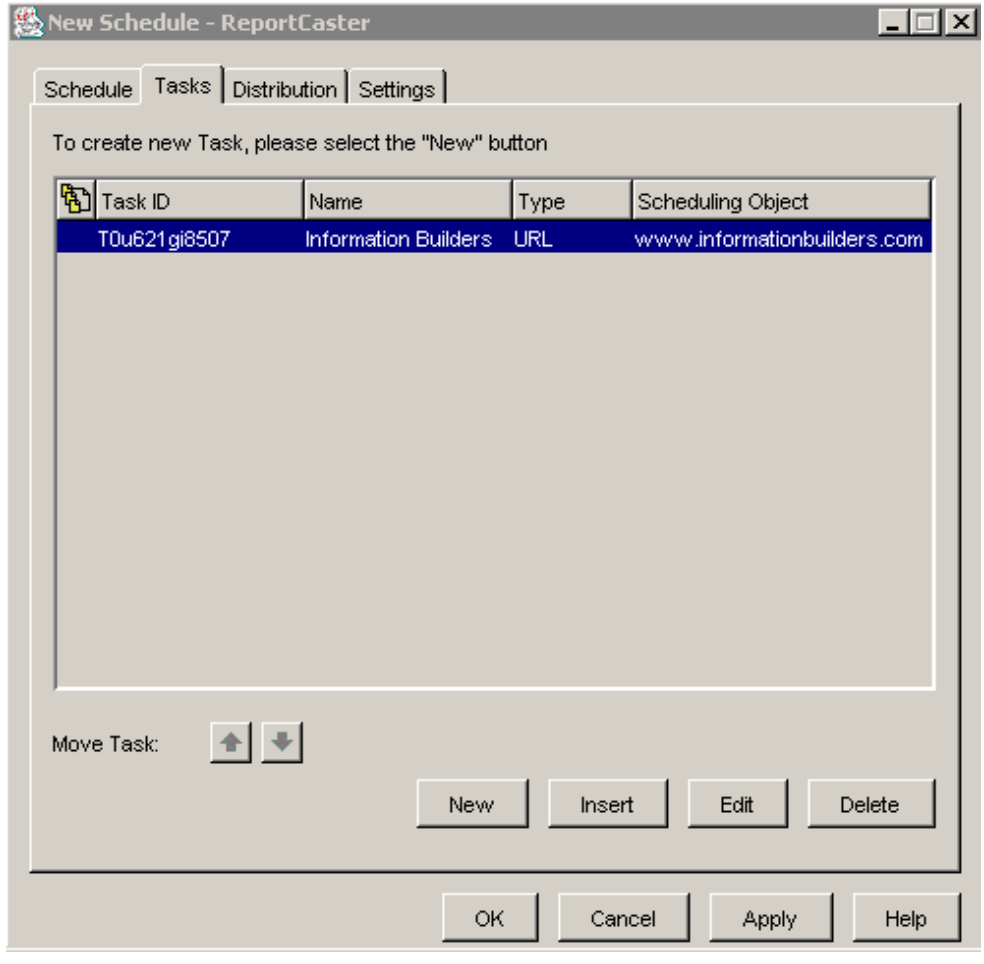
5. **URL Address.** Enter the fully-qualified path of the URL address you want to schedule (for example, http://www.informationbuilders.com).

6. **Advanced.** If your schedule has parameters, click *Advanced*. For more information, see *How to Specify Parameters and Schedule Pre- and Post-Processing Procedures* on page 4-24.

7. **Save Report As.** Enter a name for the content to be distributed. Be sure to include the extension. For example, you might save this report as informationbuilders.htm. This content will be distributed as informationbuilders.htm.

8. **Category in Library.** Leave this field blank unless you are distributing to the Report Library (this is specified in the Distribution tab). If you are distributing to the Report Library, this is a required field, and the value you enter here is the category name under which the content (in this case informationbuilders.htm) will be stored.

9. Click *OK*. The Task ID, Task Name, Type of procedure, and Scheduling Object (procedure name) of the Task display as follows:



10. Click the Distribution tab to specify distribution options (see *Specifying Distribution Options* on page 4-27), or optionally select one of the following options:

- **New.** Schedule another Task within your schedule. Follow the steps outlined in the appropriate procedure for the Task type you want to schedule. You can only create multiple Tasks when using the e-mail or printer distribution methods.
- **Insert.** Enables you to schedule another Task within your schedule. The newly created Task will appear where your cursor is positioned.
- **Edit.** Edit a selected Task within your current schedule.
- **Delete.** Delete a selected Task within your current schedule.

Note: You can also move the position of a Task within the window by clicking the following up or down arrows 

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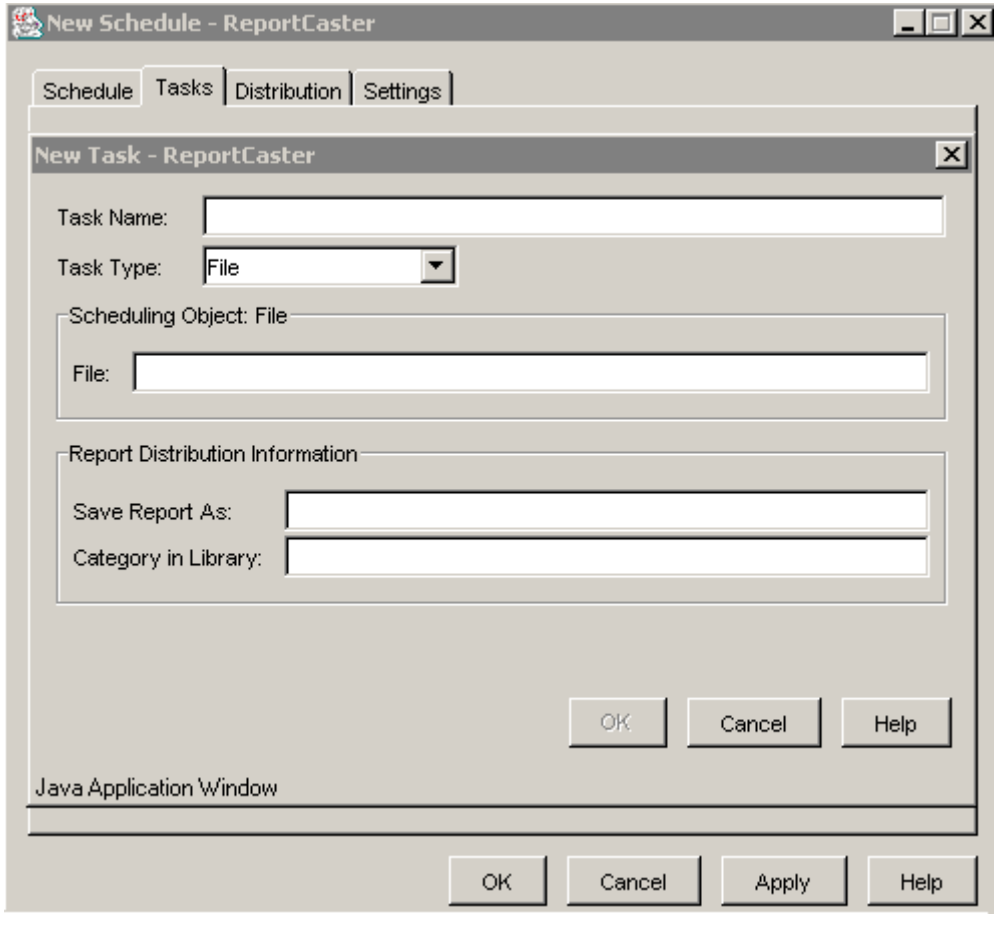
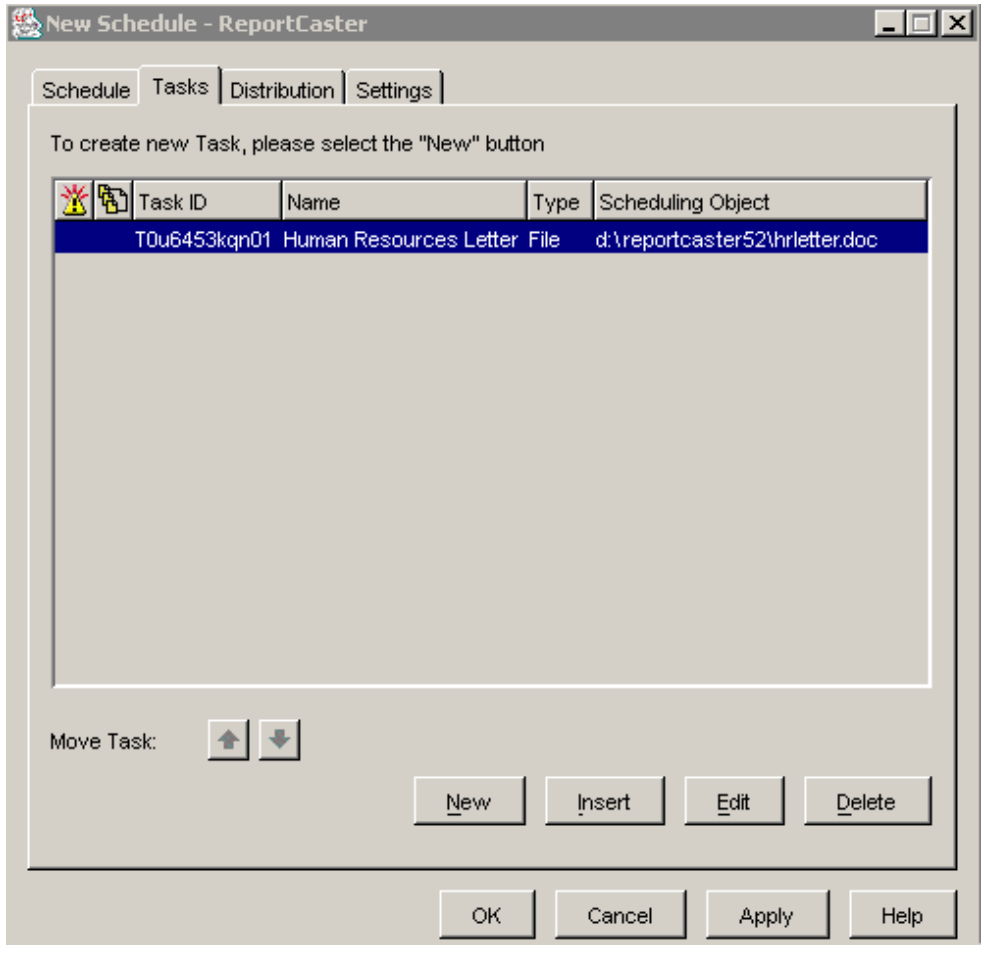
Procedure How to Create a File Task

1. From the New Schedule - ReportCaster window, click the Tasks tab. The New Task - ReportCaster window opens.
2. **Task Name.** Enter a name that describes this Task.
3. **Task Type.** Select *File* from the drop-down list. The following options appear:



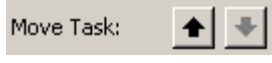
4. **File.** Enter the name of the file you want to schedule. You must enter the fully-qualified path (for example, *d:\reportcaster52\filename.doc*) of the file. In addition, the file must be accessible to the Distribution Server.

5. **Save Report As.** Enter a name for the content to be distributed. Be sure to include the extension. For example, you might save this report as hrletter.htm. This file will be distributed as hrletter.htm.
6. **Category in Library.** Leave this field blank unless you are distributing to the Report Library (this is specified in the Distribution tab). If you are distributing to the Report Library, this is a required field, and the value you enter here is the category name under which the content (in this case hrletter.htm) will be stored.
7. Click *OK*. The Task ID, Task Name, Type of procedure, and Scheduling Object (procedure name) of the Task display as follows:



8. Click the Distribution tab to specify distribution options (see *Specifying Distribution Options* on page 4-27), or optionally select one of the following options:

   - **New.** Schedule another Task within your schedule. Follow the steps outlined in the appropriate procedure for the Task type you want to schedule. You can only create multiple Tasks when using the e-mail or printer distribution methods.
   - **Insert.** Enables you to schedule another Task within your schedule. The newly created Task will appear where your cursor is positioned.
   - **Edit.** Edit a selected Task within your current schedule.
   - **Delete.** Delete a selected Task within your current schedule.

   Note: You can also move the position of a Task within the window by clicking the following up or down arrows 

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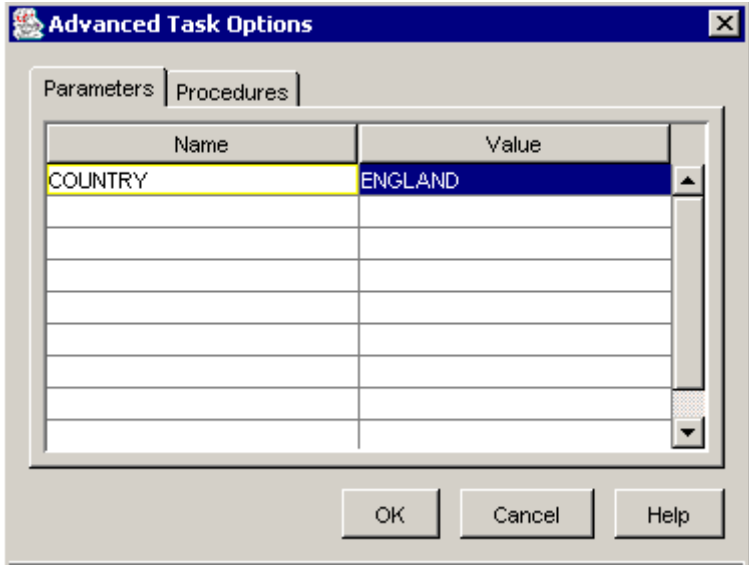
Procedure How to Specify Parameters and Schedule Pre- and Post-Processing Procedures

If the Task (WF Server Procedure, Standard Report, My Report, and URL only) you are creating has parameters, you can use the optional Advanced Task Options tab to specify parameter values. You can also use the Advanced Task Options tab to schedule a maximum of two pre- and post-processing procedures (WF Server Procedure, Standard Report, and My Report Tasks only). Pre- and post-processing procedures are non-reporting Tasks to be performed in support of the report. For example, a report procedure may have associated procedures that set up and clean up the environment. These procedures must be located on, and be accessible to, the WebFOCUS Reporting Server during execution of the scheduled job. In addition, the scheduled job must contain either ON TABLE HOLD or ON TABLE SAVE syntax so that the data will not be sent back to the Distribution Server.

Perform the following steps to select parameter values and schedule pre- and post-processing procedures for a Task:

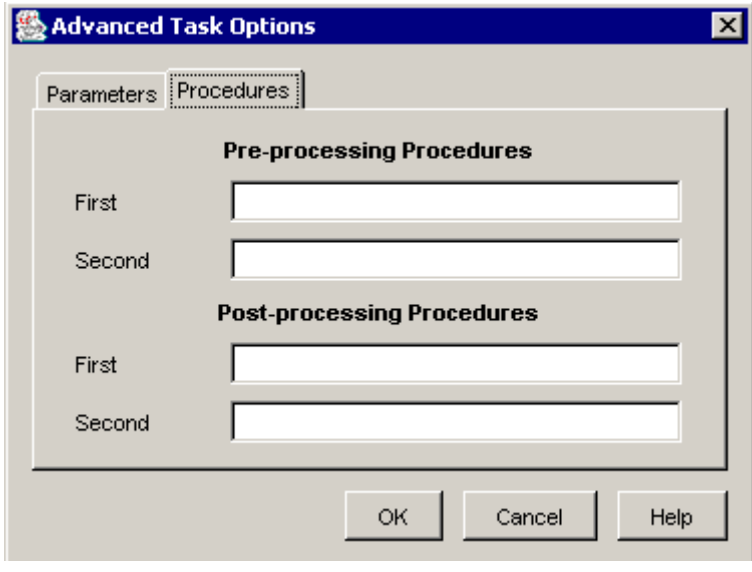
1. Click *Advanced*. The Advanced Task Options window opens:



2. Enter the parameter value(s) that correspond to each parameter name within the report. For example, ENGLAND may be a value for the COUNTRY parameter.

- If you are scheduling a WF Server Procedure or URL Task, you must enter both the parameter name and its associated value.
- If you are scheduling a Managed Reporting Standard Report or My Report Task, the parameter name will be populated automatically, and you only need to supply the parameter value.

3. If you are scheduling a report Task (WF Server Procedure, Standard Report, or My Report), you can schedule a maximum of two pre- and post-processing procedures. Click the Procedures tab. The following fields display:



4. Optionally, enter the following information:

   a. **Pre-processing Procedures:**

      First. Enter the name of the first pre-processing procedure (omit the file extension). ReportCaster will run this procedure immediately preceding the scheduled Task.

      Second. Enter the name of the second pre-processing procedure (omit the file extension). ReportCaster will run this procedure immediately after the first pre-processing procedure, but before the scheduled Task.

   b. **Post-processing Procedures:**

      First. Enter the name of the first post-processing procedure (omit the file extension). ReportCaster will run this procedure immediately following the scheduled Task.

      Second. Enter the name of the second post-processing procedure (omit the file extension). ReportCaster will run this procedure immediately after the first post-processing procedure.

5. Once you have completed entering information about your parameters and pre- and post-processing procedures, click *OK* to return to the Tasks tab.

Specifying Distribution Options

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

- **Email.** For more information, see *Distributing Scheduled Output Using E-mail* on page 4-27.
- **FTP.** For more information, see *Distributing Scheduled Output Using FTP* on page 4-35.
- **Printer.** For more information, see *Distributing Scheduled Output to a Printer* on page 4-41.
- **Managed Reporting.** For more information, see *Distributing Scheduled Output to Managed Reporting* on page 4-44.
- **Library.** For more information, see *Distributing Scheduled Output to the Report Library* on page 4-46.

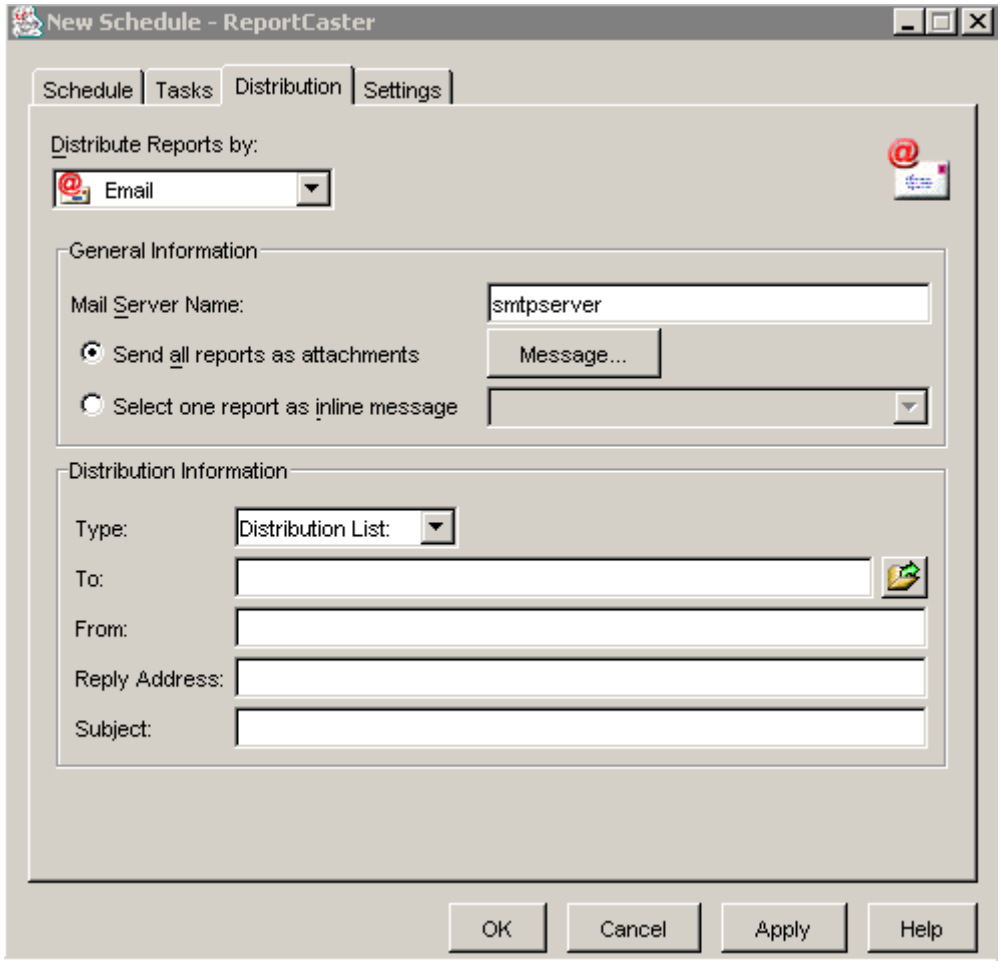
You can only schedule multiple Tasks when using the Email and Printer distribution methods.

Distributing Scheduled Output Using E-mail

You can distribute scheduled output as e-mail attachment(s) or inline within the body of an e-mail message. Distributing scheduled output as an inline e-mail message is particularly useful when output is distributed to mobile devices, fax machines, or through e-mail systems that do not support attachments. For more information about distributing scheduled output to a fax machine, see *Distributing Scheduled Output to a Fax Machine Using E-mail* on page 4-32.

Procedure How to Distribute Scheduled Output Using E-mail

1. In the Distribution tab, select *Email* from the Distribute Reports by drop-down list. The following options appear:



2. **Mail Server Name.** The SMTP e-mail server specified in the Distribution Server configuration file appears. You can accept the default e-mail server, or enter another name for the e-mail server that will distribute the scheduled output. ReportCaster requires the SMTP server's domain name, not its IP address.

3. Specify whether you want to distribute the scheduled output as one or more e-mail attachments, or inline within the body of an e-mail message:

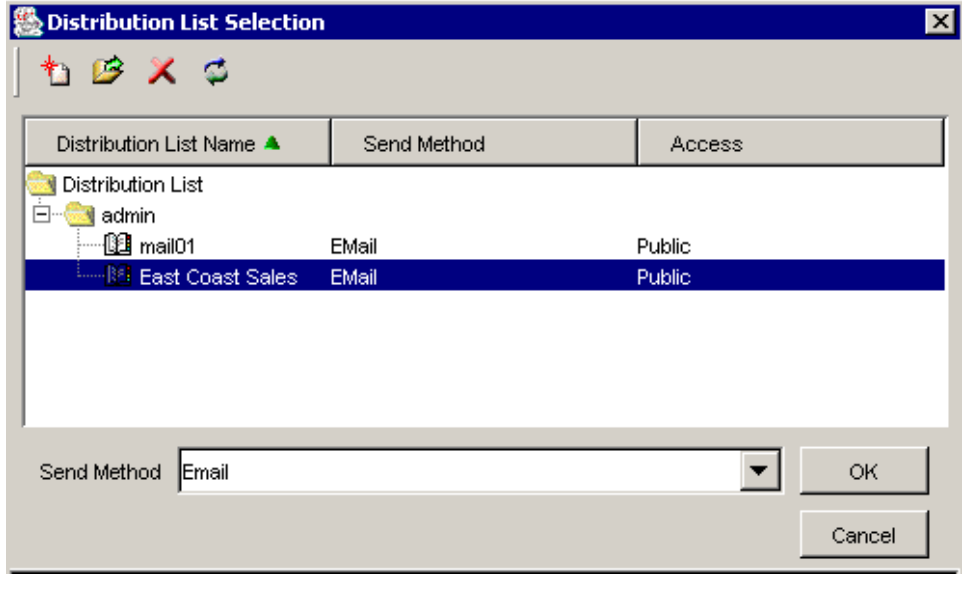
   - If you want to distribute the scheduled output as an e-mail attachment, select the *Send all reports as attachments* radio button. If you want to send an optional message within the body of your e-mail, click *Message*. Type the message (you may specify a maximum of 256 characters of text) and then click *OK*.
   - If you want to distribute the scheduled output inline within the body of an e-mail message, select the *Select one report as inline message* radio button. Select the Task from the drop-down list, which displays all Tasks created for this schedule.

   Note: You can only distribute one Task as an inline e-mail message. If you are scheduling multiple Tasks using e-mail, the additional Tasks must be distributed as e-mail attachments.

4. **Type.** Select *Distribution List*, *Distribution File*, *Single Address*, or *Dynamic Address* from the drop-down list.

   Tip: You can use group mail lists (defined on your mail server) with any of these options. Group mail lists enable you to distribute scheduled output or notifications to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository.

   - **Distribution List.** You can select a Distribution List by clicking the Address Book button  . The following window opens showing the e-mail Distribution Lists that you are the owner of, and all public e-mail Distribution Lists:



From this screen, you can:

Create a new Distribution List by clicking the *New* icon.

View or edit a Distribution List by selecting the list and clicking the *Edit* icon. The contents of the list can only be changed by the ReportCaster Administrator or the owner of the Distribution List.

Delete a Distribution List by selecting the list and clicking the *Delete* icon. The Distribution List can only be deleted by the ReportCaster Administrator or the owner of the Distribution List.

Refresh an Address Book to display any new Distribution Lists that other users may have created.

Click *OK* to return to the Distribution tab. For more information about Distribution Lists, see Chapter 3, *Creating and Maintaining a Distribution List*.

- **Distribution File.** In the To field, type the full path and file name of the Distribution File. The path and file name must be accessible to the Distribution Server.

  The external file must contain comma-delimited records, where the maximum length is 75 bytes. Records must end with a comma followed by a dollar sign (,$). Each record must be entered on a separate line in the file.

  To specify a record for a bursted procedure, use the following format:

  e-mail address, *burst value,$*

  To specify a record for a non-bursted procedure, use the following format:

  e-mail address, ,$

- **Single Address.** In the To field, type the e-mail address of the single recipient. ReportCaster cannot validate the e-mail address entered. An incorrect or unresolved address may not be noted in the log file. This is dependent upon the SMTP mail server's ability to validate the e-mail address. The SMTP mail server will return undelivered e-mail messages to the reply address you specify for the schedule. The burst option is not supported with this distribution option. The maximum length of this field is 95 bytes.

  Tip: Depending on your mail server, you may be able to enter more than one e-mail address in this field. Each address must be delimited by what your mail server requires. For example, yahoo e-mail addresses are delimited by a comma, while Outlook e-mail addresses are delimited by a semicolon.

- **Dynamic Address.** Enables you to return in memory either a list of burst values and destinations, or only a list of destinations from a data source (for example, a flat file, SQL database, FOCUS data source, or LDAP). You must code a FOCUS procedure (FOCEXEC) that is available to the path of the server defined in either the server's profile (edasprof.prf) or the user's profile. The procedure must return the distribution information (using the PCHOLD command) with the data in a specific layout that you define. This layout must contain specific values and destinations so that ReportCaster can identify and process the information returned.

  The following is a sample Master File for e-mail distribution information located in a text file.

```
FILE=MYADDR     ,SUFFIX=FIX
SEGNAME=SEG01   ,SEGTYPE=S02
FIELDNAME   =BURST_VALUE      ,BURST       ,A50   ,A50,$
FIELDNAME   =EMAIL_ADDRESS    ,EMAIL       ,A40   ,A40,$
```

  The following is a sample request (procedure) for bursting. The column names and the order in which they are returned must be 'VALUE' and then 'DEST'.

```
TABLE FILE MYADDR
PRINT BURST_VALUE AS 'VALUE'
      EMAIL_ADDRESS AS 'DEST'
ON TABLE PCHOLD
END
```

  The following is a sample request (procedure) for non-bursting. In this case, the 'VALUE' column does not need to be provided since bursting is not required.

```
TABLE FILE MYADDR
PRINT EMAIL_ADDRESS AS 'DEST'
ON TABLE PCHOLD
END
```

5. **From.** This can be any value (for example, the name of the person creating the schedule). This is not required by ReportCaster, but may be required by your e-mail system.
6. **Reply Address.** Enter a valid e-mail address. If recipients reply to the e-mail, their messages will be sent to this address. If your e-mail system is unable to deliver the content, the undelivered output message is also returned to this address.
7. **Subject.** Enter the text you want to appear in the message's subject line. This information is not required by ReportCaster, but may be needed by your e-mail system.
8. Proceed to the Settings tab (see *Specifying Optional and Notification Settings for a Schedule* on page 4-50).

Note: For considerations you should be aware of when creating a schedule using the e-mail distribution method, see *Considerations When Distributing Scheduled Output Using Email* on page 4-34.

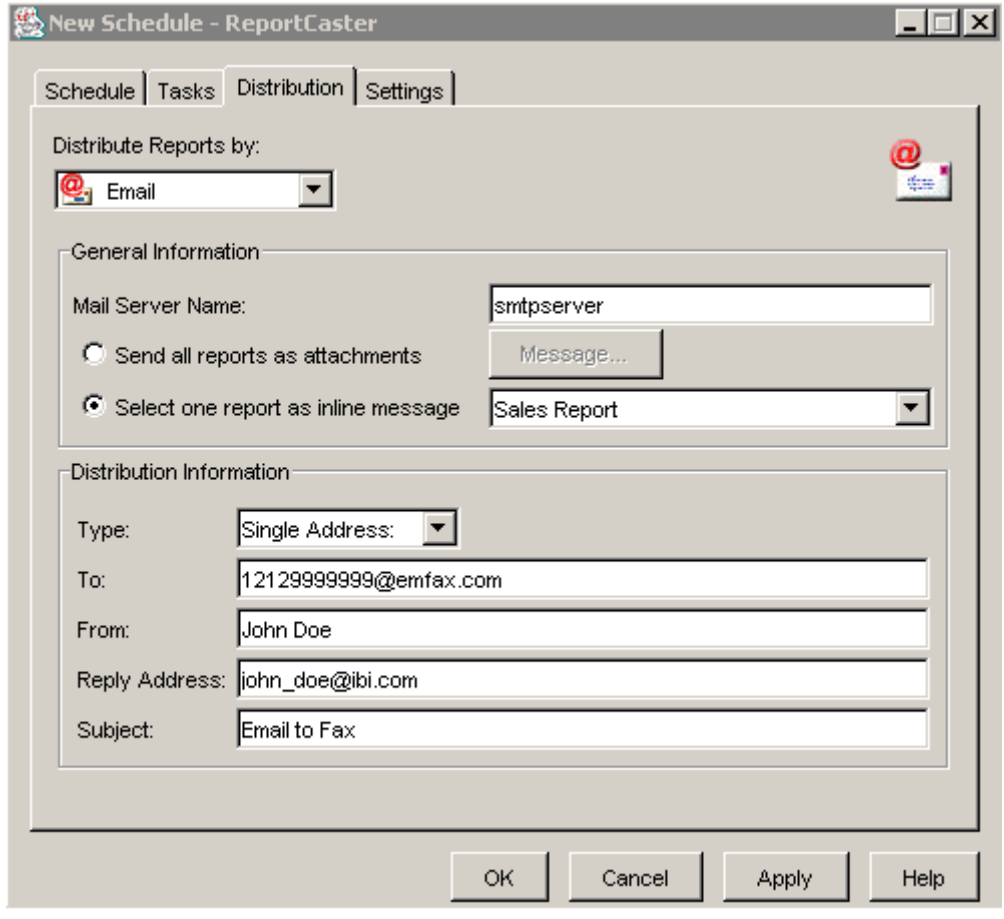
Example Distributing Scheduled Output to a Fax Machine Using E-mail

To send 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 scheduled output 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 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 will be validated by *emfax.com*. If the e-mail address is valid, *emfax.com* will distribute the scheduled output 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. In the Distribution tab, select *Email* from the Distribute Reports by drop-down list. The following options appear:



2. **Mail Server Name.** The SMTP e-mail server specified in the Distribution Server configuration file appears. You can accept the default e-mail server, or enter another name for the e-mail server that will distribute the scheduled output. ReportCaster requires the SMTP server's domain name, not its IP address.

3. Select the *Select one report as inline message* radio button. Select the report (for example, Sales Report) from the drop-down list, which displays any Tasks created for this schedule in the Tasks tab.

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

4. **Type.** Select *Single Address* from the drop-down list.

5. **To.** Enter 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*, *Distribution File*, or a *Dynamic Address*. However, be sure to use the syntax required by your provider.

6. **From.** This can be any value (for example, the name of the person creating the schedule). This is not required by ReportCaster, but may be required by your e-mail system.

7. **Reply Address.** Enter your registered e-mail address. If your e-mail system is unable to deliver the content, the undelivered output message is returned to this address.

8. **Subject.** Enter the text you want to appear in the message's subject line. This information is not required by ReportCaster, but may be needed by your e-mail system or e-mail provider.

9. Proceed to the Settings tab (see *Specifying Optional and Notification Settings for a Schedule* on page 4-50).

Reference Considerations When Distributing Scheduled Output Using Email

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

Exchange Mail Server Considerations:

- When distributing scheduled output 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 user's machine. The ReportCaster Distribution List is parsed by the user's mail client and not the Exchange Server.

