

ibiTM WebFOCUS[®]

ReportCaster Guide

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Introducing WebFOCUS® ReportCaster

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

The WebFOCUS ReportCaster tools are web-based Rich Internet Application facilities, through which you manage the WebFOCUS ReportCaster Configuration and the ability to create and access schedules, distribution lists, access lists and log reports, and Report Library reports. Access to each WebFOCUS ReportCaster tool is controlled by the ibi™ WebFOCUS® Client security authorization model.

About WebFOCUS® ReportCaster

Through WebFOCUS ReportCaster, you can schedule a report to run at specific times or intervals, which can then be distributed through email or FTP servers, to printers, or to the WebFOCUS Repository that stores Report Library and Managed Reporting reports. Reports distributed to the Report Library or the WebFOCUS Repository are stored in a database and can only be accessed by authorized users. You have the option to distribute the report to a single address or to a group of recipients using the distribution list, distribution file, or dynamic list options.

You can distribute an entire report or you can break a report into sections using the WebFOCUS ReportCaster burst feature. When you burst a report, you send only the relevant report sections specified.

Access to each of the WebFOCUS ReportCaster tools is controlled by a WebFOCUS security operation. This enables administrators to control the users who are authorized to access WebFOCUS ReportCaster to perform the following operations.

- Create and maintain a Distribution List.
- Create and maintain a schedule.
- Create and maintain Library Access Lists for Report Library reports.
- Track the status of a schedule.

- View and delete schedule log information.
- Manage the WebFOCUS ReportCaster configuration.

Report Library. The Report Library enables you to store and manage content distributed by WebFOCUS ReportCaster for rapid retrieval and future use.

WebFOCUS ReportCaster API. There is a full WebFOCUS ReportCaster API that employs both Java® technology and Web Services.

WebFOCUS® ReportCaster Overview

- **Schedule Tool.** The the options to define the parameters of a schedule, such as when a report procedure (FEX) will run, what format the output takes, and where the output is distributed. For more information about the Basic Scheduling tool, see [Basic Scheduling tool](#).
- **Distribution List.** A list stored in the Repository that allows you to specify multiple recipients to whom the report output of a schedule is distributed. For more information, see [Distribution Lists](#).
- **Log Report.** This report enables you to view information about a distributed job, such as whether or not the job executed successfully, when the report output was distributed, in what format the report output was sent, and the method of distribution. For more information about Log Reports, see [Tracking Schedules](#).
- **WebFOCUS ReportCaster Explorer.** The Explorer interface enables users to list and review all WebFOCUS ReportCaster items of a specific type at once. Each item type (schedules and distribution lists) lists column information specific to the selected item type.
- **WebFOCUS ReportCaster Status.** The Console is the interface that provides access to the WebFOCUS ReportCaster administration tools (Server Status, Job Status, Configuration, and Global Update) and schedule management tools for WebFOCUS ReportCaster.

Accessing WebFOCUS® ReportCaster Tools From the ibi WebFOCUS Home Page

After you sign in to WebFOCUS, you can access the Basic Scheduling tool, Advanced Scheduling tool, Distribution List tool, Access List tool, ReportCaster Console, and ReportCaster Explorer.

Access the Basic Scheduling Tool From the ibi WebFOCUS Home Page

Procedure

1. Navigate to the Resources tree and click a folder to display your report procedures.
2. Right-click the report procedure that you want to schedule.
The shortcut menu displays.
3. Point to **Schedule**, and choose the distribution method that you want your schedule to use.

Access the Advanced Scheduling Tool From the ibi WebFOCUS Home Page

Procedure

1. Navigate to the Resources tree and click a folder.
2. On the actions bar, click the **More** button.
The Schedule button displays.
3. Click the **Schedule** button.
The Advanced Scheduling tool displays.

Access the Distribution List Tool From the ibi WebFOCUS Home Page

Procedure

1. Navigate to the Resources tree and click a folder.
2. On the actions bar, click the **More** button.
The Distribution List button displays.
3. Click the **Distribution List** button.
The Distribution List tool displays.

Access the Access List Tool From the ibi WebFOCUS Home Page

Procedure

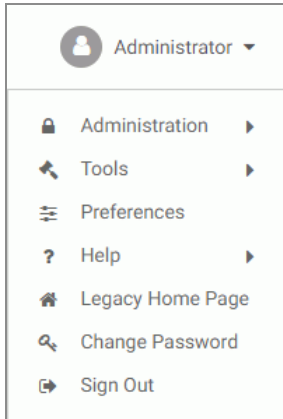
1. Navigate to the Resources tree and click a folder.
2. On the actions bar, click the **More** button.
The Access List button displays.
3. Click the **Access List** button.
The Access List tool displays.

Access the WebFOCUS ReportCaster Explorer Tool From the ibi WebFOCUS Home Page

Procedure

1. Click the User menu, in the upper-right corner of the WebFOCUS Home Page, as

shown in the following image.



Note: You may need to expand your browser window to see the User menu.

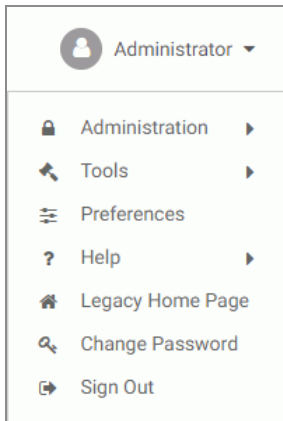
2. Point to the **Tools** option to display the Tools menu.
3. In the Tools menu, click **ReportCaster Explorer**.

The ReportCaster Explorer tool displays.

Access the ReportCaster Console Tool From the ibi WebFOCUS Home Page

Procedure

1. Click the User menu, in the upper-right corner of the WebFOCUS Home Page, as shown in the following image.



Note: You may need to expand your browser window to see the User menu.

2. Point to the **Administration** option to display the Administration menu.
3. In the Administration menu, click **Administration Console**.
4. Click the **ReportCaster** tab.

The ReportCaster Console tool displays.

Creating a Schedule in a Self-Service Installation

With a Self-Service installation in WebFOCUS 8, the schedules and distribution lists, access lists, and library content created by users are stored in the WebFOCUS repository. They are displayed in folders in the Resources tree when you sign in to WebFOCUS. The folders in the Resources tree are real folders that must be created before you can store content in them.

Once a folder is created, you can launch the Advanced Scheduling tool by right-clicking on the folder. Point to the **New** option and then click **Schedule** to launch the tool. Another way to launch the scheduler is through a schedule button on a report launch page.

The purpose of the following process is to define the steps that you will need to follow in order to create a schedule in a Self-Service installation.

i Note: You will need access to a number of manuals to complete this process. These manuals include ibi™ WebFOCUS® *Security and Administration* and *Business Intelligence Portal*.

Create a Schedule in a Self-Service Installation

Procedure

1. Sign in to WebFOCUS with an account that is authorized to create folders and schedules. For more information, see the ibi™ WebFOCUS® *Security and Administration* manual.
2. Create a folder using the following steps:
 - a. From the left navigation pane in the Resources tree, right-click **Domains**.
 - b. Click **New** and then click **Folder**.
 - c. Enter a **Title** and optionally a **Summary**.
3. Right-click on the folder, click **New**, and then click **Schedule**.

i Note: The tools options on the context menu and the file types that can be created are based on the WebFOCUS Client license. The report development tool that is available from the context menu for a ReportCaster Self-Service license code is the Text Editor, which allows only the .HTM file type.

i Note: For customers using legacy licenses, the tools options on the context menu and the file types that can be created are based on the WebFOCUS Client license. For customers using the Golden Key license, all of the tools options on the context menu and file types that can be created are available. The report development tool that is available from the context menu for a ReportCaster Self-Service license code is the Text Editor, which allows only the .HTM file type.

The Advanced Scheduling tool displays.

Authorized users will be able to launch the scheduling tool from a folder to create a

schedule. For more information on security, see the ibi™ WebFOCUS® *Security and Administration* manual.

Save a Schedule Created From the Launch Page

Procedure

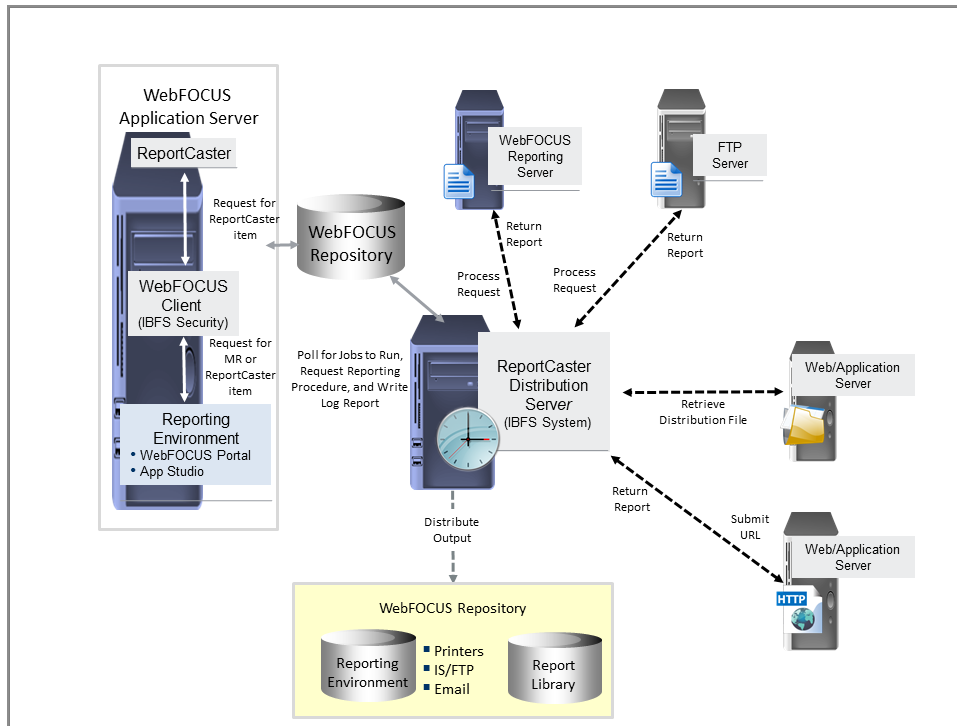
1. Launch the scheduling tool from your launch page or access the scheduling functionality in the Advanced Scheduling tool.
2. Once you have defined the criteria for the schedule, click **Save & Close** to navigate to the folder where you would like to keep the schedule. If a folder does not exist, refer to Step 1 in [Creating a Schedule in a Self-Service Installation](#).

Section 508 Compliance

For information on specific accessibility requirements for ReportCaster, see the *WebFOCUS Release Guide*.

ReportCaster Processing

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



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

The WebFOCUS® WebFOCUS Reporting Server processes a scheduled request, retrieves the data, and returns the report to the Distribution Server, which distributes the output. ReportCaster supports multiple Reporting Servers (specified in the ReportCaster Configuration tool), and one Repository (specified in the Application Settings folder within the Repository).

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 Repository that have a next run time less than or equal to the current time. Once the scheduled job runs, the NEXTRUNTIME is updated to the next instance that the schedule is set to run.

ReportCaster Processing of a Scheduled Job

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 in 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 in the queue when the next schedule cycle begins, these jobs are reprioritized to include new jobs entering the queue.
2. When a session (thread) to the WebFOCUS Reporting Server is available, the Distribution Server dynamically retrieves schedule, parameter, and alert information from the WebFOCUS Repository. The number of concurrent threads available for job dispatching is controlled by the Maximum Thread parameter setting in the ReportCaster Console Configuration tool. Each WebFOCUS Reporting Server that is configured in ReportCaster has its own thread allocation. In addition, threads can be allocated for jobs that do not use a WebFOCUS Reporting Server. The maximum number of threads is the total of these separate thread settings. Additionally, reports (WebFOCUS Reporting Server Procedures, Standard Reports, and My Reports) are packaged for submission to the IBFS system for security and WF Client configuration processing. The IBFS system submits the scheduled job to the WebFOCUS Reporting Server.
3. When the scheduled job is a:
 - **Procedure (WebFOCUS Server Procedure or Managed Reporting procedure).** The retrieved reports are packaged for submission to a WebFOCUS Reporting Server. When ReportCaster prepares and submits a scheduled job for WebFOCUS Server Procedures or WebFOCUS reports (Managed Reporting), it sends commands to the IBFS system to submit to the WebFOCUS Reporting Server. Resource Analyzer, which is used to track and monitor requests submitted to the Reporting Server and resources used to create the report that is distributed, then retrieves these commands for the purpose of monitoring the resources used to create the report. The WebFOCUS Reporting Server runs the procedure, retrieves the data, creates the report, and returns the report to the IBFS system, which returns it to the Distribution Server. The Distribution Server then processes the distribution information and distributes the report. For graph requests, the data is returned to the Distribution Server, which creates the graph image and distributes it.

i Note: You can specify that certain commands are to be run prior to the execution of a scheduled job by using the Universal Profile setting in the WebFOCUS Administration Console.

- **URL.** The Distribution Server submits the URL to a web server, which runs the URL. The content is then sent back to the Distribution Server, which distributes it.
 - **File.** The Distribution Server accesses its mapped drives to retrieve the file, which it then distributes.
 - **FTP.** The Distribution Server accesses an FTP server and retrieves the report output, which it then distributes.
 - **WebFOCUS Schedule.** Based on the option the user has selected, the Distribution Server either runs the called schedule immediately before any other queued jobs, or adds the called schedule to the queue in respect to its priority.
4. The Distribution Server distributes scheduled output as an email message, through FTP or SFTP, to a printer, as a report in a Managed Reporting (WebFOCUS Repository) folder, or to the Report Library. You can also distribute the scheduled output to a fax machine using a third-party email to fax provider.

WebFOCUS Server Procedures and Managed Reporting support bursting, which enables you to send portions of a report to specific recipients. If you are distributing a burst tabular report, the burst value is determined by the first BY field. If you are distributing a burst 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.

5. 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 WebFOCUS Repository.

Note: The logging process has been modified so that messages are written to the WebFOCUS Repository as they are available, rather than all at once at the end of a schedule. ReportCaster log information is written to the log tables as the schedule progresses. As a result, you can run a log report while a schedule is running to determine how far a schedule has progressed.

Error conditions in log reports appear in red text and warnings appear in orange text.

6. If notification is requested, the Distribution Server sends an email notification. The name of the mail server that processes the notification email is specified in the Notify Mailhost setting in the Configuration tool. If the mail server is blank, ReportCaster uses the default mail server used to distribute an email schedule, which is specified by the Mailhost setting in the Configuration tool.

Error conditions occur for log reports or notification when:

- A FOC error message is returned to the Distribution Server.
- There is no report to distribute.
- There was an error when communicating to services (Email, FTP, SFTP, printer, Managed Reporting, Repository, Report Library).

Tip: We recommend using different mail servers for notification and email distribution. Using separate mail servers ensures that you still receive notifications if the default mail server falters.

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 authorized users to change the polling interval for the Distribution Server using the Reader Interval setting in the Configuration tool. You can specify an interval from 1 to 999999 minutes.

1. At 9:01 AM, you schedule a job with a start date/start time of today at 12:00 PM and an end date/end time of tomorrow at 3:00 PM. The job is scheduled to run every two hours.
2. At 9:02 AM, 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 PM.

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 PM, 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 Distribution Server queue and the Distribution Server updates its NEXTRUNTIME by two hours so that the NEXTRUNTIME is 2:00 PM.
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 PM, 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 Distribution Server queue and the Distribution Server updates its NEXTRUNTIME by two hours so that the NEXTRUNTIME is 4:00 PM.
7. This process repeats itself. The job will run every two hours until 3:00 PM tomorrow. The last time the job will be put in the run queue is tomorrow at 2:00 PM.

 **Note:** For additional schedule considerations, see [ReportCaster Processing](#).

Time Zone Considerations

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

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

Time Zone Considerations

All times that are displayed in a job schedule are defined in terms of the time zones assigned to them. The time zone defined within a schedule enables the Distribution Server to run scheduled distributions at the appropriate local time, regardless of the time zone in which the Distribution Server is located.

During product installation, the time zone assigned to the operating system of the server on which WebFOCUS is installed is added to the ReportCaster configuration. This time zone appears in all new schedules, by default. However, if the recipients of scheduled distribution content are located outside of that time zone, schedule times must be adjusted to ensure that scheduled content arrives at the appropriate time. To make this adjustment, we recommend that you replace the default time zone with the time zone of the recipients of your content.

By selecting a time zone, you can easily schedule a distribution for a local time that is most convenient to the recipients of the distributed content, without having to factor the time difference into the values you assign to the times in the schedule. For example, if you are working in New York with a default time zone of EST and want to start the distribution of content at 9:00 AM in London, you only need to select the **(UTC) Dublin, Edinburgh, Lisbon, London** time zone entry and set the Start Time to **9:00 AM**. Without this ability, you would be required to calculate the equivalent time in New York, 4:00 AM, and use that value as the Start Time.

Time zones are identified in terms of their offset from Coordinated Universal Time (UTC). These offsets identify the number of hours that a local time zone is ahead of or behind the time zone located at zero degrees longitude. Time zone entries are also identified by time zone name or by cities within the zone. For example, (UTC – 5:00) is identified in one entry as Eastern Time (US & Canada) and in another entry by the South American cities that fall within it, Bogota, Lima, and Quito. Because both entries use the same offset, the same number of hours are used for both entries when converting time values.

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

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

Daylight Saving Time Considerations

When considering the effect of Daylight Saving Time (DST) for jobs scheduled by ReportCaster, the main thing to remember is that 1:59:59 AM is when the time change occurs. As a result, the clock time is set to either 3 AM (when DST begins) or 1 AM (when DST ends).

A simple rule to remember is that regardless of the time change, the schedule interval stays the same. This is because the schedule run time is based on elapsed time rather than the actual clock time.

The following table lists and describes the expected behavior for jobs scheduled by ReportCaster when Daylight Saving Time is in effect.

Interval	Description	For example:
Schedule is set to run once at a specific time, or to run every day, week, month, or year.	The schedule runs at that time, regardless of the time change.	A 9:15 AM schedule will still run at 9:15 AM.
The schedule is set to run every minute or hour when DST begins.	The schedule is advanced by 1 hour.	A schedule that runs every 2 hours: 12:00 AM, 2:00 AM, 4:00 AM, and so on. Will run at the following times: 12:00 AM, 3:00 AM, 5:00 AM, and so on. This occurs because at 1:59:59 AM, the clock is set ahead to 3:00 AM.
The schedule is set to run every minute or hour when DST ends.	The schedule is set back 1 hour.	A schedule that runs every 2 hours: 12:00 AM, 2:00 AM, 4:00 AM, and so on. Will run at the following times: 12:00 AM, 1:00 AM, 3:00 AM, and so on.

Interval	Description	For example:
		This occurs because at 1:59:59 AM, the clock is set back to 1:00 AM.

Establishing a Location for the ReportCaster temp Directory

The ReportCaster temp directory is a staging area for reports. The location of the temp directory is not configurable using the ReportCaster tools. However, you can issue commands to point to a different location, if the default location does not provide enough space to stage your reports.

Point to a Location for the ReportCaster temp Directory

In these directions, the new location of the temp directory on a drive named D on Windows, or a new directory on Unix/Linux.

Procedure

1. Create a path for the new temp directory.

On Windows, the new path can be:

```
D:\ReportCaster\temp
```

On UNIX or Linux, the new path is referred to as:

```
path_to_newdir/ReportCaster/temp
```

The DOS commands for creating this directory are:

```
D:
mkdir ReportCaster\temp
```

The UNIX or Linux commands for creating this directory are:

```
cd path_to_newdir
mkdir /ReportCaster/temp
```

2. Delete the original ReportCaster temp directory.

On Windows, the default original location is:

```
C:\ibi\WebFOCUS82\ReportCaster\temp
```

On UNIX or Linux, the default original location is:

```
/home/user/ibi/WebFOCUS82/ReportCaster/temp
```

The DOS commands for removing this are:

```
cd C: \ibi\WebFOCUS82\ReportCaster
rmdir temp /s /q
```

The UNIX or Linux commands for removing this are:

```
cd /home/user/ibi/WebFOCUS82/ReportCaster
rm -r temp
```

3. Create a virtual directory called **temp** in its place, pointing to the new directory on the D drive:

The DOS command for creating this link is:

```
mklink /D C:\ibi\WebFOCUS82\ReportCaster\temp D:\ReportCaster\temp
```

The UNIX or Linux command for creating this link is:

```
ln -s path_to_newdir/ReportCaster/temp
/home/user/ibi/WebFOCUS82/ReportCaster/temp
```

This creates the configuration changes needed.

Distribution Server Features

Authorized users should be aware of the following Distribution Server activities and features:

- [Distribution Server Startup](#)
- [Recovery](#)
- [Scanback](#)
- [WebFOCUS® ReportCaster Server Configuration Tool](#)

Distribution Server Startup

During startup, the Distribution Server calls the IBFS system to obtain information about how to communicate with the WebFOCUS Repository. If the Distribution Server cannot communicate with the Repository, it is not start. If the Distribution Server does not start, check the Distribution Server startup trace and log files for error messages.

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

Configuration Considerations When the Distribution Server is Installed Separately From the ibi WebFOCUS Client

When the ReportCaster Distribution Server is installed as a stand-alone server, on a machine that is separate from the WebFOCUS Client, you must perform additional manual steps to ensure that configuration changes made through the WebFOCUS Administration Console are available to ReportCaster. This is because the stand-alone Distribution Server does not have access to the WebFOCUS configuration files being updated by the console.

This is especially important when configuring external security for WebFOCUS, since your ReportCaster jobs may not run properly if the Distribution Server is not using the same security settings as the WebFOCUS Client.

The recommended procedure is to make changes to WebFOCUS, as per the documentation, and then test them with a web browser. When the settings are verified, perform the following steps to ensure that the configuration is available to ReportCaster:

1. Copy the webfocus.cfg file and the install.cfg file from the ..\ibi\WebFOCUS909192\config directory to the ..\ibi\WebFOCUS909192\config directory on the stand-alone Distribution Server machine.
2. Copy the odin.cfg file from the ..\ibi\WebFOCUS909192\client\wfc\etc directory to the ..\ibi\WebFOCUS909192\client\wfc\etc directory on the stand-alone Distribution Server machine.
3. Copy the cgivars1.wfs file from the ..\ibi\WebFOCUS909192\client\wfc\etc directory to the ..\ibi\WebFOCUS909192\client\wfc\etc directory on the stand-alone Distribution Server machine.
4. Restart the Distribution Server and test the scheduled job behavior.

Recovery

The purpose of the Recovery parameter is to recover jobs that were placed in the Distribution Server queue, but did not complete schedule execution processing. This could be due to the Distribution Server or WebFOCUS Reporting Server being stopped. You can activate the recovery feature by setting Recovery to ON in the .

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 in the queue, WebFOCUS ReportCaster recovers the job when the Distribution Server becomes available, even if the Recovery parameter is set to OFF. After the job is run and all log records have been written, the RECOVERY field is set back to N.

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 runs only once and will resume running on an hourly basis thereafter.

i Note:

- The Recovery option works independently of the Scanback option. For more information about the Scanback option, see [Scanback](#).
- Only scheduled jobs can be recovered. Jobs that were submitted on demand cannot be recovered.

How Jobs Are Recovered

Scheduled jobs are recovered as follows:

1. When you start the Distribution Server, it checks for Recovery ON in the WebFOCUS ReportCaster configuration.
2. If Recovery is set to ON, the Distribution Server reads all records whose RECOVERY field is set to Y and places them in the run queue, regardless of schedule information and NEXTRUNTIME value.
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 on the Distribution Server queue, its NEXTRUNTIME is updated to the next time it should run after the current time.

i Note:

- If the Recovery parameter is set to OFF, the Distribution Server modifies all jobs 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 the time at which the Recovery parameter was set back to ON.

Scanback

In certain instances, the Distribution Server may be unavailable for time. During this time, no scheduled jobs can run. By default, when the Distribution Server becomes available

again, it searches for and runs all jobs with a next run time less than the current time and resets the next run time according to the next scheduled run time of the job. If the Distribution Server is unavailable for a long time, you may want to adjust this behavior. Using the Scanback parameter, you can run only those jobs found in a specified time period of the outage, or reset the next run time of all unexecuted jobs without running them.

There are two Scanback parameters:

- Scanback Type (On, Off, or Reset Next Run Time)
- Scanback Interval (number of days)

The Scanback Interval is active only when the Scanback Type is On.