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.

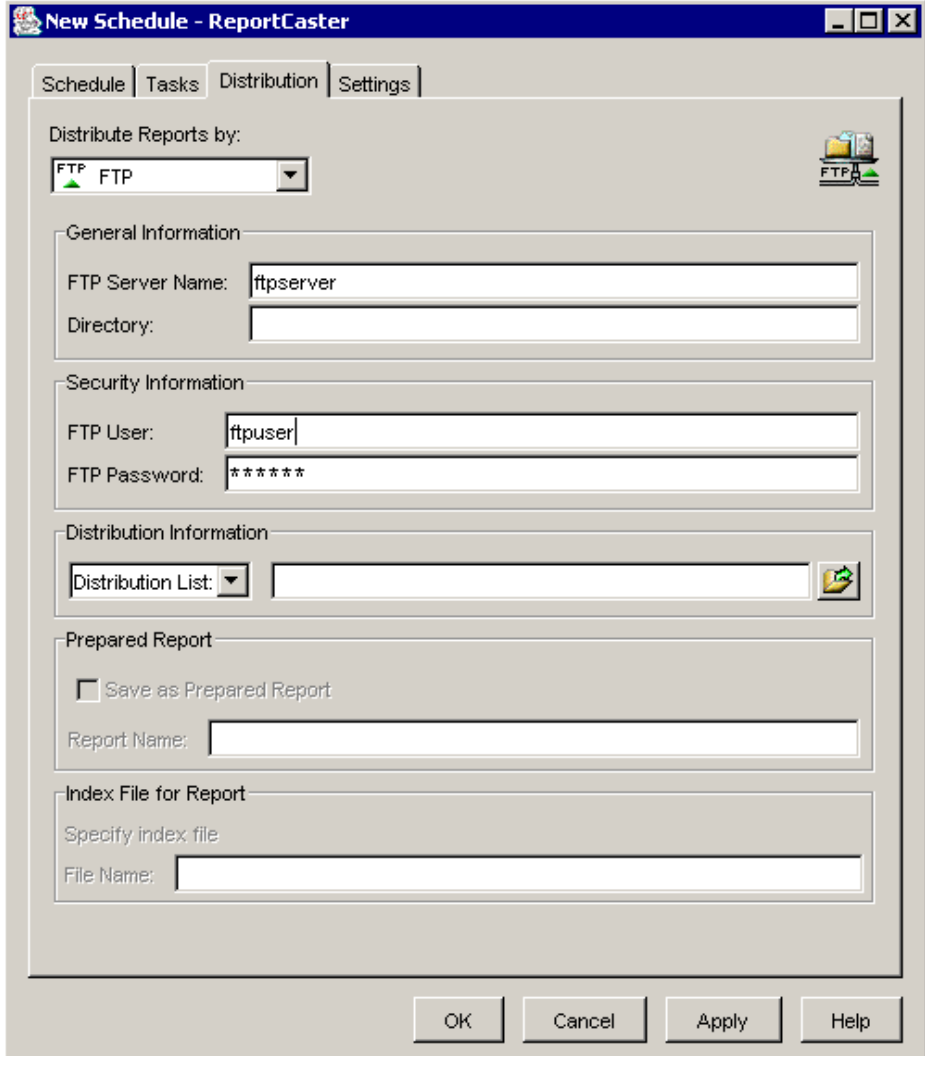
Distributing Scheduled Output Using FTP

The following topics describe how to distribute scheduled output using FTP:

- *How to Distribute Scheduled Output Using FTP* on page 4-35.
- *How to Distribute Scheduled Output to a PDA Using FTP* on page 4-40.

Procedure How to Distribute Scheduled Output Using FTP

1. In the Distribution tab, select *FTP* from the Distribute Reports by drop-down list. The following options appear:

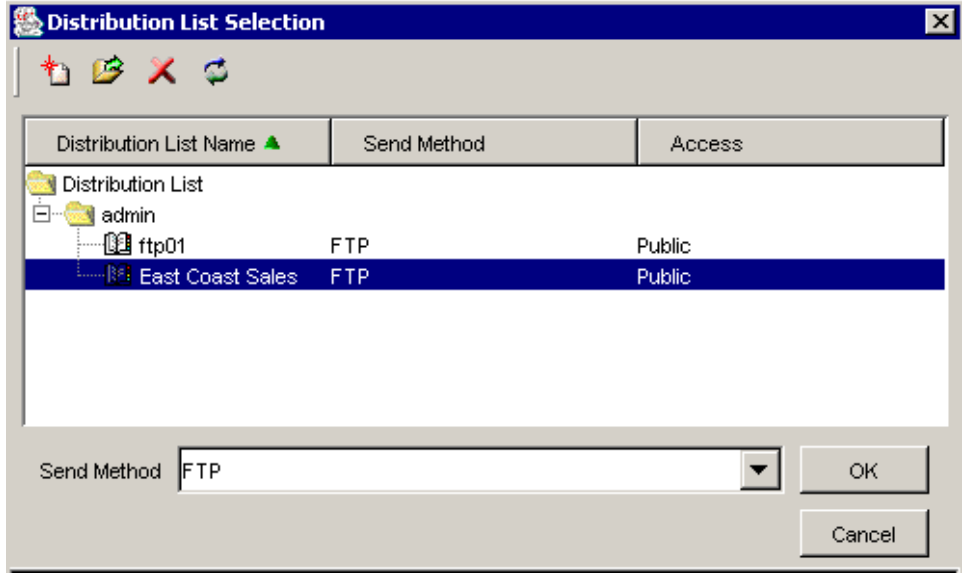


2. **FTP Server Name.** The FTP server specified in the Distribution Server configuration file appears. You can accept the default FTP server, or enter another name for the FTP server that will distribute the scheduled output.
3. **Directory.** Enter the destination to which the output will be sent.
   - You cannot create new Prepared Reports for Version 5 Release 2. However, all previously created Prepared Reports will be supported.
   - For WF Server Procedures and Managed Reporting reports other than Prepared Reports, specify the FTP logon directory and path of the user ID to whose account on the FTP server the report will be sent.
   - If left blank, this specifies that WF Server Procedures distributed using FTP will be sent to the home directory of the FTP user.
   - If the FTP server resides on an OpenVMS file system, use UNIX-style directory specifications.
   - If the FTP server resides on a z/OS UNIX system in data set mode, you must enter a forward slash (/) as the first character for the directory.
   - If the FTP server resides on a VM system, you must enter ./ for the directory. This will send reports to the default VM minidisk of the FTP user.

   Note: When scheduling a Managed Reporting report from Domain Builder for FTP distribution, the maximum number of characters that can be specified for the directory is 64, including the full path name.
4. **FTP User and FTP Password.** Type the user ID and password for the FTP server account to which the scheduled output will be sent. You can specify a default FTP user ID and password within the Distribution Server configuration file.

5. **Distribution Information.** Select *Distribution List*, *Distribution File*, *Single Address*, or *Dynamic Address* from the drop-down list.

   - **Distribution List.** You can select a Distribution List by clicking the Address Book button  . The following window opens showing the FTP Distribution Lists that you are the owner of, and all public FTP Distribution Lists:



   From this screen, you can:

   Create a new Distribution List by clicking the *New* icon.

   View or edit a Distribution List by selecting the list and clicking the *Edit* icon. The contents of the list can only be changed by the ReportCaster Administrator or the owner of the Distribution List.

   Delete a Distribution List by selecting the list and clicking the *Delete* icon. The Distribution List can only be deleted by the ReportCaster Administrator or the owner of the Distribution List.

   Refresh an Address Book to display any new Distribution Lists that other users may have created.

   Click *OK* to return to the Distribution tab. For more information about Distribution Lists, see Chapter 3, *Creating and Maintaining a Distribution List*.

- **Distribution File.** In the To field, type the full path and file name of the Distribution File. The path and file name must be accessible to the Distribution Server.

  The external file must contain comma-delimited records, where the maximum length is 75 bytes. Records must end with a comma followed by a dollar sign (,$). Each record must be entered on a separate line in the file.

  To specify a record for a bursted procedure, use the following format:

  ftp filename, *burst value,$*

  To specify a record for a non-bursted procedure, use the following format:

  ftp filename, ,$

- **Single Address.** In the To field, type the FTP file of the single recipient. ReportCaster cannot validate the FTP file entered. The burst option is not supported with this distribution option.

- **Dynamic Address.** Enables you to return in memory either a list of burst values and destinations, or only a list of destinations from a data source (for example, a flat file, SQL database, FOCUS data source, or LDAP). You must code a FOCUS procedure (FOCEXEC) that is available to the path of the server defined in either the server's profile (edasprof.prf) or the user's profile. The procedure must return the distribution information (using the PCHOLD command) with the data in a specific layout that you define. This layout must contain specific values and destinations so that ReportCaster can identify and process the information returned.

  The following is a sample Master File for FTP distribution information located in a text file.

```
FILE=MYADDR      ,SUFFIX=FIX
SEGNAME=SEG01    ,SEGTYPE=S02
FIELDNAME    =BURST_VALUE       ,BURST       ,A50    ,A50,$
FIELDNAME    =FTP_FILENAME      ,FTP         ,A40    ,A40,$
```

  The following is a sample request (procedure) for bursting. The column names and the order in which they are returned must be 'VALUE' and then 'DEST'.

```
TABLE FILE MYADDR
PRINT BURST_VALUE AS 'VALUE'
      FTP_FILENAME AS 'DEST'
ON TABLE PCHOLD
END
```

The following is a sample request (procedure) for non-bursting. In this case, the 'VALUE' column does not need to be provided since bursting is not required.

```
TABLE FILE MYADDR
PRINT FTP_FILENAME AS 'DEST'
ON TABLE PCHOLD
END
```

6. **Report Name.** If you selected *Save as Prepared Report* when creating a Managed Reporting Standard Report in WebFOCUS Version 4 Release 3.6 or earlier, you can edit the report's name in the Report Name field. The name identifies the report in the Prepared Reports folder. This field is only applicable for Standard Reports.

7. **Index File for Report:**

   - For Managed Reporting reports, if you want to distribute the reports using the Domain's Prepared Reports folder, you must provide a file name. If the report is burst, this will be the name of the index page. If the report is not burst, this will be the name of the file.
   - For WF Server Procedures, if you are going to specify that the report is to be burst, type the name of the file in which you want the index page to be created.

   The name of the index must be entered in the case specific to your operating system.

   The following table lists the case you should use for a specific operating system:

Case	Operating System
Upper	z/OS
Lower	Windows NT/2000/XP UNIX

   Note: HTML, PDF, and EXL2K are the only formats that generate an index page for bursted report output. These index pages only contain the burst values specified in the Distribution List.

8. Proceed to the Settings tab (see *Specifying Optional and Notification Settings for a Schedule* on page 4-50).

Procedure How to Distribute Scheduled Output to a PDA Using FTP

ReportCaster can prepare reports for transfer to a Palm™ Personal Digital Assistant (PDA) using the HotSync process. Use the following steps to distribute a report to a PDA:

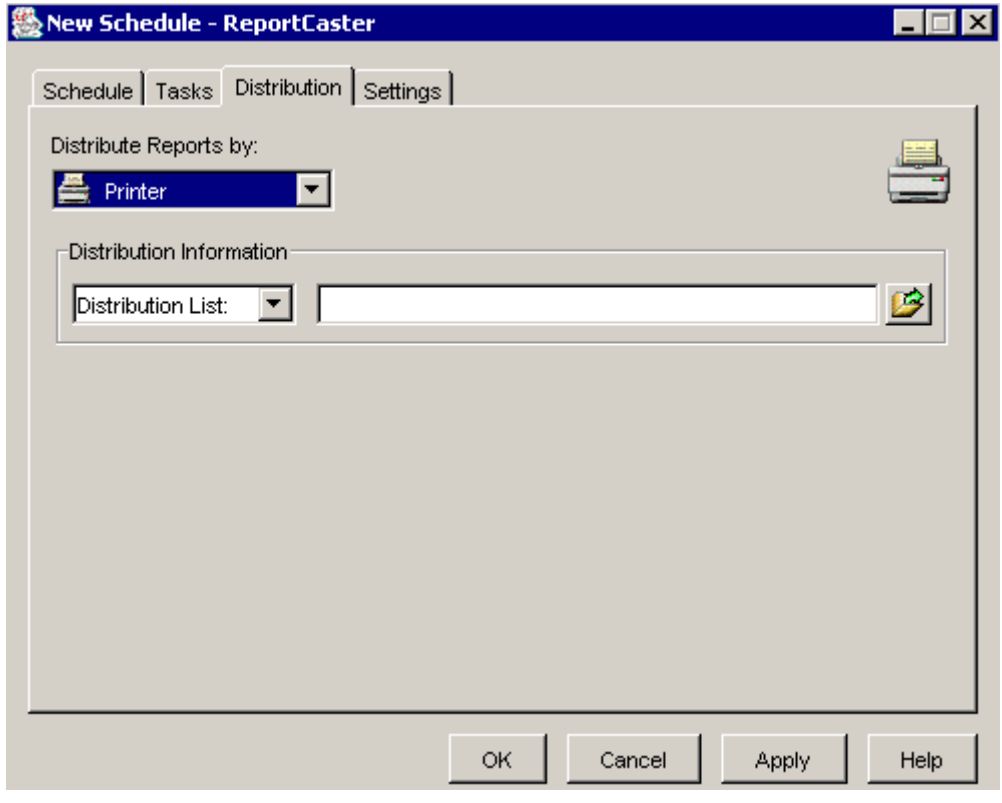
1. Create a schedule that runs periodically and distributes a report using FTP to a specified directory location.
2. In the Tasks tab, select the DOC format.
3. Create a Distribution List for the schedule that specifies the .txt extension for any file name. The Palm Memo Pad application requires that all file names end with the .txt extension.
4. Create a file link to the FTP location using the Palm Desktop software:
   a. Open the Palm Desktop application.
   b. From the menu, select *Hotsync* and then *File Link*.
   c. Click the *Create a New Link* radio button.
   d. Click *Next*. The Create a New Link dialog box opens.
   e. In the Application name input box, enter *Memo Pad*.
   f. In the File path input box, specify the complete path name for the file from which the PDA is to receive the data.
   g. Click *Next*, located at the bottom of the dialog box.
   h. Click *Done*.

Distributing Scheduled Output to a Printer

When you distribute scheduled output to a printer, it is sent to your company's network printers. The following section describes how to schedule ReportCaster content to a printer.

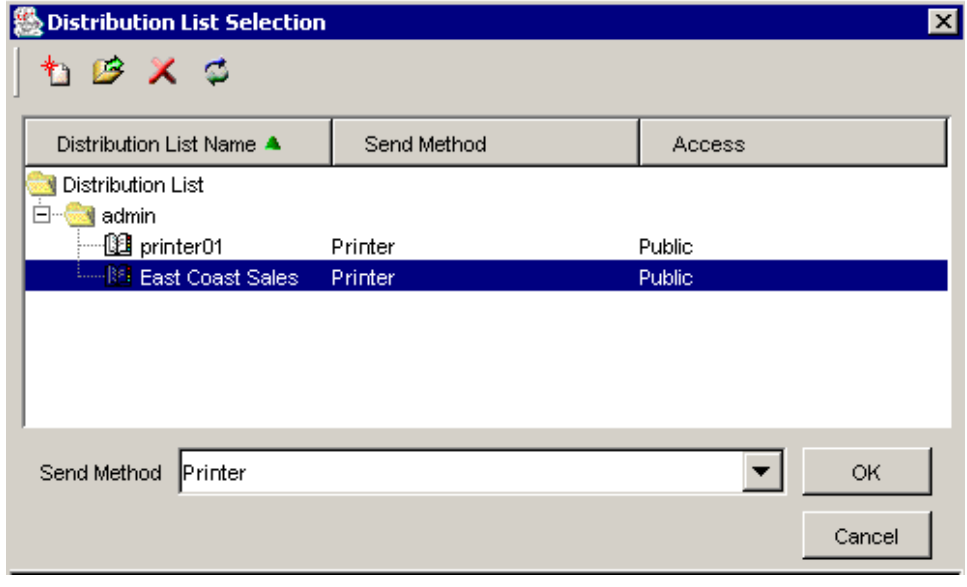
Procedure How to Distribute Scheduled Output to a Printer

1. In the Distribution tab, select *Printer* from the Distribute Reports by drop-down list. The following options appear:



2. **Distribution Information.** Select *Distribution List*, *Distribution File*, *Single Address*, or *Dynamic Address* from the drop-down list.

   - **Distribution List.** You can select a Distribution List by clicking the Address Book button  . The following window opens showing the printer Distribution Lists that you are the owner of, and all public printer Distribution Lists:



   From this screen, you can:

   Create a new Distribution List by clicking the *New* icon.

   View or edit a Distribution List by selecting the list and clicking the *Edit* icon. The contents of the list can only be changed by the ReportCaster Administrator or the owner of the Distribution List.

   Delete a Distribution List by selecting the list and clicking the *Delete* icon. The Distribution List can only be deleted by the ReportCaster Administrator or the owner of the Distribution List.

   Refresh an Address Book to display any new Distribution Lists that other users may have created.

   Click *OK* to return to the Distribution tab. For more information about Distribution Lists, see Chapter 3, *Creating and Maintaining a Distribution List*.

- **Distribution File.** In the To field, type the full path and file name of the Distribution File. The path and file name must be accessible to the Distribution Server.

  The external file must contain comma-delimited records, where the maximum length is 75 bytes. Records must end with a comma followed by a dollar sign (,$). Each record must be entered on a separate line in the file.

  To specify a record for a bursted procedure, use the following format:

  printer, burst value,$

  To specify a record for a non-bursted procedure, use the following format:

  printer, ,$

- **Single Address.** Type the name of the printer.
- **Dynamic Address.** Enables you to return in memory either a list of burst values and destinations, or only a list of destinations from a data source (for example, a flat file, SQL database, FOCUS data source, or LDAP). You must code a FOCUS procedure (FOCEXEC) that is available to the path of the server defined in either the server's profile (edasprof.prf) or the user's profile. The procedure must return the distribution information (using the PCHOLD command) with the data in a specific layout that you define. This layout must contain specific values and destinations so that ReportCaster can identify and process the information returned.

  The following is a sample Master File for printer distribution information located in a text file.

```
FILE=MYADDR     ,SUFFIX=FIX
SEGNAME=SEG01   ,SEGTYPE=S02
FIELDNAME  =BURST_VALUE        ,BURST       ,A50  ,A50,$
FIELDNAME  =PRINTER_ADDRESS    ,PRINTER     ,A40  ,A40,$
```

  The following is a sample request (procedure) for bursting. The column names and the order in which they are returned must be 'VALUE' and then 'DEST'.

```
TABLE FILE MYADDR
PRINT BURST_VALUE AS 'VALUE'
      PRINTER_ADDRESS AS 'DEST'
ON TABLE PCHOLD
END
```

  The following is sample request (procedure) for non-bursting. In this case, the 'VALUE' column does not need to be provided since bursting is not required.

```
TABLE FILE MYADDR
PRINT PRINTER_ADDRESS AS 'DEST'
ON TABLE PCHOLD
END
```

Note: If the printer you specify is unrecognized, the "Cannot connect to specified printer" message will be recorded in the log file when the Distribution Server tries to distribute the report.

3. Proceed to the Settings tab (see *Specifying Optional and Notification Settings for a Schedule* on page 4-50).

Distributing Scheduled Output 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 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.

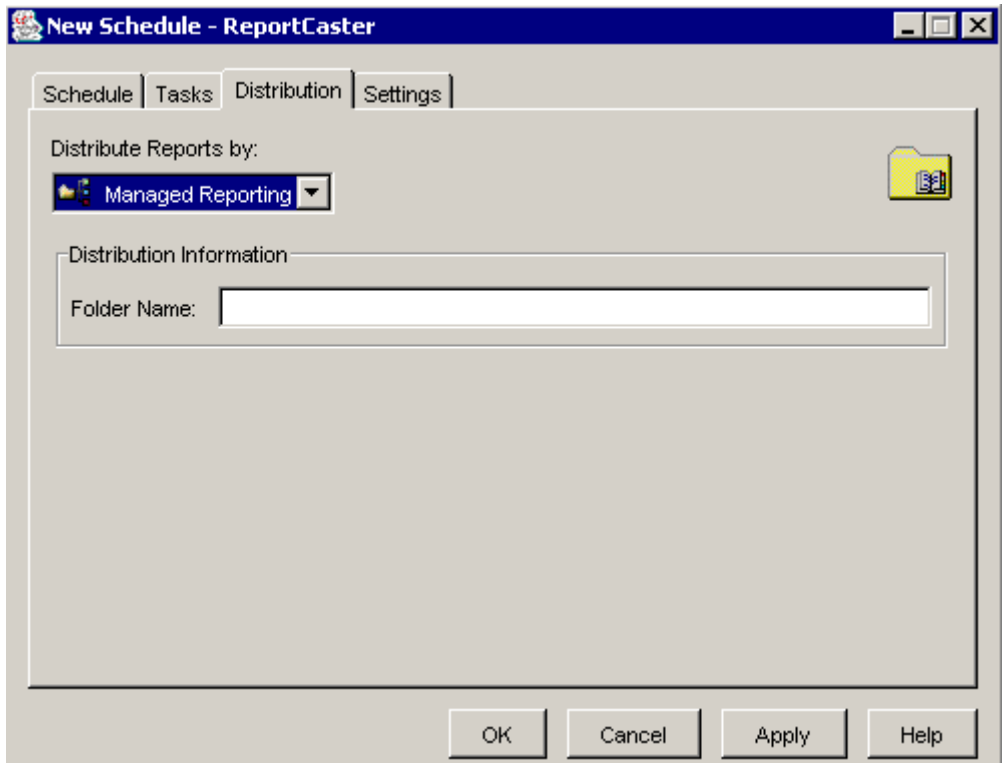
Note: The PostScript (PS) report format is not supported for this distribution method.

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 the report was scheduled in the Standard Reports Domain, ReportCaster creates a folder in the Standard Reports Domain. The report output is stored in the Domain's /app directory.
   - If the report was created in the My Reports Domain, ReportCaster creates a folder in the My Reports Domain. The report output is stored in the user's directory under /basedir.

Procedure How to Distribute Scheduled Output to Managed Reporting

1. In the Distribution tab, select *Managed Reporting* from the Distribute Reports by drop-down list. The following options appear:



2. **Folder Name.** Enter the job description of the scheduled report. This description must not exceed 90 characters.
3. Proceed to the Settings tab (see *Specifying Optional and Notification Settings for a Schedule* on page 4-50).

Note:

- 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. Information Builders recommends using the EXL2K format instead.

- When distributing scheduled output to Managed Reporting with a format of COMMA, the following information must be added to the /client52/wfs/etc/mime.wfs file to open the output in Excel:

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

Distributing Scheduled Output to the Report Library

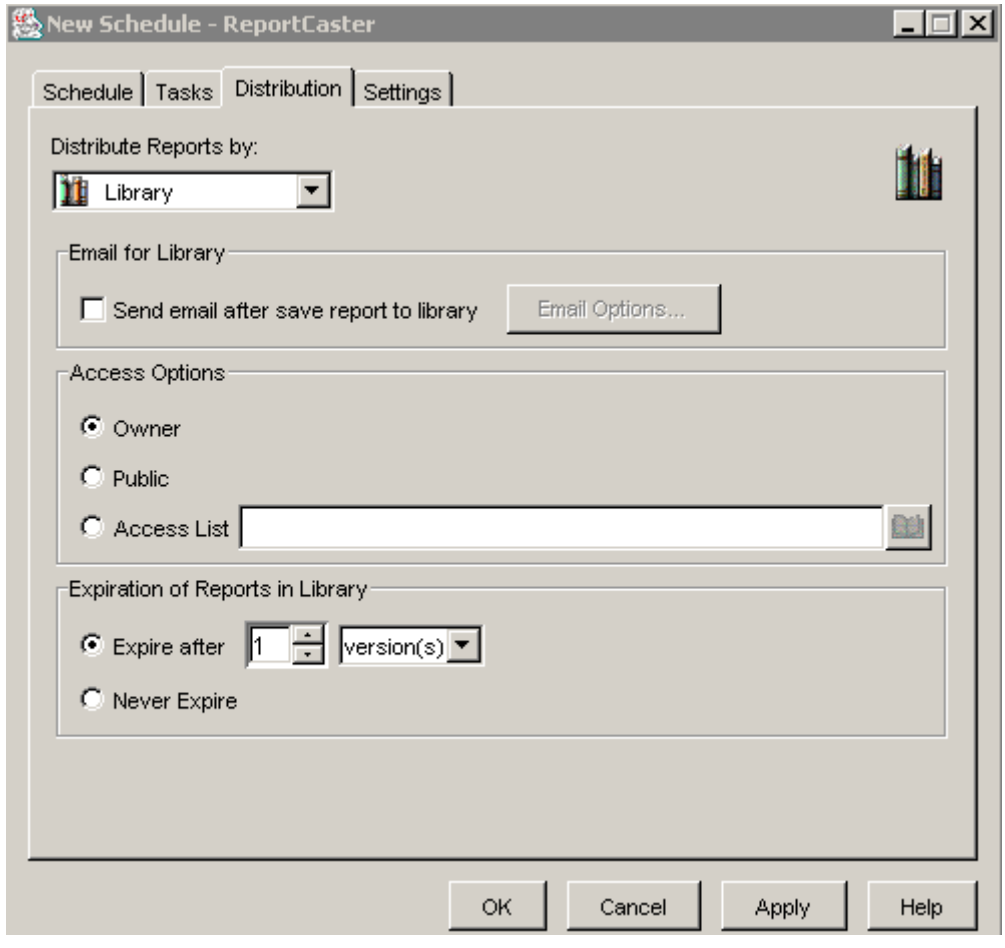
When you create a schedule, you can specify to distribute scheduled output to the Report Library, an optional storage and retrieval facility. The Report Library can contain any information that is distributed by ReportCaster (WF Server Procedures, Standard Reports, My Reports, the contents of URLs, and files). When distributing to the Report Library, you can send an e-mail informing users of its availability and the link to the content in the library.

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. The Report Library is only available to ReportCaster users who have been granted library privileges.

The Report Library consists of the Library Access List, Library Content, and Library Management interfaces. For more information about how to access these interfaces to use the optional Report Library product, see Chapter 5, *Report Library*.

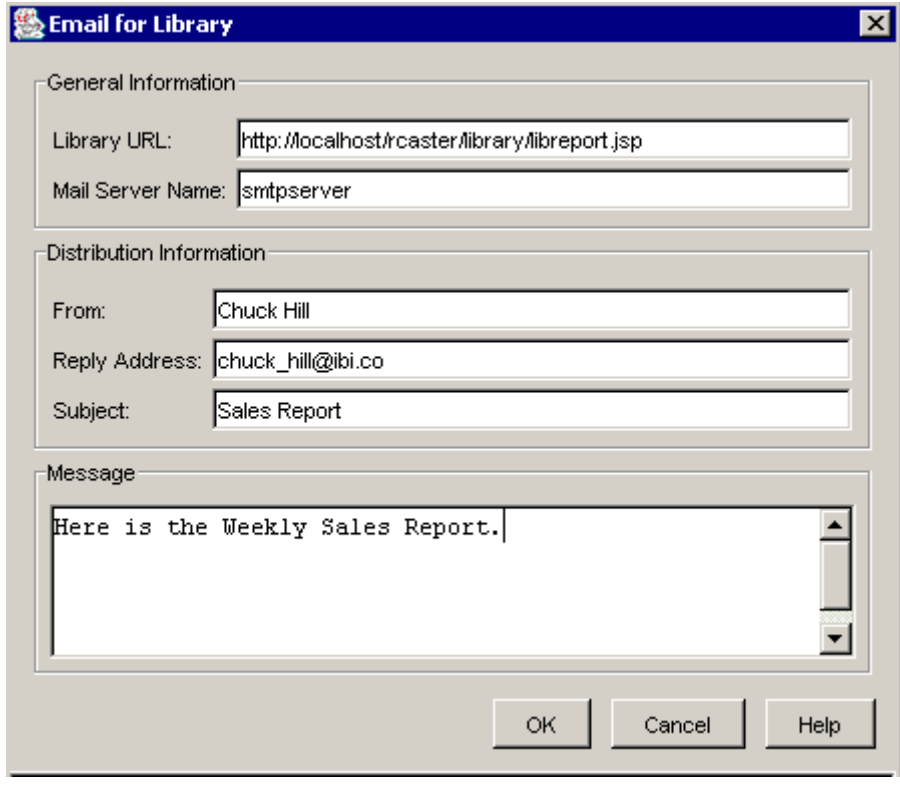
Procedure How to Distribute Scheduled Output to the Report Library

1. In the Distribution tab, select *Library* from the Distribute Reports by drop-down list. The following options appear:



2. **Email for Library.** You can send an e-mail message to users with access rights to the content in the Report Library. Any user with access to this report will receive this e-mail message, which contains the URL address needed to access the scheduled output.

Select the *Send email after save report to library* check box and then click *Email Options*. The Email for Library window opens:



3. The only field that requires user input is the Reply Address field. The Email for Library window contains the following fields:

- **Library URL.** The URL that is needed to access the content in the Report Library. This URL is specified during the Distribution Server installation.
- **Mail Server Name.** The SMTP e-mail server specified in the Distribution Server configuration file. You can accept the default e-mail server, or enter another name for the e-mail server. ReportCaster requires the SMTP server's domain name, not its IP address.
- **From.** This can be any value (for example, the name of the person creating the schedule). This is not required by ReportCaster, but may be required by your e-mail system.

- **Reply Address.** The sender's e-mail address. If report recipients reply to the notification, their messages will be sent to this address. If your e-mail system is unable to deliver a report, the undelivered report message is also returned to this address.
- **Subject.** The optional text you want to display in the subject line of the e-mail message.
- **Message.** The optional e-mail message. You can overwrite the default message.

Click *OK*.

4. **Access Options.** Select one of the following radio buttons:
   - **Owner.** Only the Owner of the schedule has access to the content in the library. This is the default.
   - **Public.** All users with access to the Report Library can view the content in the library.
   - **Access List.** Only the users or groups defined in the Library Access List can view the report. If you select the Access List radio button, click the Access List icon  and then select the users or groups from the User List.

     For more information about creating a Library Access List, see *Managing Users and Groups Using the Library Access List Interface* in Chapter 5, *Report Library*.
5. **Expiration of Reports in Library.** Select one of the following radio buttons:
   - **Expire after.** If you select this radio button, specify a number and then select one of the following options:

     version(s). The Report Library will store the number of versions specified.

     day(s). The Report Library will store the output for the number of day(s) specified.

     week(s). The Report Library will store the output for the number of week(s) specified.

     month(s). The Report Library will store the output for the number of month(s) specified.

     year(s). The Report Library will store the output for the number of year(s) specified.

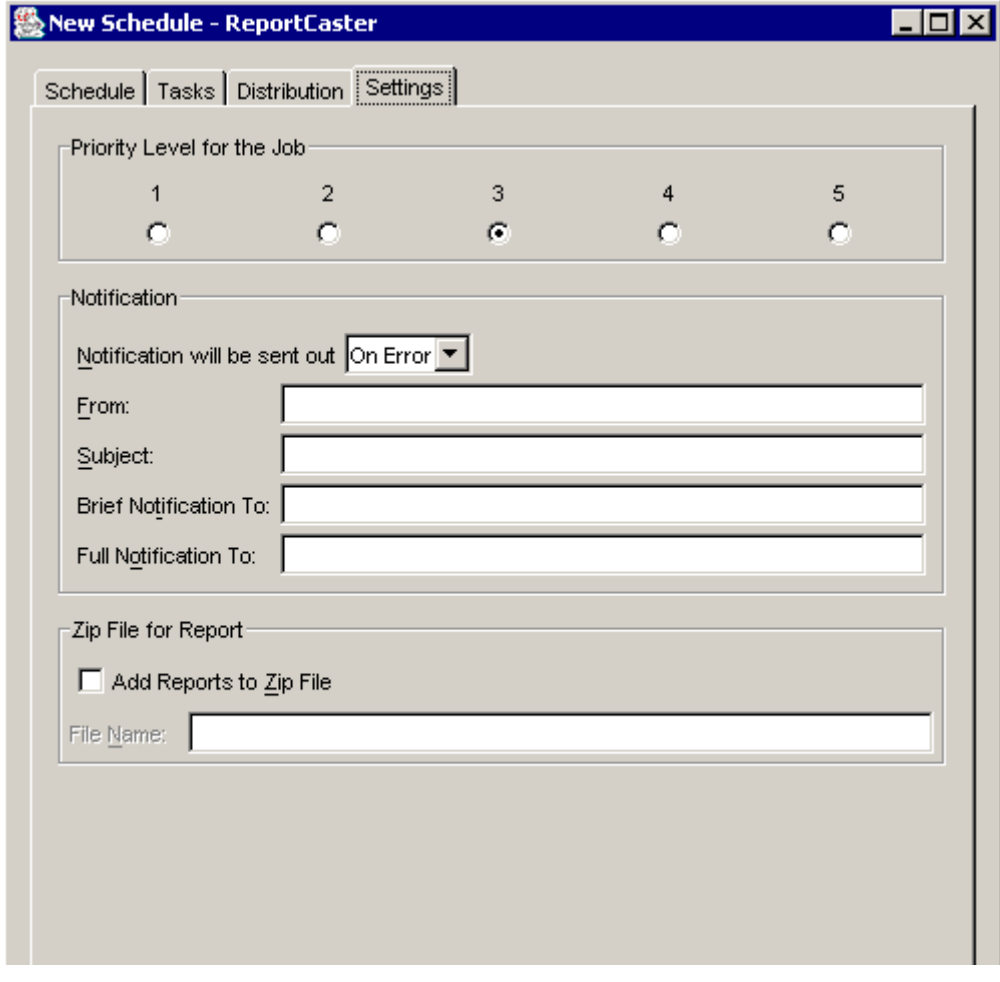
     Note: ReportCaster automatically purges expired output at 2:00 A.M. each day.
   - **Never Expire.** The output will remain in the Report Library until it is manually deleted by the owner or ReportCaster Administrator.
6. Proceed to the Settings tab (see *Specifying Optional and Notification Settings for a Schedule* on page 4-50).