The Scanback Type parameter can have the following settings:

- **On, when Scanback interval is an integer value greater than zero.** Represents the number of 24-hour periods (beginning with the Distribution Server restart time) that the Distribution Server will scan back to look for and run jobs with a next run time less than the current time.

For example, if the Distribution Server is unavailable for three days and Scanback is set to 2, then the Distribution Server will only run those jobs it finds with a next run time within the previous 48 hours of the server restart time.

A valid value is any integer from 1 to 365. The default value is 15 days.

- **Reset Next Run Time.** Looks for all jobs with a next run time less than the current time and resets the next run time to the next scheduled run time of the job.
- **Off.** Disables Scanback. This means that the Distribution Server follows its default behavior to find, run, and reset all jobs with a next run time that is less than the current time.

i Note:

- The Scanback option works independently of the Recovery option. For more information about the Recovery option, see [Recovery](#).
- Consider Daylight Saving Time when setting the Scanback parameter. For more information, see <http://webexhibits.org/daylightsaving/b.html>.

WebFOCUS® ReportCaster Server Configuration Tool

The WebFOCUS ReportCaster Server Configuration tool is an administration tool that allows authorized users the ability to navigate through and change the various settings that define the WebFOCUS ReportCaster configuration. For example, the polling interval for the Distribution Server can be changed and the Maximum Threads to control the number of connections available for each WebFOCUS Reporting Server can be defined. The configuration settings are accessed from the Configuration tab in the WebFOCUS ReportCaster Console.

For more information about WebFOCUS ReportCaster configuration settings, see [WebFOCUS ReportCaster Configuration](#).

Verifying Report Broker Distribution Server Configuration Settings

Web Query Administrators can manage the Distribution Server Configuration Settings using the Administration Console.

 **Note:** It is important to verify these settings before using Report Broker.

Distribution Server Failover and Workload Distribution

ReportCaster provides the ability to incorporate a backup Distribution Server, and to configure two or more Distribution Servers to share the work of executing scheduled jobs.

- The Distribution Server Failover feature enables you to configure a backup Distribution Server that can resume ReportCaster operations when there is an interruption (planned or unplanned) in the primary Distribution Server service. A synchronized service monitors the primary server to verify that it is operational. If

there is an interruption in service, the monitor triggers the failover server to take over the role of the primary server. For details on setting up a fail-over Distribution Server, see the *WebFOCUS ReportCaster Post-Installation Tasks* chapter in the of the ibi™ WebFOCUS® Installation and Configuration for Windows manual for your platform.

The ReportCaster Console provides information, such as mode and status, on the primary and fail-over servers. From the ReportCaster Console, you can suspend, start, and stop the Distribution Servers.

i Note: If you have the ReportCaster Server Configuration Recovery option set to On, the Distribution Server recovers scheduled jobs that were processed but not completed.

- The Workload Distribution feature enables ReportCaster to distribute the scheduled jobs across multiple Distribution Servers, providing an efficient and fast way to process large numbers of ReportCaster schedules.

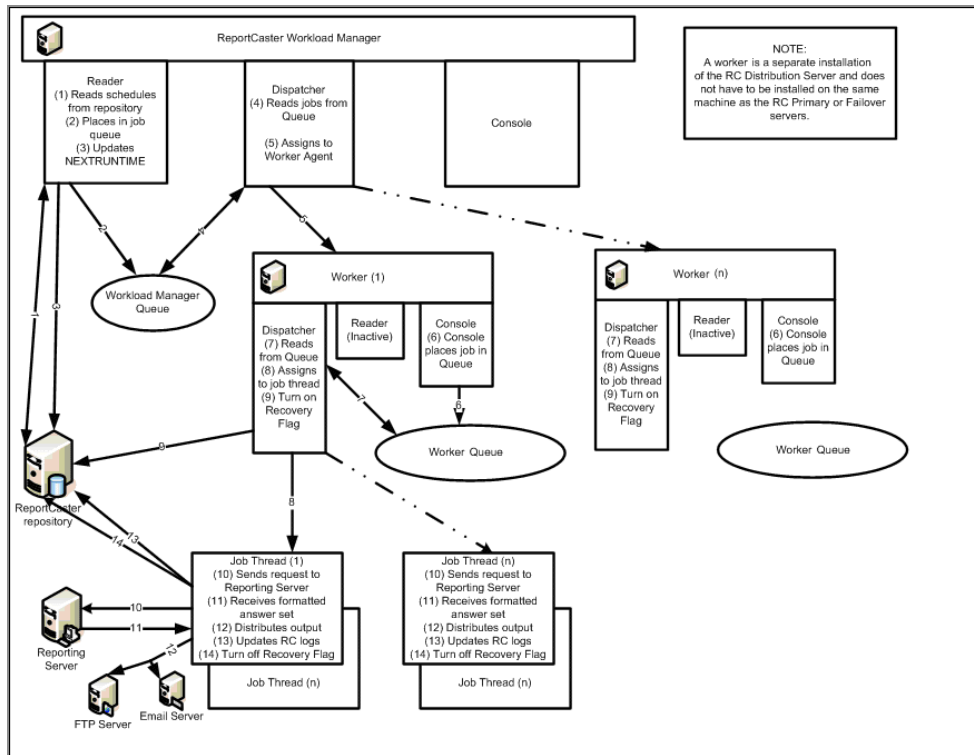
Multiple Distribution Server instances can be installed on one or more hosts. One instance is designated as the Workload Manager, while the others are designated as Workers. The WebFOCUS Repository is shared by the Workload Manager and the Workers.

i Note: To configure for Workload Distribution, use the ReportCaster Configuration tool settings under the Distribution Servers folder. All servers share one set of configuration information. The Workload Manager pushes any configuration changes to the Workers.

The Workload Manager polls the WebFOCUS repository to retrieve jobs scheduled for execution and place the jobs in its queue. It then dispatch individual jobs to the next available Worker.

The Workers queue the jobs sent by the Workload Manager and dispatch the jobs for execution. The Workers distribute output from the executed jobs and update the ReportCaster Log files.

The following diagram illustrates the processing and relationship between the Workload Manager and its Workers.



Distribution Server Failover can apply to the Workload Manager, which is the primary Distribution Server, but not to the Workers.

You can monitor and manage the Workload Manager and Workers through the ReportCaster Console, Server Status window.

Using the WebFOCUS® ReportCaster Console

The WebFOCUS ReportCaster Console is the interface that provides access to the tools that administer the Distribution Server and manage schedule job logs, blackout dates.

i Note: Throughout this section, the WebFOCUS ReportCaster Console will be referred to as the Console.

Using the WebFOCUS® ReportCaster Console

The following tools are accessible from the Console.

You can access the ReportCaster Console from any of the following locations. On the Hub, select the **Main Menu** and then select **ReportCaster Status** under the Quick Access section. On the WebFOCUS Home Page, select **Utilities** and then select **ReportCaster Status**. From the Administration Console, select the **ReportCaster** tab. The ReportCaster Console opens and displays the Server Status tab, by default.

The Console displays in a new browser window. The ribbon displays buttons for each of the tools that the user is authorized to access.

Server Status

The Server Status tool allows Managers to select a Distribution Server to restart, suspend, or stop. The tool also enables Managers to switch servers, view traces, or refresh data.

Viewing the Distribution Server Status

The Server Status tool, accessed by selecting the Server Status tab in the Console, enables you to view the status of the Distribution Server. The Server Status tool provides details about the Distribution Server, such as the host name and port number, the status, and the

number of jobs that are running and in the queue. The Distribution Server information includes:

- **Distribution Server.** The name used to identify the server in the Console.



Note: When the Distribution Server attempts to make an SMTP connection to a mail server, the connection will timeout after five minutes.

- **Host and Port.** The host name and port number where the Distribution Server is installed.

- **Mode.** The state and function of the Distribution Server. Options include:

Manager. When a Distribution Server operates as a Manager, the server listens for requests for on-demand jobs and polls the repository for scheduled jobs. Scheduled and on-demand jobs are dispatched by the Manager to a Distribution Server operating as a Worker. The Manager does not execute jobs. The Manager monitors jobs running on the Worker and communicates job status information to the Client and the WebFOCUS ReportCaster API.

Worker. When a Distribution Server operates as a Worker, it receives a job from a Manager and executes the job. The Worker communicates with the Client to retrieve procedures stored in the Repository and with the WebFOCUS Reporting Server to run schedule job procedures. The Worker also dispatches HTTP requests and communicates with the file system or FTP servers to retrieve files for distribution. The Worker distributes the results returned from either the WebFOCUS Reporting Server, HTTP, or file requests by as specified in the schedule. The Worker also updates the WebFOCUS ReportCaster logs with job information and updates the schedule with the next run time.

- **Full Function.** Indicates that the Distribution Server is up and functioning.
- **Down.** Indicates that the Distribution Server is stopped.
- **Running.** The number of scheduled and on demand jobs that are currently running.
- **Queued.** The number of scheduled and on demand jobs that are in the Distribution Server queue.
- **Services.** The services currently running on the Distribution Server. Options include:
 - **Cache Cleaner.** The Distribution Server uses this service to refresh the IBFS Cache. The frequency at which the cache is refreshed is controlled by the setting `IBI_Repository_Sync_Interval` in the Administration Console.

- **Console.** The Distribution Server uses this service to listen for communication from the WebFOCUS ReportCaster application or API.
- **Dispatcher.** The Distribution Server uses this service to execute scheduled jobs.



Note: Depending on your server configuration, you may have one or more additional Dispatchers listed in the Server Status dialog box.

- **Reader.** The Distribution Server uses this service to poll the Repository.
- **Status.** The status of each service currently running on the Distribution Server. Options include:
 - **Ready.** The service is available.
 - **Standing By.** The service is standing by.
 - **Suspend.** The service is suspended.
 - **Listening.** The Console service is actively listening.
 - **Polling.** The Reader service is active.
 - **Monitoring.** The Repository Monitor is active.
 - **Waiting.** Displayed when a job in the running queue is waiting for a connection to the WebFOCUS Reporting Server. Occurs when a multi-task schedule is started because a connection is available to the WebFOCUS Reporting Server in the first task but then waits because a connection is not available to the reporting server in the second task.

From the Server Status interface, you can perform the following tasks:

- **Refresh.** Retrieves the most current information and refreshes the Distribution Server status with this information.
- **Restart.** Recycles the Distribution Server and the Application Server.
- **Suspend.** This option is always available, regardless of whether a failover Distribution Server is configured or not. Suspends the Distribution Server services, but the server remains running. When you suspend a server, the Suspend button label changes to Resume.
- **Stop.** Brings the Distribution Server completely down.

i Note: When you stop the Distribution Server using this option, you must restart it from the machine where it resides. You cannot restart the Distribution Server remotely.

- Allows you to view trace information for the scheduler.log, main.trc, reader.trc, console.trc, and dispatcher.trc files. You can also turn the Distribution Server traces on or off. For more information, see [Server Status](#).

i Note: Distribution Server traces are tracked separately from job traces using this functionality. You do not need to turn on job traces to see Distribution Server traces.

- **Help.** Opens the Server Status online documentation.

Turn Distribution Server Traces On or Off

Procedure

1. From the WebFOCUS ReportCaster Console, select **Server Status**.
2. From the Distribution Server list, select a server.
3. On the toolbar, click the down arrow on the Server Log button.
4. Click **Turn On Server Traces** to turn the Distribution Server traces on.

To disable the Distribution Server traces, follow steps 1 and 2, hover over **Turn On Server Traces**, and click **Turn Off Server Traces**.

Separate Job Queues for Each Data Server

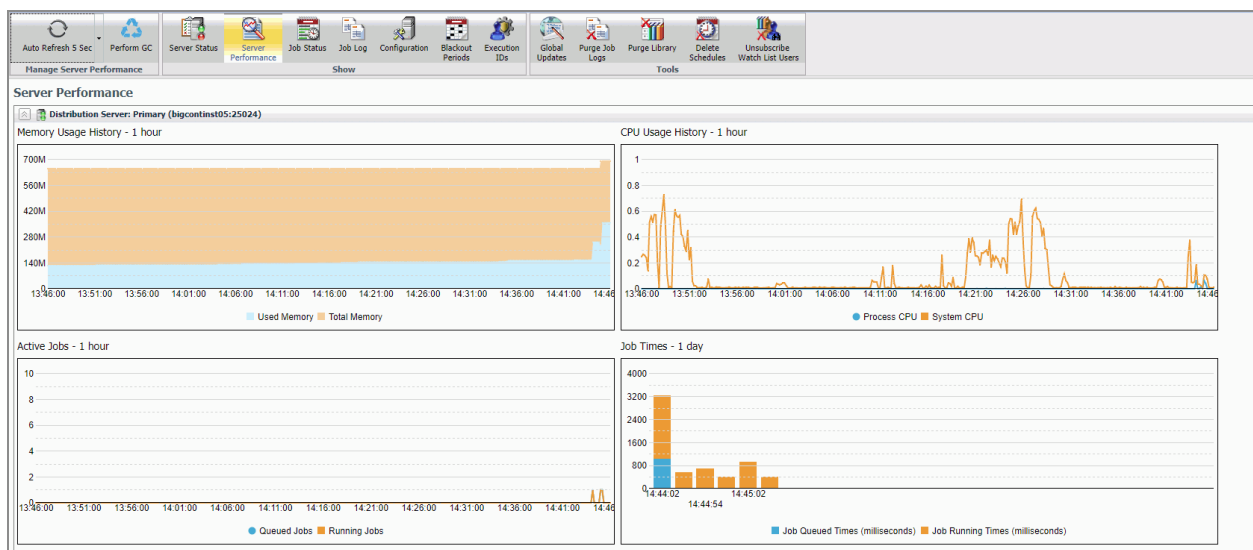
The Distribution Server has separate job queues for each WebFOCUS Reporting Server, as well as an additional queue for tasks that do not require a WebFOCUS Reporting Server. Therefore, there will always be at least one job thread available for each WebFOCUS Reporting Server, in addition to at least one thread for non-server based jobs. No one WebFOCUS Reporting Server can have all available job threads consumed by jobs associated with that server.

Each WebFOCUS Reporting Server is allocated job threads equal to the total number of connections available for that WebFOCUS Reporting Server. The Maximum Threads setting is now the total number of threads for each WebFOCUS Reporting Server, in addition to the number of threads allocated for remaining tasks.

Server Performance

The Server Performance tab displays graphs that provide a one hour performance history of memory usage, active jobs, and CPU usage for the Distribution Server that you select. You can also see a one day history of active jobs.

The following image shows an example of the Server Performance tab.



Using the Java Heap Dump Feature

The heap dump feature enables you to generate a Java heap dump file directly from the ReportCaster Console, which streamlines the troubleshooting process for certain types of software issues.

When you click the **Server Performance** button, the Heap Dump button displays. Clicking the Heap Dump drop-down list button gives you the option to create a new heap dump file, or to delete all previous heap dump files.

When you create a heap dump file, a log file is generated, which shows that the heap dump file has been saved to your WebFOCUS software directory. To view this log file, click the **Job Log** button on the ReportCaster Console ribbon. In the Job Logs panel, click the **system** folder to display the Java Heap Dump log folder.

Failover Distribution Server Status and Tasks

When you configure a failover Distribution Server for ReportCaster, the Server Status window lists the status of the primary and secondary servers.

The primary Distribution Server is in Full Function mode. The Console service is listening for communication from ReportCaster, the Reader service is polling the repository, and the Dispatcher service is ready to trigger the execution of ReportCaster jobs. The Secondary Server is in Failover Mode, monitoring the Primary Server. The Failover Monitor service monitors the Primary Server to verify that it remains active and, if it is not active, to signal the failover server to take over the role of the Primary Server. The Suspend option, which puts the Primary Server services on hold, is available for selection when a failover Distribution Server has been configured and the Primary Distribution Server is selected.

From the Server Status interface, you can perform the following failover tasks, which are described below:

- Restart the Full Function or Failover Distribution Server.
- Suspend the Full Function Distribution Server.
- Stop the Full Function or Failover Distribution Server.
- Put the Failover Distribution server on Stand By.
- Switch server roles so that the Failover Distribution server becomes the Full Function server and vice versa. For more information, see [Failover Distribution Server Status and Tasks](#).

Restart a Server

Procedure

1. Select a server that is running.

2. From the toolbar, in the Manage Server group, click **Restart** to restart the server.
A window opens, asking you to confirm that you want to restart the server.
3. Click **Yes**.

Suspend a Server

Procedure

1. Select the server in Full Function mode.
2. On the toolbar, in the Manage Server group, click **Suspend**.
A window opens, asking you to confirm that you want to suspend the server.
3. Click **Yes**.

Set the Failover Server to Stand By Mode

 **Note:** You must have multiple servers, one of which is in Failover Mode, to perform this procedure.

Procedure

1. Select the server in Failover Mode.
2. On the toolbar, in the Manage Server group, click **Stand By**.
A window opens, asking you to confirm that you want to set the Failover server to Stand By Mode.
3. Click **Yes**.

Stop a Server

Procedure

1. Select a running server and click **Stop**.

A window opens, asking you to confirm that you want to stop the server.

2. Click **Yes**.

Switch Server Roles

Procedure

1. Select the server in Full Function Mode.

2. On the toolbar, click **Suspend**.

A window opens, asking you to confirm that you want to suspend the server.

3. Click **Yes**.

4. On the toolbar, in the Manage Server group, click **Switch**.

A window opens, asking you to confirm that you want to switch the roles of the servers.

5. Click **Yes**.

6. Click the **Refresh** icon to update the server status.

 **Note:** You may need to wait for 1 to 2 minutes for the switch to complete.

Job Status

Another resource for tracking schedules is the schedule job status. The schedule status provides a list of scheduled jobs that are in the Distribution Server queue. Status information includes the Schedule ID, the time it started running, and the status of the job.

The schedule information includes:

- **Job Id.** The ID assigned to the job.
- **Description.** The description provided when the schedule was created.
- **Priority.** The priority level of the schedule. 1 is the highest and 4 is the lowest

priority.

- **Start Time.** The time that the schedule run began.
- **Owner.** The name of the user who owns the schedule.
- **Status.** The status of the scheduled job. It contains one of the following values:
 - **Running.** The scheduled job is currently running.
 - **Queued.** The scheduled job is waiting for a thread to become available to run the request.
- **Server Name.** The WebFOCUS Reporting Server to which the job has been submitted.
- **Dispatcher Name.** The Distribution Server Dispatcher that submitted the job.
- **Full Path.** The full path the Schedule in the repository.

Job Log

i Note: The Job Log tab supports the functionality of a multiple selection, whereby you can open or delete multiple files simultaneously.

The job logs information includes:

- **Job Id.** The ID assigned to the job.
- **Start Time.** The time that the schedule was run.
- **Job Duration(seconds).** The amount of time needed to complete a job.
- **Job Status.** The status of the job when it completed processing.
 - **Success.** No errors occurred during the scheduled job processing.
 - **Error.** One or more errors occurred during the scheduled job processing. No report was generated or distributed.
 - **Warning.** One or more warnings occurred during the scheduled job processing. A report was generated and distributed.

For information about downloading WebFOCUS ReportCaster job trace files, see [Schedule and Report Tracing](#).

WebFOCUS ReportCaster Configuration

The Configuration tool enables Managers to view and manage the configuration of the Distribution Server, Servlet (deployed in WebFOCUS ReportCaster web application) interfaces and tools. Options that Managers can modify include Distribution Servers, General Preferences, Email Distribution, Notification, and other options.

i Note: When you change a configuration setting, the event is logged in the audit log file located in the Administration Console. Configuration events are logged, by default. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

Configuration Icons

In the Configuration tab on the WebFOCUS ReportCaster Console ribbon, a series of icons enable you to perform the following tasks.

i Note: When you select **Configuration** in the WebFOCUS ReportCaster Console ribbon, the Manage Configuration group displays on the left-hand side. Clicking **Server Status**, **Server Performance**, **Job Status**, **Job Log**, will change the name and functionality of this group, depending where you are in the interface. These options all appear in the Show group of the ribbon.

- **Manage Configuration group**

- **Save.** Saves any changes made to the configuration. You will receive a message asking you to confirm the save. You must save the changes to the configuration settings as part of the process to implement the change. For details, see [Changing Configuration Settings](#).
- **New.** Creates a new WebFOCUS Reporting Server connection. This option is only active when working in the Data Servers folder.
- **Remove.** Deletes a WebFOCUS Reporting Server from the WebFOCUS ReportCaster configuration. You will receive a message asking you to confirm the deletion. This option is only active when working in the Data Servers folder.
- **Test.** Tests the connection to the selected server or repository. This option is

only active when working in the Data Servers and LDAP Settings folders. You may be prompted for a user ID and password to connect to a specified server. You will receive a message describing whether the test succeeded or failed.

- **Restart.** Restarts the Distribution Server and WebFOCUS ReportCaster to implement changes to the server configuration. You can also select **Restart** from the Action menu. For more information, see [Changing Configuration Settings](#).
- **Configuration Files.** Provides options to view and download the WebFOCUS ReportCaster configuration files. Click the arrow to access the following individual files.
 - **dserver.xml.** Contains a record of current WebFOCUS ReportCaster configuration settings.
 - **sendmodes.xml.** Contains information about MIME output file formats.
 - **rc_preference.xml.** Contains information about the display of options in the UI.

Clicking one of these file options displays the file information in a browser window. Click **Download Configuration Files** to download all files as a single zip file.

- **Tools group**

- **Global Updates.** Authorized users can make global updates for the values stored in schedules and distribution lists. using the Global Updates interface, the following settings can be updated:
 - Mail Server
 - FTP Server
 - Printer
 - Email Address
 - Email From
 - Data Server
 - Notification Type
 - Notification Reply Address

- Notification Subject
- Notification Brief Message To
- Notification Full Message To
- First Pre-processing Procedure
- Second Pre-processing Procedure
- First Post-processing Procedure
- Second Post-processing Procedure

For more information, see [Global Updates](#).

- **Delete Schedules.** The Delete Schedules functionality provides on-demand options for deleting all inactive or nonrecurring schedules. You can also specify an option for traces: Default Traces, No Traces, or Trace On. For more information, see [Delete Schedules](#).
- **Actions group**
 - **Refresh.** Refreshes the settings to reflect the last saved configuration settings.

Delete Expired Library Reports

Procedure

1. From the Tools group in the ReportCaster Console, click **Purge Library**.
The Delete Library Reports dialog box displays.
2. Accept the default, **Delete Expired Library Reports**, or select **Delete Library Reports Older Than**, for which you can specify a date using the drop-down menu to enable a calendar control, where you can select a date.
3. Under Trace Options, you can accept the default of *Default Traces*, or select **No Traces** or **Trace On**.
4. Click **OK**.

Configuration Tab Folders

The Configuration tab provides access to configuration settings through the following folders:

- **Distribution Servers.** Defines and configures the Distribution Server. This folder provides settings to define a failover Distribution Server to act as a backup, and configure two or more Distribution Servers to share the workload. This folder also contains the Additional Settings folder. For details on these settings, see [Distribution Server Settings](#).
- **General Preferences.** Specifies which distribution formats, and methods will be available to a user creating a schedule. In this folder, you can also specify blackout period settings, and if WebFOCUS ReportCaster scheduling options will include the ability to distribute a PDF file directly to a printer. For details on these settings, see [General Preferences](#).
- **Email Distribution.** Configures email settings, such as the default email host, number of attempts to distribute to an email host, and security information. For details on these settings, see [Email Distribution](#).
- **Notification.** Configures notification settings, such as the notification email host and default notification type. For details on these settings, see [Notification](#).
- **FTP Settings.** Allows you to specify the default FTP and user ID, and security plug-in. You can also indicate whether the server requires a secure SFTP connection and specify the authentication method. For details on these settings, see [Configure FTP Settings](#).
- **Zip Settings.** Provides settings to configure how Zip files will be created and named. For details on these settings, see [Zip Settings](#).
- **Other Schedule Defaults.** Defines the default end date and time of a WebFOCUS ReportCaster schedule. For details on these settings, see [Other Schedule Defaults](#).
- **Log Purge.** Allows you to specify the time and period that log files will be automatically purged. For details on these settings, see [Log Purge](#).
- **Data Servers.** Allows you to configure multiple Reporting Servers, including cluster servers. For details on these settings, see [Data Servers Settings](#).

Changing Configuration Settings

To implement changes to the WebFOCUS ReportCaster server configuration settings, you must save the changes, and then restart the Distribution Server and the WebFOCUS ReportCaster web application. Use the following steps to save any configuration changes.