Specifying Optional and Notification Settings for a Schedule

The optional Settings tab is where you specify the priority level of the schedule, notification options, and whether or not to zip the scheduled output.

Procedure How to Specify Optional Settings for a Schedule

1. Click the *Settings* tab. The following options appear:



2. **Priority Level for the Job.** Indicate the priority for running the job. Possible values are from 1 to 5, where 1 is the highest priority and 5 is the lowest priority. The default is 3. The Distribution Server queue sorts scheduled jobs by priority and then by time.

3. **Notification will be sent out.** Send notification of the schedule's status to a specified e-mail address by selecting one of the following options:

   - **On Error.** This is the default. The specified users are notified when errors are encountered while running the schedule. Information Builders recommends using the On Error notification option.
   - **Never.** ReportCaster does not send notification of the schedule's status under any circumstance. If you select *Never*, you may proceed to step 8.
   - **Always.** The specified user is always notified when the schedule runs.

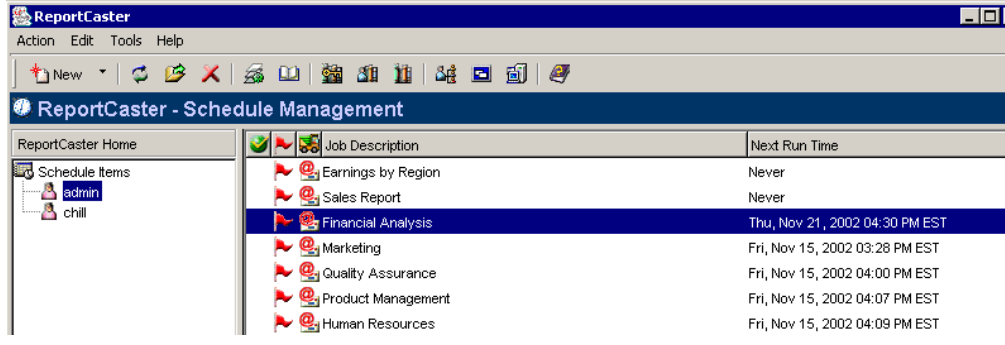
4. **From.** Enter the sender's e-mail address. If report recipients reply to the report's sender, their messages will be sent to this address. If your e-mail system is unable to deliver a report, the undelivered report message is also returned to this address.
5. **Subject.** Enter the text you want to display in the message's subject line. There is a limit of 255 alphanumeric characters.
6. **Brief Notification To.** Enter the e-mail address to which you want a brief notification sent. A brief notification sends the schedule ID and job description of a schedule, plus messages about the schedule such as "Completed Successfully". Note that there is no syntax error checking for this field.

   Tip: Information Builders recommends using the Brief Notification To option when you are sending notification to devices that have limited memory, such as pagers and cell phones.
7. **Full Notification To.** Enter the e-mail address to which you want a full notification sent. A full notification sends a complete Job Process Log Report as an e-mail attachment. Note that there is no syntax error checking for this field.
8. **Zip File for Report.** If you want to zip the scheduled output (e-mail only), select the *Add Reports to Zip File* check box.
9. **File Name.** Enter the name of the zip file that will contain the scheduled output.
10. Click *OK* to complete the schedule.

Maintaining a Schedule

If you are a ReportCaster Administrator, you can edit or delete an existing schedule at any time by performing the following steps:

1. From the ReportCaster - Schedule Management window, select the user who owns the schedule you want to edit or delete. The right frame of the interface displays the schedules owned by the selected user, the job description for each schedule, and the next run time of each schedule.
2. Select the schedule you want to edit or delete (for example, Financial Analysis):



3. To edit the schedule, click the Open icon , select *Open* from the Edit menu, right-click and select *Open* from the drop-down menu, or simply double-click the schedule.

   To delete the schedule, click the Delete icon , select *Delete* from the Edit menu, or right-click and select *Delete* from the drop-down menu.
4. If you are editing the schedule, make the necessary changes and save the schedule. If you are deleting the schedule, a message appears asking if you are sure that you want to delete the schedule. Click *Yes* to confirm that you want to delete the schedule.

Tracking a Schedule Using the Schedule Log Option

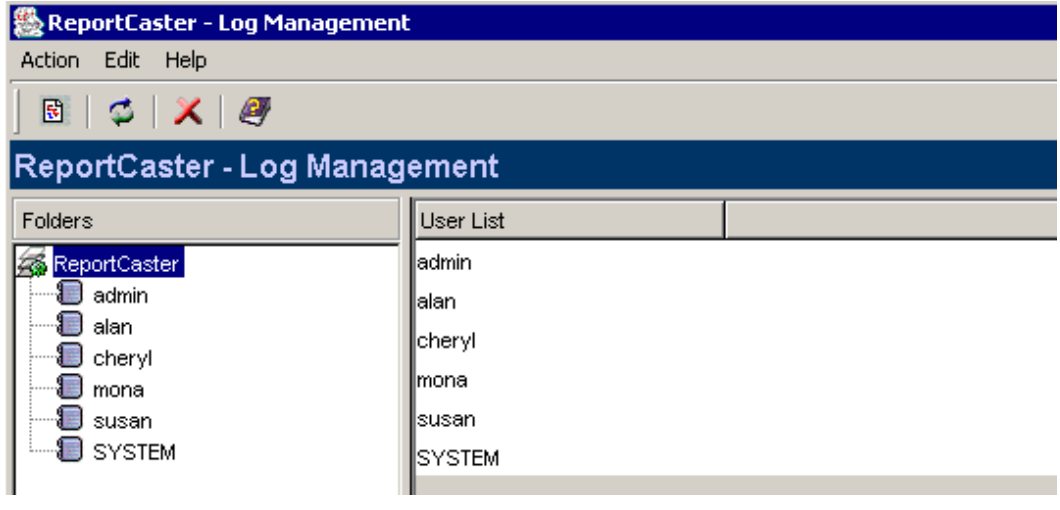
Information about the date, time, execution status, and recipients of a distributed job can be accessed using the Schedule Log option on the ReportCaster Development and Administration Interface. The Schedule Log option enables you to view information about a distributed job, such as whether or not the job executed successfully, when the scheduled output was distributed, in what format the distributed output was sent, and the method of distribution. Log reports are stylized HTML format and display in a separate browser window. You can search, print, or save the log report.

You can access the Schedule Log option from the ReportCaster Development and Administration Interface by clicking the Schedule Log icon, or by clicking the *Schedule Log* link. Administrators can also generate a log leport from the ReportCaster Console (for more information, see *Using the Log Option to View Information About a Distributed Job* in Chapter 6, *ReportCaster Console*).

Tip: You should periodically view a Job Process Log Report to confirm that scheduled jobs ran and were successfully distributed. You should also periodically purge the log file to conserve space (for details, see *Purging the Log File* on page 4-59).

Viewing a Job Process Log Report Using the Schedule Log Option

When you access the Schedule Log from the ReportCaster Development and Administration Interface, the ReportCaster - Log Management window opens:

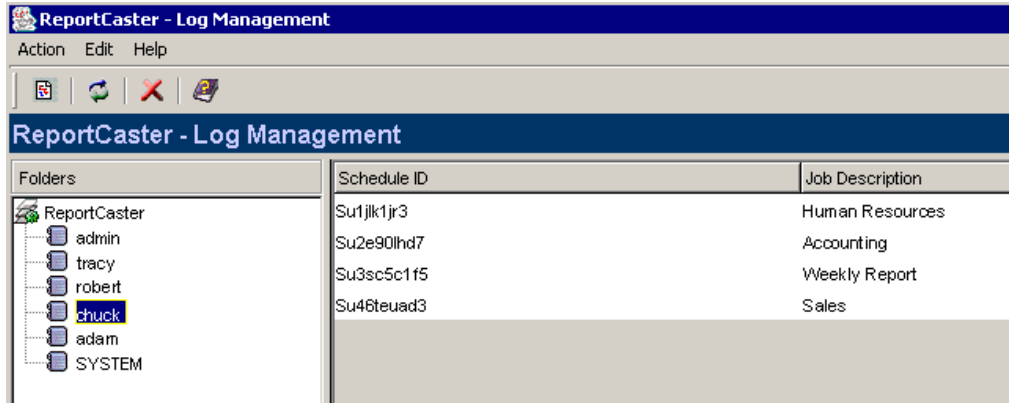


From the ReportCaster - Log Management window, you can:

- **View** a Job Process Log Report for a specific schedule or for all schedules for a specific user. For more information, see *How to View a Job Process Log Report* on page 4-54.
- **Refresh** the current list with any new schedule information.
- **Purge** log file information for all schedules, for all schedules for a specific user, or for a specific schedule for a specific user. For more information, see *Purging the Log File* on page 4-59.
- **Help.** Opens the online Help documentation.

Procedure How to View a Job Process Log Report

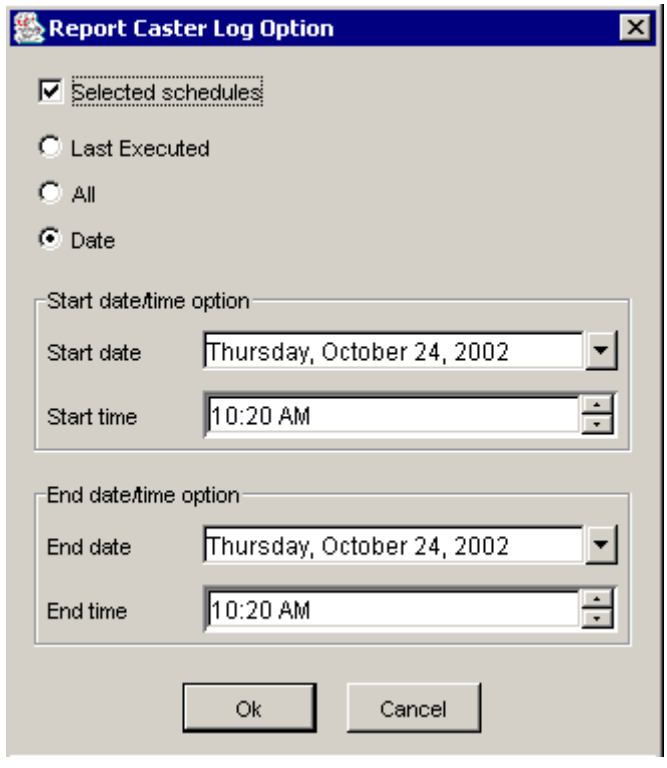
1. From the ReportCaster - Log Management window, select a user (for example, chuck). A list of schedules for the selected owner appears:



2. **To view a Job Process Log Report for a selected schedule:**

   Select a schedule (for example, Schedule ID Su1jlkjr3) and then click the Open Log Report icon. You can also select the schedule and then select *Open* from the Action menu, or right-click the schedule and then select *Open* from the drop-down list.

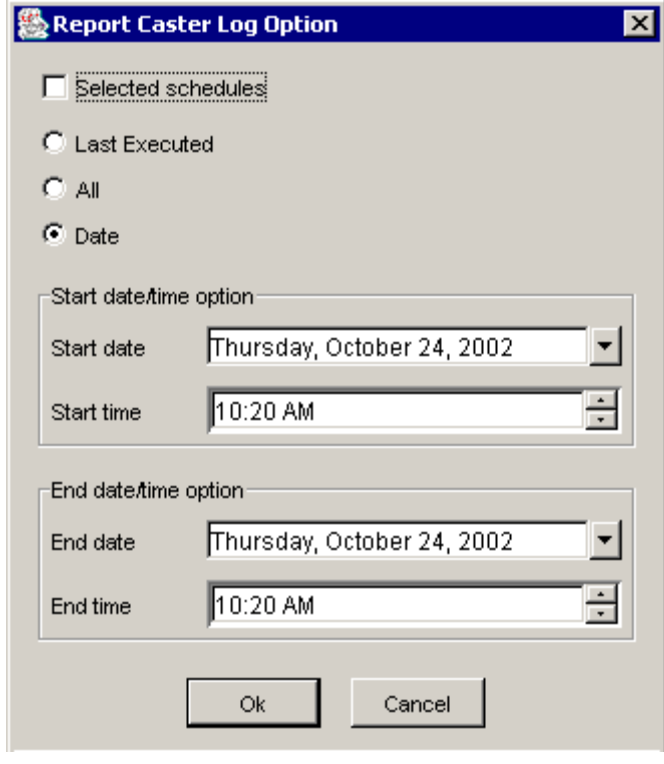
The ReportCaster Log Option dialog box opens with the Selected schedules check box active and checked.



Note: To switch from the item you selected to viewing all schedules for that user, uncheck the *Selected schedules* check box.

To view a Job Process Log Report for all schedules:

Click the Open Log Report icon without selecting a schedule. The ReportCaster - View Log Selection Criteria dialog box opens with the Selected schedules check box inactive and unchecked:



3. Select one of the following radio buttons:

   - **Last Executed.** Produces a Job Process Log Report containing the most currently run process for the selected schedule or for all schedules (if you did not select a schedule). This is the default.
   - **All.** Produces a Job Process Log Report containing all run processes for the selected schedule or for all schedules (if you did not select a schedule).
   - **Date.** Activates the Start date, Start time, End date, and End time fields.

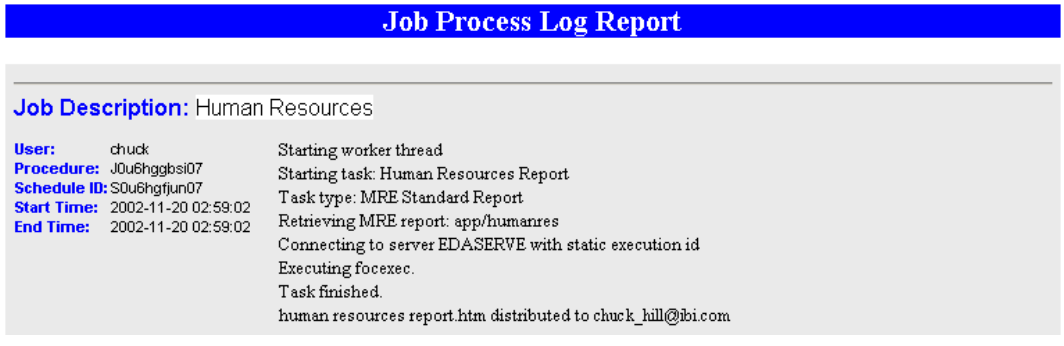
   If you have selected the Date option, proceed to step 4. Otherwise, proceed to step 8.

4. In the Start date field, specify the date on which you want the log report to begin. The report will display all processes for the selected schedule (or schedules) that were run on or after the specified Start date. You can either type the Start date directly in the field or select a Start date from the drop-down calendar. The default for the Start date field is the current date.
5. In the Start time field, specify a start time for the Start date by entering it directly into the text box, or by using the arrows. The default for the Start time field is the current time.
6. In the End date field, specify the date on which you want the log report to end. The report will display all processes for the selected schedule (or schedules) that were run before the specified End date. You can either type the End date directly in the field or select an End date from the drop-down calendar. The default for the End date field is the current date.
7. In the End time field, specify an end time for the End date by entering it directly into the text box, or by clicking the arrows. The default for the End time field is the current time.
8. Click *OK* to run the Job Process Log Report.

Example

Reading a Log Report

The Job Process 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 Job Process Log Report will display similar to the following:



A Job Process Log Report includes the following information:

- **Job Description.** Unique description that you supplied to identify the schedule.
- **User.** ReportCaster user ID, indicating the owner of the schedule.
- **Procedure.** Unique, ReportCaster-generated key that identifies a specific execution of a scheduled job.

- **Schedule ID.** Unique, ReportCaster-generated key 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.
- **Messages.** These consist of:
  - General information, such as the method of distribution for a particular job (for example, mail distribution).
  - Processing information, indicating that the request started, distribution was successful, and the request completed. Processing information also includes reasons why a request failed, such as the unavailability of a data source.

Reference Considerations When Viewing a Log Report

When viewing a Job Process Log Report, be aware of the following considerations.

E-mail Addresses:

- ReportCaster cannot validate e-mail addresses, so incorrect e-mail addresses are not noted in a Job Process Log Report.

Bursted Reports:

- If the distribution list does not contain all possible values for the primary sort (BY) field specified in the procedure, the following message is omitted in the log report:

  ```
  NO RECIPIENT SPECIFIED FOR BURST VALUE burst value
  ```

  This will significantly reduce the size of the log report, particularly when the database contains many values for the primary field and only a very small subset of those values are burst.
- When a report is successfully burst using the value(s) in the distribution list, the log will include the following message for each burst value:

  ```
  FILE filename SUCCESSFULLY DISTRIBUTED TO destination FOR burst value.
  ```
- If a burst value is specified, but the value does not exist, the following message appears in the log file:

  ```
  VALUE burst value DOES NOT EXIST FOR by field.
  ```

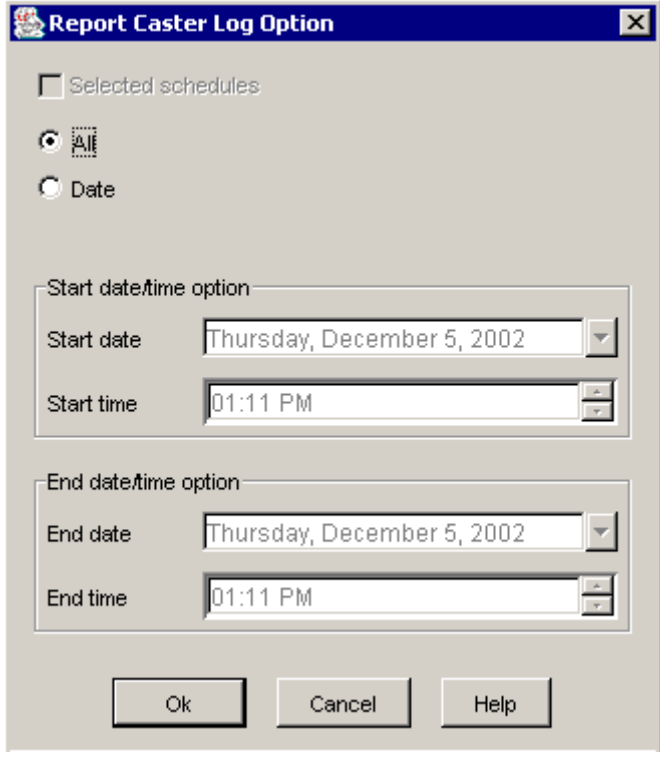
Purging the Log File

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

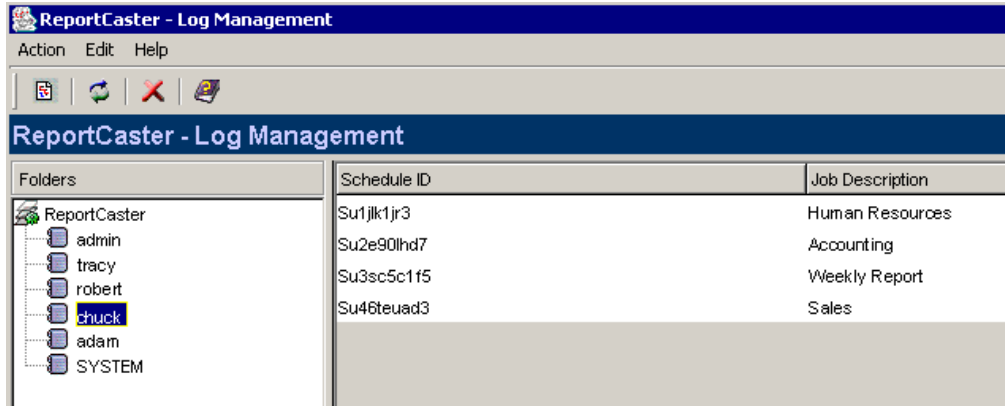
You can use the Log Purge Period setting in the ReportCaster Server Configuration tool to automatically purge log reports when they are older than a set number of days.

You may also manually purge the log file in one of the following ways:

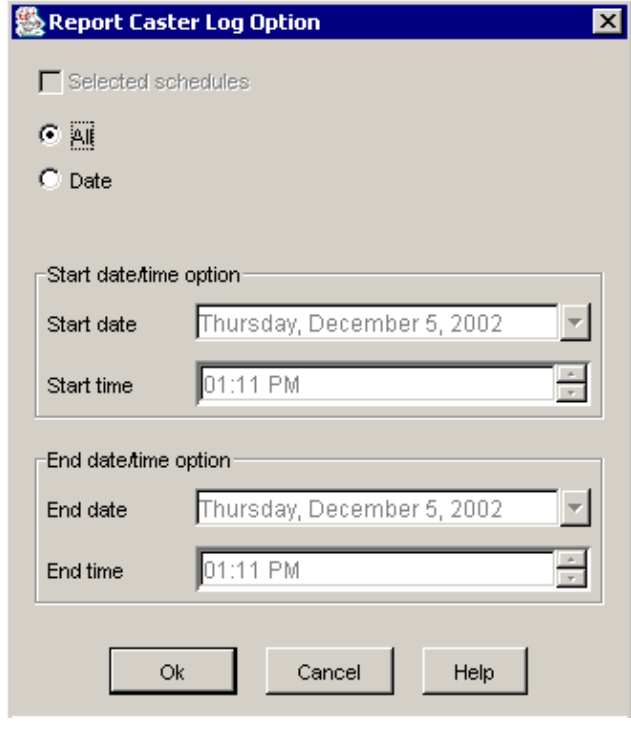
- **Purge log file information for all schedules:** Without selecting a schedule, click the Delete Log Report icon , or select *Delete* from the Edit menu. The ReportCaster Log Option dialog box opens with the Selected schedules check box inactive and unchecked, and the All radio button selected.



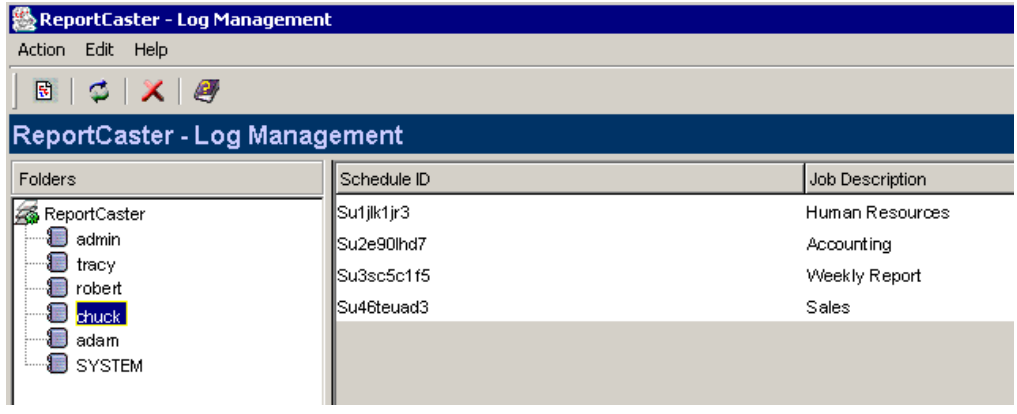
- **Purge log file information for all schedules for a specific user.** From the ReportCaster - Log Management window, select a user (for example, chuck). A list of schedules for the selected owner appears:



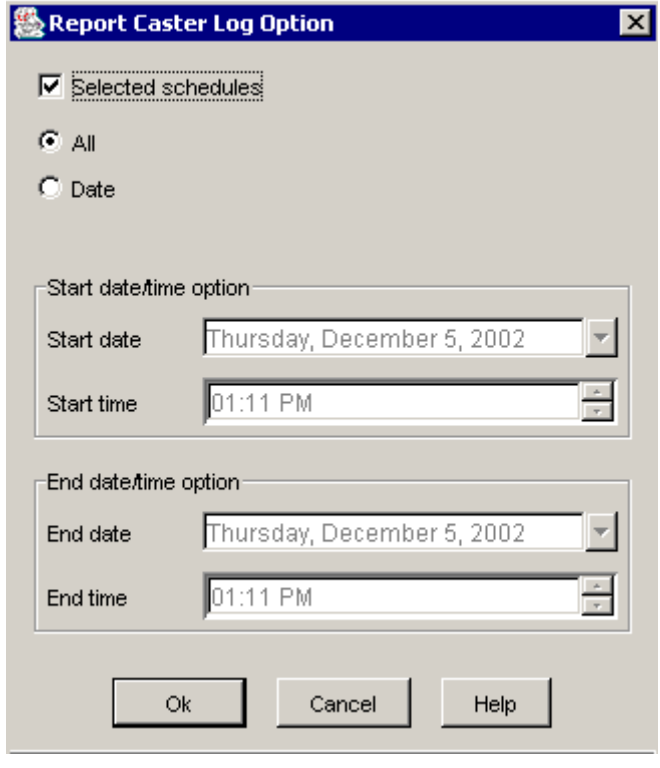
Without selecting a schedule, click the Delete Log Report icon , or select *Delete* from the Edit menu. The ReportCaster Log Option dialog box opens with the Selected schedules check box inactive and unchecked, and the All radio button selected.



- **Purge log file information for a specific schedule for a specific user.** From the ReportCaster - Log Management window, select a user (for example, chuck). A list of schedules for the selected owner appears:



Select a schedule and then click the Delete Log Report icon . You can also select a schedule and then select *Delete* from the Edit menu, or right-click the schedule and then select *Delete* from the drop-down menu. The ReportCaster Log Option dialog box opens with the Selected schedule check box active and checked, and the All radio button selected.



To switch from purging the schedule selected to purging all schedules in the list, uncheck the *Selected schedules* check box.

Clicking the Date radio button activates the Start date, Start time, End date, and End time fields.

- In the Start date field, specify the date from which you want to begin purging the log file. You can either type the Start date directly in the field or select a Start date from the drop-down calendar. The default for the Start date field is the current date.
- In the Start time field, specify a start time for the Start date by entering it directly into the field, or by using the arrows. The default for the Start time field is the current time.
- In the End date field, specify the date on which you want to end purging the log file. You can either type the End date directly in the field or select an End date from the drop-down calendar. The default for the End date field is the current date.
- In the End time field, specify an end time for the End date by entering it directly into the text box, or by clicking the arrows. The default for the End time field is the current time.

Click *OK* to process the request and refresh the list of schedules for the selected owner, or click *Cancel* to return to the list of schedules.

CHAPTER 5

Report Library

Topics:

- Using the Report Library
- Managing Users and Groups Using the Library Access List Interface
- Viewing Library Content
- Library Management

When you create a schedule (see Chapter 4, *Creating and Maintaining a Schedule*), you can specify to distribute the output to the Report Library, an optional storage and retrieval facility. The output (content) must be stored in an SQL repository (for example, SQL Server, Oracle, or DB2). The Report Library can contain any output that is distributed by ReportCaster (WF Server Procedures, Standard Reports, My Reports, files, and the contents of URLs). When distributing scheduled output to the Report Library, you can send an e-mail informing recipients of its availability and the link to the content in the library.

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. The Report Library is available only to ReportCaster users who have been granted access to the library (for details, see Chapter 2, *Accessing the ReportCaster Development and Administration Interface and Enabling User Capabilities*).

Using the Report Library

The Report Library consists of the following interfaces:

- **Library Access List.** Defines who may access specific content in the Report Library.
- **Library Content.** View the content in the Report Library to which you have been granted access.
- **Library Management.** ReportCaster Administrators can view a high-level summary of the content in the Report Library. Reports can be deleted using this tool, but the actual content of the reports cannot be viewed.

Procedure How to Access and Use the Report Library

The following are guidelines for accessing and using the Report Library:

1. Create users and groups.

   - Managed Reporting users must be enabled for ReportCaster capabilities using the User Administration tool in Managed Reporting.
   - Non-Managed Reporting users must be enabled for ReportCaster capabilities using the User Administrator tool in the ReportCaster Development and Administration Interface.

   For more information, see Chapter 2, *Accessing the ReportCaster Development and Administration Interface and Enabling User Capabilities*.

2. Add the users and groups to a Library Access List, which enables users and groups to view specific content in the Report Library. For more information about accessing the Library Access List interface and creating a Library Access List, see *Managing Users and Groups Using the Library Access List Interface* on page 5-3.

3. Create a schedule that will distribute output to the Report Library. You can optionally send an e-mail informing recipients of its availability and the link to the content in the library. For more information, see *How to Distribute Scheduled Output to the Report Library* in Chapter 4, *Creating and Maintaining a Schedule*.

4. Access the Library Content interface to view the reports in the Report Library to which you have been granted access. For more information, see *Viewing Library Content* on page 5-9.

5. Access the Library Management interface to manage content within the Report Library database tables. Only ReportCaster Administrator's can access the Library Management interface. For more information, see *Library Management* on page 5-14.

Managing Users and Groups Using the Library Access List Interface

The Library Access List interface allows you to create and maintain Library Access Lists. An Access List is similar to a Distribution List. Access Lists define the users and groups that are allowed to view the output of specified schedules distributed to the Report Library. Once the Access List is created, 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.

Accessing the Library Access List Interface

From the ReportCaster Development and Administration Interface, select the Library Access List icon. You can also select *Library Access List* from the Tools menu.

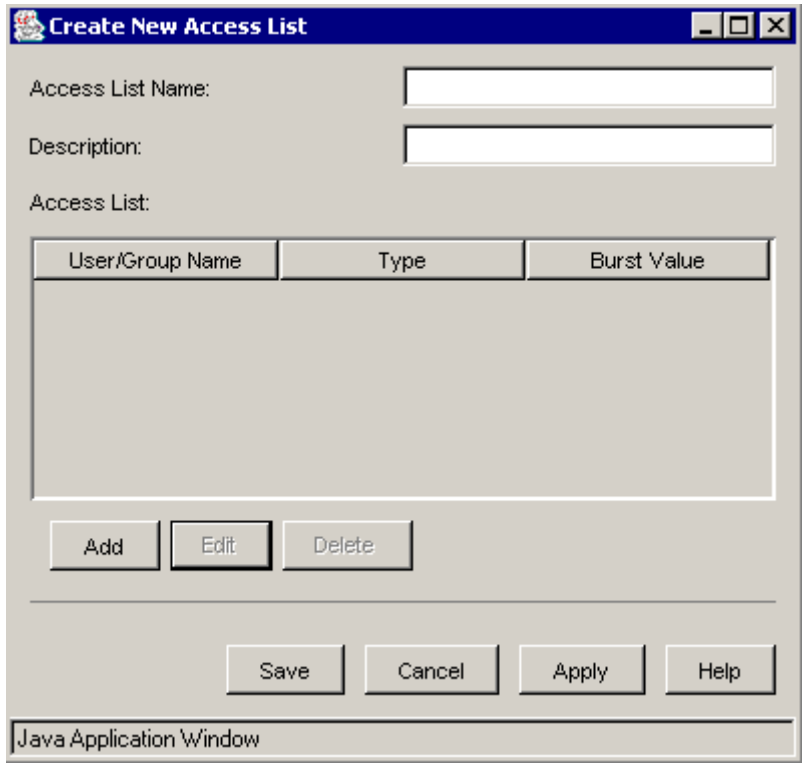
- If you are an administrator, the Library Access Management window opens displaying all users who own a Library Access List.
- If you are not an administrator, the Library Access Management window opens displaying all Library Access Lists that you own.

From the Library Access Management interface, you can:

- Create a new Library Access List. For more information, see *How to Create a New Library Access List* on page 5-4.
- Edit the properties of a Library Access List. For more information, see *How to Edit the Properties of a Library Access List* on page 5-7.
- Delete a Library Access List. For more information, see *How to Delete a Library Access List* on page 5-9.
- Refresh the Report Library so that it contains the latest Library Access List information. Click the Refresh icon, select *Refresh* from the Action menu, or right-click a user and then select *Refresh* from the drop-down menu.
- Exit the Library Access List interface by selecting *Exit* from the Action menu.
- Access the online Help file. Click the Help icon or select a topic from the Help menu.

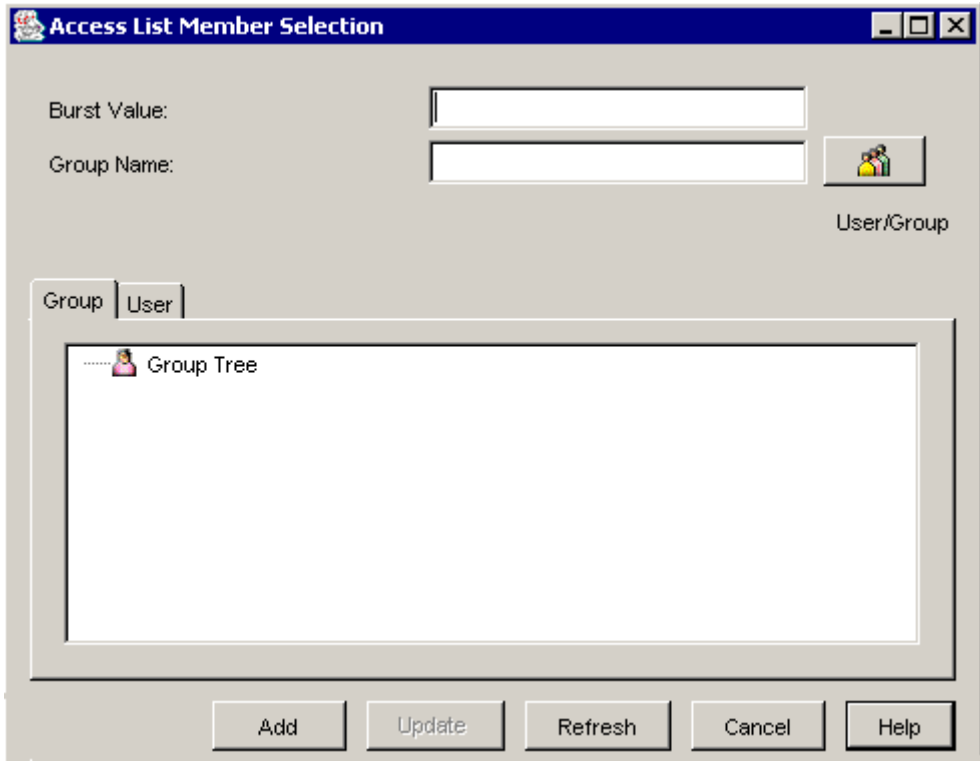
Procedure How to Create a New Library Access List

1. Select the *Create a New Access* List icon, or select *New Access List* from the Action menu. The Create New Access List window opens:



2. In the Access List Name field, enter the name of the Library Access List.
3. In the Description field, enter a description that can be used to identify the list.

4. Click *Add* to retrieve a list of users and groups who may be added to the list. The Access List Member Selection window opens:



5. Optionally, enter a burst value.
6. To add a group or user to the Library Access List, perform one of the following steps:

   To add an entire group to the Library Access List:

   - Enter the group name in the Group Name field. The Group Name field displays by default. You can click *User/Group* to enter a user name instead.

     or

   - Click the Group Tree to view a list of groups that can be added to the Library Access List. Select the group you want to add. This populates the Group Name field with the group name you selected.

   Click *Add* to add the group to the Library Access List. Repeat these steps for each additional group you want to add to the Library Access List.

To add a user to the Library Access List:

- Double-click a group and then select a user from within the group. This populates the User Name field with the user you selected.

  or

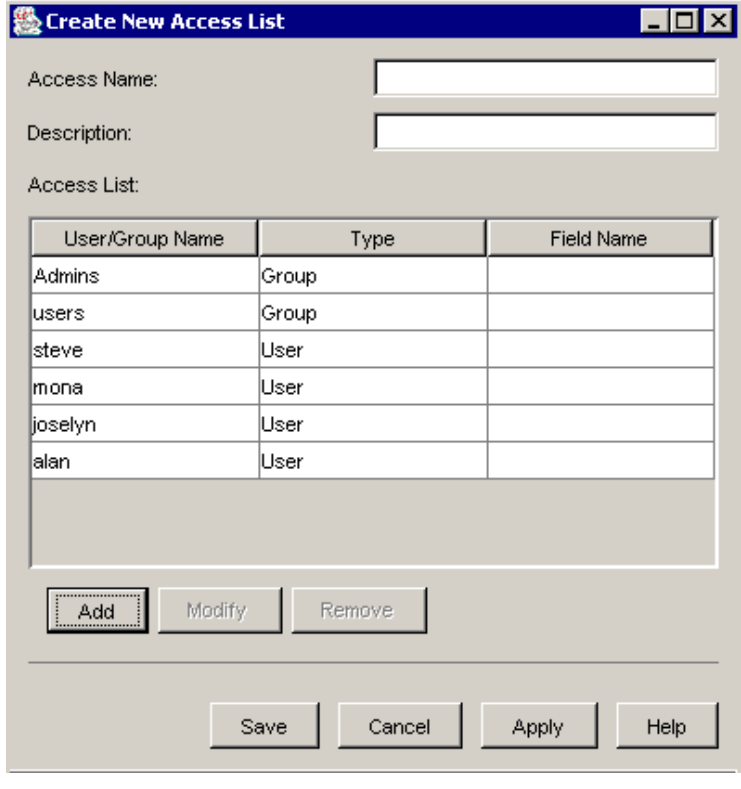
- Click *User/Group* and then enter the user's name in the User Name field.

  or

- Click the User tab and then select a user from the list. This populates the User Name field with the user you selected.

Click *Add* to add the user to the Library Access List. Repeat these steps for each additional user you want to add to the Library Access List.

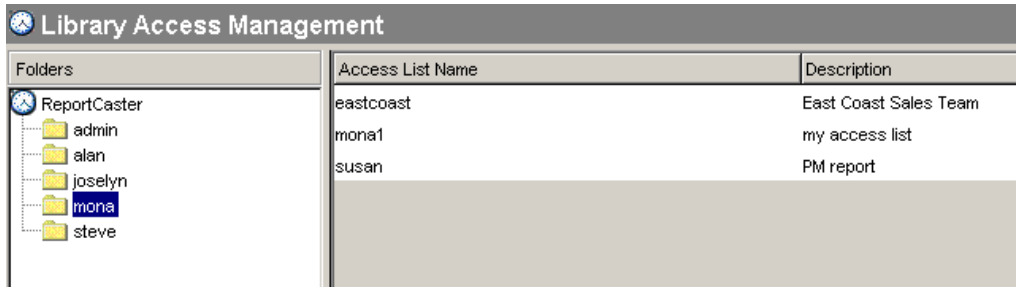
7. Click *Cancel* to return to the Create New Access List window, which is now populated with the users and/or groups you added to the list:



8. Click *Apply* to save the Library Access List and remain in the Update Access List window, where you can continue to add additional users and/or groups. Click *Save* to save the Library Access List and return to the Library Access Management window.

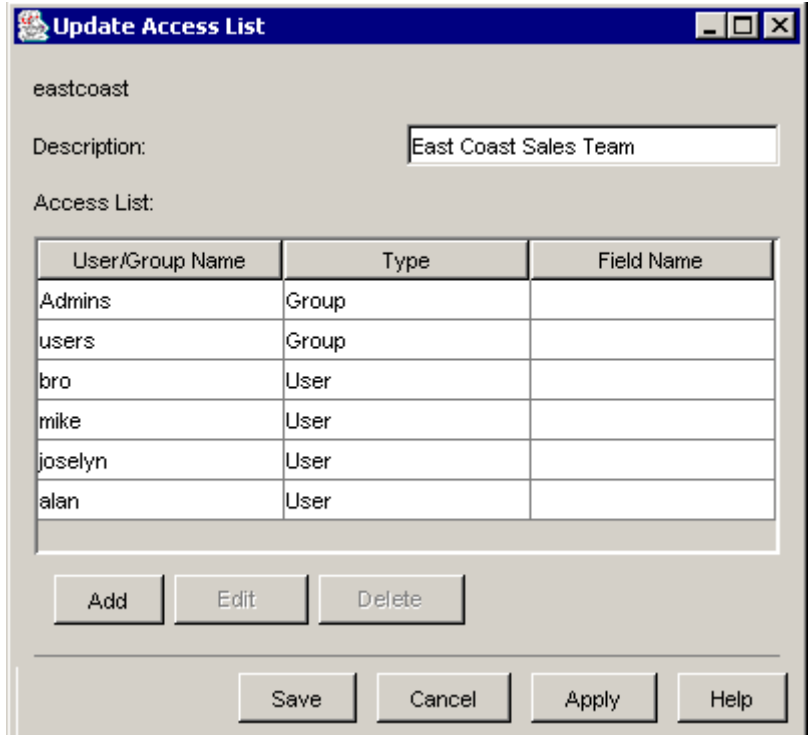
Procedure How to Edit the Properties of a Library Access List

1. Select a user from the User List (for example, mona). The right panel displays all Library Access Lists that the user owns, along with the description for each list.



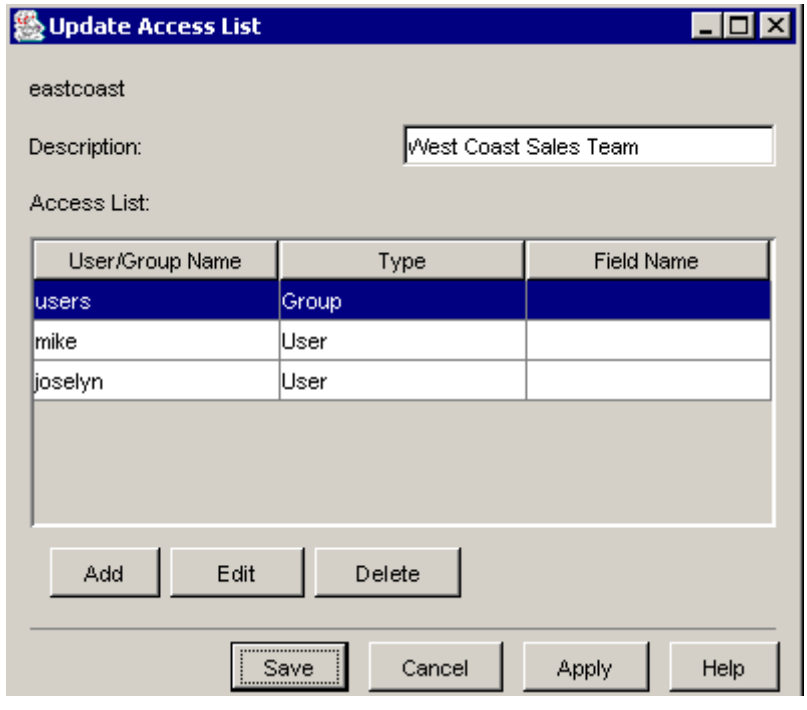
2. Select the Library Access List whose properties you want to edit (for example, eastcoast).

3. Click the Open icon, select *Open* from the Edit menu, or right-click and select *Open* from the drop-down menu. The Update Access List window opens:



4. You can edit the properties of the Library Access List by:

- Entering a different description (for example, West Coast Sales Team).
- Clicking *Add* to change or add a Burst Value, and add users and groups to the list.
- Selecting a user or group and then clicking *Edit* to change or add a Burst Value, and add users and groups to the list.
- Selecting a user or group and then clicking *Delete* to delete the user or group from the list.



5. Click *Apply* to save your changes to the Library Access List and remain in the Update Access List window, where you can continue to make changes. Click *Save* to save the updated Library Access List and return to the Library Access Management window.

Procedure How to Delete a Library Access List

1. Select a user from the User List. The right panel displays all Library Access Lists that the user owns, along with a description for each list.
2. Select the Library Access List you want to delete.
3. Click the Delete icon, select *Delete* from the Edit menu, or right-click and select *Delete* from the drop-down menu. A message appears asking for confirmation that you want to delete the selected list.
4. Click *OK* to delete the list, or click *No* to cancel the request.

Viewing Library Content

The Library Content interface is where you can view content in the Report Library to which you have been granted access. You can access the Library Content interface in several ways:

- When you create a schedule to be distributed to the Report Library (for details, see Chapter 4, *Creating and Maintaining a Schedule*), you can send an e-mail message to all recipients with access rights to the content in the Report Library. This message contains the URL needed to access the content. If you receive such an e-mail:
  - Open the e-mail and click the link to the library content. The logon window opens.
  - Enter your ReportCaster user ID and password. After a successful logon, you are sent directly to the specified output within the Library Content interface.

    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.
- If you do not receive an e-mail notification, you can access the Library Content interface to view information in the Report Library as follows:
  - If you are in Developer Studio, access the WebFOCUS Environments component and then click the Report Library icon.

- If you are in Managed Reporting, click the Report Library icon on the gray toolbar.
- To access the Library Content interface directly from a browser, enter the following URL

  `http://hostname/rcaster/library/liblogon.htm`

  where:

  hostname

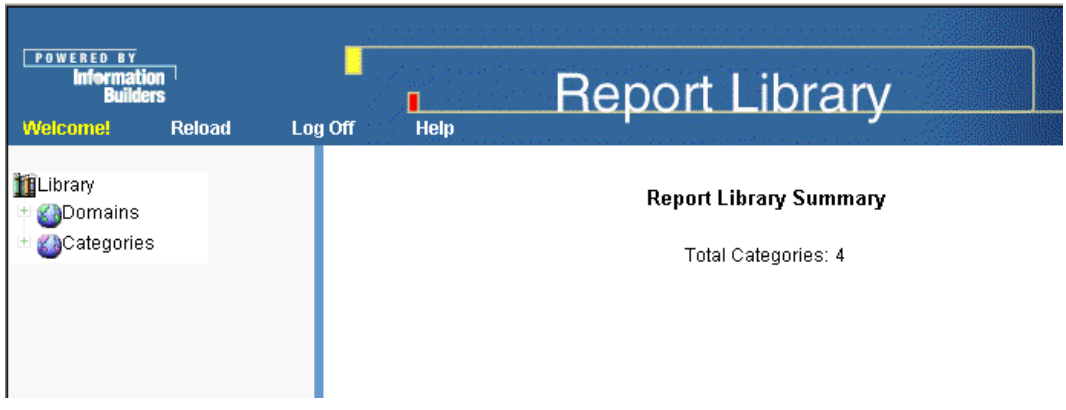
  Is the host name of the Distribution Server.

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

Viewing Content in the Report Library

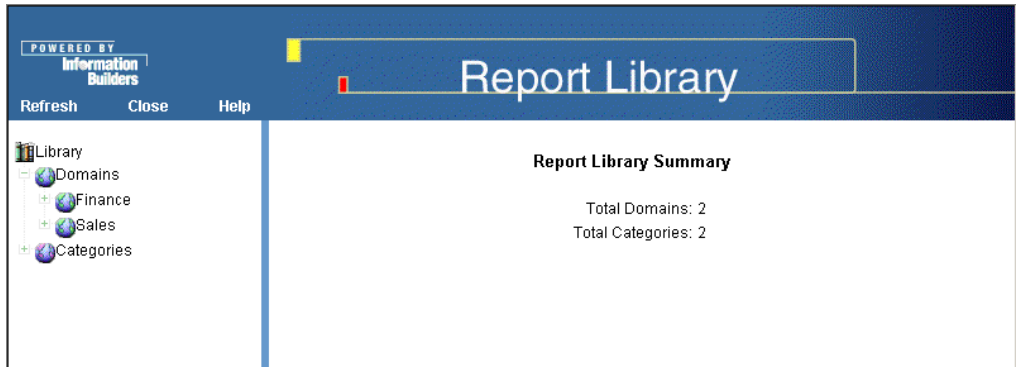
When you access the Library Content interface, the Report Library Summary window opens displaying either or both of the following:

- **Domains** contains Managed Reporting Standard Reports and My Reports content.
- **Categories** contains WF Server Procedures, the contents of URLs, and files.

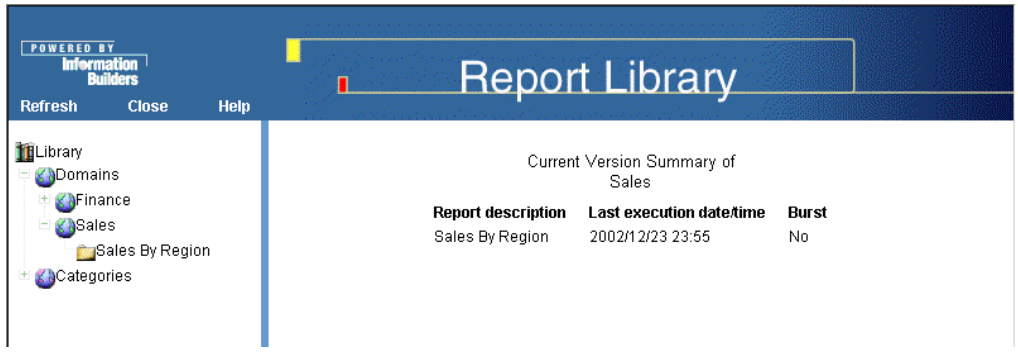


Procedure How to View Content in the Report Library

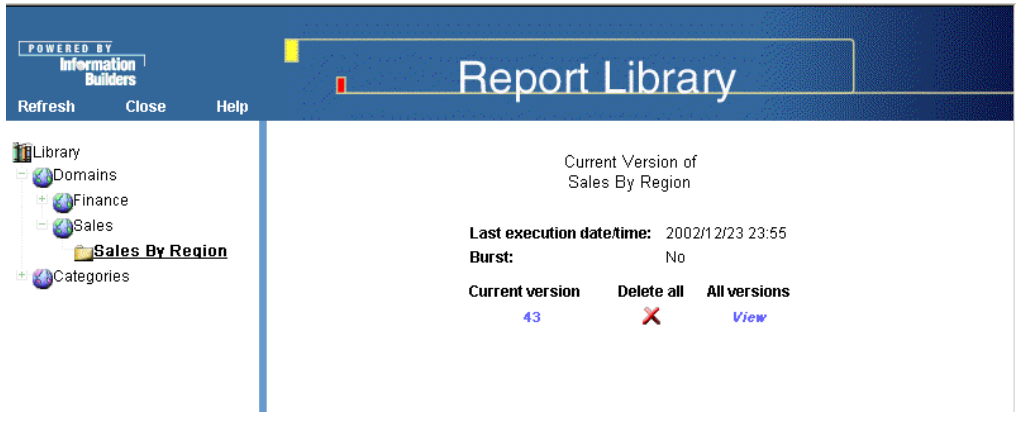
1. Select Domains or Categories. If you select Domains, the available Domains appear:



2. Click a Domain or Category to view summary information about the folders within the Domain or Category. For example, if you click the Sales Domain, the Sales By Region folder appears in the tree structure on the left side of the window, and the Current Version Summary of Sales report appears on the right side of the window:



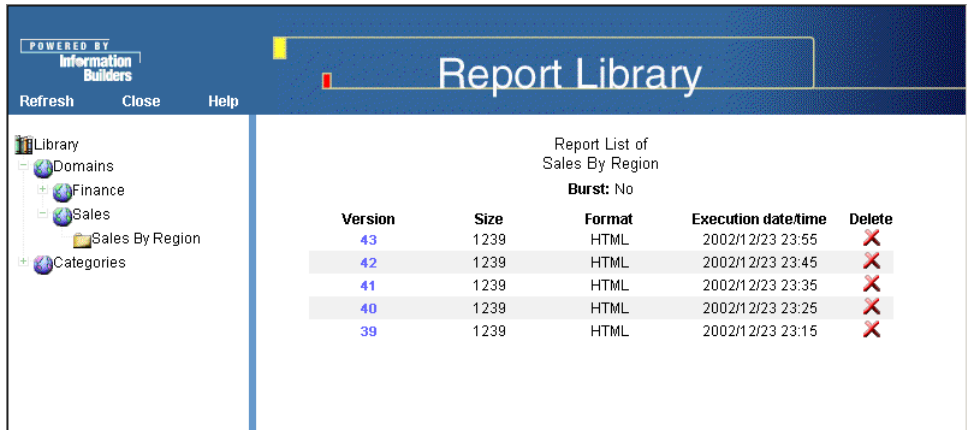
3. To view content in a specific Domain or Category folder, click the folder (for example, *Sales By Region)* on the tree structure on the left side of the window. The Current Version Summary of *Sales By Region* window appears with the following information:



- **Last execution date/time.** 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, and *DD* is the day of the month. The time format is the format *HHMM*, where *HH* is the hour and *MM* is the minute.
- **Burst.** Possible values are Yes (burst) and No (do not burst).
- **Burst Value (optional).** Only appears when Burst is Yes. Values for this field are Non Burst (highlighted in red) or the burst value.
- **Current version.** The number of versions currently in the library. Click the version (for example, 43) to view the latest output.

  Note that ReportCaster does not renumber when versions are deleted. For example, if you delete versions 1 through 43, the next report sent to the Report Library will be version 44.
- **Delete all (optional).** Only appears if you are the owner of the schedule. If you click the Delete All icon (which displays as a red X), a message appears asking for confirmation that you want to delete all versions of the selected content. Click *OK* to confirm the deletion, or click *Cancel* to cancel the request.

- **All versions.** Click *View* to view a summary of all output in the library. A window appears specifying the version number, the size (in bytes), the format (for example, HTML), the execution date and time, and the Delete icon (if you are the owner of the schedule):



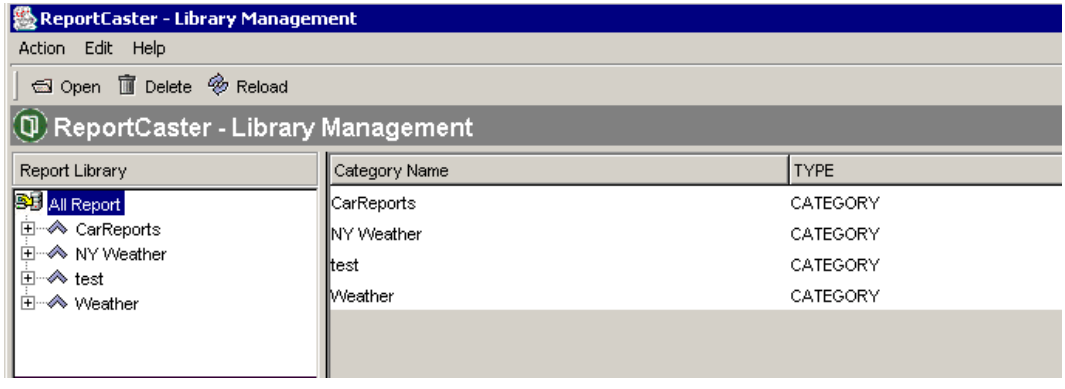
Click a specific version (for example, 43) to view its content:

PAGE 1				
Region	Category	Product	Unit Sales	Dollar Sales
Midwest	Gifts	Thermos	905045	11400665
Northeast	Gifts	Thermos	916675	11392300
Southeast	Gifts	Thermos	935232	11710379
West	Gifts	Thermos	932039	11652946

Library Management

The Library Management tool enables ReportCaster Administrators to manage content in the Report Library database tables. It can be used to view a summary list of the reports within the library, or to delete output from the library. From this interface, you cannot view the actual contents of a report.

To access the Library Management tool from the ReportCaster Development and Administration Interface, click the Library Management icon. You can also select *Library Management* from the Tools menu. The ReportCaster - Library Management window opens listing all categories and domains contained in the Report Library:

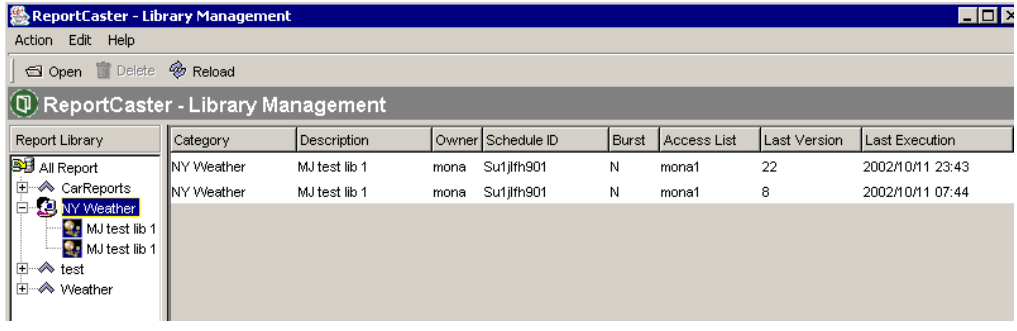


From the ReportCaster - Library Management window, you can:

- View a list of content in the Report Library. For more information, see *How to View a List of Content in the Report Library* on page 5-15.
- Delete content in the Report Library. For more information, see *How to Delete Content in the Report Library* on page 5-17.
- Refresh the Report Library so that it contains the latest information. Click the Refresh icon or select *Refresh* from the Action menu. You can also right-click a category, domain, or report and then select *Refresh* from the drop-down menu.
- Exit the Report Library by selecting *Exit* from the Action menu.
- Access the online Help file. Click the Help icon or select a topic from the Help menu.

Procedure How to View a List of Content in the Report Library

1. Select a category or domain and then either click the Open icon or select *Open* from the Edit menu. You can also double-click the category or domain. A list of all content currently contained in the Report Library for the selected category/domain appears:

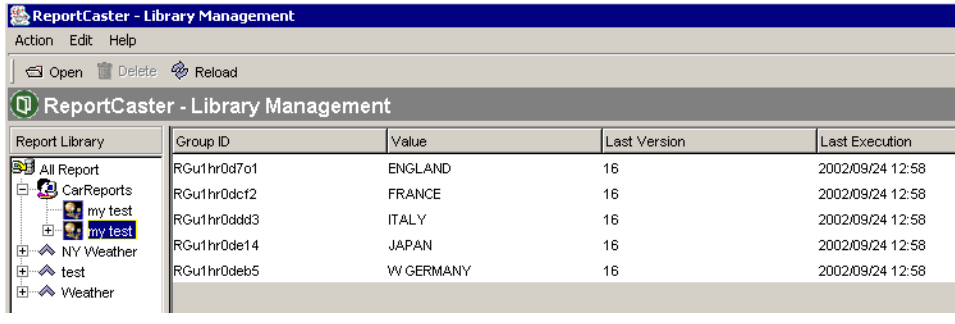


- **Category/Domain.** The high-level folder name in the library. Category contains information about WF Server Procedures, the contents of URLs, and files. Domains contains information about Managed Reporting Standard Reports and My Reports.
- **Description.** The name of the scheduled job.
- **Owner.** The user ID that created the scheduled job.
- **Schedule ID.** The internal name of the scheduled job assigned by ReportCaster.
- **Burst.** Valid values are Y (Yes) and N (No). If a bursted report is distributed to the Report Library, then each burst value is saved as a separate report.
- **Access List.** This can be Owner, Public, or the name of the Access List assigned.
- **Latest Version.** The most current version of the content.
- **Latest Execution.** The last time the scheduled job ran.

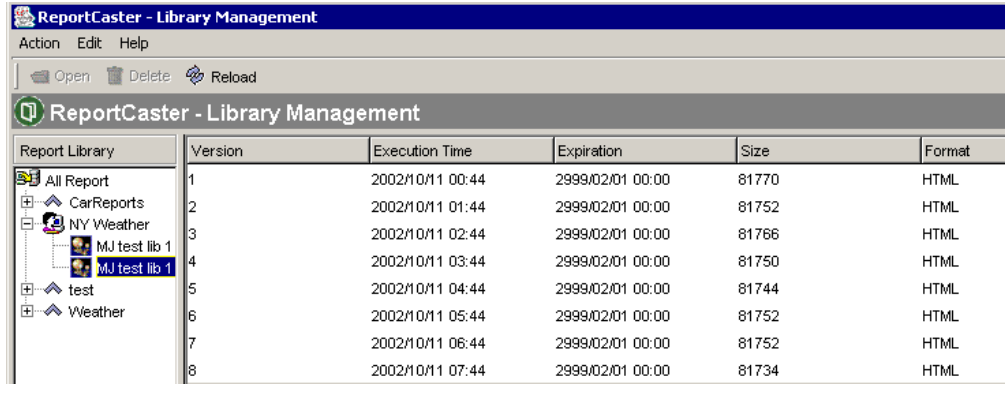
2. Once you have opened a category or domain, you can view information about reports within the category/domain.

- To view non-bursted information, click the report in the Report Library frame, or double-click the report in the right frame of the window.
- To view information about a bursted report, click the report in the Report Library frame, or double-click the report in the right frame of the window.

  Each bursted section of the report appears. For example, 16 versions of the my test report have been stored for each Burst Value (for example, ENGLAND and ITALY). To view detailed information about each bursted report, click the report (for example, ITALY) in the Report Library frame, or double-click the report in the right frame of the window:



The following information displays for either bursted reports or non-bursted content:



- **Version.** The version of a particular report in the library.
- **Execution Time.** The time that the scheduled job was run.
- **Expiration.** The date until which the report will be stored in the library.
- **Size.** The size (in bytes) of the report.
- **Format.** The format of the content (for example, HTML).

Procedure How to Delete Content in the Report Library

From the ReportCaster - Library Management window, you can:

- **Delete a category or domain folder.** Select a category or domain folder and then click the Delete icon (or select *Delete* from the Action menu). A message appears asking for confirmation that you really want to delete the selected category/domain. Click *Yes* to confirm the deletion, or click *No* to cancel the request.
- **Delete content within a category or domain.** Select a single content (report, file, or the contents of a URL) within a category/domain and then click the Delete icon (or select *Delete* from the Action menu). You can also right-click the content in the right frame of the window and then select *Delete* from the drop-down menu. A message appears asking for confirmation that you really want to delete the selected content. Click *Yes* to confirm the deletion, or click *No* to cancel the request.

CHAPTER 6

ReportCaster Console

Topics:

- Accessing the ReportCaster Console
- Viewing and Running a Scheduled Job
- Checking the Status of a Scheduled Job
- Using the Log Option to View Information About a Distributed Job
- Creating, Updating, and Deleting an Execution ID
- Globally Replacing Field Values in the ReportCaster Repository
- Logging off the ReportCaster Console
- Accessing the Online Help File

The ReportCaster Console is an interactive administrator's tool that may be used to maintain and view schedule and log information stored in the ReportCaster Repository. From the ReportCaster Console, you can select the following options:

Info. Generates a list of schedules based on criteria you specify. The resulting list may then be used to view additional information about a specific schedule. You may also run a schedule adding task parameters, and run a log report for a specific schedule.

Status. Generates a list of scheduled jobs that are in the Distribution Server queue. Depending on the status of the job, you can then delete a job, change its priority, or run a log report.

Log. Generates a list of schedules based on criteria you specify. The resulting list may then be used to view a log report or purge a log transaction. These actions may be performed for a specific schedule or for all schedules.

Execution ID. Add a new Execution ID, which is a valid user ID that is used to run a scheduled Task on a specified server. You can also change the password of an Execution ID, or delete an Execution ID.

Tools. Globally replace values in the ReportCaster Repository.

Logoff. Log off the ReportCaster Console.

Help. Open the online help file.

Accessing the ReportCaster Console

A ReportCaster Administrator can access the ReportCaster Console as follows:

1. Enter the URL of the ReportCaster Logon page in a Web browser:

   `http://hostname/rcaster/console/RCHConsoleLogon.jsp`

   where:

   hostname

   Is the host name of the Distribution Server.

   The ReportCaster Logon screen opens. Enter a valid ReportCaster Administrator user ID and password and click *Logon*.

2. If you are a Managed Reporting Administrator with ReportCaster Administrator capabilities, you can also access the ReportCaster Console from Managed Reporting.

   Enter the URL of the Managed Reporting Logon page in a Web browser:

   `http://hostname/ibi_html/workbnch/mrlogon.htm`

   where:

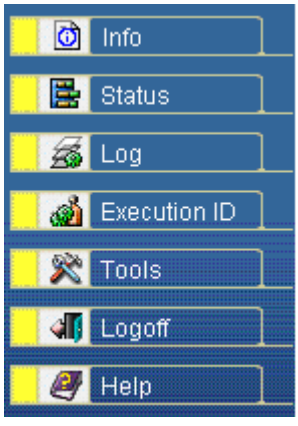
   hostname

   Is the host name of the Web server on which Managed Reporting is installed.

   The Managed Reporting Logon screen opens. Enter a valid Managed Reporting user ID and password and click *Logon*. From Managed Reporting, you can access the ReportCaster Console by clicking the ReportCaster Console icon  on the gray toolbar. The ReportCaster Logon screen is bypassed (since your user credentials have already been validated by Managed Reporting), and the ReportCaster Console opens.