1. After you make changes to any of the configuration settings within a Configuration folder, click the **Save** icon in the Manage Configuration group toolbar.
A window opens, asking you to confirm the save.
2. Click **OK**.
A window opens, explaining that you must restart the Distribution Server and the WebFOCUS ReportCaster web application in order for the changes that you saved to take effect.
3. Click **OK**.
4. Click the **Restart** icon in the Manage Configuration group toolbar.
A window opens, asking you to confirm that you want to stop all running jobs and restart.
5. Click **Yes**.
6. Notify all users that are currently logged that they must restart their sessions to obtain the new configuration information. This is required because user sessions have information cached pertaining to the WebFOCUS ReportCaster configuration. The user interfaces must be restarted to obtain any updated configuration information.

Changing Default User IDs

Several of the Configuration tab folders provide the option to change the default user ID and/or password. To change default user ID settings, click the  icon that appears to the right of the setting field. This opens the User dialog box, where you can type a new user ID and password. When your changes are complete, click **OK** to exit the User dialog box. Remember to save your changes and restart the Distribution Server to implement any changes.

Distribution Server Settings

The Distribution Servers folder contains the settings that define and configure the Distribution Server. The Server Status option, located on the ribbon, provides the ability to restart the Distribution Server, suspend distribution, stop distribution, switch servers, and refresh data.

The Distribution Servers folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Primary Distribution Server section		
Host	Required.	Host name of the primary Distribution Server.
Port	Required.	Port number of the primary Distribution Server.
Restrict to IP Address	Optional.	Restricts Distribution Server Console access to one or more IP Addresses. For more information, see Restricting Distribution Server Console Access to an IP Address List .
Maximum Threads Controls how many simultaneous connections (threads) the WebFOCUS ReportCaster Distribution Server can utilize to process scheduled jobs. The default value is 3. This setting is also available in the Administration Console. You can specify any maximum that can be supported by your hardware and memory.		
Server Name	Required if one or more servers are listed.	Displays the name of the server.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Threads (Connections)	Required. The Default Value is 3.	Displays the simultaneous connections (threads) for each server.
Other Task		Non server-based tasks.
Reader Interval, Recovery, Processing for No Report to Distribute, , and Max Messages per Task from Data Server options:		
Reader Interval	Required. Default value is 1 minute.	Polling interval (in minutes) for the WebFOCUS ReportCaster Distribution Server to check for scheduled jobs. An acceptable value is any positive integer from 1 to 999999. Negative numbers and zero are not allowed. Note: This setting is also available in the Administration Console.
Recovery	Default value is Off.	On. During startup, the WebFOCUS ReportCaster Distribution Server recovers scheduled jobs that were processed but not completed. Off (Default). During startup, the WebFOCUS ReportCaster Distribution Server does not recover any scheduled jobs.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: This setting is also available in the Administration Console.
Processing for No Report to Distribute	Required. Default value is Error.	Specifies whether the No Report to Distribute message from the WebFOCUS Reporting Server is categorized as an error or a warning. This is a global setting, relevant to all schedules. Possible values are: • Error. The No Report to Distribute message is categorized as an error and the message is written to the WebFOCUS ReportCaster log report in red. When the schedule has the Notification option set to Error, the Notification is sent. • Warning. The No Report to Distribute message is categorized as a warning and the message is written to the log report (in orange) as an informational message. When the schedule has the Notification option set to Warning, no error notification is sent. These settings also apply to

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		burst reports when there is a No Report to Distribute message for an individual burst value. If a schedule contains multiple tasks, the No Report to Distribute processing only applies if all tasks that are part of the schedule produce the No Report to Distribute message. If one task in the schedule produces a report, then the value of this setting does not affect log messaging or notification.
Processing for Blackout Period Job Termination	Required. Default value is Error.	If a scheduled report distribution is terminated due to a previously set blackout period, this option specifies whether or not an error notification will be sent via email. • Error. An error notification will be sent to the designated email recipient. • Warning. An error notification will not be sent to the designated email recipient. For more information, see Using Blackout Periods.
Max Messages per Task from Data Server	Required. Default value is 1000.	Controls the number of messages for each task from the Data Server written to the WebFOCUS ReportCaster log file.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Scan-back section		
Scan-back Type	Required. Default value is On.	Possible values are: • On • Off • Reset Next Run Time
Scan-back Interval	Default value is 15, 24 hour periods.	If the Distribution Server is unavailable for a period of time, this is the number of 24 hour periods (beginning with the Distribution Server restart time) that you want the Distribution Server to scan for jobs not yet run and run them. Note: This setting is also available in the Administration Console.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Settings for the Additional Settings folder:		
The Console Requires Secure SSL Connection	Optional.	Select this check box to encrypt the communication between the WebFOCUS ReportCaster application and the WebFOCUS ReportCaster Distribution Server. After enabling secure communication and saving the

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		changes, you must manually restart the WebFOCUS ReportCaster application and the WebFOCUS ReportCaster Distribution Server.
SSL Certificate	Required if The Console Requires Secure SSL Connection check box is selected.	A default SSL Certificate is supplied by the installation procedure. You can optionally replace the default certificate with your own certificate to activate secure communication. To do this, you must import your signed server certificate from a CA or self-signed certificate to the distribution server keystore, and then export an SSL certificate from the keystore. Once you have exported the SSL certificate, you must paste this certificate to the SSL Certificate setting, save the configuration changes, and manually restart the ReportCaster application and the ReportCaster Distribution Server.
Days Until Traces are Deleted	Optional. The default value is 10.	Files and folders in the trc, log, and temp directories that are older than the specified number of days are automatically deleted by the Distribution Server. They are deleted at the same time as the daily Job Log purge and deletion of expired Library

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		versions.
Schedule Job Traces	Optional. The default value is Off.	Enables Distribution Server Traces. • Off. Trace is disabled. • Schedule. Schedule job processing information. • Schedule and Report. Scheduled job processing information and report output is returned to the Distribution Server to be distributed.
Job Status Notification Plug-in	Optional.	Name of a custom written Java class that implements the WebFOCUS ReportCaster Job Status Notification interface and instructs the Distribution Server to perform some action (such as notifying a Web Service or other listener) that a scheduled job has started and ended. For more information, see Configure the Job Status Notification Plug-in .
Provide Metrics Information from Resource Analyzer	Optional.	This functionality enables the collection of RA DBMS statistics from the Reporting Server for display in the schedule log.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: If you do not have Resource Analyzer on the WebFOCUS Reporting Server, this functionality will not work. When the check box is selected, the RC log displays messages containing RA DBMS information. When the check box is not selected, messages are not displayed.
Hold Repository Connection	Required. By default, this option is selected.	Selected. The database connection is kept open throughout the execution of the schedule, including obtaining Address Book information, and writing information to the log files. Not selected. 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.

Configure the Job Status Notification Plug-in

Procedure

1. From the Tools menu, click **WebFOCUS ReportCaster Status**.

2. Click the **Configuration** button.
3. In the left pane, expand the **Distribution Servers** folder, then click the **Additional Settings** folder.
4. Populate the Distribution Servers fields using the information provided in the preceding tables.
5. In the Job Status Notification Plug-in field, enter the name of the program that implements the Job Listener interface.
6. Click **Save**.

Your program will be called at the start and end of each schedule to perform the customized actions it has been designed to do. For more information, refer to the `ibi.broker.scheduler.plugin` package found in the Java documentation.

Your program will be called at the start and end of each schedule to perform the customized actions it has been designed to do.

For more information about the Job Status Notification plug-in, refer to the `ibi.broker.api.data.console` package description found in the ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

Configuring ReportCaster Failover and Workload Distribution

The Distribution Server Failover feature allows you to configure a secondary Distribution Server that can resume ReportCaster operations when there is an interruption (planned or unplanned) in the primary Distribution Server service. The primary Distribution Server is monitored to verify it is operational. If there is an interruption in service, the failover Distribution Server is triggered to take over the role of the primary server.

The Workload Distribution feature allows ReportCaster to distribute scheduled jobs across multiple Distribution Servers, providing an efficient and fast way to process large numbers of schedules. Multiple Distribution Servers can be installed on one or more hosts. One instance is designated as the Workload Manager, while the other are designated as Workers. The WebFOCUS Repository will be shared by the Workload Manager and the Workers. Workload Distribution is set up through the ReportCaster Configuration tool. All servers will share one set of configuration information, and the Workload Manager will push any configuration changes to the Workers.

For your application of ReportCaster, you can configure either or both Failover and Workload Distribution. The following procedure includes instructions to configure both, but notes when to skip to the appropriate steps if you are only configuring one or the other.

Configure Distribution Server Failover

To configure Distribution Server failover:

Procedure

1. From the Tools menu, click **ReportCaster Status**.
The ReportCaster Console opens.
2. Click the **Configuration** tab.
3. Click the **Distribution Servers** folder in the left pane.
4. Click the button to the right of the Secondary Distribution Server field.
The Secondary Distribution Server dialog box opens.
5. Select the **Enabled** check box.
6. Enter the hostname, port number, and failover interval of the Secondary server.
7. Optionally, select the **Use Repository to Synchronize Primary and Failover Servers** check box.
8. Click **OK**.
9. Click **Save** and then **OK** when you are prompted to save.
10. Install the Distribution Server on the specified host with the specified port number for that host.

Configure Workload Distribution

Procedure

1. Open the ReportCaster Console and click **Configuration** in the top pane.
2. Click the **Distribution Servers** folder in the left pane.

3. Click the button to the right of the Workload Distribution field.
The Workload Distribution dialog box opens.
4. Select the **Enabled** check box.
5. Click **Add**.
6. Enter the name, hostname, and port number of the Worker Distribution Server.
Repeat this step for each Worker Distribution Server instance that you want to add.
7. Click **OK**.
8. Click **Save** and then **OK** when you are prompted to save.
9. Install the Distribution Server on each of the specified hosts with the specified port number for that host.

Restricting Distribution Server Console Access to an IP Address List

Limiting Distribution Server access to a preselected IP address helps prevent denial of service (DoS) attacks against your server. A DoS attack is a malicious cyber-attack that overloads a server with requests from multiple IP addresses, which blocks legitimate IP addresses from accessing the server. You can use the Restrict to IP Addresses option in the WebFOCUS ReportCaster Console to enhance the security of your network. If you populate the Restrict to IP Addresses field with one or more IP addresses, the Distribution Server only accepts TCP/IP requests from the addresses listed. This setting is blank by default.

Configure IP Address Restrictions

Procedure

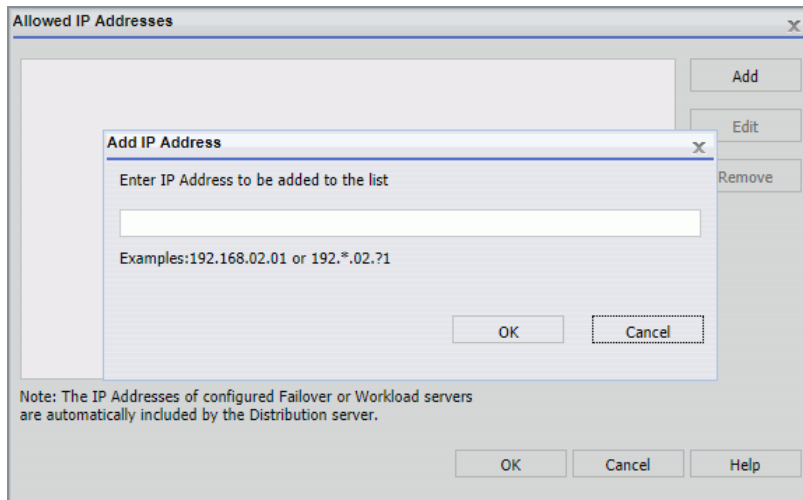
1. Open the WebFOCUS ReportCaster Console.
2. On the ribbon, in the Show group, click **Configuration**.
3. In the Configuration pane, click **Distribution Servers**.
The Primary Distribution Server options display.

4. Click the **Restrict to IP Addresses** open folder button.

The Allowed IP Addresses dialog box opens.

5. Click **Add**.

The Add IP Address dialog box opens, as shown in the following image.



6. Type an IP address and click **OK**. This adds the IP address to the Allowed IP Address list.
7. Repeat steps 5-6 to add any additional IP addresses.
8. Click **OK** to save the Allowed IP Address list and return to the WebFOCUS ReportCaster Console.
9. On the ribbon, in the **Manage Configuration** group, click **Save** to keep your allowed IP address changes.
10. On the ribbon, in the **Manage Configuration** group, click **Restart** to apply your changes.