3. If you are in Developer Studio, access the WebFOCUS Environments component and then click the ReportCaster Console icon on the gray toolbar. The ReportCaster Logon screen is bypassed (since your user credentials have already been validated by Managed Reporting), and the ReportCaster Console opens.

Once you have successfully accessed the ReportCaster Console, the following menu options appear:



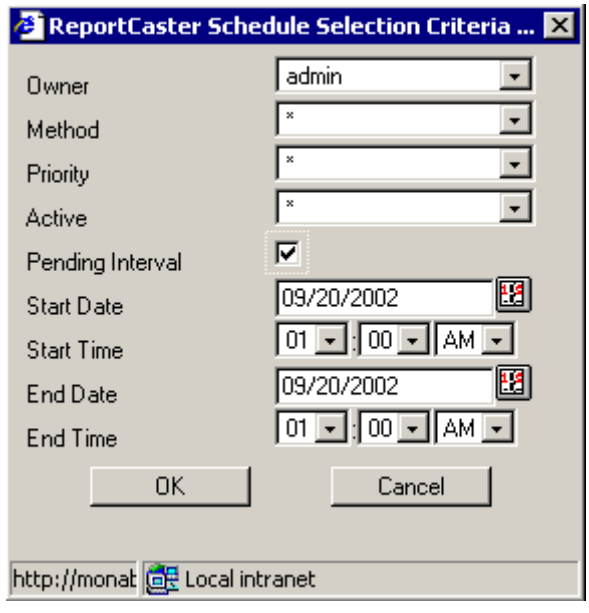
Viewing and Running a Scheduled Job

The Info menu option is used to generate a list of schedules based on criteria you specify. The resulting list may then be used to:

- Drill-down for further information about a specific schedule.
- Run a schedule specifying task parameters.
- Run a log report for a specific schedule.
- Delete a specific schedule.

Procedure How to Generate a List of Schedules

1. From the ReportCaster Console, click *Info*. The ReportCaster Schedule Selection Criteria dialog box opens:



2. Specify the following criteria for the list of schedules:

   a. **Owner.** ReportCaster owner that created the schedule.

   b. **Method.** Possible values are * (all methods), Email, Printer, FTP, Managed Reporting, or Library.

   c. **Priority.** Possible values are * (all priority values) or from 1 to 5, where 1 is the highest priority and 5 is the lowest priority. Jobs are distributed based on the priority of the schedule.

   d. **Active.** Possible values are * (Yes and No), Yes, or No.

   e. **Pending Interval:** If this box is checked, the following fields become active and available for specifying additional criteria:

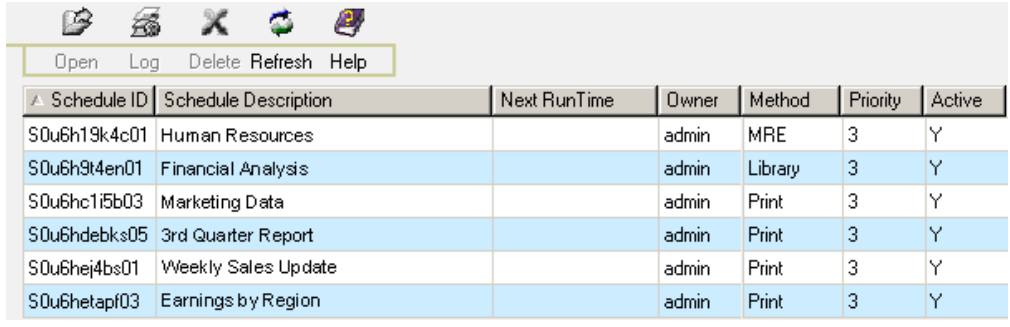
      Start Date. Date that the pending job is scheduled to run.

      Start Time. Time that the pending job is scheduled to run.

      End Date. Date that the pending job is scheduled to end.

      End Time. Time that the pending job is scheduled to end.

3. Click *OK* to generate a list of schedules:



Schedule ID	Schedule Description	Next RunTime	Owner	Method	Priority	Active
S0u6h19k4c01	Human Resources		admin	MRE	3	Y
S0u6h9t4en01	Financial Analysis		admin	Library	3	Y
S0u6hc1i5b03	Marketing Data		admin	Print	3	Y
S0u6hdebks05	3rd Quarter Report		admin	Print	3	Y
S0u6hej4bs01	Weekly Sales Update		admin	Print	3	Y
S0u6hetapf03	Earnings by Region		admin	Print	3	Y

In addition to displaying parameter values you previously entered (Owner, Method, Priority, Active), the following columns appear:

- **Schedule ID.** A unique, ReportCaster-generated key assigned to the job when it was scheduled.
- **Schedule Description.** The description entered for the schedule when it was created.
- **Next Run Time.** When you create a ReportCaster schedule, one of the properties of the schedule set by ReportCaster is the next run time (NEXTRUNTIME) for that schedule. The Distribution Server checks for schedules in the ReportCaster Repository that have a next run time less than or equal to the current time.

Note: You can sort the list of schedules for each column by clicking on the column title (for example, Schedule Description). The default sort order is ascending.

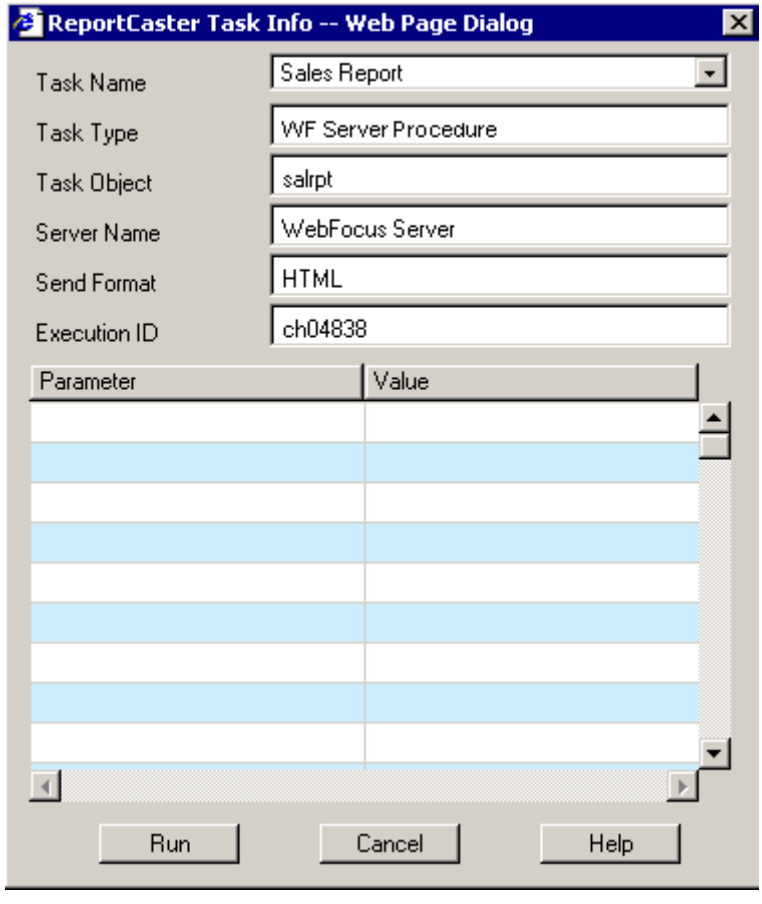
Info Options

Once you have generated a list of schedules using the Schedule Selection Criteria dialog box, you can:

- Select a schedule and click the Open icon. This enables you to view information about a schedule, and run the schedule with the optional parameter values that you specify. For more information, see *Viewing and Running a Schedule* on page 6-6.
- Select a schedule and click the Log icon to run a Job Process Log Report for the selected schedule.
- Select a schedule and click the Delete icon to delete the selected schedule. A message appears asking if you really want to delete the selected schedule. Click *OK* to confirm that you want to delete the schedule.
- Click the Refresh icon to refresh the current list of schedules with any newly created schedules that meet the previously specified criteria.
- Click the Help icon to open the online Help documentation.

Viewing and Running a Schedule

Once you have generated a list of schedules using the Schedule Selection Criteria dialog box (see *How to Generate a List of Schedules* on page 6-4), you can view a single schedule by selecting the schedule and clicking the Open icon. The ReportCaster - Task Info dialog box opens:

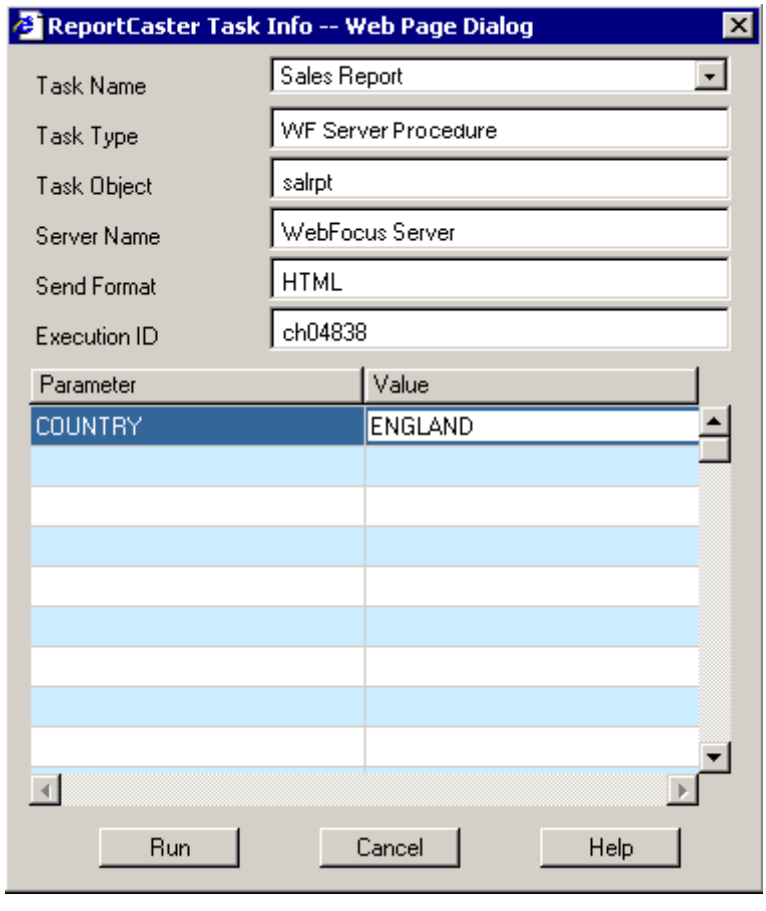


You can select any Task associated with the schedule from the Task Name drop-down list. Upon specifying a task name, you can view the following information about the task:

- **Task Type.** Valid task types are WF Server Procedure, Standard Report, My Report, File, or URL.
- **Task Object.** The name of the procedure scheduled for the selected Task.
- **Server Name.** The name of the WebFOCUS Reporting Server associated with the task.

- **Send Format.** Valid formats are HTML (the default), ALPHA, COMMA, DOC, EXCEL, EXCL97, EXL2K, EXL2K FORMULA, GIF, PDF, PS, TABT, WK1, WP, and XML.
- **Execution ID.** The user ID that is used to connect to the WebFOCUS Reporting Server running the schedule.

You may run the Task using the displayed parameter information (if any), or by specifying different parameter information. For example, in the following task the value for the COUNTRY parameter has been changed to ENGLAND:

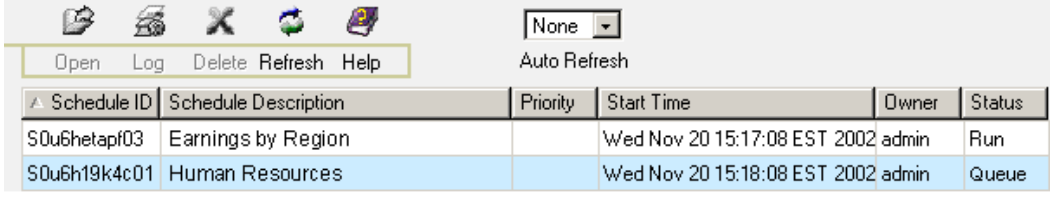


Click *Run* to run the schedule and its Task(s) using the specified parameters (if any). Parameter values that you specify here will override any values that were stored in the ReportCaster Repository the last time the schedule was run.

Clicking *Cancel* will close the dialog box without running the schedule.

Checking the Status of a Scheduled Job

From the ReportCaster Console, click the *Status* menu option to generate a list of scheduled jobs that are in the Distribution Server queue:



The list includes schedule ID, schedule description, priority, start time, owner, and status information. Sorting is available for each column by clicking on the column title (for example, Schedule ID). The Status column will contain 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.

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

- Select a scheduled job with a status of Queue and click the Delete icon. The schedule will be removed from the queue, and the Status list will be refreshed.
- Select a scheduled job with a status of Queue and click the Open icon. The Change Priority dialog box opens. In the New Priority field, you can change the priority of the scheduled job using the drop-down list. Click *OK* to change the priority and refresh the status list with the new priority value, or click *Cancel* to return to the status list.
- Select a scheduled job (with a status of Run or Queue) and click the Log icon to run a Job Process Log Report containing all processes for the selected schedule.
- Click the Refresh icon to refresh the current list of schedules with any new jobs that are in the Distribution Server queue.
- Click the Help icon to open the online Help documentation.

Using the Log Option to View Information About a Distributed Job

Information about the date, time, execution status, and recipients of a distributed job can be accessed using the Log option on the ReportCaster Console. The Log option enables you to view information about a distributed job, such as whether or not the job executed successfully, when the scheduled output was distributed, in what format the distributed output was sent, and the method of distribution. Log reports are stylized HTML format and display in a separate browser window. You can search, print, or save the log report.

Tip: You should periodically view a log report to confirm that scheduled jobs ran and were successfully distributed. You should also periodically purge the log file to conserve space.

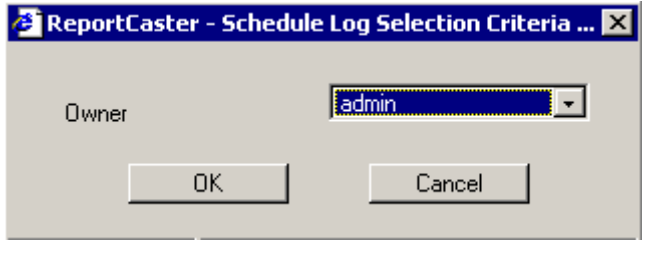
Viewing a Log Report and Purging the Log File

The Log menu option is used to generate a list of schedules based on criteria you specify. The resulting list may then be used to:

- View (run) a log report for a specific schedule or for all schedules.
- Purge (delete) a log transaction for a specific schedule or for all schedules.

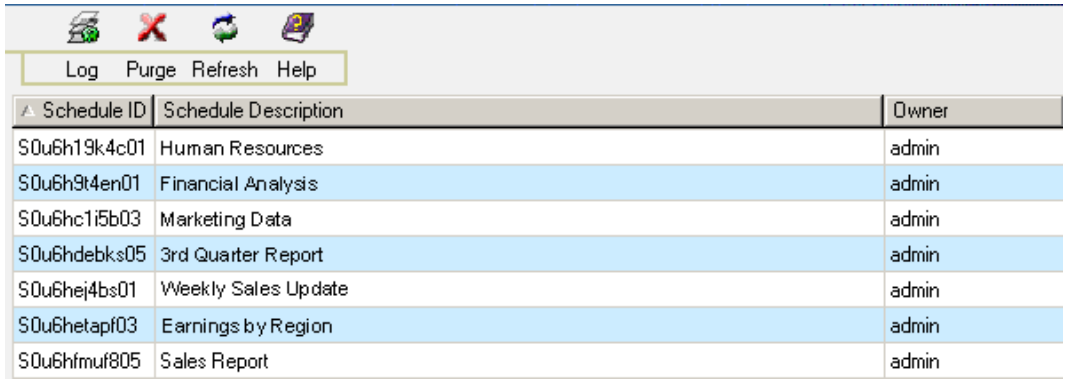
Procedure How to Generate a List of Schedules for a Log Report

1. From the ReportCaster Console, click the *Log* menu option. The ReportCaster - Schedule Log Selection Criteria dialog box opens:



2. From the Owner drop-down list, select a specific schedule owner (user ID).
3. Click *OK*.

A list of schedules for the selected owner appears:



The schedule list contains icons that enable you to:

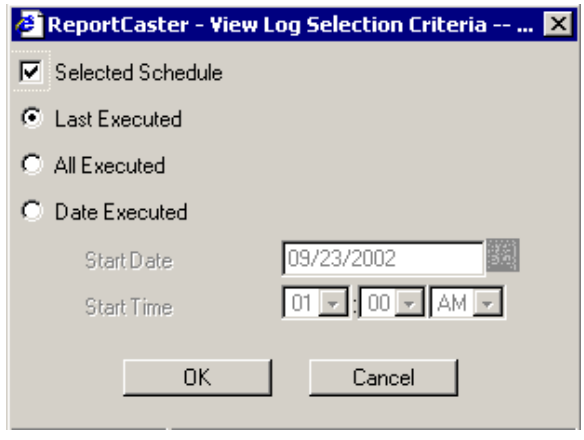
- **Log.** View a Job Process Log Report for a specific schedule or for all schedules in your list. For more information, see *How to View a Log Report* on page 6-11.
- **Purge** log file information for a specific schedule in your list or for all schedules in your list. For more information, see *How to Purge the Log File* on page 6-15.
- **Refresh** the current list with any newly created schedules that match the previously selected criteria.
- **Help.** Open the online Help documentation.

Procedure How to View a Log Report

Once you have generated a list of schedules for a log report using the Schedule Log Selection Criteria dialog box (see *How to Generate a List of Schedules for a Log Report* on page 6-9), perform the following steps to view a Job Process Log Report for a selected schedule.

1. **To view a Job Process Log Report for a selected schedule:**

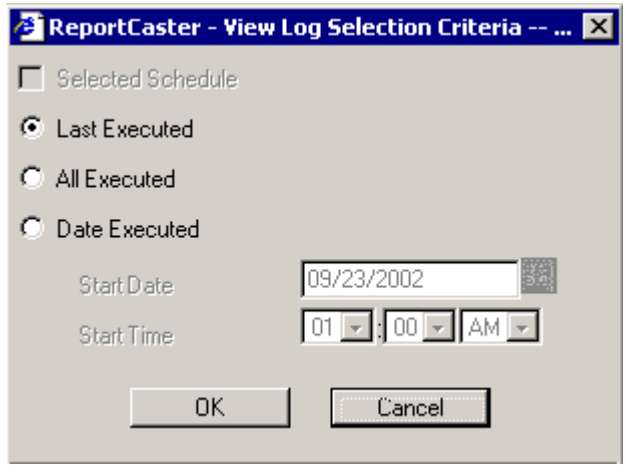
   Select a schedule and click the Log icon. The ReportCaster - View Log Selection Criteria dialog box opens with the Selected Schedule check box active and checked:



   To switch from the item you selected to viewing all schedules in the list, uncheck the *Selected Schedule* check box. If you want to change your selection criteria, click *Cancel* and reselect a schedule from the list.

To view a Job Process Log Report for all schedules:

Click the Log icon without selecting a schedule. The ReportCaster - View Log Selection Criteria dialog box opens with the Selected Schedule check box inactive and unchecked:



If you want to change your selection criteria, click *Cancel* and reselect a schedule from the list.

2. Select one of the following radio buttons:

   - **Last Executed.** Produces a Job Process Log Report containing the most currently run process for the selected schedule or for all schedules (if you did not select a schedule). This is the default.
   - **All Executed.** Produces a Job Process Log Report containing all run processes for the selected schedule 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 step 3. Otherwise, proceed to step 5.

3. In the Start Date field, specify the date on which you want the log report to begin. The report will display all processes for the selected schedule (or schedules) that were run on or after the specified start date. You can either type the start date directly in the field or select a start date from the drop-down calendar. The default for the Start Date field is the current date.

4. In the Start Time field, specify a start time for the start date by entering it directly into the text boxes, or by using the drop-down lists. The default for the Start Time field is 1:00 A.M.

5. Click *OK* to run the Job Process Log Report.

Example **Reading a Log Report**

The Job Process 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 Job Process Log Report will display similar to the following:

A Job Process Log Report includes the following information:

- **Job Description.** Unique description that you supplied to identify the schedule.
- **User.** ReportCaster user ID, indicating the owner of the schedule.
- **Procedure.** Unique, ReportCaster-generated key that identifies a specific execution of a scheduled job.
- **Schedule ID.** Unique, ReportCaster-generated key 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.
- **Messages.** These consist of:
  - General information, such as the method of distribution for a particular job (for example, mail distribution).
  - Processing information, indicating that the request started, distribution was successful, and the request completed. Processing information also includes reasons why a request failed, such as the unavailability of a data source.

Reference

Considerations When Viewing a Job Process Log Report

When viewing a Job Process Log Report, be aware of the following considerations.

E-mail Addresses:

- ReportCaster cannot validate e-mail addresses, so incorrect e-mail addresses are not noted in a Job Process Log Report.

Bursted Reports:

- If the Distribution List does not contain all possible values for the primary sort (BY) field specified in the procedure, the following message is no longer included in the log report:

  `NO RECIPIENT SPECIFIED FOR BURST VALUE burst value.`

  This will significantly reduce the size of the log report, particularly when the database contains many values for the primary field and only a very small subset of those values are burst.

- When a report is successfully burst using the value(s) in the Distribution List, the log includes the following message for each burst value:

  `FILE filename SUCCESSFULLY DISTRIBUTED TO destination FOR burst value.`

- If a burst value is specified, but the value does not exist, the following message appears in the log file:

  `VALUE burst value DOES NOT EXIST FOR by field.`

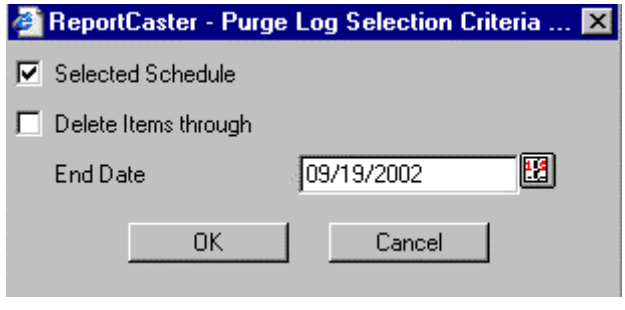
Procedure How to Purge the Log File

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

You can use the Log Purge Period setting in the ReportCaster Server Configuration tool to automatically purge log reports when they are older than a set number of days.

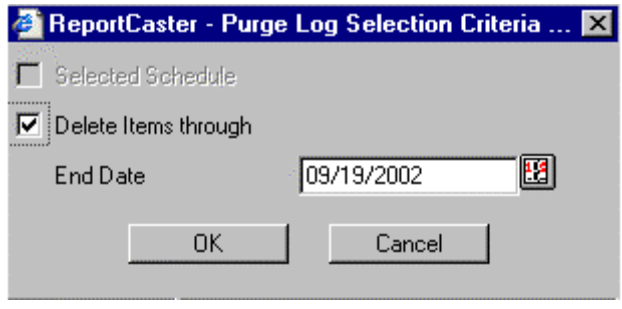
You may also manually purge the log file. Once you have generated a list of schedules for a log report using the Schedule Log Selection Criteria dialog box (see *How to Generate a List of Schedules for a Log Report* on page 6-9), you can perform one of the following:

- **Purge log file information for a specific schedule in your list.** Select a schedule and then click the Purge icon. The ReportCaster - Purge Log Selection Criteria dialog box opens with the Selected Schedule check box active and checked, and the Delete Items through check box inactive and unchecked.



  To switch from purging the schedule selected to purging all schedules in the list, uncheck the *Selected Schedule* check box. Use the default End Date, or change the date by entering it directly in the field or by selecting a date from the drop-down calendar. This is the date through which log files will be deleted for the selected schedule.

- **Purge log file information for all schedules in your list.** Without selecting a schedule, click the Purge icon. The ReportCaster - Purge Log Selection Criteria dialog box opens with the Selected Schedule check box inactive and unchecked, and the Delete Items through check box active and checked.



  Use the default End Date, or change the date by entering it directly in the field or by selecting a date from the drop-down calendar. This is the date through which log files will be deleted for the schedules in the list.

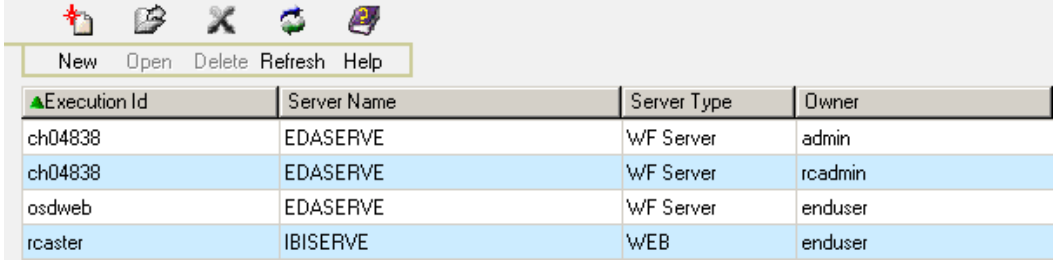
  If you uncheck the *Delete Items through* check box, then all processes for all schedules in the list will be deleted from the log file.

Click *OK* to process the request and refresh the list of schedules for the selected owner, or click *Cancel* to return to the list of schedules.

Creating, Updating, and Deleting an Execution ID

An Execution ID is a valid user ID that is used to run a scheduled Task on a specified server. When an Execution ID is created or deleted on a WebFOCUS Reporting Server, it must also be created or deleted in the ReportCaster Repository tables using the ReportCaster Console. Similarly, when the password for an Execution ID is changed on the WebFOCUS Reporting Server, the password for that Execution ID must also be changed in the ReportCaster Repository tables using the ReportCaster Console.

From the ReportCaster Console, click the *Execution ID* menu option to generate a list of Execution IDs.



Execution Id	Server Name	Server Type	Owner
ch04838	EDASERVE	WF Server	admin
ch04838	EDASERVE	WF Server	rcadmin
osdweb	EDASERVE	WF Server	enduser
rcaster	IBISERVE	WEB	enduser

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

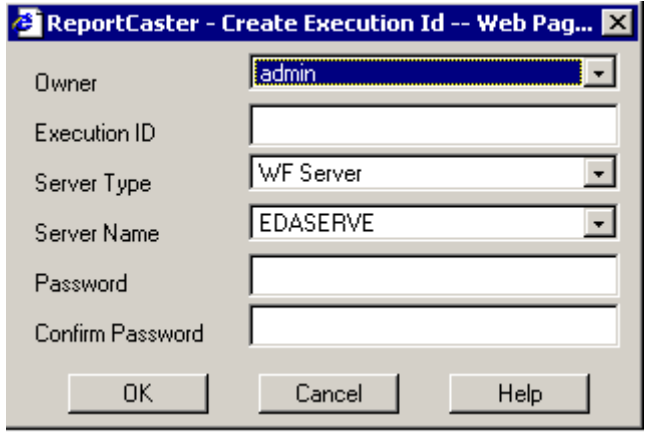
- Click the New icon to add a new Execution ID. For more information, see *How to Create a New Execution ID* on page 6-17.
- Select an Execution ID and click the Open icon to change the password of the Execution ID. For more information, see *How to Change the Password for an Execution ID* on page 6-18.
- Select an Execution ID and click the Delete icon to delete the Execution ID from the ReportCaster Repository tables. For more information, see *How to Delete an Execution ID* on page 6-19.
- Click the Refresh icon to refresh the current list with any newly created Execution IDs.
- Click the Help icon to open the online Help documentation.

Note: When you create, change, or delete an Execution ID it updates the ReportCaster Repository tables so that they are in sync 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

Once you have generated a list of Execution IDs (see *Creating, Updating, and Deleting an Execution ID* on page 6-16), perform the following steps to create a new Execution ID:

1. Click the New icon. The ReportCaster – Create Execution Id dialog box opens:

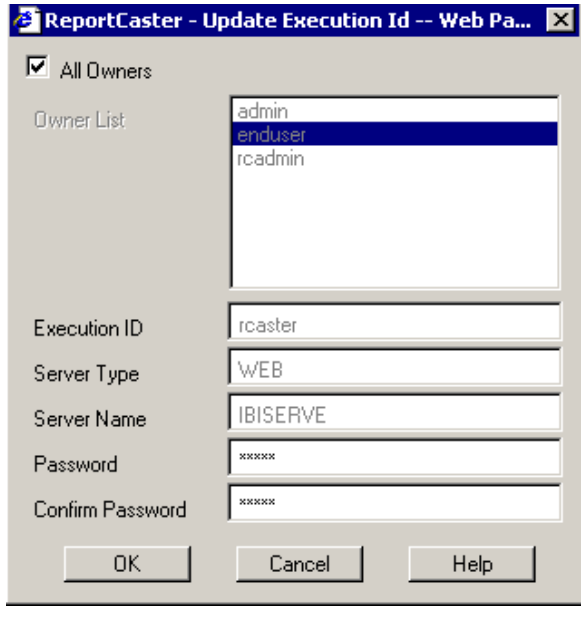


2. Specify the following parameters:
   a. **Owner:** Select a ReportCaster user ID (owner ID) from the drop-down list.
   b. **Execution ID:** Enter a valid user ID for the server that will be specified in step d.
   c. **Server Type:** Select the server type (for example, WF Server).
   d. **Server Name:** Select the appropriate Server Name from drop-down list. The Execution ID must be a valid user ID for this server.
   e. **Password:** Enter 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.
   f. **Confirm Password:** Reenter the password.
3. Click *OK* to create the Execution ID in the ReportCaster Repository table, or click *Cancel* to abort the request.

Procedure How to Change the Password for an Execution ID

Once you have generated a list of Execution IDs (see *Creating, Updating, and Deleting an Execution ID* on page 6-16), perform the following steps to change the password for an Execution ID:

1. Select the Execution ID whose password you must change (for example, rcaster). This activates the Open icon.
2. Click the *Open* icon. The ReportCaster - Update Execution Id dialog box opens:



3. Enter the following information:

   a. **All Owners:** Select the *All Owners* check box to update the password for all ReportCaster user IDs (owner IDs) that use this Execution ID to run schedules.

   b. **Password:** Enter the new 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.

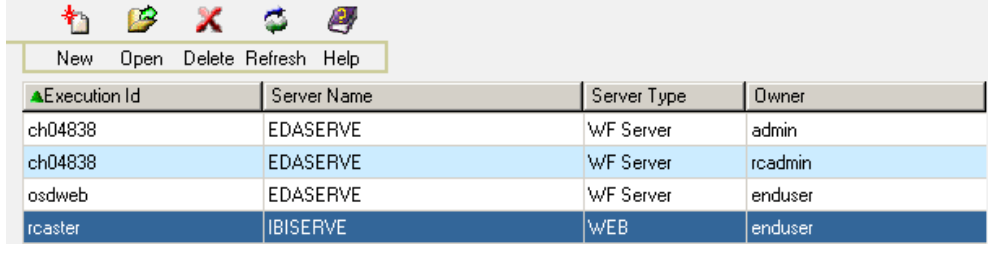
   Changing the password using the ReportCaster Console does not change the password on the specified server.

4. Click *OK* to change the password in the ReportCaster Repository tables. A message appears confirming that the password has been changed.

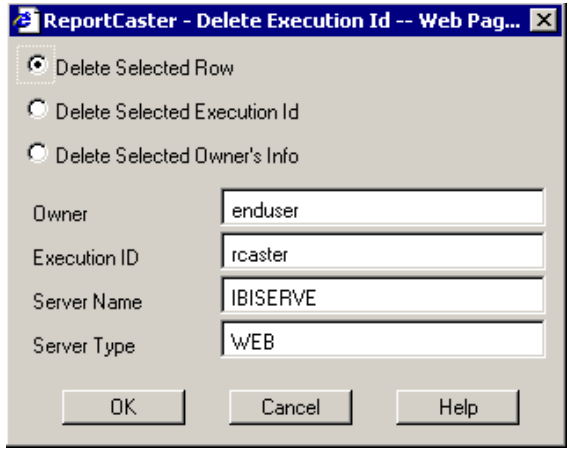
Procedure How to Delete an Execution ID

Once you have generated a list of Execution IDs (see *Creating, Updating, and Deleting an Execution ID* on page 6-16), perform the following steps to delete an Execution ID:

1. Select the Execution ID you want to delete (for example, rcaster).



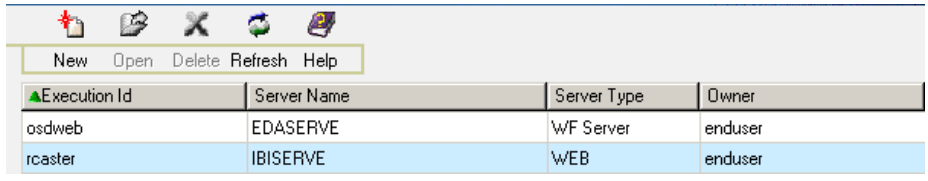
2. Click the Delete icon. The ReportCaster - Delete Execution ID dialogue box opens:



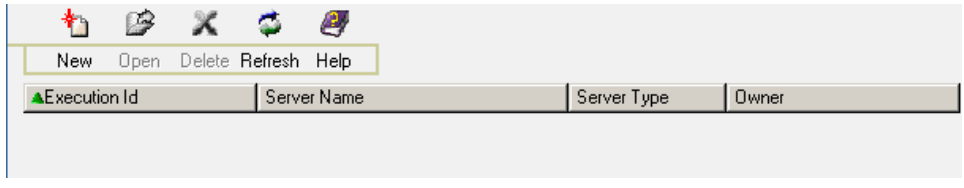
3. Selet one of the following radio buttons and then click *OK*:

   a. **Delete Selected Row.** Deletes the selected row.

   b. **Delete Selected Execution Id.** Deletes all instances of the selected Execution ID. For example, if you select this radio button for Execution ID ch04838, this Execution ID will be deleted for the admin and rcadmin Owner IDs.



   c. **Delete Selected Owner's Info.** Deletes all Execution IDs for the selected Owner. For example, if you select this radio button for Owner enduser, the osdweb and rcaster Execution IDs would be deleted.



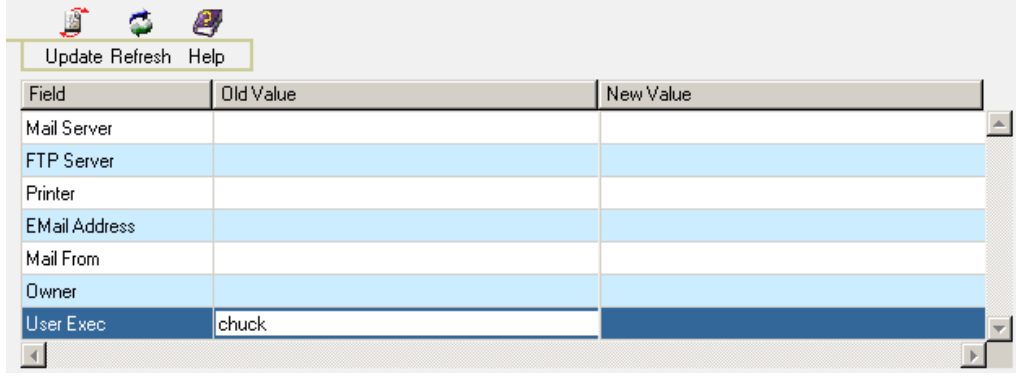
Globally Replacing Field Values in the ReportCaster Repository

Clicking on the Tools menu enables you to globally replace the following fields:

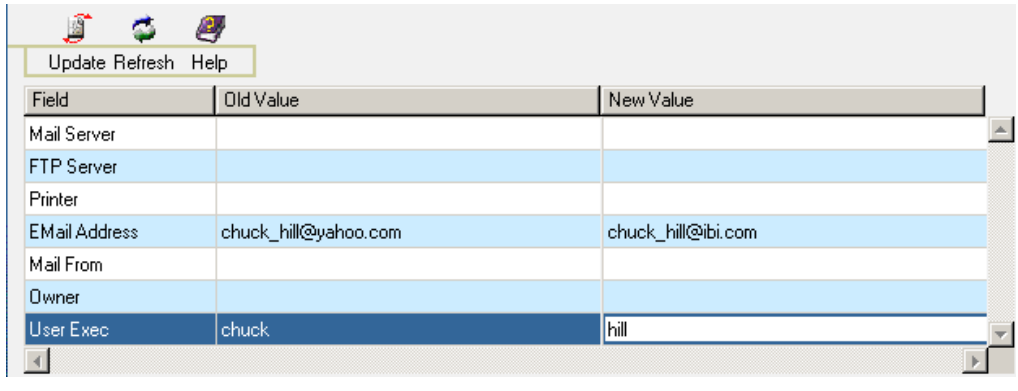
- **Mail Server.** Replaces the mail server name in every schedule that is using the specified e-mail server.
- **FTP Server.** Replaces the FTP server name in every schedule that is using the specified FTP server.
- **Printer.** Replaces the printer name in every occurrence of any Distribution List or schedule that is using the specified printer.
- **EMail addresses.** Replaces the e-mail address in every occurrence of any Distribution List or schedule that is using the e-mail address.
- **Mail From.** Replaces the optional From field in every schedule that uses e-mail and has the specified value.
- **Owner.** Replaces the owner user ID in every occurrence of any Distribution List or schedule that is owned by the user ID.
- **User Exec.** Replaces the Execution ID in the ReportCaster Repository user table.

Procedure How to Globally Replace a Field

1. From the ReportCaster Console, click *Tools*.
2. Enter an Old Value for one of the fields (for example, User Exec). This is the field that you will be globally replacing. Note that values for all fields are case sensitive.



3. Enter the New Value (for example, hill) that will replace the Old Value (for example, chuck).



   If you have entered an incorrect value, you can click the Refresh icon to clear all field values.

4. Click the Update icon. A message appears requesting confirmation that you want to perform the update.

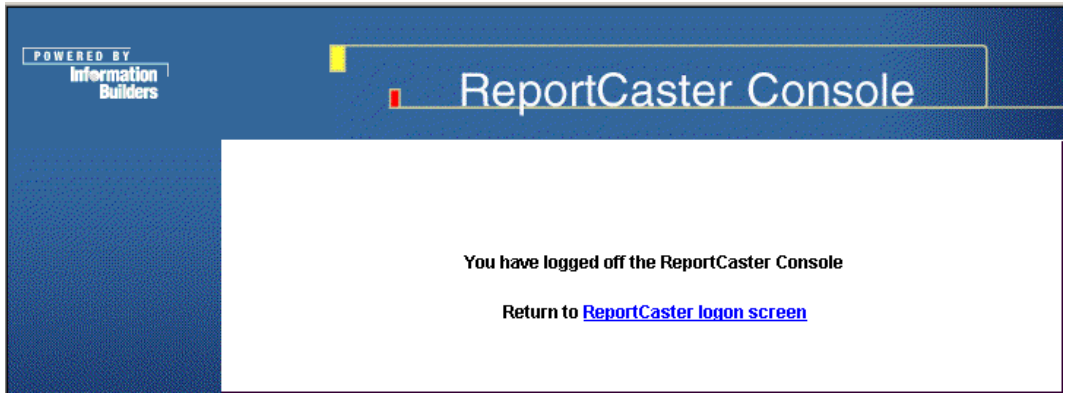
   Note: Although information may be entered in more than one field (for example, EMail Address and User Exec), only the currently selected field will be updated.

5. Click *OK* to globally replace the old value of the specified field with the new value.

   A message appears informing you of the tables that have been updated in the ReportCaster Repository, and the amount of updates for each table.

Logging off the ReportCaster Console

The Logoff option allows you to log off the ReportCaster Console. From the ReportCaster Console, click *Logoff*. The following screen appears:



You can return to the ReportCaster Logon screen by clicking the *ReportCaster logon screen* link.

Accessing the Online Help File

From the ReportCaster Console, click *Help* to view the online Help file.

CHAPTER 7

ReportCaster Security

Topics:

- ReportCaster Authentication
- ReportCaster Security Settings
- ReportCaster Authentication Exit
- ReportCaster Remote Authentication
- ReportCaster Security Cookies
- External User IDs for Use With ReportCaster
- Securing ReportCaster Temporary Files
- ReportCaster Repository Password Synchronization
- Java Web Start Security Warning

The following sections highlight issues that administrators and security professionals should be aware of so that they can appropriately configure ReportCaster. A properly configured and managed implementation of ReportCaster should provide an acceptable level of security for any organization.

ReportCaster Authentication

ReportCaster security is based primarily on authenticating the following user IDs:

ReportCaster user ID (owner ID). This user ID and password enables users to access ReportCaster, usually by entering credentials on a signon page.

If ReportCaster is licensed with Managed Reporting, ReportCaster user IDs and passwords are created and maintained using the User Administration tool in Managed Reporting. In this case, the Managed Reporting user ID and password are the same as the ReportCaster user ID and password. If you successfully log on to Managed Reporting, you do not need to again supply the ReportCaster user ID and password when accessing ReportCaster, since your security credentials will have already been authenticated by Managed Reporting.

If ReportCaster is not licensed with Managed Reporting, ReportCaster user IDs and passwords are created and maintained using the User Administrator tool in the ReportCaster Development and Administration Interface. This applies to both ReportCaster-only licenses, and when ReportCaster is licensed with self-service WebFOCUS.

For more information about creating and maintaining ReportCaster user IDs and passwords, see Chapter 2, *Accessing the ReportCaster Development and Administration Interface and Enabling User Capabilities*.

Execution ID. A valid user ID that is used to run a scheduled Task on a specified server. Execution IDs can be created and maintained using the Execution ID menu option in the ReportCaster Console. For more information, see *Creating, Updating, and Deleting an Execution ID* in Chapter 6, *ReportCaster Console*.

Note: A schedule that includes multiple Tasks may include multiple Execution IDs. However, there can only be one ReportCaster user ID for each schedule.

ReportCaster Security Settings

Depending on your organization's security needs, the following settings in the Data Server tab of the ReportCaster Server Configuration tool (see Chapter 8, *ReportCaster Server Configuration*) may be used to affect ReportCaster user IDs and passwords, and Execution IDs and passwords. These settings may be different for each WebFOCUS Reporting Server:

Run Id. Possible values are USER or STATIC. This setting applies only to the Execution ID and password.

- If Run Id is set to USER, a valid Execution ID and password must be specified for the WebFOCUS Reporting Server when creating a schedule.
- If Run Id is set to STATIC, a valid Execution ID and password is supplied in the SRV User setting of the ReportCaster Server Configuration tool.

Shared. Possible values are YES or NO (the default).

- If Shared is set to YES: When creating a schedule, the Execution ID and ReportCaster user IDs and passwords must be the same. This only applies when Run Id is set to USER.
- If Shared is set to NO: When creating a schedule, the Execution ID and ReportCaster user IDs and passwords are independent sets of credentials.

Trusted. Possible values are ON or OFF.

- If Trusted is set to ON: ReportCaster runs schedules on the WebFOCUS Reporting Server in trusted mode. This means that the Execution ID has already been authenticated by Web server security. Trusted security is not supported when the WebFOCUS Reporting Server resides on a Windows platform, or when ReportCaster is accessed from Developer Studio.
- If Trusted is set to OFF: A valid Execution ID and password is required to connect to each WebFOCUS Reporting Server.

The Trusted setting can be used with the Shared setting to affect security behavior. When Shared is set to YES, and Trusted is set to ON, the ReportCaster user ID and Execution ID are the same. Both user credentials are authenticated by Web server security. When Trusted is set to ON, the Caster Remote Authentication setting for the server you are connecting to is automatically set to YES.

ReportCaster Authentication Exit

If ReportCaster is not licensed with Managed Reporting, a user-written, external authentication program can be implemented. Using this Java program, security administrators can ensure that ReportCaster user IDs and passwords are properly authenticated without having to store user passwords in the ReportCaster Repository.

To enable this exit, specify the class name of the exit in the Caster Authentication Exit setting in the ReportCaster Server Configuration tool. This can be any class name you choose.

Example Enabling the ReportCaster Authentication Exit

The purpose of the following ReportCaster Authentication Exit is to implement the ReportCaster DSTCasterAuthInterface. Implementing this interface enables you to override the normal authentication process of ReportCaster.

```
/*
** DSTCasterAuthInterface
**
**
*/

package ibi.broker.exit;

public interface DSTCasterAuthInterface {

    public void setUser(String userName);
    public void setPass(String password);
    public static final int INVALID_USER = -1;
    public static final int INVALID_PASS = -2;
    public static final int AUTH_FAILED  = 0;
    public static final int AUTH_SUCCESS = 1;
    public int authenticate();
}
/*
* RCSampleAuthExit.java
*
*/
import ibi.broker.exit.*;
/**
*
* @author
* @version 5
*/
public class RCSampleAuthExit implements DSTCasterAuthInterface {

    String user = "";
    String pass = "";

    public RCSampleAuthExit() {
    }

    public void setUser(String tempUser) {
        user = tempUser;
    }
```

```
    public void setPass(String tempPass) {
        pass = tempPass;
    }

    public int authenticate() {

       if( user.equalsIgnoreCase("validuser") == true )
            return RCSampleAuthExit.AUTH_SUCCESS;
       else

            return RCSampleAuthExit.AUTH_FAILED;
    }
}
```

ReportCaster Remote Authentication

The Caster Remote Authentication setting in the ReportCaster Server Configuration tool may be set as follows:

- If Caster Remote Authentication is set to YES, the ReportCaster user ID has already been authenticated remotely using Web server security, and a matching user ID exists in the ReportCaster Repository. However, there is no need to store a password in the ReportCaster Repository. This setting only works with Web-based applications.
- If Caster Remote Authentication is set to NO, the ReportCaster user ID must be authenticated by entering user credentials onto a signon page.

Example Enabling ReportCaster Remote Authentication

To enable Caster Remote Authentication, the following sample code may be appended to your ibi/reportcaster52/cfg/web.xml file. This sample enables the use of basic authentication for the ReportCaster user ID. It only enables administrators to access the ReportCaster Console.

```
<web_app>
!code
!code
!code
!Insert the following code here right before the </web_app> tag
<security-constraint id="SecurityConstraint_1">
         <web-resource-collection id="WebResourceCollection_1">
            <web-resource-name>console</web-resource-name>
            <description>Report Caster Console</description>
            <url-pattern>/console/*</url-pattern>
         </web-resource-collection>
         <auth-constraint id="AuthConstraint_1">
            <description>Console:+:Administrators</description>
            <role-name>Admins</role-name>
         </auth-constraint>
         <user-data-constraint id="UserDataConstraint_1">
            <transport-guarantee>NONE</transport-guarantee>
         </user-data-constraint>
      </security-constraint>
      <security-constraint id="SecurityConstraint_2">
         <web-resource-collection id="WebResourceCollection_2">
            <web-resource-name>access</web-resource-name>
            <description>regular users</description>
            <url-pattern>/servlet/DSTRCServlet/*</url-pattern>
         </web-resource-collection>
         <auth-constraint id="AuthConstraint_2">
            <description>rusers:+:regular access</description>
            <role-name>Users</role-name>
            <role-name>Admins</role-name>
         </auth-constraint>
         <user-data-constraint id="UserDataConstraint_2">
            <transport-guarantee>NONE</transport-guarantee>
         </user-data-constraint>
      </security-constraint>
      <login-config id="LoginConfig_1">
         <auth-method>BASIC</auth-method>
         <realm-name>WebFOCUS</realm-name>
      </login-config>
      <security-role id="SecurityRole_1">
         <description>Regular Users</description>
         <role-name>Users</role-name>
      </security-role>
      <security-role id="SecurityRole_2">
         <description>Administrators</description>
         <role-name>Admins</role-name>
      </security-role>
</web_app>
```

REMOTEUSER Parameter

When Caster Remote Authentication is implemented, the ReportCaster servlets determine the user's identity based on the value stored by the Web server in a parameter called REMOTEUSER. This parameter is set only when the Web server is performing authentication.

The REMOTEUSER parameter contains the browser user's Web server user ID. This may be an operating system ID or another user ID (such as a Lightweight Directory Access Protocol (LDAP) user ID).

ReportCaster Security Cookies

Before accessing ReportCaster, a valid signon must take place. A successful signon results in the setting of one or more of the following security cookies:

- **WF_COOKIE** contains the user's Execution ID and password for each server to which the user has logged on. This cookie is set when IBIWF_action=WF_SIGNON is specified on the signon request.
- **MR_COOKIE** contains the user's Managed Reporting user ID. This cookie is set when IBIMR_action=MR_SIGNON is specified on the signon request.
- **RC_COOKIE** contains the user's ReportCaster user ID. If ReportCaster is configured with Managed Reporting, and you access ReportCaster from Managed Reporting, RC_COOKIE is generated using MR_COOKIE.

These cookies are always encrypted and expire at the end of the session.

External User IDs for Use With ReportCaster

In addition to the ReportCaster user ID and the Execution ID, administrators can use the following external user IDs with ReportCaster:

- HTTP ID
- SQL Database ID
- FTP User ID

HTTP ID

If the Web server requires a user ID and password for signon, you must specify these values in the HTTP User setting of the ReportCasterServer Configuration tool. This setting only applies when Managed Reporting is configured with ReportCaster.

Whenever values are found for these settings, they are supplied with the connection to the Web server. Connection to the Web server can occur if the job being run is a Standard Report or My Report, or if ReportCaster is distributing output back to Managed Reporting.

SQL Database ID

Customers running with the SQL Database repository option are prompted during installation to supply a valid database user ID for that connection.

The SRV User setting in the General tab of the ReportCaster Server Configuration tool is used to store this ID, which is used to create the ReportCaster Repository tables. The ReportCaster Distribution Server and servlets also use SRV User to connect to the repository. The Database Administrator must enable insert, update, and delete privileges for this user.

Note: When using DB2 on OS/390 for the ReportCaster Repository, there are several considerations for security. For more information on configuring DB2, see the *WebFOCUS and ReportCaster Installation and Configuration for OS/390* manual.

FTP User ID

During installation, you can specify a default FTP user ID and password for distributing FTP requests. These values are stored in the Default FTP User ID/Password setting in the ReportCaster Server configuration file. You can change the values of these settings using the ReportCaster Server Configuration tool.

The values specified in the configuration file display in the FTP User and FTP Password fields when creating an FTP schedule. Users creating a schedule can accept or override these default values. Every FTP schedule has an FTP user ID and password associated with it in the ReportCaster Repository.

Securing ReportCaster Temporary Files

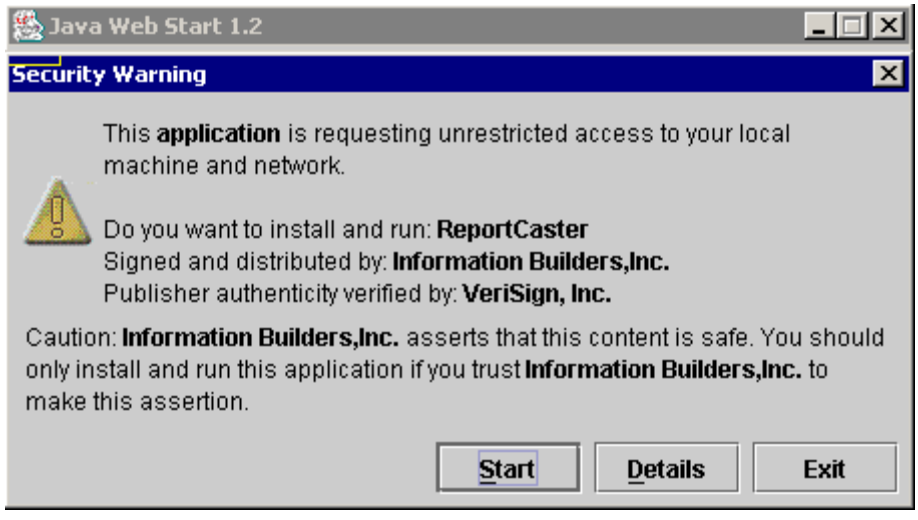
For testing or debugging purposes, administrators sometimes activate tracing, which retains temporary directories in order to aid in problem determination. The permissions on these temporary directories are generally read/write for the system administrator with access to those directories. Administrators should exercise care so that unauthorized users are not able to access these directories, since they contain sensitive passwords that should be kept secure.

ReportCaster Repository Password Synchronization

To synchronize ReportCaster user IDs with any external user repository (including the Managed Reporting Repository and LDAP), use the rcusersync.bat utility. For more information about this utility, see the *WebFOCUS and ReportCaster Installation and Configuration* manual for your platform.

Java Web Start Security Warning

When you access ReportCaster as an administrator for the first time, you will see the following message:



This message appears only the first time you access ReportCaster. It denotes that an agreement has been signed, certifying that Information Builders can use Java Web Start. This enables you to cut and paste strings (such as URLs) from various tools on your desktop to the ReportCaster Development and Administration Interface. You must click Start to enable ReportCaster functionality.

CHAPTER 8

ReportCaster Server Configuration

Topics:

- Accessing and Using the ReportCaster Server Configuration Tool
- General Configuration Settings
- Configuring WebFOCUS Reporting Servers With ReportCaster
- Two-Way Email Settings
- Report Library Settings
- Managed Reporting Settings

The ReportCaster Distribution Server configuration file contains information about the ReportCaster environment, including all default settings. If you are an administrator, you may use the ReportCaster Server Configuration tool to navigate through and change the configuration settings. For example, ReportCaster enables administrators to change the polling interval for the Distribution Server, and define access to multiple WebFOCUS Reporting Servers.

Accessing and Using the ReportCaster Server Configuration Tool

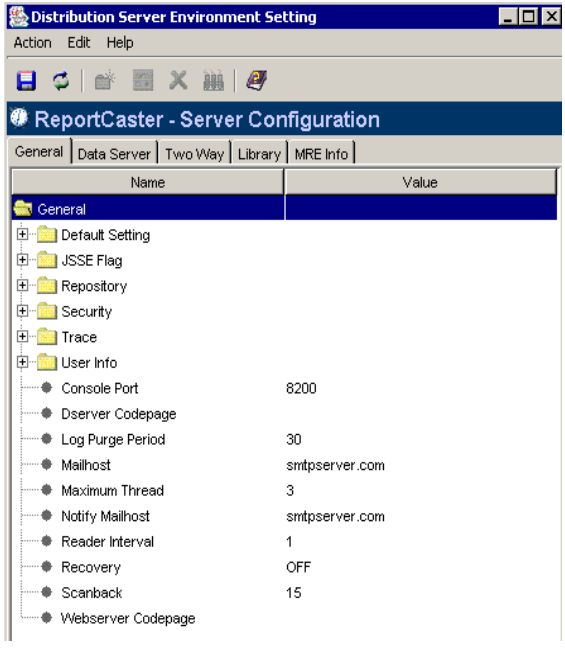
The ReportCaster Distribution Server configuration file is an encrypted XML file that is created during the Distribution Server installation. The dserver.ini file, which is used only once to create the XMLS file, populates the values in the XMLS file. Subsequent changes to values in the XMLS file must be made using the ReportCaster Server Configuration tool. After you have made changes to the configuration file, you must recycle the Distribution Server and reload the Web application in order for the changes to take effect.

The ReportCaster Distribution Server configuration file contains information about the ReportCaster environment, including all default settings. However, values input when creating a schedule override the default values in the configuration file. The ReportCaster Distribution Server configuration file settings and values may be uppercase or lowercase.

From the ReportCaster Development and Administration Interface, you can access the ReportCaster Server Configuration tool in one of the following ways:

- Select the ReportCaster Server Configuration icon  on the gray toolbar icon.
- Select *ReportCaster Server Configuration* from the Tools menu.
- Click the *ReportCaster Server Configuration* link.

The ReportCaster - Server Configuration window opens displaying the General tab:



From the ReportCaster - Server Configuration window, you can navigate through and provide information on the following tabs:

- **General.** Specify the following general settings:
  - Default values, such as an FTP user ID and password, and a WebFOCUS Reporting Server for running schedules.
  - Secure Sockets Layer (SSL) security information.
  - Default ReportCaster Repository settings.
  - Security settings for a user-written exit or remote authentication.
  - Tracing options and default trace file locations.
  - User information, such as a default ReportCaster Administrator user ID and password. This section also enables administrators to change the polling interval for the Distribution Server.

  For more information, see *General Configuration Settings* on page 8-4.
- **Data Server.** Configure multiple WebFOCUS Reporting Servers, including cluster servers. For more information, see *Configuring WebFOCUS Reporting Servers With ReportCaster* on page 8-10.
- **Two-Way Email.** Specify settings for the optional Two-Way Email product. For more information, see *Two-Way Email Settings* on page 8-15.
- **Library.** Specify the default URL that is needed to access content in the Report Library. For more information, see *Report Library Settings* on page 8-17.
- **Managed Reporting.** Specify Managed Reporting settings such as a default HTTP user and password, whether or not Managed Reporting was installed with ReportCaster, and the node on which the Managed Reporting Repository is located. For more information, see *Managed Reporting Settings* on page 8-18.

Note: When entering any of the various default user IDs, you must click the following icon  . This opens the User dialog box, where you can enter the password for each user ID.

ReportCaster Server Configuration Tool Icons

The ReportCaster Server Configuration tool contains icons that enable you to:

Save any changes made to the configuration file. You can also select *Save* from the Action menu. You must save any changes to the configuration file in order for them to take effect.

Refresh the settings so that they are the same as when you first accessed the configuration tool. You can also select *Refresh* from the Action menu.

Create. Create a new WebFOCUS Reporting Server.

Properties. Change the name of a setting. You can also select *Properties* from the Edit menu.

Caution: Information Builders does not recommend changing the name of a WebFOCUS Reporting Server, since all existing jobs on that server will no longer run.

Delete specified settings in the configuration tool. You can also select *Save* from the Action menu. You will then receive a message asking for confirmation about the deletion.

Test that you can connect to a specified server or repository. You can also select *Test* from the Edit menu. You may be prompted for a user ID and password to connect to a specified server. You will then receive a message describing whether the test succeeded or failed.

Help. Open the online Help file.

To exit the ReportCaster Server Configuration tool, select *Exit* from the Action menu.

General Configuration Settings

The General tab in the ReportCaster Server Configuration tool contains the following settings:

Folder	Setting	Optional/ Required	Values and Descriptions
Default Setting			
	Default FTP Host	Optional	Name of the default FTP server when creating an FTP schedule.
	Default FTP User ID/ Password	Optional	Default user ID and password to perform FTP file transfers.
	Default Mail From	Optional	Default value for the From field. This may be any value.
	Default Mail Reply Address	Optional	Default reply address when creating an e-mail schedule.
	Default WebFOCUS Server	Required Default is EDASERVE.	The default WebFOCUS Reporting Server for running schedules.

Folder	Setting	Optional/ Required	Values and Descriptions
JSSE Flag			
	JSSE Caster	Optional Default is NO.	Enables the use of SSL on the Distribution Server.
	JSSE Servlet	Optional Default is NO.	Enables the use of SSL for the ReportCaster servlets.
Repository			
>Data Source			
	Context Factory	Optional	For SQL-based repository configuration only. The path and name of the Java class to connect to a relational database. For more information, see your database documentation.
	JNDI Name	Optional	For SQL-based repository configuration only. Used internally to establish the JDBC connection to the database server. For more information, see your database documentation.
>Use URL			
	Class Name	Required	The path and name of the Java class to connect to the relational database. If a value is not specified, the FOCUS-based repository is assumed, and the URL setting is used for database interaction.
	URL	Required	Used internally to establish the JDBC connection to the database server.

Folder	Setting	Optional/ Required	Values and Descriptions
	DB name	Optional There is no default.	This parameter is used only with an OS/390 Distribution Server installation when a DB2 repository is configured. If specified, the value is used in the DB2 CREATE TABLE syntax to direct ReportCaster Repository tables to the intended data source. If not specified, the tables are created in the DB2 subsystem's default data source.
	Focus	Optional Default is NO.	NO indicates SQL, DB2, or Oracle repository. YES indicates FOCUS repository.
	Hold Connection	Optional Default is YES.	YES - The database connection is kept open throughout the execution of the schedule, including obtaining Address Book information and writing information to the log files. NO - The database connection is dropped before executing the schedule. A new connection is made after the schedule is executed to obtain Address Book information and write information to the log files.
	SRV User	Optional	Default database user ID and password.
	Unitype	Optional Default is NO.	YES indicates that Unicode is enabled. The database will store Unicode.

Folder	Setting	Optional/ Required	Values and Descriptions
Security			
	Authenticate Exit	Optional	Class name of a user-written, external authentication program. For more information, see Chapter 7, *ReportCaster Security*.
	Caster Remote Authentication	Optional Default is NO	Indicates that the ReportCaster user ID has already been authenticated remotely using Web server security, and that a matching user ID exists in the ReportCaster Repository. This setting only works with Web-based applications. For more information, see Chapter 7, *ReportCaster Security*.
Trace			
>Servlet Trace			
	Trace File	Optional Default location is *drive*:\ibi\ reportcaster52 \servlet.trc	Path and file name on the Web server where servlet tracing statements are written. If not specified, tracing statements are only written to the Web server log files. This setting is ignored if the Trace Flag setting is OFF.
	Trace Flag	Optional Default is OFF.	When set to ON, servlet tracing statements are written.

Folder	Setting	Optional/ Required	Values and Descriptions
>Trace			
	Report Trace	Optional Default is OFF.	When set to ON, tracing is enabled, and the trace file contains the actual scheduled output.
	Schedule Trace	Optional Default is OFF.	When set to ON, Distribution Server tracing is enabled, and the trace file contains all operations of the Distribution Server.
User Info			
	Administrator	Required Default is admin.	The default ReportCaster Administrator user ID and password.
	Default User	Optional	Schedules created by the ReportCaster API Version 4 Release 3.6 that are migrated to Version 5 Release 2 are given this ReportCaster user ID (owner ID). All schedules created using the ReportCaster Servlet API in Version 5 Release 2 are owned by this default user ID. This user ID has replaced the API_based user ID.
	Console Port	Required Default is 8200.	Port number used for the ReportCaster Console.
	Dserver Codepage	Optional	The code page of the platform where the Distribution Server is running. Passed to the WebFOCUS Reporting Server to enable its communication back to the Distribution Server. Used for National Language Support (NLS).

Folder	Setting	Optional/ Required	Values and Descriptions
	Log Purge Period	Optional Default is 30.	Automatically purge individual log reports when they are older than a set number of days.
	Mailhost	Required	Name of the default mail server used to distribute an e-mail schedule.
	Maximum Thread	Default is 3.	Controls how many simultaneous connections the Distribution Server can have open with the WebFOCUS Reporting Server.
	Notify Mailhost	Optional	Name of the mail server that handles notification e-mail. If blank, ReportCaster uses the Mailhost setting as the notification mail server.
	Reader Interval	Required Default is 1 minute.	Polling interval (in minutes) for the Distribution Server to check for scheduled jobs.
	Recovery	Required Default is OFF.	ON - During startup, the Distribution Server checks for jobs that were processed but not completed during normal processing. The Distribution Server sets the RECOVERY flag in the BOTSCHED table to track incomplete jobs. OFF (Default) - The Distribution Server does not recover any jobs.
	Scanback	Optional Default is 15 days.	For recovery after the Distribution Server becomes unavailable. Used to specify how far back to look and schedule unexecuted jobs.
	Webserver Codepage	Optional	The code page of the platform where the Web server is installed.

Configuring WebFOCUS Reporting Servers With ReportCaster

The Data Server tab in the ReportCaster Server Configuration tool is where you can configure multiple WebFOCUS Reporting Servers with ReportCaster. Although the Distribution Server installation program automatically populates values for the EDASERVE server, all additional WebFOCUS Reporting Servers must be added to the configuration file manually. For more information about configuring WebFOCUS Reporting Servers, see the following topics:

- *How to Add a WebFOCUS Reporting Server* on page 8-10.
- *Configuring Cluster Servers* on page 8-11.
- *Data Server Settings* on page 8-13.

Procedure How to Add a WebFOCUS Reporting Server

9. In the Data Server tab of the ReportCaster Server Configuration tool, click the WebFOCUS Server List folder.
10. Click the Create a new element icon, or right-click and select *New* from the drop-down menu. The Server Name dialog box opens.
11. In the Name field, specify the name of the server you want to add to the ReportCaster Server configuration file. For Managed Reporting Standard Reports or My Reports, this name must match the NODE setting for that server specified in the client52/wfc/etc/odin.cfg file.
12. Click *OK*. The server is added to the list of available WebFOCUS Reporting Servers.
13. Fill in the appropriate settings. For more information about these settings, see *Data Server Settings* on page 8-13. If you are planning to configure a cluster server, see *Configuring Cluster Servers* on page 8-11.
14. Click the Save icon, or select *Save* from the Action menu. A message appears asking for confirmation that you want to save the changes to the configuration file.
15. Click *Yes* to save the changes, click *No* to cancel the changes and exit the configuration tool, or click *Cancel* to cancel the changes and remain in the configuration tool.

Caution: Information Builders does not recommend changing the name of a WebFOCUS Reporting Server, since all existing jobs on that server will no longer run.