Edit an IP Address

Procedure

1. Click the Restrict to IP Addresses open folder button.

The Allowed IP Addresses dialog box opens.

2. Click the IP address that you want to modify, and then click **Edit**.
The Edit IP Addresses dialog box opens.
3. Modify the IP address, and then click **OK**.
4. On the ribbon, in the **Manage Configuration** group, click **Save** to keep your allowed IP address changes.
5. On the ribbon, in the **Manage Configuration** group, click **Restart** to apply your changes.

Delete an IP Address

Procedure

1. Click the **Restrict to IP Addresses** open folder button.
The Allowed IP Addresses dialog box opens.
2. Click the IP address that you want to delete, and then click **Remove**.
The selected IP address is deleted.
3. Click **OK**.
4. On the ribbon, in the **Manage Configuration** group, click **Save** to keep your allowed IP address changes.
5. On the ribbon, in the **Manage Configuration** group, click **Restart** to apply your changes.

General Preferences

The General Preferences folder in the Configuration tab contains settings that determine which schedule tasks, distribution formats and methods will be available to a user.

The General Preferences folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Set Next Run Time to Day After Blackout Period End	Optional. By default, this option is not selected.	When selected, if a recurring scheduled distribution is cancelled due to the schedule being run on a blackout period date, the schedule will run at the same time the following day. For more information, see Controlling When Schedules Run After Blackout Periods .
Allow PDF Distribution Directly to a Printer	Required. By default, this option is selected.	When selected, PDF is a selectable format for the Printer distribution method. This enables a PDF file to be distributed directly to a printer. The printer must have the appropriate driver to print PDF files.
Use Legacy Behavior for Parameterized Schedule Settings	Optional. By default, this option is not selected.	Restores the legacy behavior for the use of amper variables in schedule settings. When selected, amper variables can only be used in the Email Subject. The value of an amper variable is set to the value stored with the schedule in the WebFOCUS ReportCaster parameters table. Runtime values are not available.
Schedule Tasks	Optional. All Task Types are enabled, by default.	Specifies what Task Types are available to users. The default Schedule task for all Advanced Schedules is WebFOCUS Report. When you are creating a task in the Advanced Scheduling tool, clicking the New button displays the dialog box for the selected default task. For more information, see Specifying Schedule Task Settings .

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Distribution Formats	Optional. All formats are enabled, by default.	Specifies what report and graph formats are available to users.
Distribution Methods	Optional. All distribution methods are enabled, by default.	Specifies what distribution methods are available to users.

Specifying Schedule Task Settings

The Schedule Tasks setting in the General Preferences folder enables authorized users to specify what Task Types are available to users and groups.

By default, all Task Types are enabled (selected). A minimum of one Task Type must be selected.



Note:

- If a task is cleared after a schedule using that task has been created, the schedule will fail when it is run. A message in the log will indicate how to fix the problem.

Specify Schedule Task Settings

Procedure

1. In the General Preferences folder, click the icon to the right of the **Schedule Tasks** field.

The WebFOCUS ReportCaster - Schedule Tasks dialog box opens.

2. To enable or disable specific Task Types, select or clear the check box for the following options:
 - WebFOCUS Report
 - WebFOCUS Server Procedure
 - File
 - URL
 - FTP
 - WebFOCUS Schedule
3. Optionally, choose a default Schedule task for the Advanced Scheduling tool. **WebFOCUS Report** is selected, by default.
4. Optionally, if you want the ReportCaster Distribution Server to not run scheduled jobs for the task types that have been cleared, select the **Only run schedules for selected Tasks** check box.
5. When your selections are complete in the Schedule Tasks dialog box, click **OK**.
The changes are saved and the Schedule Tasks dialog box closes.
6. To implement the configuration changes, restart the Distribution Server and WebFOCUS ReportCaster web application.

Specifying Schedule Format Settings

The Distribution Formats setting in the General Preferences folder enables users to specify what report and graph formats are available to users and groups.

This setting only applies to WebFOCUS ReportCaster (Repository) procedures. By default, all report and graph formats are enabled (selected). A minimum of one report or graph format must be selected.



Note: If a format is cleared after a schedule using that format has been created, the schedule will fail when it is run. A message in the log will indicate how to fix the problem.

Specify Schedule Format Settings

Procedure

1. In the General Preferences folder, click the icon to the right of the **Distribution Formats** field.

The WebFOCUS ReportCaster - Report/Graph Formats dialog box opens.

2. Using the Styled Formats drop-down list, you can select **Specialized Formats**, **Non-styled Formats**, or **Graph Images**. Optionally, you can keep the default, **Styled Formats**.

By default, Styled Formats are displayed with each format type selected.

3. To enable or disable styled formats, select or clear the check box for one of the listed formats.
4. To enable or disable Non-styled Formats, which do not support styling using WebFOCUS ReportCaster StyleSheet commands, select **Non-styled Formats** from the drop-down list. By default, the Non-styled Formats are displayed with each format type enabled.
5. To enable or disable graph images, select **Graph Images** from the drop-down list. By default, the graph image formats are displayed with each format type enabled.
6. When your selections are complete in the Report/Graph Formats dialog box, click **OK**.
The changes are saved and the Report/Graph Formats dialog box closes.
7. To implement the configuration changes, restart the Distribution Server and WebFOCUS ReportCaster.

Specifying Schedule Distribution Method Settings

The Distribution Methods setting, in the General Preferences folder, enables authorized users to specify the distribution methods that are available to users and groups. If a method is cleared after a schedule using that method has been created, and **Only run schedules for selected Distribution Method** is selected, the schedule processing will not run the scheduled tasks. A message in the log will indicate that the distribution method is not configured for use. In addition, a schedule that has multiple distributions will not run if

one of the distribution methods is cleared in the Distribution Methods drop-down menu, in the General Preferences folder, of the Configuration tab.

By default, all distribution methods are enabled (selected).

 **Note:** A minimum of one distribution method must be selected.

The Repository option only appears if these products are enabled. Repository is an optional product component that is installed with the WebFOCUS ReportCaster Client.

Specify Schedule Distribution Method Settings

Procedure

1. In the General Preferences folder, click the icon to the right of the **Distribution Methods** field.

The WebFOCUS ReportCaster - Schedule Distribution Methods dialog box opens.

2. To enable or disable specific distribution methods, select or clear the check box for one of the listed options.

 **Note:** At least one schedule distribution method must be selected.

3. Optionally, select the **Only run schedules for selected Distribution Methods** check box to limit the schedules running to those that have at least one of the Distribution Methods selected.
4. When your selections are complete in the Schedule Distribution Methods dialog box, click **OK**.

The changes are saved and the Schedule Distribution Methods dialog box closes.

5. To implement the configuration changes, restart the Distribution Server and WebFOCUS ReportCaster web application.

Email Distribution

The Email Distribution folder in the Configuration tab contains default email settings, email retry options, and email security.

The Email Distribution folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Inline Report Distribution	Required. The default value is Allowed.	Specifies whether the Schedule tool will enable the email distribution option to send a report in the body of the email (inline). Note: If this option is cleared after a schedule using this option has been created, the schedule will fail when it is run. A message in the log will indicate how to fix the problem.
Packet Email	Required. The default value is Yes.	Controls how task output and burst content are distributed through email. Valid values are: • No. Each burst value or task output is distributed in a separate email. • Yes. People receiving burst values or output from tasks will receive a single email with multiple attachments. • Burst. Each burst value in a distribution list will generate a separate email for a given email address. There may be one or more attachments in the email,

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		depending on the number of tasks in the schedule.
Allowed Email Domains and Addresses	The default value is off.	Contains the email domains and addresses that are authorized to be used in a distribution. Select the Restrict user input with this list check box to restrict user input of email addresses and domains to the allowed addresses saved in your list. For more information, see Validating Allowed Email Domains and Addresses.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: • If this list has changed before you attempt to edit email addresses for a previously saved Basic Schedule, Distribution List, Distribution File, or Dynamic Distribution List, the system checks if your new email addresses and domains are still valid. If you enter an invalid email address or domain, you will be prompted to change the email address or domain before saving. • Files containing email addresses intended for distribution are also verified for valid domains at schedule execution time. If it contains a restricted address, then no delivery is made to that address and an error message is written to the log file.
Restrict Email Distribution to the Email Address of the Schedule Owner	Optional.	Check this box if you want to restrict email distribution to the email address of the schedule owner. Note: If no email address is specified for the schedule owner in the Security Center, the schedule cannot be saved.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Always Compress and Password Protect Distributed Report	Optional.	Select this box to have any distributed reports converted into a password-protected Zip file. Passwords can be provided in a distribution file, a dynamic distribution list, or by way of the zip encryption plug-in. If no password is created, the report will not be distributed. The distribution server will enforce this rule on all schedules, including schedules created prior to selecting the check box. Note: When this check box is selected, Inline Report Distribution will be disabled. If Inline Email is enabled, the Always Compress and Password Protect Distributed Report check box will be cleared. Also, if the Always Compress and Password Protect Distributed Report check box is selected, then the Add Report to Zip File check box in the Distribution tabs of schedules created from
Customize Attachment Message	Optional.	Provides the ability to specify a custom message.
Email Default Priority	Optional.	Provides the ability to set email default priority.
Default Attachment	Required.	Defines the default message used in

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Message		your Email Distribution. The message that you define here displays in the Basic Scheduling Tool. Note: If you customize the default message, this new message will be the default message for new schedules.
Mail Server Defaults section		
Mail Server	Required.	Name of the default mail server used to distribute an email schedule. You can also specify a port for Mail Host using <i>hostname:port</i>. If you do not specify a port or the port you specify is not present, the default port is used.
This Server Requires a Secure SSL Connection	Optional.	Select this check box if the specified mail server uses SSL.
This Server Requires a Secure TLS Connection	Optional.	Select this check box if the specified mail server uses TLS.
This Server Requires Authentication	Optional.	Select this check box if the specified mail server requires authentication with a user ID and password. You can also switch between password and OAuth 2 Authentication.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
SMTP User Id/Password	Required if the mailhost is using SMTP Authorization. No default value.	User ID and password used to connect to the mailhost. Note: SMTP Authentication is only supported for email schedule distribution and library notification emails.
SMTP Security Plug-in	Optional.	Name of a custom written Java class that implements the WebFOCUS ReportCaster SMTP security interface to dynamically retrieve the user ID and password needed to connect to an SMTP server. For more information, see Configure Email Distribution . Note: SMTP Authentication is only supported for email schedule distribution and library notification emails.
Email Reply Defaults section		
Mail From	Optional.	Default value for the email From field. This can be any value.
Email Retries section		
Email Retries	The default value is 1.	Number of times the Distribution Server will try to connect to the email server to deliver report output. If the Distribution Server is unable to connect to the email server on the first try, it will attempt to connect

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		again after the specified Email Retry Interval has passed. A message for each attempt is written to the log file. Valid values are 0 through 9.
Email Retry Interval (seconds)	The default value is 60 seconds.	Amount of time that the Distribution Server will wait between retries. Valid values are 1 through 999.
Email Reconnection		
Reconnect if SMTP Server Disconnects	The default value is Yes.	If the value in this setting is Yes, the distribution server performs three attempts to reconnect to the SMTP server and resume sending email. If all three attempts are unsuccessful, the distribution server stops processing and writes an error message to the log. If the value is No, no attempts to reconnect are made.
Number of messages per connection	The default value is 0.	If the value in this setting is zero (0), there will be no limits on the number of messages that can be sent over a single connection. If a non-zero value appears in this setting, the distribution server will be able to send that many emails over a single connection. It can then make a new connection to send any remaining emails, making as many new connections as necessary.