Configuring Cluster Servers

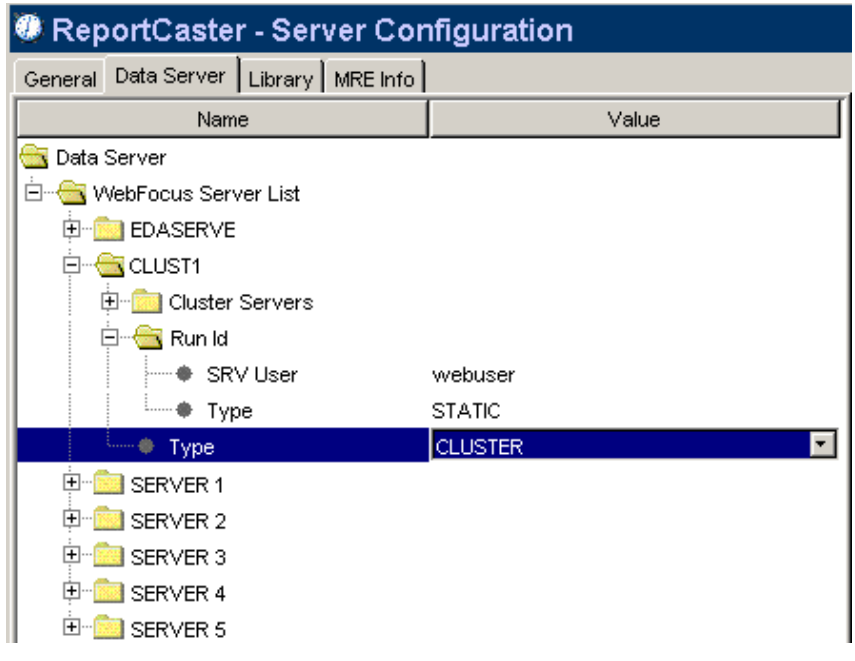
In the Data Server tab of the ReportCaster Server Configuration tool, you can configure cluster servers. This way, if ReportCaster attempts to connect to a primary WebFOCUS Reporting Server but is unsuccessful, it can connect to a secondary, or alternate server.

The cluster functionality can be seen as a workload distributor because it distributes users and applications to different servers. This process is controlled through a single primary node that may be defined by the configuration tool.

The priority of the alternate servers are based on a combination of the Maximum Connections and Weight settings for each server. To obtain the priority value of each alternate server, multiply the values for these two settings. The higher the resultant value for the server, the higher the priority is for that server when allocating jobs to schedule. During run time, this priority is calculated dynamically based on the number of connections currently being used.

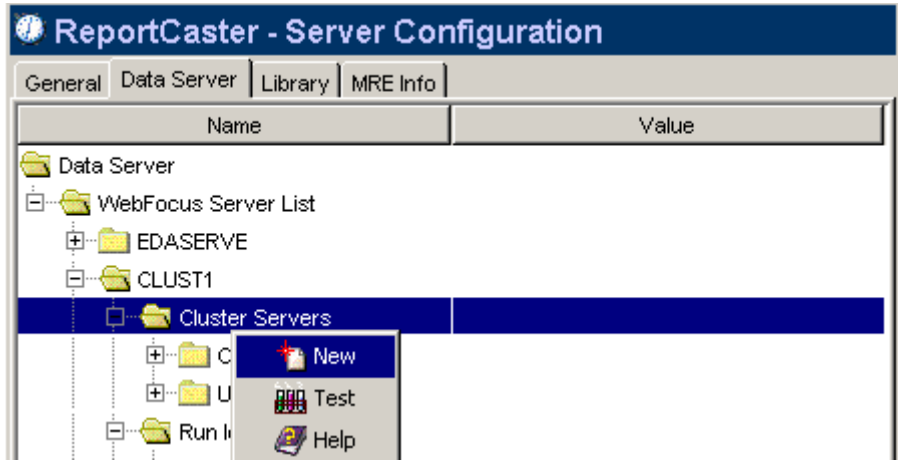
Procedure How to Configure a Cluster Server

1. For the primary server within the cluster (for example, CLUST1), configure the Run Id and Type settings. Be sure to specify CLUSTER as the Type setting:



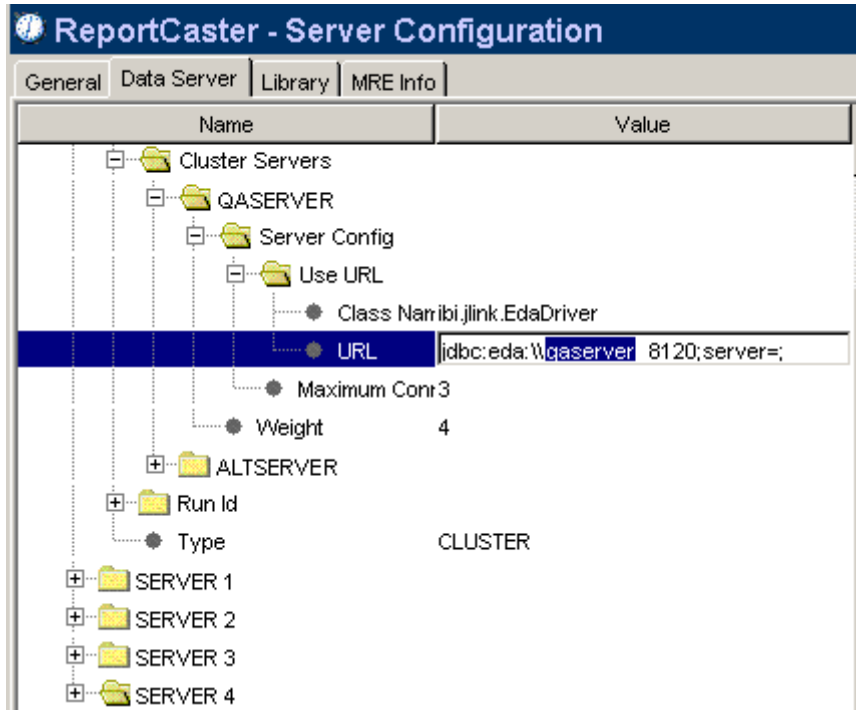
2. Click the Cluster Servers folder.

3. Right-click and select *New* from the drop-down menu.



4. The Server Name dialog box opens. In the Name field, specify the name of the alternate server you want to add to the cluster.

5. Enter the URL setting for the server (for example, jdbc:eda:*qaserver:8120*;server=;):



Note: You can optionally specify Maximum Connections and Weight values for each server.

6. Repeat steps 2 through 5 for any additional alternate servers you want to add to the cluster. Once you have completed adding alternate servers to the primary cluster server, click the Save icon, or select *Save* from the Action menu. A message appears asking for confirmation that you want to save the changes to the configuration file.
7. Click *Yes* to save the changes, click *No* to cancel the changes and exit the configuration tool, or click *Cancel* to cancel the changes and remain in the configuration tool.

Data Server Settings

Each WebFOCUS Reporting Server may contain the following settings, which are specific to each server:

Folder	Setting	Optional/Required	Values and Descriptions
Run Id			
	SRV User	Required if Type is set to STATIC.	Default Execution ID and password.
	Type	Required USER or STATIC. The default is USER.	**USER** – A valid Execution ID and password must be specified when creating a schedule. **STATIC** – A valid Execution ID and password is supplied in the SRV User setting. When creating a schedule, you cannot specify an Execution ID and password.
Server Config			
>Use URL			
	Class Name	Required Default is ibi.jlink.EdaDriver	Path and name of the Java class that is the driver for the WebFOCUS Reporting Server.
	URL	Required Default is jdbc:eda:\\{host}:{port};server=;	Used internally to establish the JDBC connection to the WebFOCUS Reporting Server for the execution of reports.

Folder	Setting	Optional/Required	Values and Descriptions
>Server Config			
	Maximum Connections	Optional Default is 3. Used with the Weight setting. For alternate servers within a cluster.	This setting works in conjunction with the Weight setting, enabling you to prioritize the alternate servers in a cluster queue. Maximum number of connections available to the WebFOCUS Reporting Server. You can specify a maximum of 20 connections.
	Weight	Optional This setting may be from 10 (the highest) to 0 (the lowest). 4 is the default. Used with the Maximum Connections setting. For alternate servers within a cluster.	This setting works in conjunction with the Maximum Connections setting, enabling you to prioritize the alternate servers in a cluster queue. For example, if you have three servers (A, B, and C), you might want server A to be used as the primary server. You would specify a higher weight (10 is the highest) and Maximum Connection (20 is the highest) setting for server A. If you want server B to be used the least, you would specify the lowest weight of 1 and a Maximum Connection of 3.
	Shared	Optional YES or NO. NO is the default. Can only be enabled when Run Id is set to USER.	YES - When creating a schedule, the Execution ID and ReportCaster user IDs and passwords must be the same. NO - When creating a schedule, the Execution ID and ReportCaster user IDs and passwords are independent sets of credentials.

Folder	Setting	Optional/Required	Values and Descriptions
	Trusted	Optional Default is OFF.	ReportCaster uses trusted security when set to ON. The Execution ID 's password is not required to connect to the WebFOCUS Reporting Server since the user credentials have already been authenticated. Trusted security is not supported on Windows platforms or when ReportCaster is accessed from Developer Studio.
	Type	Required NODE or CLUSTER. NODE is the default.	NODE - This server provides a single connection point for data transmissions. CLUSTER - This is the primary server among a group of servers that act as a single system. This feature is useful for enabling high availability, load balancing, and parallel processing. For more information about cluster servers, see *Configuring Cluster Servers* on page 8-11.

Two-Way Email Settings

The Two Way tab in the ReportCaster Server Configuration tool only appears if you have installed the the optional Two-Way Email product. It contains the following settings:

Folder	Setting	Optional/Required	Values and Descriptions
Two Way			
>Two Way Default			
	Two Way Server Name	Required Default is EDASERVE.	Default WebFOCUS Reporting Server for Two-Way Email requests. Two-Way Email does not support multiple WebFOCUS Reporting Servers. Two-Way Email requests run against one dedicated server.

Folder	Setting	Optional/Required	Values and Descriptions
	Two Way User	Required	Default Execution ID and password. This ID is used when a Two-Way Email subscriber selects the default check box for WebFOCUS credentials during a subscription.
>Two Way			
	Account	No default.	Full e-mail address used as the reply address for the Two-Way Email listener. Should be equivalent to MAILUSER@MAILSERVER.
	Error Account	No default.	An e-mail box to which all unknown e-mails (for example, e-mails lacking a proper Two-Way Email tag) will be forwarded.
	Event Log	Optional. Default is ON.	Controls what Two-Way Email inbox events should be logged. ON displays all events. ERROR displays only errors. OFF turns off the Event Log. Nothing displays.
	Install	No default. Depends on license code.	YES (if license code for Two-Way Email and Managed Reporting was entered). Activates the Two-Way Email listener. NO (if non-Two-Way Email license code was entered). Disables the Two-Way Email listener. SELF (if license code for Two-Way Email only was entered). This is for self-service (non-Managed Reporting) applications.
	Mail Frequency	Any integer. Default is 60 seconds.	Frequency to poll the inbox (*n* seconds between each poll).
	Mail Server	Required.	POP3 or IMAP mail server.

Folder	Setting	Optional/Required	Values and Descriptions
	Mail User	Any alphanumeric string. Default is blank.	Two-Way inbox logon user ID and password.
	Protocol	Default is POP3.	Controls the post-office protocol to be used to connect to the Two-Way Email inbox. Set to either POP3 or IMAP. For OS/390 platforms, only IMAP is supported.

Report Library Settings

The Library tab in the ReportCaster Server Configuration tool only appears if you have installed the optional Report Library product. It contains the following settings:

Folder	Setting	Optional/Required	Values and Descriptions
Library			
	Default Library URL	Required Specified during the Distribution Server installation. The default is http://*hostname*/rcaster/library/libreport.jsp (where *hostname* is the host name of the Distribution Server).	The URL that is included within the e-mail that enables you to access specific content in the Report Library.
	Install	Required YES or NO	Indicates whether (YES) or not (NO) the Report Library product may be used with ReportCaster.

Managed Reporting Settings

The MRE Info tab in the ReportCaster Server Configuration tool only appears if you have installed the the optional Managed Reporting product. It contains the following settings:

Folder	Setting	Optional/Required	Values and Descriptions
MRE Info			
	HTTP User	Optional	If Web server authentication is enabled (when anonymous access is disabled), this user ID and password are used by both the Distribution Server and the WebFOCUS Reporting Server to make their respective connections to the Managed Reporting Repository on the Web server. If the Web server allows anonymous connections, then this parameter is not needed and should not be specified. This parameter is not prompted for during the installation of the Distribution Server.
	Install	Required YES or NO.	Indicates whether (YES) or not (NO) Managed Reporting was installed with ReportCaster.
	Repository Node	Optional Default is http://*hostname*/ibi_apps/WFServlet (where *hostname* is the host name of the server on which the Managed Reporting Repository is located).	Node name where Managed Reporting Repository is located.

CHAPTER 9

Maintenance Functions for a FOCUS Repository

Topics:

- Repository Table Backups
- Stopping and Starting the FOCUS Database Server
- Repository Table Maintenance Procedures

The following topics describe administrative functions that can be performed if you have configured ReportCaster with a FOCUS Repository. These functions include backing up FOCUS Repository tables, starting and stopping the FOCUS Database Server (FDS), purging log records, and rebuilding (or reorganizing) FOCUS Repository tables.

Repository Table Backups

The FOCUS Repository tables should be backed up periodically. Before making backup copies of these tables, you should make sure that all ReportCaster users are logged off the system.

Procedure How to Backup FOCUS Repository Tables

1. Stop the FOCUS Database Server (FDS). For more information, see *Stopping and Starting the FOCUS Database Server* on page 9-2.
2. Create a backup of the FOCUS Repository tables.
3. Rebuild or reorganize the FOCUS Repository tables to maintain disk space and improve performance. Although this is an optional step, it is recommended. For more information, see *Repository Table Maintenance Procedures* on page 9-6.
4. Restart the FDS.

Note: You may leave the Distribution Server running during this procedure. Any users trying to access ReportCaster while the FDS is down will receive a message. Normal operation will return once the FDS is restarted. Any jobs scheduled to run during the time that the FDS is down will be processed as soon as the FDS is restarted.

Stopping and Starting the FOCUS Database Server

The procedure to stop and start the FOCUS Database Server (FDS) varies by platform. For more information, see the iWay Server documentation for your platform.

Windows and UNIX-based WebFOCUS Reporting Servers may be stopped from the command line or from the Workspace Manager Web Console.

Syntax How to Stop the FDS from the Command Line

Windows-based systems. From the Windows command line, issue the following command

```
drive:\ibi\srv52\wfs\bin\edastart -stopsu
```

where:

drive

Is the drive where your WebFOCUS Reporting Server configuration is located.

UNIX-based systems. From the UNIX command line, issue the following command

```
edaconf/bin/edastart -stopsu
```

where:

edaconf

Is the location of your WebFOCUS Reporting Server configuration. The default is /home/ibi/srv52/wfs.

Note: You can restart the FDS by substituting -startsu for -stopsu in the command.

Procedure How to Stop the FDS From the Workspace Manager Web Console

For both Windows and UNIX-based systems, perform the following steps:

1. Start the Workspace Manager.
2. From your Web browser, enter the following URL

   ```
   http://ip_address:http_service
   ```

   where:

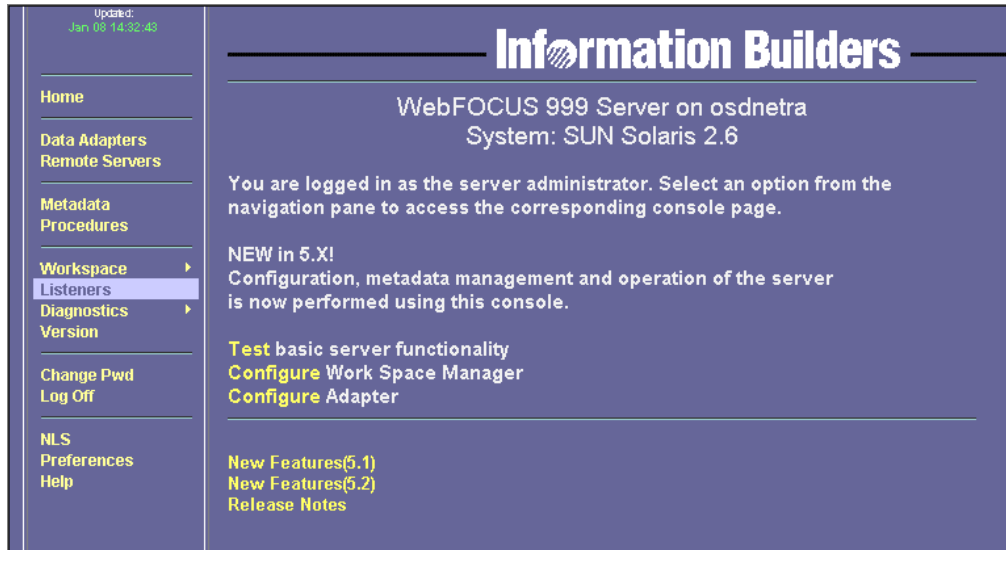
   ip_address

   Is the IP address of the machine onto which the server was installed.

   http_service

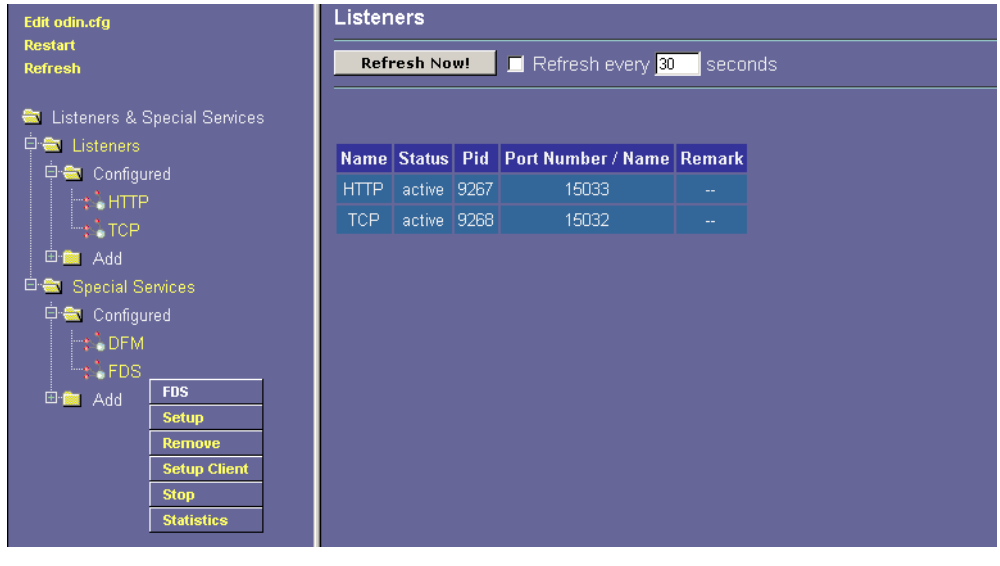
   Is the value for HTTP Service entered during the Server configuration procedure.
3. If you are running your server with security on, you must enter the WebFOCUS Reporting Server Administrator user ID and password. If you are running your sever with security off, you may enter any valid operating system user ID and password.

4. The Web Console Home Page opens. On the left side of the page is a menu providing access to the different features of the Web Console. Select the *Listeners* menu option.



The Listeners window opens.

5. Under the Special Services and Configured folders, click *FDS* and then select *Stop* from the drop-down menu.



Note: You can restart the FDS from the Workspace Manager Web Console by repeating these steps and selecting *Start* instead of Stop from the drop-down menu.

Stopping and Starting the FDS on z/OS

On a z/OS system, the FDS runs as a batch job or as a started task. You should not stop the FDS with the ISPF Cancel command. Instead, stop it from TSO or with a batch job.

Example Stopping the FDS From TSO

Execute the HLIKX utility found in the partitioned data set FOCLIB.LOAD.

Enter

```
ALLOC F(FOCSU) DA(dataset)  SHR
CALL FOCLIB.LOAD (HLIKX)
```

where:

dataset

Is the name of the communication data set that the FDS allocated to DDNAME FOCSU.

When you execute this program, the FDS processes current transactions, pauses, closes all files, and stops. This usually takes less than one minute.

Example Stopping the FDS With a Batch Job

You can stop the FDS with a batch job containing the following JCL

```
//STEP1          EXEC     PGM=HLIKX
//STEPLIB        DD       DSN=FOCLIB.LOAD,DISP=SHR
//FOCSU          DD       DSN=dataset,DISP=SHR
```

where:

dataset

Is the name of the communication data set that the FDS allocated to DDNAME FOCSU.

Repository Table Maintenance Procedures

The FOCUS Repository tables used by ReportCaster make use of internal indices for fast retrieval of information. However, over time system performance may be affected, especially if many records have been added and deleted. This is because WebFOCUS does not automatically recognize the internal space freed up by the deletions, and therefore uses new space to store subsequent records.

Standard FOCUS maintenance procedures should be followed periodically to keep ReportCaster running at its optimum performance level. There are two types of FOCUS Repository table maintenance procedures that are of importance to ReportCaster:

- **Rebuilding a FOCUS Repository table.** This procedure rebuilds the internal structure of the table so that new records can be placed in the space freed up by the previous deletions. This procedure does not reduce the size of the file on disk. However, after the table is rebuilt it can accept new records without growing in size until the newly freed up space has been used up.

  This procedure should be used to maintain peak performance on tables that have had many records deleted but are expected to have many new records added. You should plan on rebuilding the BOTLOG and BOTLOG2 tables after purging old records so that new log records can be stored efficiently.

- **Reorganizing a FOCUS Repository table.** This procedure recreates the table through a dump and load process. It frees up space occupied by previous record deletions and reduces the size of the file on disk. The table begins to grow as new records are then added.

  This procedure should be used when a large number of records have been removed from a table and many new record additions are not anticipated. For example, if a large number of addresses are deleted from the Repository and many new address additions are not expected, using this procedure can return free space to the operating system.

Reference FOCUS Repository Tables

It is not necessary to rebuild or reorganize all of ReportCaster's FOCUS Repository tables. Which tables should be managed and how often the procedures should be performed varies from one site to the next. The following table provides some guidelines.

Table	Purpose	Notes
BOTADDR	Distribution List storage.	Contains one record per list.
BOTDEST	Distribution information.	Contains one record per destination. Can have many records for each list.
BOTTSKEX	User security information.	Contains one record per Task.
BOTUPROF	User profiles and capabilities.	Contains one record per scheduling user.
BOTLOG	Job log storage.	Contains one record per job run.
BOTLOG2	Job log message storage.	Contains many records per job run.
BOTPARMS	Optional report parameters for job execution.	Optionally stores one record per parameter per Task.
BOTSCHED	Schedule information for each job.	One record per schedule.
BOTTELL	User subscription information.	Used by optional Two-Way Email feature. Contains one record for each user subscription.
BOTJOURN	Journal of all Two-Way Email events.	Contains many records per job run.
BOTTASK	Individual Task information.	Contains one record for each Task in a schedule.
BOTPACK	Contains the packet ID, which uniquely identifies each schedule.	Contains one record per schedule.
BOTGRP	Group name and description.	Contains one record per group.
BOTGUSER	User IDs within each group name.	Contains one record per user per group.

Table	Purpose	Notes
BOTCAT	Report Library catalog table.	Contains one record for each schedule in the Report Library. If the schedule is burst, each burst report is a record.
BOTLIB	Report Library information. Includes version and expiration information.	Contains one record per report in the library.
BOTLIST	User IDs and burst values within each Access List.	Contains one record per destination.
BOTACCES	Access List names.	Contains one record per Access List.

Purging Log Records

The ReportCaster Console, ReportCaster Interface, and Distribution Server configuration file purge option (Log Purge Period) deletes all log records, or log records that are older than a specified date. These log records are deleted from the BOTLOG and BOTLOG2 tables. Since BOTLOG2 contains one record per message per job run, this file can become very large. It is recommended that you follow up log purges with either a rebuild or a reorganization of these FOCUS Repository tables.

Rebuilding and Reorganizing FOCUS Repository Tables

The following procedures and examples describe how to rebuild and reorganize FOCUS Repository tables on:

- Windows
- UNIX
- z/OS

Procedure How to Rebuild and Reorganize Windows-based Systems

1. Stop the FDS. For more information, see *Stopping and Starting the FOCUS Database Server* on page 9-2.
2. Run a FOCUS procedure to either rebuild or reorganize the table. This procedure can be run in one of the following ways:
   - Interactively using WebFOCUS.
   - As an NT batch file, which runs a dedicated agent process for the FOCUS procedure.

     For example,

     ```
     drive:\ibi\srv52\wfs\bin\edastart.bat -x EX focexec >
     path\rcreorg.log
     ```

   where:

   drive
   Is the drive where your WebFOCUS Reporting Server configuration is located.

   focexec
   Is the procedure name that includes the rebuild or reorganization command.

   path
   Is the location of the log file.

   Note: The command should appear on a single line in the batch file.
3. Start the FDS.

Note: On Windows-based systems, the intermediate dump file for the reorganization defaults to the root of the WebFOCUS Reporting Server's configuration directory (for example, ibi\srv52\wfs). This cannot be controlled.

Example Rebuilding the BOTDEST Table on Windows

The following example shows how to rebuild the BOTDEST table on Windows.

```
-TYPE Beginning ReportCaster FDS file rebuild...
-* duplicate the steps between these comments for each file to rebuild
COPY d:\ibi\srv52\wfs\fds\botdest.foc d:\ibi\fds_backup\botdest.foc
-*
-RUN
USE CLEAR
USE
d:\ibi\srv52\wfs\fds\botdest.foc
END
REBUILD
REBUILD
BOTDEST
NO
-TYPE File botdest rebuilt.
-************************************************************
-RUN
-TYPE ReportCaster FDS rebuild complete.
```

Example Reorganizing the BOTDEST Table on Windows

The following example shows how to reorganize the BOTDEST table on Windows.

```
-TYPE Beginning ReportCaster FDS file reorganization...
-* duplicate the steps between these comments for each file to reorg
COPY d:\ibi\srv52\wfs\fds\botdest.foc d:\ibi\fds_backup\botdest.foc
-*
-RUN
USE CLEAR
USE
d:\ibi\srv52\wfs\fds\botdest.foc
END
REBUILD
REORG
DUMP
BOTDEST
NO
-* Dump complete. Remove old file then begin load.
!ERASE d:\ibi\srv52\wfs\fds\botdest.foc
-RUN
USE CLEAR
USE
d:\ibi\srv52\wfs\fds\botdest.foc NEW AS BOTDEST
END
FILEDEF BOTDEST DISK d:\ibi\srv52\wfs\rebuild.ftm
REBUILD
REORG
LOAD
BOTDEST
-RUN
!ERASE d:\ibi\srv52\wfs\rebuild.ftm
-TYPE File botdest reorganized.
-************************************************************
-RUN
-TYPE ReportCaster FDS reorganization complete.
```

Procedure How to Rebuild and Reorganize UNIX-based Systems

1. Stop the FDS. For more information, see *Stopping and Starting the FOCUS Database Server* on page 9-2.
2. Run a FOCUS procedure to either rebuild or reorganize the table. This procedure can be run in the following ways:
   a. Interactively using WebFOCUS.
   b. As a batch script file, which runs a dedicated agent process for the FOCUS procedure.

      For example,

      ```
      edaconf/bin/edastart -x EX focexec > /apps/ibi/rcreorg.log
      ```

      where:

      edaconf

      Is the location of your WebFOCUS Reporting Server configuration. The default is /home/ibi/srv52/wfs.

      focexec

      Is the procedure name that includes the rebuild or reorganization command.
3. Use the Windows examples from the preceding topics for reference. However, you should replace the path references to reflect the path on your UNIX system. In addition, change the following operating system command syntax:

   Replace COPY with !cp

   Replace ERASE with !rm
4. Start the FDS.

Note: On UNIX-based systems, the intermediate dump file for the reorganization defaults to the root of the WebFOCUS Reporting Server's configuration directory (for example, /home/ibi/srv52/wfs). This cannot be controlled.

Procedure How to Rebuild and Reorganize z/OS-based Systems

1. Stop the FDS.
2. Run a FOCUS procedure to either rebuild or reorganize the table. This procedure can be run in one of two ways:
   a. Interactively using WebFOCUS.
   b. In batch using a TSCOM script file, which runs a dedicated agent process for the FOCUS procedure. For an example, refer to the member EDADEBUG in the *qualif.edactl.data* library.

Example Rebuilding the BOTDEST Table on z/OS

Use this example if the FOCUS Repository table has had many records deleted and you want to be able to use this internal space for new records. Any disk allocations (primary and secondary) in use at the start of this procedure will remain afterwards. However, the file itself will not grow in size until its internal space is used up.

```
DYNAM ALLOC DD BOTDEST DA qualif.BOTDEST.FOCUS SHR REU
DYNAM ALLOC DD BOTDESTX DA qualif.BOTDESTX.FOCUS NEW
DYNAM COPY BOTDEST BOTDESTX
REBUILD
BOTDEST
NO
```

where:

qualif

Is the high-level qualifier of your FOCUS Repository table.

Example Reorganizing the BOTDEST Table on z/OS

Use this example if the FOCUS Repository table has had many records deleted and many new record additions are not anticipated.

```
DYNAM ALLOC DD BOTDEST  DA qualif.BOTDEST.FOCUS SHR REU
DYNAM ALLOC DD BOTDESTX DA qualif.BOTDESTX.FOCUS NEW
DYNAM COPY BOTDEST BOTDESTX
REBUILD
REORG
DUMP
BOTDEST
NO
DYNAM DELETE qualif.BOTDEST.FOCUS
DYNAM FREE DD BOTDEST
DYNAM ALLOC DD BOTDEST DA qualif.BOTDEST.FOCUS NEW -
    SPACE TRACKS 5,5
REBUILD
REORG
LOAD
BOTDEST
```

where:

qualif

Is the high-level qualifier of your FOCUS Repository table.

APPENDIX A

ReportCaster Formats

Topic:

- ReportCaster Formats for Scheduled Output

Using ReportCaster, you can distribute scheduled output in the following formats:

- ALPHA
- COMMA
- DOC
- EXCEL
- EXCL97
- EXL2K
- EXL2K FORMULA
- GIF
- HTML
- PDF
- PS
- TABT
- WK1
- WP
- XML

For information about how these formats relate to ReportCaster, see *ReportCaster Formats for Scheduled Output* on page A-2.

ReportCaster Formats for Scheduled Output

When you create a task for a schedule, you specify the format for the scheduled output. The following table describes the different types of available ReportCaster formats:

Format	Description	Suggested Uses	Considerations
ALPHA	Saves scheduled output as fixed-format character data.	For display in a text document; for further reporting in WebFOCUS; as a transaction file for modifying a data source.	When created as a HOLD file, a corresponding Master File is created. Bursting is not supported.
COMMA	Saves scheduled output as a variable-length text file in comma-delimited format with character values enclosed in double quotation marks. All blanks within fields are retained. This format is required by certain software packages such as Microsoft Access.	For further processing in a database application. This format type can be imported into applications such as Excel or Lotus.	This format type does not create a Master File. Bursting is not supported. Smart date fields and dates formatted as I or P fields with date format options are treated as numeric and are not enclosed in double quotation marks in the output file. Dates formatted as alphanumeric fields with date format options are treated as alphanumeric and enclosed in double quotation marks. Continental decimal notation (CDN=ON|SPACE |QUOTE) is not supported. A comma within a number is interpreted as two separate columns by a destination application such as Microsoft Access.

Format	Description	Suggested Uses	Considerations
DOC	Scheduled output opens as a plain-text word processing document. Text can be opened by any word processing application. Retains ASCII form feed characters to correctly page output.	Word Processing applications, printing unformatted reports, e-mail, Report Library.	Does not retain most formatting. Does not support hyperlinks or alerts. Can be distributed as an e-mail attachment or as an inline e-mail message. Bursting is supported.
EXCEL (XLS)	For Excel 2000 and earlier, scheduled output opens as a Microsoft Excel spreadsheet file.	E-mail, Managed Reporting	Any version of Microsoft Excel must be installed. Cannot use the print distribution method. Does not support bursting reports or alerts. Does not retain headings, footings, subheads, or subfoots. The format is binary.
EXCL97 (XLS)	Scheduled output opens as an Excel97 spreadsheet file, an HTML-based display format that supports report formatting and drill-downs.	E-mail, Report Library	Microsoft Excel 97 or higher must be installed. Bursting is supported.

Format	Description	Suggested Uses	Considerations
EXL2K (XLS)	For Excel 2000 and higher, scheduled output opens within Excel 2000. Supports most StyleSheet attributes, allowing for full report formatting.	E-mail, Report Library	Microsoft Excel 2000 or higher must be installed. The format is ASCII. All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server's MIME table so that the .xls extension is ascii/application data instead of binary. Bursting is supported.
EXL2K FORMULA (XLS)	For Excel 2000 and higher, scheduled output opens within Excel 2000. Contains Excel formulas that calculate and display the results of any type of summed information (such as column totals, row totals, and sub-totals).	E-mail, Report Library	Microsoft Excel 2000 or higher must be installed. The format is ASCII. All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server's MIME table so that the .xls extension is ascii/application data instead of binary. Bursting is supported.
GIF	Scheduled output opens as a graphic in GIF format.	E-mail, Report Library	Only works with procedures that contain GRAPH FILE syntax. Bursting is supported and is performed on the second BY field in the GRAPH FILE request.

Format	Description	Suggested Uses	Considerations
HTML (HTM)	Supports hyperlinks and other World Wide Web features. Retains StyleSheet formatting.	Report Library, e-mail for display in a Web browser	Bursting is supported except for FML reports. Can be distributed as an e-mail attachment or as an inline e-mail message.
PDF	Appearance of the scheduled output is preserved in an electronic document when printed using Adobe Acrobat. Retains all relevant StyleSheet formatting.	E-mail, Report Library	Does not support hyperlinks in e-mail attachments. Recipient must have an Adobe Acrobat application to view. The OS/390 UNIX platform requires the Web server configuration file to have the MIME setting for PDF set to binary in mime.wfs. Bursting is supported.
PS	Appearance of the scheduled output is preserved in an electronic document when printed using PostScript. Retains all relevant StyleSheet formatting.	Printing	Does not support hyperlinks. Printers must support PostScript. Recipient must have a GhostView application to view. Bursting is not supported.
TABT (TAB)	Scheduled output opens in tab-delimited format, including column headings in the first row. This format is required by certain software packages such as Microsoft Access.	E-mail, Report Library	Bursting is not supported.

Format	Description	Suggested Uses	Considerations
WK1	Scheduled output opens within Lotus 1-2-3, Excel.	Report Library, e-mail	In the mime.wfs configuration file: • You must specify 'no' in the 'rdr' column to launch Lotus 1-2-3. • You must specify 'yes' in the 'rdr' column to launch Excel. • The format is binary. Cannot use the print distribution method. Does not support bursting reports or alerts. Does not retain headings, footings, subheads, or subfoots. Lotus 1-2-3 or Excel must be installed. Internet Explorer 5.5 or higher is the preferred browser.
WP	Scheduled output opens as a plain-text word processing document in the Web browser. Text can be opened by any word processing application.	Word processing applications, printing unformatted reports, e-mail, Report Library.	Does not retain page breaks or most formatting. Does not support hyperlinks, bursting, or alerts. Can be distributed as an e-mail attachment or as an inline e-mail message.
XML	Scheduled output opens in XML format, a markup language that is derived from the Standard Generalized Markup Language (SGML).	Describing and exchanging data for applications on different systems.	Bursting is not supported.

APPENDIX B

ReportCaster Repository Reports and Tables

Topics:

- ReportCaster Repository Reports
- Running ReportCaster Repository Reports
- ReportCaster Repository Tables

Enhancements to the ReportCaster Repository have been made to account for the increased functionality of ReportCaster, such as the ability to schedule against multiple WebFOCUS Reporting Servers.

The following sections provide information about how to run reports that enable you to retrieve information from the ReportCaster Repository. It also describes the contents and primary keys of each table within the repository.

ReportCaster Repository Reports

The following reports access the ReportCaster Repository and are available from the ReportCaster API sample page:

- Distribution Lists By Method (rcdlist) - Select all methods or a particular method (e-mail, FTP, or printer)
- Distribution Lists By Owner (rcabook) - You can drill-down on the information within each Distribution List.
- Schedule Contacts (rcnotify) - All schedules that send notification.
- No Contacts (rcnonote) - All schedules that do not send notification.
- ReportCaster Owner and Execution IDs (rcuser) - You can drill-down for schedules and Distribution Lists for each owner.
- Alert Schedules (rcalert) - All schedules that test for an alert condition.

There is no security built into these reports. If you run a report to see all Distribution Lists By Method (rcabook), you will see all public and private Distribution Lists. However, you can modify the code of these sample reports to apply the level of security appropriate for your organization.

Running ReportCaster Repository Reports

ReportCaster Repository reports are located in the ibi/apps/ibisamp subdirectory of the Web server on which WebFOCUS is installed. You can run these reports by:

- Importing the reports into any domain and then adding the reports to the domain's Standard Reports folder.
- Running them from the ReportCaster API sample page. You may access the ReportCaster API sample page by entering the following URL

  `http://hostname/rcaster/samples/rbalogon.htm`

  where:

  hostname

  Is the host name of the Distribution Server.

Coding Considerations for Relational Databases

ReportCaster Repository reports run for all FOCUS repositories without any modifications to the programs. However, when running these sample reports using a relational database, you must manually modify the following procedures located in the ibi/apps/ibisamp directory:

- rcabook
- rcuser
- rcdlist
- rcudets
- rcdldet
- rcnonote
- rcnotify
- rcalert

In each procedure, remove the code beginning with the USE command and ending with the END command. Next, run rccrsyn.fex to create synonyms for the ReportCaster Repository tables. Specify a SQL Server (mss), DB2 (db2), or Oracle (ora) repository.

In addition, you must also remove the following tables from EDAMFD (z/OS only):

- BOTSCHED
- BOTPARMS
- BOTTASK
- BOTTSKEX
- BOTUPROF
- BOTGRP
- BOTGUSER
- BOTADDR
- BOTDEST
- BOTLOG

- BOTLOG2
- BOTTELL
- BOTJOURN
- BOTPACK

Replace these tables by running the Synonym Wizard. For more information about the Synonym Wizard, see your iWay Server documentation.

ReportCaster Repository Tables

ReportCaster uses a repository of tables that store distribution and scheduling information. At installation, either an SQL-based (recommended) or FOCUS-based repository is created in a selected location. FOCUS Repository tables must reside on the same platform as the WebFOCUS Reporting Server. The Report Library requires an SQL-based repository.

The following is a list of ReportCaster Repository tables, their contents, and primary keys:

Table	Contains	Primary Keys
BOTSCHED	Timing, frequency, and connection information about a particular schedule. Distribution methods (for example, e-mail or FTP), along with supporting information such as Reply Address and location of recipient. Distribution List (if any).	Schedule ID.
BOTTASK	Individual Task information. Includes the name of the Task, the Execution ID for the Task, and the WebFOCUS Reporting Server name. For Managed Reporting Standard Report or My Report Tasks, BOTTASK also lists the folder and domain. There is a BOTTASK record for each Task in a schedule.	Task ID, Packet ID
BOTTSKEX	ReportCaster user ID. Execution ID and password. Contains execution type (WF Server Procedure, MR Standard Report or My Report, File, or URL). Depending on execution type, contains server name (for WF Server Procedures and MR reports), application name (for Files), or server name and port (for URLs).	ReportCaster User ID, Execution ID, server name, server type

Table	Contains	Primary Keys
BOTPARMS	Parameter names and values for each Task.	Schedule ID**,** Task ID, parameter name, and a counter from 1 to *n* for each parameter in a Task.
BOTUPROF	User profiles and capabilities.	ReportCaster user ID
BOTGRP	Group name and description.	Group name
BOTGUSER	User IDs within each group name.	Group name, group user
BOTACCES	Access List names.	Access List name
BOTLIST	User IDs and burst values within each Access List.	Access List name and a counter from 1 to *n* for each member of a particular Access List.
BOTCAT	Library catalog table. Includes one record for each report group. A report group can be burst (contains report group for each burst value) or non-burst (report group exists for each schedule).	Report group
BOTLIB	One record for each physical report stored in the Report Library. Includes version and expiration information.	Report group, report version
BOTADDR	Properties of each Distribution List. For example, its name and whether it is a public or private list.	Distribution List name.
BOTDEST	Recipients and destinations within a Distribution List.	Distribution List name and a counter from 1 to *n* for each member of a particular Distribution List.
BOTLOG	General log information such as the start time and end time for each execution of a job.	Process number that is generated when a job is run.
BOTLOG2	Detailed log records for all jobs that have run.	Process number and a counter that runs from 1 to *n* for each detail log record for a particular process number.

Table	Contains	Primary Keys
BOTTELL	User subscription information.	Subscriber's e-mail ID, ReportCaster user ID.
BOTJOURN	A journal of all Two-Way events.	Process number that is generated when e-mail activity occurs on the mail Listener. Time of e-mail activity.
BOTPACK	Contains the packet ID, which uniquely identifies each schedule.	Packet ID.

APPENDIX C

Tips and Techniques for Coding a ReportCaster Report

Topics:

- Editing WebFOCUS Procedures
- Using an Ampersand or a Single Quotation Mark
- HTML and Drill-Down Reports
- Using -HTMLFORM
- Distributing a TOC Report Using ReportCaster
- Data Visualization
- Using the GRAPH FILE Command
- Distributing a Graphic in a PDF Report
- Financial Modeling Language
- Using the &&KILL_RPC Flag

This appendix provides tips and techniques that will enable you to review existing WebFOCUS reports and develop new reports that meet the requirements for scheduling and distribution using ReportCaster.

Among the coding techniques discussed are best practices for coding reports that will be distributed as HTML and graphical output, and examples for using WebFOCUS commands that were previously unavailable for use with ReportCaster (for example, -HTMLFORM and GRAPH FILE). Additionally, information is included about distributing drill-down reports, creating Financial Modeling Language (FML) reports for ReportCaster distribution, and using the &&KILL_RPC flag in a pre-processing procedure to stop ReportCaster processing.

For more information about coding WebFOCUS reports, see the *Creating Reports with WebFOCUS Langauge* manual.

Editing WebFOCUS Procedures

When editing WebFOCUS procedures to be scheduled using ReportCaster, Information Builders recommends using Notepad instead of WordPad. This is because WordPad places blank spaces at the end of lines that WebFOCUS cannot parse properly. This is most likely to happen when using the cut and paste technique.

Using an Ampersand or a Single Quotation Mark

In ReportCaster, the following fields allow the use of an ampersand (&) and a single quotation mark (‘):

- Job description.
- Mail subject.
- Company.
- FTP (scheduled from Managed Reporting) report name.
- Managed Reporting folder name.
- Notify subject.

The technique for Using an Ampersand (&)—Place a concatenation sign after the & and before the next character in the string. For example:

```
-SET &COMPANY='AT&|T';
-TYPE &COMPANY
```

The technique for Using a Single quotation mark (')—When a value contains a ', use two single quotation marks (for example, O"Brien). Within a quoted string, two single quotation marks (") are interpreted as one single quotation mark.

Note: Although Information Builders recommends using this technique, you can also use the CTRAN subroutine to change one character to another.

Syntax How to Use CTRAN to Translate One Character to Another

```
CTRAN (inlen, infield, decfrm, decto, output)
```

where:

inlen

Is the integer that specifies the length in characters of the input string.

infield

Is the alphanumeric input string.

decfrm

Is the decimal value of the character to be translated.

decto

Is the decimal value of the character to be used as a substitute for decfrm.

output

Is the resulting alphanumeric output string.

To use this subroutine, you need to know the decimal value of the characters in internal machine representation. Printable EBCDIC or ASCII characters and their decimal values are listed in character charts.

Example Using CTRAN to Change a Single Quotation Mark to a Double Quotation Mark

You can use the following code to change a single quotation mark to a double quotation mark:

```
TABLE FILE TRAIN
PRINT TRAIN AND COMPUTE
ALT_MOD/A20 = CTRAN(20, MODEL, 39, 34, ALT_MOD);
BY COUNTRY
END
```

HTML and Drill-Down Reports

When distributing an HTML or drill-down report, you must use the BASEURL command in the scheduled procedure to set a fully-qualified URL. A fully-qualified URL is needed so that the user viewing the report will have access to the URL on the Web server where the WebFOCUS Client is installed. This will enable the user to run the HTML or drill-down report, view images (.gifs or .jpegs), resolve hyperlinks, and apply external Cascading Style Sheets (CSS).

Note: External Cascading Style Sheets (CSS) files must be fully-qualified and accessible to the user receiving the report.

To run a drill-down report, a user must be able to access the Web server and the WebFOCUS Reporting Server. If the WebFOCUS Reporting Server is running in secured mode, the user must have a valid Execution ID and password to run the report. If the user does not have a valid user ID and password, an authentication message appears.

Do not use localhost as the host name when performing drill-downs. When the report gets sent to the user's machine, localhost refers to the machine the user is on. To be able to run the drill-down request, the request must be sent to the host name of the Web server where the WebFOCUS Client is installed.

Using -HTMLFORM

In the deployment environment, the -HTMLFORM command enhances the functionality of your Web page by enabling you to include HTML commands in your procedures. You can use all standard HTML elements in your Web page, including character styling, hyperlinks, graphic images, tables, forms, and frames. The content must be self-contained in a single answer set.

Example Using -HTMLFORM to Save Two Tabular Reports in an HTML Form

```
TABLE FILE CENTORD
SUM
   LINEPRICE
BY
   PRODCAT AS 'Product Category'
HEADING
" "
" "
ON TABLE SET PAGE-NUM OFF
ON TABLE NOTOTAL
ON TABLE SET ONLINE-FMT HTML
ON TABLE SET STYLE *
.....
.....
ENDSTYLE
ON TABLE HOLD AS HOLD1 FORMAT HTMTABLE
END
TABLE FILE CENTORD
SUM LINEPRICE AS 'Sales'
BY STORE_CODE AS 'Store'
BY PRODCAT AS 'Category'
WHERE STORE_CODE EQ '4003NY' OR
STORE_CODE EQ '1003CA'
HEADING
" "
" "
ON TABLE SET PAGE-NUM OFF
ON TABLE NOTOTAL
ON TABLE SET ONLINE-FMT HTML
ON TABLE SET STYLE *
.....
.....
ENDSTYLE
ON TABLE HOLD AS HOLD2 FORMAT HTMTABLE
END
-HTMLFORM SALES
```

The following HTML form can be distributed by ReportCaster:

Century Corp Sales Analysis

Sales by Category

Product Category	Line Total
CD Players	$85,034,454.74
Camcorders	$739,819,546.58
Cameras	$24,856,684.65
DVD	$112,057,864.09
Digital Tape Recorders	$81,204,933.20
PDA Devices	$490,694,824.12
VCRs	$59,954,512.81

Sales By Category For Select Stores

Store	Category	Sales
1003CA	CD Players	$555,790.98
	Camcorders	$8,755,177.98
	Cameras	$361,298.05
	DVD	$2,821,530.46
	Digital Tape Recorders	$1,854,704.60
	PDA Devices	$11,502,951.64
	VCRs	$700,307.48
4003NY	CD Players	$264,394.76
	Camcorders	$2,306,444.02
	Cameras	$173,836.22
	DVD	$1,621,890.92
	Digital Tape Recorders	$679,284.00
	PDA Devices	$4,164,274.76
	VCRs	$33,866.80

Distributing a TOC Report Using ReportCaster

You can enhance navigation within a large HTML report by adding a dynamic HTML-based Table of Contents (TOC). To take advantage of this feature, the report must contain at least one vertical sort (BY) field. If you include more than one sort field in a report, the hierarchy is determined by the order in which the sort fields are specified in the request. To add a TOC for a lower-level sort field, you must also add a TOC for its parent.

The TOC displays, as hyperlinks, all values of the first (highest-level) vertical sort field, as well as the values of any lower level BY fields that you designate for inclusion. Unless otherwise specified in the request, a new page begins when the highest-level sort field changes.

Note: Bursting a TOC-enabled report using ReportCaster is not supported.

To distribute a TOC report using ReportCaster, add the following code:

```
SET BASEURL=http://hostname/
```

where:

hostname

Is the host name of the Web server on which the WebFOCUS Client is installed.

For example:

```
SET BASEURL=http://hostname/
SET PAGE-NUM=OFF
TABLE FILE CENTORD
HEADING
"Sales Report"
" "
SUM LINEPRICE AS 'Sales'
BY PLANT
BY PRODCAT
ON TABLE SET HTMLCSS ON
ON TABLE SET STYLE *
TYPE=REPORT, GRID=OFF, FONT=ARIAL, SIZE=12, $
TYPE=HEADING, SIZE=16, $
ENDSTYLE
ON TABLE SET COMPOUND BYTOC
END
```

The following HTML TOC output can be distributed by ReportCaster:

Sales Report

Manufacturing Plant	Product Category:	Sales
BOS	CD Players	$22,571,367.04
	Camcorders	$206,055,067.72
	Cameras	$8,391,548.06
	DVD	$27,348,509.88
	Digital Tape Recorders	$23,059,956.89
	PDA Devices	$143,842,219.22
	VCRs	$17,655,690.92

Data Visualization

To make your HTML reports more powerful, you can insert visual representations of selected data directly into the report output. These visual representations are in the form of vertical or horizontal bar graphs that make relationships and trends among data more obvious. Data visualization graphs can be used with a Managed Reporting report or WF Server Procedure.

For example, the following code retrieves information from the CENTHR data source:

```
SET BASEURL=http://hostname:port
TABLE FILE CENTHR
SUM EMP_COUNT
BY PLANT
ON TABLE SET STYLE *
GRAPHTYPE=DATA, FIELD=EMP_COUNT, GRAPHCOLOR=RED,$
END
```

hostname:port is the host name (or IP address) and port number of the Web server on which the WebFOCUS Client is installed. If the port number is 80 (the default), you may omit the colon and port number. For example,

hostname

If the port number is not 80, use a colon as a delimiter and then specify the port number. For example,

hostname:81

The resulting output, which can be distributed by ReportCaster, displays in graph format:

PAGE 1

Plant Location	Employed Count	
BOS	18	
DAL	25	
LA	58	
ORL	30	
SEA	14	
STL	6	

Procedure How to Use Data Visualization on a Web Server Without WebFOCUS

To use data visualization files on a Web server without WebFOCUS installed on it, you must:

1. Create a Web server alias for /ibi_html on the Web server. For more information about creating the WebFOCUS /ibi_html alias, see the *WebFOCUS and ReportCaster Installation and Configuration* manual for your platform.
2. Create the vis subdirectory under the /ibi_html directory.
3. Copy the GIF files from the Web server on which WebFOCUS is installed into your *outside*/vis/ directory (where *outside* is the name of the Web server on which WebFOCUS is not installed).
4. Execute "SET BASEURL=http://*outside*/" in the procedure that produces the report you want to distribute

Note:

- SET BASEURL will also work against a server outside the firewall that has a full WebFOCUS installation.
- BASEURL must point to the top-level Web server URL, since the HTML generated using data visualization refers to the GIF files using URLs that start with /ibi_html

Using the GRAPH FILE Command

Most TABLE requests can be converted into GRAPH requests by simply replacing the TABLE FILE command with the GRAPH FILE command. The only limitations are those inherent in the nature of the graphic format. When a TABLE request is converted in this manner, the various phrases that make up the body of the request determine the format and layout of the graph. The type of graph produced by a GRAPH FILE request depends on the display command used (SUM or PRINT), and the sort phrase(s) used (ACROSS or BY).

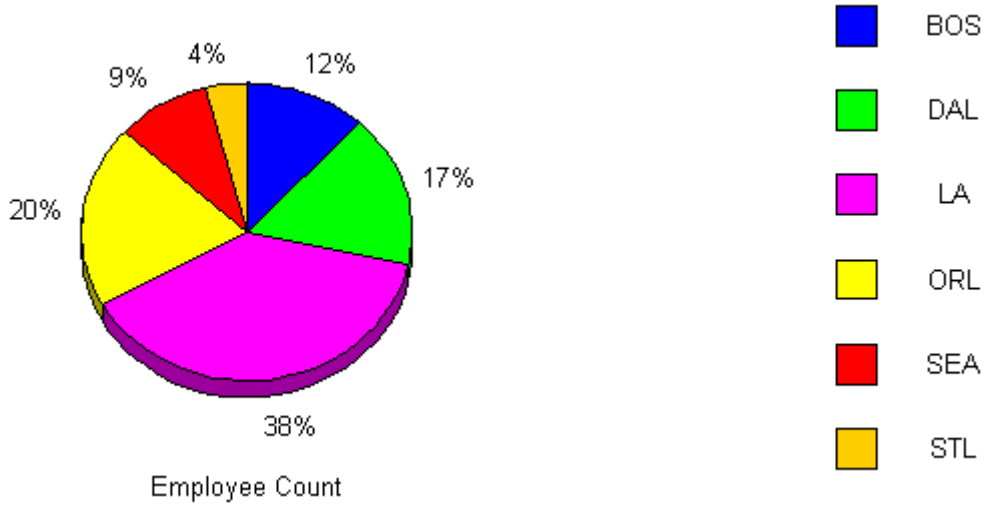
The internal graph engine used by WebFOCUS has been integrated into the Distribution Server. This means that when the data for the GRAPH FILE request is sent back to the Distribution Server, it will create and distribute the graph. When using the GRAPH FILE command, you must include SET GRAPHEDIT=SERVER syntax to return data to the ReportCaster Distribution Server. Bursting is supported and is performed on the second BY field in the GRAPH FILE request.

Example Creating a Report That Displays Output as a Pie Graph

You can use Graph Assistant to create a report that displays output as a pie graph:

```
SET LOOKGRAPH=PIE
SET GRAPHEDIT=SERVER
SET GRID=ON
SET BARNUM=ON
SET 3D=OFF
SET VERO=ON
GRAPH FILE CENTHR
SUM EMP_COUNT
ACROSS PLANT
ON GRAPH SET GRAPHSTYLE *
.....
.....
ENDSTYLE
ON GRAPH SET STYLE *
ENDSTYLE
END
```

The following pie graph output can be distributed by ReportCaster:



Distributing a Graphic in a PDF Report

You can distribute a graphic using ReportCaster by peforming the following steps:

1. **Windows NT, Windows 2000, or Windows XP:** Perform manual configurations based on your WebFOCUS environment.

   UNIX: Export the DISPLAY and IBIJAVAPATH variables.

   OS/390: This feature is not supported on OS/390 platforms.

   For more information about these steps, see the *WebFOCUS and ReportCaster Installation and Configuration* manual for your platform.

2. Create the GIF file (in a temporary directory on the WebFOCUS Reporting Server) and then insert the GIF file in the header or body of a PDF report. For more information, see *Creating and Inserting the GIF File* on page C-10.

3. Create a schedule using ReportCaster. This schedule can be distributed to one or many recipients depending on what you specify. For more information, see *Distributing a PDF Report With an Embedded GIF File Using ReportCaster* on page C-13.

Note: Developer Studio and Managed Reporting allow users to create a GIF file in a directory and insert it into a PDF report. However, manual configuration is required to set the IBIJAVAPATH system environment variable since no GUI interface is available.

Creating and Inserting the GIF File

The following syntax and example sections describe how to create a GIF image and insert it in a PDF report. These sections apply to Windows NT, Windows 2000, Windows XP, and UNIX.

Syntax How to Create a GIF Image and Insert it in a PDF Report

Type the following commands and press the Enter key after each command line:

```
GRAPH FILE Master_File
SUM FIELD1 FIELD2...FIELDN
ACROSS FIELDK
ON GRAPH HOLD AS FILENAME FORMAT GIF
END
TABLE FILE Master File
...
ON TABLE SET STYLE *
TYPE=REPORT, IMAGE=FILENAME.gif,
POSITION=(RIGHT DOWN), SIZE=(WIDTH HEIGHT),$
ENDSTYLE
ON TABLE PCHOLD FORMAT PDF
END
```

where:

Master File

Is the name of the Master File you want to report against.

FIELD1 FIELD2...FIELDN

Are fields in the Master File.

FILENAME

Is the name of the GIF file. If you want to prompt for a GIF file name, include an amper variable such as &FILENAME in the procedure.

...

Is where the procedure is included.

RIGHT DOWN

Are integer values that specify the position of the GIF file.

WIDTH HEIGHT

Are integer values that specify the size of the GIF file.

Important:

- To insert the GIF image in the report heading or footing, insert the TYPE=HEADING or TYPE=FOOTING syntax on the same line where the GIF image is specified.
- To create the GIF file in a permanent location, specify the FILEDEF command at the top of the graph request. For example,

  FILEDEF *FILENAME* DISK *DRIVE*:\...*FILENAME.GIF*
- To insert a GIF image that resides in a permanent location into the PDF report, you must provide the fully-qualified path to the GIF file. For example,

  TYPE=REPORT, IMAGE=*DRIVE:*\...*FILENAME.GIF*

  where:

  DRIVE:\...\

  Is the letter of the drive and the system path where the GIF file is located. The WebFOCUS Reporting server must be installed on this drive.

Example Creating a GIF Image and Inserting it in a PDF Report

1. Create the remote procedure in a location accessible to EDAPATH. For example,

```
GRAPH FILE CAR
SUM SALES
BY COUNTRY
ON GRAPH HOLD AS CARGIF FORMAT GIF
END
TABLE FILE CAR
SUM SALES NOPRINT
BY COUNTRY
ON TABLE SET STYLE *
TYPE=REPORT, IMAGE=CARGIF.gif
POSITION=(2 0), SIZE=(5 3), $
ENDSTYLE
ON TABLE PCHOLD FORMAT PDF
END
```

   Note: To insert the GIF file in the header or footer of the PDF report, set TYPE to HEADING (or FOOTING) instead of REPORT in the FOCUS stylesheet.

   For more information on running remote procedures, see the *WebFOCUS Developing Reporting Applications* manual.

2. Save the procedure as GIFTEST.

3. Create an HTML file that calls the GIFTEST procedure from a hyperlink. For example,

```
<HTML>
<HEAD>
<TITLE> Inserting a GIF Image in A PDF Report </TITLE>
</HEAD>
<BODY>
<H4 ALIGN=CENTER>Car Sales Report by Country</H4>
<HR>
<P><FONT SIZE=+2></FONT></P>
<UL TYPE=SQUARE
<LI><A HREF="/cgi-bin/ibi_cgi/ibiweb.exe?IBIF_ex=giftest">
<H4 ALIGN=CENTER>Click Here to Launch A PDF Report with an Embedded
GIF Image</H4></A>
</UL>
</BODY>
</HTML>
```

You can now run the report from Managed Reporting or distribute the report using ReportCaster.

Example Running the Procedure as a Managed Reporting Standard Report

To run the procedure as a Managed Reporting Standard Report, add the -mrnoedit syntax to the beginning of the style sheet line containing the IMAGE parameter. The image that is specified must reside on the WebFOCUS Reporting Server. For example,

```
GRAPH FILE CAR
SUM SALES
BY COUNTRY
ON GRAPH HOLD AS CARGIF FORMAT GIF
END
TABLE FILE CAR
SUM SALES NOPRINT
BY COUNTRY
ON TABLE SET STYLE *
-MRNOEDIT TYPE=REPORT, IMAGE=CARGIF.gif, POSITION=(2 0), SIZE=(5 3), $

ENDSTYLE
ON TABLE PCHOLD FORMAT PDF
END
```

The -MRNOEDIT syntax instructs the WebFOCUS Client to not process the code prior to sending it to the WebFOCUS Reporting Server. The -MRNOEDIT syntax is not case sensitive and it can be used on a single line or a block of lines using the following syntax:

Single line:

```
-MRNOEDIT FOCUS COMMAND
```

Multiple lines:

```
-MRNOEDIT BEGIN
FOCUS COMMAND
-MRNOEDIT END
```

Distributing a PDF Report With an Embedded GIF File Using ReportCaster

After the GIF image is created and embedded into a PDF report, and you have saved the PDF report as a Managed Reporting Standard Report, you can distribute it using ReportCaster. Be sure to use the PDF report format when creating the schedule. For more information about scheduling a report, see Chapter 4, *Creating and Maintaining a Schedule*.

Financial Modeling Language

The Financial Modeling Language (FML) is used for creating, calculating, and presenting financially oriented data such as balance sheets, consolidations, or budgets. These reports are distinguished from other reports because calculations are inter-row as well as inter-column.

The following guidelines must be followed when scheduling Financial Modeling Language (FML) reports that use the POST and PICKUP commands. Separate the POST and PICKUP steps into two procedures:

- **POST** is required to save the results of the FML report. The POST command should be used within a pre-processing step. The ON TABLE HOLD syntax must be included in a POSTed report to *not* generate a report during pre-processing execution. This procedure must reside on the WebFOCUS Reporting Server.
- **PICKUP** is required to retrieve POSTed data. It is the procedure to schedule. This procedure may reside on the WebFOCUS Reporting Server, in a Managed Reporting Repository, or in a local application.

Note: Bursting an FML report is not supported since there is no BY field.

Example Using the POST Command in an FML Request

The following code creates an FML report and POSTs two tag rows to the LEDGEOUT workfile. This procedure must reside on the WebFOCUS Reporting Server.

```
FILEDEF LEDGEOUT DISK D:\IBI\LEDGEOUT.DAT
DEFINE FILE LEDGER
CUR_YR/I5C=AMOUNT;
LAST_YR/I5C=.87 * CUR_YR - 142;
END

TABLE FILE LEDGER
SUM CUR_YR LAST_YR
FOR ACCOUNT
1100 LABEL AR POST TO LEDGEOUT OVER
1200 LABEL INV POST TO LEDGEOUT OVER
RECAP CA=R1 + R2; AS 'ASSETS'
ON TABLE HOLD
END
```

Example Using the PICKUP Command in an FML Request

The following code retrieves the POSTed data from the LEDGEOUT workfile and uses it in the RECAP calculation. The output from this procedure will be distributed by ReportCaster.

```
FILEDEF LEDGEOUT DISK D:\IBI\LEDGEOUT.DAT
DEFINE FILE LEDGER
CUR_YR/I5C=AMOUNT;
LAST_YR/I5C=.87 * CUR_YR - 142;
END

TABLE FILE LEDGER
SUM CUR_YR LAST_YR
FOR ACCOUNT
1010 TO 1030 AS 'CASH' LABEL CASH OVER
DATA PICKUP FROM LEDGEOUT AR
AS 'ACCOUNTS RECEIVABLE' LABEL AR     OVER
DATA PICKUP FROM LEDGEOUT INV
AS 'INVENTORY' LABEL INV              OVER
BAR                                   OVER
RECAP CUR_ASSET/I5C = CASH + AR + INV;
END
```

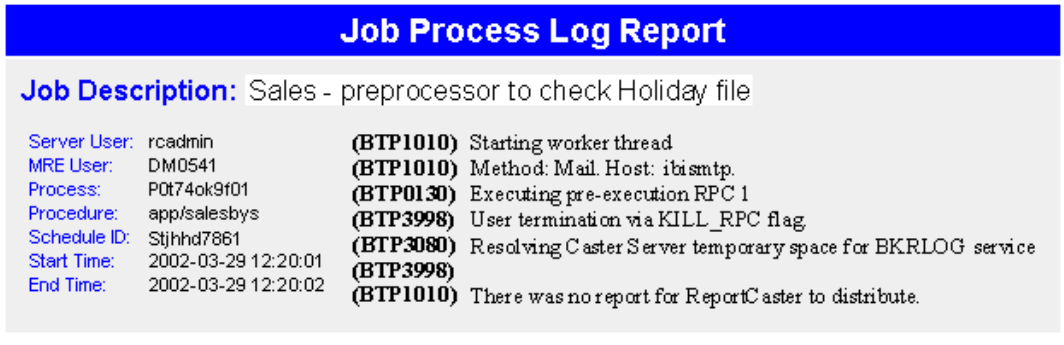
Using the &&KILL_RPC Flag

The &&KILL_RPC flag is a ReportCaster amper variable that you can use in a pre-processing procedure when you want to stop ReportCaster processing and not execute the scheduled procedure based on a condition. The condition may be the existence of a data extract, or a restriction on the days that schedules are allowed to run. The code to evaluate the condition can be a combination of Dialogue Manager and FOCUS supported by the WebFOCUS Reporting Server. The &&KILL_RPC amper variable must be set using Dialogue Manager.

The following sample code has been set up to run as a pre-processing procedure. It will stop a request if today's date is in a list of holiday days.

```
-*
-* TEST TODAYS DATE AGAINST A CALENDAR OF BUSINESS EXCEPTION DAYS
-* The assumption here is that the dates in the data file are in
-* ascending order
FILEDEF HDAYRCLB DISK C:\IBI\APPS\MIPS\HDAYRCLB.DAT
-RUN
-*
-SET &TDAYX = &YYMD;
-SET &&KILL_RPC = 'N';
-*
-*set PREV_DATE to some value that will cause the first IF to continue
-* the loop
-SET &PREV_DATE = 00000101;
-REPEAT DATELOOP WHILE &&KILL_RPC NE 'Y';
-READ HDAYRCLB &FILEDATE.I8
-SET &&KILL_RPC = IF &TDAYX EQ &FILEDATE THEN 'Y' ELSE 'N';
-IF &PREV_DATE GE &FILEDATE THEN GOTO ENDME;
-SET &PREV_DATE = &FILEDATE;
-DATELOOP
-ENDME
```

The following information displays in the Job Process Log Report. Note the "Executing pre-execution RPC 1" and "User termination via KILL_RPC flag" entries.



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