Configure Email Distribution

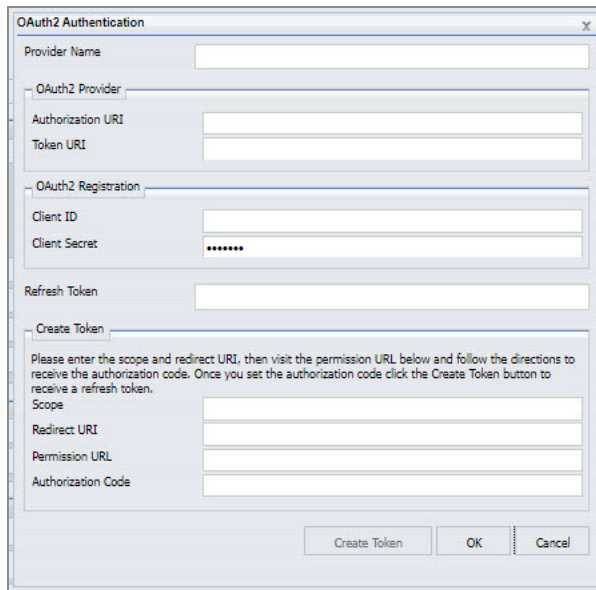
Procedure

1. From the Tools menu, click **WebFOCUS ReportCaster Status**.
2. Click the **Configuration** button.

i Note: Authorized users can also access the WebFOCUS ReportCaster Configuration tool from the Administration Console.

3. In the left pane, select the **Email Distribution** folder.
4. Populate the email distribution fields. You can:
 - Make changes to the current email settings. For more information, refer to the preceding table.
 - Supply any default values that you would like to be available at schedule creation time.
5. If your mail server(s) require authentication or SSL or TLS, check the appropriate boxes and enter the required credentials.
6. Click **Save**.

Configuring OAuth2 Authentication

The screenshot shows a window titled "OAuth2 Authentication" with a close button (X) in the top right corner. The window is divided into several sections. The first section, "Provider Name", has a text input field. Below it is a section titled "OAuth2 Provider" containing "Authorization URI" and "Token URI" text input fields. The next section is "OAuth2 Registration", which includes "Client ID" and "Client Secret" (masked with dots) text input fields. Below that is a "Refresh Token" text input field. The final section is "Create Token", which contains a paragraph of instructions: "Please enter the scope and redirect URI, then visit the permission URL below and follow the directions to receive the authorization code. Once you set the authorization code click the Create Token button to receive a refresh token." This section includes "Scope", "Redirect URI", "Permission URL", and "Authorization Code" text input fields. At the bottom of the window are three buttons: "Create Token", "OK", and "Cancel".

1. Select the **OAuth2 Authentication** configure icon.
OAuth2 Authentication window pops-up.
2. Provide the name of the provider in the **Provider Name** field.
3. Provide the **Authorization URI**, **Token URI**, **Client ID**, **Client Secret** in the respective fields.
4. Set the scope for OAuth2 Authentication.
5. Provide a redirect URL in the Redirect URL field.
6. The **Permission URL** field is auto populated after the above sets are completed.
7. Then visit the permission URL from a browser, and follow the directions to get the authorization code.
8. Provide the authorization code from step 7 in the **Authorization Code** field.
9. Select **Create Token** button to generate the refresh token.
10. Select **OK** to save the configuration.

Use the Default Implementation for the SMTP Security Plug-in

i Note: In WebFOCUS 8, the functionality provided by the default implementation of the SMTP Security Plug-in can be accomplished within a schedule using the Email Server options in the scheduling tool.

Procedure

1. From the Tools menu, click **ReportCaster Status**.
2. Click the **Configuration** button.
3. In the left pane, select the **Email Distribution** folder.
4. Enter the following value in the SMTP Security Plug-in field.

```
ibi.broker.scheduler.plugin.DefaultSMTPSecurityExit
```

For more information about the Default SMTP Security Exit Interface, refer to the ibi.broker.scheduler.plugin package description found in the ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

5. Click **Save**.
6. Create a file called smtp_security_exit.txt using the following format:

```
HOSTNAME, AUTHORIZATION REQUIRED(Y,N), USERNAME, PASSWORD, SSL  
(Y,N), TLS(Y,N)
```

7. Copy the smtp_security_exit.txt file to the .../ReportCaster/cfg directory.
8. Restart the Distribution Server.

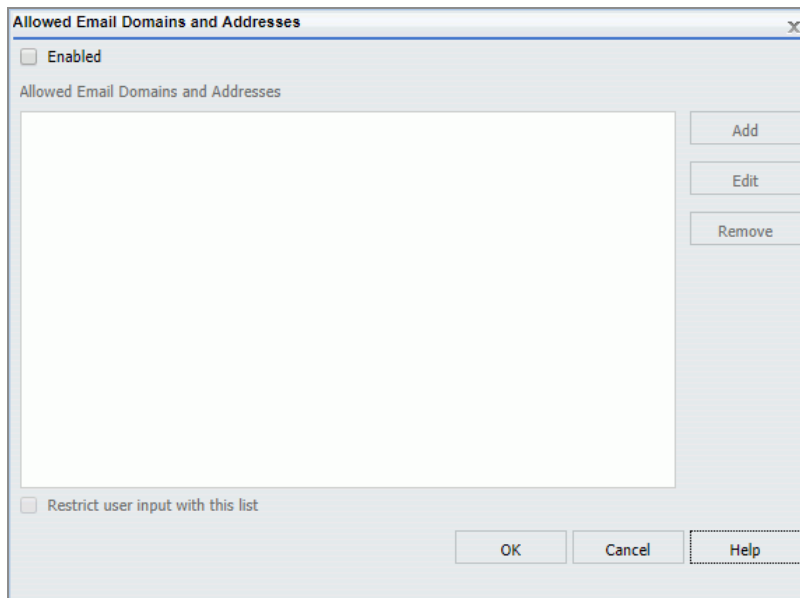
Result

If the mail server (hostname) is found in the smtp_security_exit.txt file and the authorization required flag is Y, the user and password in the file will be used to authenticate the mail server. If the SSL flag is Y, then SSL will be used. If the TLS flag is Y, TLS will be used.

Validating Allowed Email Domains and Addresses

When sending reports by email, you can restrict user selection of email domains and addresses from a pre-defined list.

The following image shows the Allowed Email Domains and Addresses dialog box in the WebFOCUS ReportCaster Console, where this option is available.



Select the **Enabled** check box to restrict email distribution to a list of valid email domains and addresses. When the list is enabled, and a user enters an email address that is not on this list, the WebFOCUS ReportCaster job cannot be saved.

If you select the **Restrict user input with this list** check box, users will only be able to use email domains and addresses selected from this list, applying another layer of email distribution restriction for other users.



Note: You must select the Enabled check box in order to select the Restrict user input with this list check box.

Examples of Invalid Email Addresses and Domains

In this example, an Administrator added the following email addresses and email domains to the Allowed Email Domains and Addresses list:

- john@ibi.com
- roger@ibi.com
- @gmail.com
- @yahoo.com

These additions to the list define what is valid and what is invalid for user input.

Invalid Email Addresses

For example, since john@ibi.com was added to the list, if a user types in John@ibi.com, with an upper case J, the email address is valid. This is because the Allowed Email Domains and Addresses feature is not case sensitive.

However, if a user types johnroger@ibi.com, which is a combination of two email addresses that were added to the list, the email address would be invalid, because this specific email address was not added to the list.

Invalid Email Domains

When entering domain addresses, if a user types in any email address with the email domain @gmail.com, it is valid, because @gmail.com is one of the domains added to the list.

However, if a user types in any email address with the email domain @outlook.com, it is not valid, because @outlook.com is not one of the domains added to the list.

Email Domain and Address Restrictions

Restrictions apply during the following situations:

- Editing Email Distribution options in the

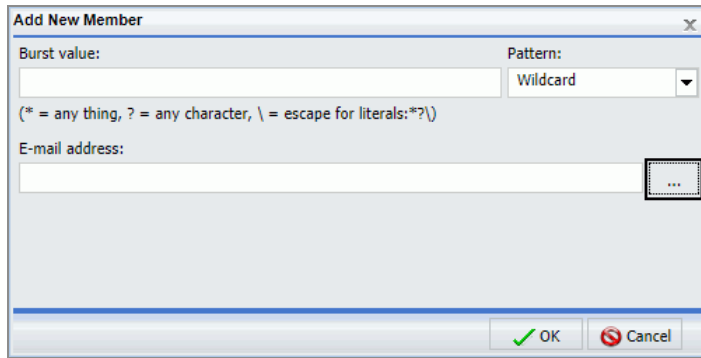
The following image shows the Email Distribution options in the If you select the **Restrict user input with this list** check box, you can click the **To**, **From**, and **Reply Address** fields to select or create email addresses.

- Editing Notification Email options in the

The following image shows the Notification Email options in the If you select the **Restrict user input with this list** check box, you can click the **Reply Address**, **Brief Message To**, and **Full Message To** fields to select or create email addresses.

- Adding new members to a Distribution List

The following image shows the Distribution List Add New Member dialog box. If you select the **Restrict user input with this list** check box, you can click the **ellipsis** button next to the E-mail address field to select or create email addresses.



The 'Add New Member' dialog box contains the following fields and controls:

- Burst value:** A text input field.
- Pattern:** A dropdown menu currently set to 'Wildcard'.
- Legend:** A text label stating '(* = any thing, ? = any character, \ = escape for literals:*\?)'.
- E-mail address:** A text input field with a small button containing three dots (ellipsis) to its right.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Restrictions also apply to the following file types:

- **Distribution Files.** If you import an external distribution file, the emails listed in the file are validated against the list of allowed email addresses and domains.
- **Dynamic Distribution Lists.** If you create a Dynamic Distribution List, the emails selected for use are validated against the list of allowed email addresses and domains.

The Email Selection Dialog Box

When the Restrict user input with this list check box has been selected, you can click a **To**, **From**, **Cc**, **Bcc**, **Reply**, **Reply Address**, **Brief Message To**, **Full Message To**, or **ellipsis** button to display one of three dialog boxes. The dialog box that displays is based on the type of email domain and address information contained in the Allowed Email Domains and Addresses list.

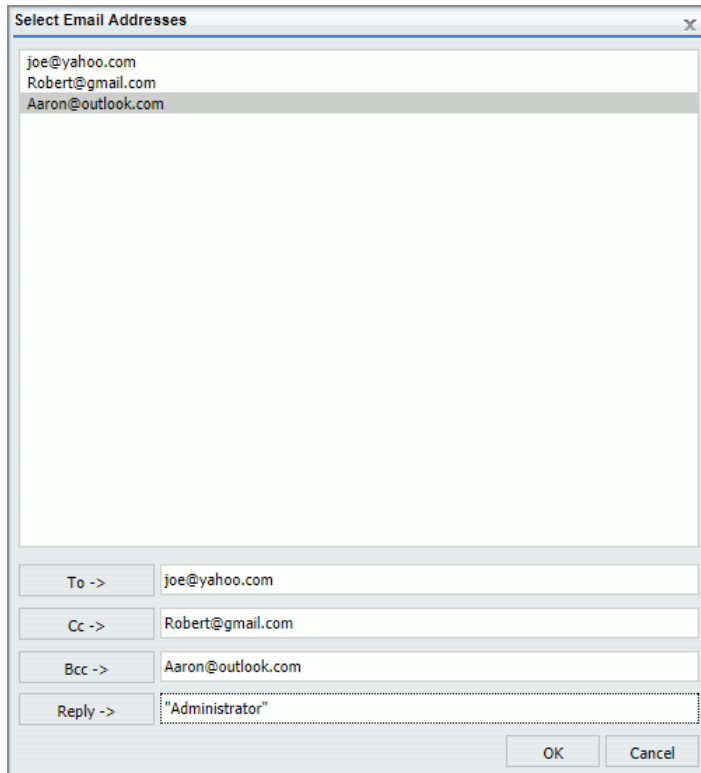
Note:

- You can enter multiple email addresses into the To, From, Cc, Bcc, Reply, Reply Address, Brief Message To, and Full Message To fields.
- To cancel the selection of an email address in the Select Email Addresses dialog box, hold the Ctrl key and select the email address.

A List of Only Email Addresses

If the Allowed Email Domains and Addresses list contains only email addresses, the Select Email Addresses dialog box allows you to select an email address for the **To**, **Cc**, **Bcc**, or

Reply fields, as shown in the following image.



After you select an email address, click the To, Cc, Bcc, or Reply button to assign the email address to the respective field.

A List of Email Domains and Addresses

If the Allowed Email Domains and Addresses list contains both email domains and addresses, the Select or Enter Email Addresses dialog box lets you select from a list of email address. The dialog box also lets you create an email address for specific domains, as shown in the following image.

Select or Enter Email Addresses

Jackie @ outlook.com

joe@yahoo.com
Aaron@live.com

To -> joe@yahoo.com

Cc -> Aaron@live.com

Bcc -> Robert@gmail.com

Reply -> Jackie@outlook.com

OK Cancel

After you select an email address, or enter an email address and choose a domain, click the **To**, **Cc**, **Bcc**, or **Reply** button to assign the email address to the respective field.

A List of Only Email Domains

If the Allowed Email Domains and Addresses list contains only email domains, the input dialog box lets you select an email domain and enter the name of an email address, as shown in the following image.

After you enter an email address and choose a domain, click the **To**, **Cc**, **Bcc**, or **Reply** button to assign the email address to the respective field.

Notification

The Notification folder in the Configuration tab contains default notification settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Notification Defaults section		
Notify Mail Server	Optional.	Name of the mail server that distributes the notification email. If blank, WebFOCUS ReportCaster uses the Mailhost setting as the notification mail server.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Tip: We recommend using different mail servers for notification and email distribution. This way, if there is a problem with your Mailhost, notification will still be sent. Having separate mail servers ensures that you will be informed when the default mail server falters. You can also specify a port for the Notify Mailhost using <i>hostname:port</i>. If you do not specify a port or the port you specify is not present, the default port is used.
Default Notify Type	The default value is Never.	Specifies whether to send notification of the schedule status to a specified email address. Possible values are: • Never. This is the default value. WebFOCUS ReportCaster does not send notification of the schedule status under any circumstance. • On Error. The specified users are notified when errors are encountered while running the schedule. We recommend using the On Error notification option. • Always. The specified user is always notified when the schedule runs.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: This setting is also available in the Administration Console.
Enable Brief Notification Only	Optional.	Controls whether Full Notification is available as a scheduling option. When this check box is selected, you can only select the Brief Notification option when you schedule a report. Full Notification is not available. Note: Messages are displayed in the log when Full Notification is disabled. If a schedule is created before Full Notification is disabled, when the schedule executes, a Brief Notification will be sent, and a warning will be displayed in the schedule log.
Enable system notifications	Optional.	Controls whether a notification is sent to a designated administrator when a Failover event occurs, when a Distribution Server changes from Failover Mode to Full Function mode, or when a Distribution Server is stopped. When this option is selected, the fields within the System Notifications section must be filled out before this configuration can be saved. When a Distribution Server changes from Failover to Full Function mode, the body of the email will display as

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		follows: The Distribution Server at <i><Host>:<Port></i> has changed from Failover to Full Function mode. When a Distribution Server has stopped, the body of the email will display as follows: The Distribution Server at <i><Host>:<Port></i> is going to stop.
System Notifications section		
Administrative Email Address	Required.	Enter the default Administrative Email Address to which you want the system notification to be sent. This value is required.
From	Optional.	Enter the default address from which you want the system notification to be sent. This value is not required.
Reply Email Address	Required.	Enter the default Reply Email Address to which you want the user receiving the email address to reply. This value is required.
Email Subject	Optional.	Enter the default Email Subject line. This value is not required.

Configure Notification

Procedure

1. From the Tools menu, click **WebFOCUS ReportCaster Status**.
2. Click the **Configuration** button.

i Note: Authorized users can also access the WebFOCUS ReportCaster Configuration tool from the Administration Console.

3. In the left pane, select the **Notification** folder.
4. Populate the notification fields. You can:
 - Make changes to the current notification settings. For more information, refer to the preceding table.
 - Supply any default values that you would like to be available at schedule creation time.
5. Click **Save**.

FTP Settings

The FTP Settings folder in the Configuration tab contains the settings that define the default FTP server that WebFOCUS ReportCaster will use for FTP distributions.

The following table lists and describes the configuration settings that are available in the FTP Settings folder.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Default FTP Host	Optional.	Name of the default FTP server when creating an FTP schedule. If you want to designate a port number other than the default port number, then use the following format: <i>hostname:port</i>
Default FTP	Optional.	Name of the default FTP location

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Location		(directory) when creating an FTP schedule.
Default User	Optional.	Default user ID and password to perform FTP file transfers. To access the Default User settings, click the icon to the right of the Default User field. The User dialog box opens, where you can type the user name and password.
SFTP Security Plug-in	Optional.	Name of a custom written Java class that implements the WebFOCUS ReportCaster SFTP security interface to dynamically retrieve the value of a public key needed to connect to a secure FTP server. For configuration information, see Configure FTP Settings.
Create Index File with Burst Distribution	Required. By default, this option is selected.	For an FTP distribution of burst reports, this option determines whether or not to create an index file when the schedule runs.
FTP Server Information		
This server requires a File Transfer Protocol (FTP).	Optional By default, this option is selected.	This option specifies that the default setting in the schedule tool is to use FTP.
This server requires a secure	Optional	This option specifies that the default setting in the schedule tool is to use

Setting	Optional or Required/Default Value	Descriptions and Possible Values
File Transfer Protocol over TLS/SSL (FTPS).		FTPS. This functionality enables you to select this option once in the configuration tool, eliminating the need to select the button each time you use the scheduling tool. You can clear the option in the scheduling tool. If this button is not selected, you can optionally select the button in the scheduling tool at schedule creation time.
This server requires a secure SSH File Transfer Protocol (SFTP)	Optional.	This option specifies that the default setting in the schedule tool is to use SFTP. This functionality enables you to select this option once in the configuration tool, eliminating the need to select the button each time you use the scheduling tool. You can clear the button in the scheduling tool. If this button is not selected, you can optionally select the button in the scheduling tool at schedule creation time.

Configure FTP Settings

You can optionally supply values for the Default FTP Host, Default FTP Location, and Default User fields. These values are defaults for the schedule, as they are used at schedule creation time.

Procedure

1. On the ribbon, in the show group, click the **Configuration** button.
2. In the left pane, select the **FTP Settings** folder.
3. Optionally, populate the FTP Settings fields, using the following information as a guideline:
 - **Default FTP Host.** Enter a name for the default FTP Server. This will be used when creating an FTP schedule.
 - **Default FTP Location.** Enter the name of the directory that will be used when creating an FTP schedule.
 - **Default User.** Enter the default user ID and password to perform FTP file transfers.
 - **SFTP Security Plug-in.** Enter the name of a custom written Java class that will implement the WebFOCUS ReportCaster SFTP security interface to dynamically retrieve the value of a public key needed to connect to a secure FTP server.

For more information about the SFTP Plug-in, refer to the `ibi.broker.scheduler.plugin` package description found in the ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

i Note: Once stored, these values are used when you create a schedule. They are constant, unless you override them at the time you create a schedule.

4. Optionally, clear the **Create Index File with Burst Distribution** check box to indicate that an index will not be generated when the FTP schedule is run.
5. If your SFTP Server uses encryption keys, you can use the SFTP Security Plug-in to provide the values. To use this plug-in, enter the name of your program that implements the SFTP Security interface.
6. Optionally, select the **This server requires a File Transfer Protocol (FTP)** button if the FTP server does not require SFTP or FTPS.
7. Optionally, select the **This server requires a secure SSH File Transfer Protocol (SFTP)** button to secure the configuration information. Select the Security Mode, Protocol, and Data Connection Security settings to authenticate the server.

8. Optionally, select the **This server requires a secure File Transfer Protocol over TLS/SSL (FTPS)** button if the FTP server requires FTPS. Select the type of authentication you want for the server.
9. Click **Save**.

Use the Default Implementation for the SFTP Security Plug-in

Procedure

1. On the ribbon, in the Show group, click the **Configuration** button.
2. In the left pane, select the **FTP Settings** folder.
The FTP Settings options display.
3. In the SFTP Security Plug-in field, enter the name of the SFTP Security Plug-in program. The default program name is:

```
ibi.broker.scheduler.plugin.DefaultSFTPSecurityExit
```

For more information about the default SFTP Plug-in, refer to the `ibi.broker.scheduler.plugin` package description found in the WebFOCUS ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

4. Click **Save**.
5. Create a file called `sftp_private_key.txt`, then copy and paste the private key shown in the following example.

```
----- BEGIN SSHTOOLS ENCRYPTED PRIVATE KEY -----
Subject: My Subject
Comment: 1024-bit DSA

AAAABG5vbmUAAAFGAAAAB3NzaC1kc3MAAACBAP1/U4EddRIpUt9KnC7s50f2EbdSP09
EAMMeP4C2
```

```

USZpRV1AI1H7WT2NWPq/xfW6MPbLm1Vs14E7gB00b/JmYLdrnVC1pJ+f6AR7ECLCT7u
p1/63xhv4

01fnxqimFQ8E+4P208UewwI1VBNaFpEy9nXzrith1yrv8iIDGZ3RSAHHAAAFQCXYFC
PFSMLzLKS

uYKi64QL8Fgc9QAAAIEA9+GghdabPd7LvKtcNrhXuXmUr7v60uqC+VdMCz0HgmdRWVe
OutRZT+Zx

BxCBgLRJFnEj6EwoFh03zwyjMim4TwWeotUfI0o4K0uHiuzpnWRbqN/C/ohNWLx+2J6
ASQ7zKTx

vqhRkImog9/hWuWfBpKLZ16Ae1U1ZAFMO/7PSSoAAAAUa8Tjs7fHbpawvjIB6fzsCJn
Ruvk=
----- END SSHTOOLS ENCRYPTED PRIVATE KEY -----

```

The following image shows the private key in the text file.



- In your file system, navigate to the ...ibi\WebFOCUS nn \ReportCaster\cfg directory, where nn is the release number of your WebFOCUS software. Save this file to the cfg directory. If you are using a UNIX environment, the correct file path is ../ReportCaster/cfg.

The following image shows the sftp_private_key.txt file saved to the cfg directory.

Name	Date modified	Type	Size
dsKeystore.jks	3/8/2018 5:13 PM	JKS File	3 KB
log4j	3/8/2018 5:16 PM	XML Document	3 KB
log4j_stop	3/8/2018 5:16 PM	XML Document	2 KB
log4jUtil	3/8/2018 5:16 PM	XML Document	2 KB
rametrics	3/8/2018 5:16 PM	FEX File	1 KB
Readme	3/8/2018 5:16 PM	Text Document	1 KB
zipencrypt	3/8/2018 5:16 PM	Text Document	1 KB
log4j2	5/13/2018 10:39 PM	XML Document	10 KB
log4j2_stop	5/13/2018 10:39 PM	XML Document	2 KB
log4j2_util	5/13/2018 10:39 PM	XML Document	2 KB
sftp_private_key	6/1/2018 3:54 PM	Text Document	1 KB

7. Set the Distribution Server JVM system property DSINSTALL to the root directory of the Distribution Server.
8. Restart the Distribution Server.

If the default SFTP Plug-in is in use, then for any schedule distributing by SFTP, the Distribution Server will attempt to authenticate to the SFTP Server using the private key found in the `sftp_private_key.txt` file.

FTP Settings

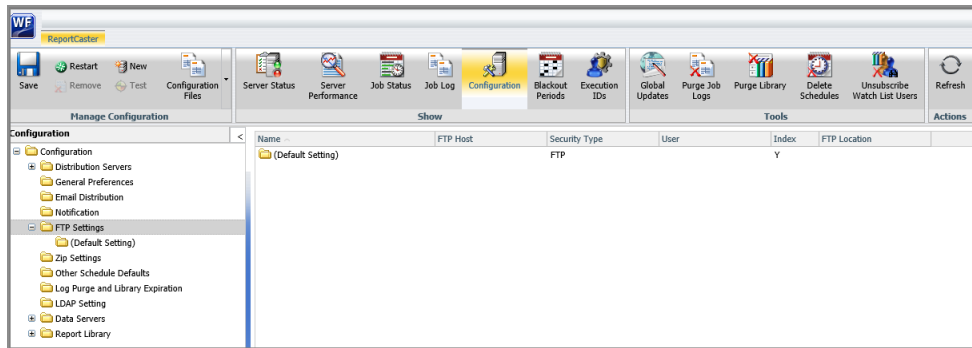
The FTP Settings folder in the Configuration tab contains a list of FTP server configurations that WebFOCUS ReportCaster can use for FTP distribution schedules and for Repository distribution schedules that target distribution directory nodes linked to an FTP Server. FTP Settings include details that identify the name and network location of an FTP Server. They also identify the name of the user who can gain access to the FTP Server, and additional details about the way in which the connection to that server is secured.

Predefined FTP setting configurations can be made available to basic or advanced distribution schedules. They can also be assigned to a distribution directory node designed to transfer scheduled report content to an FTP server for distribution.

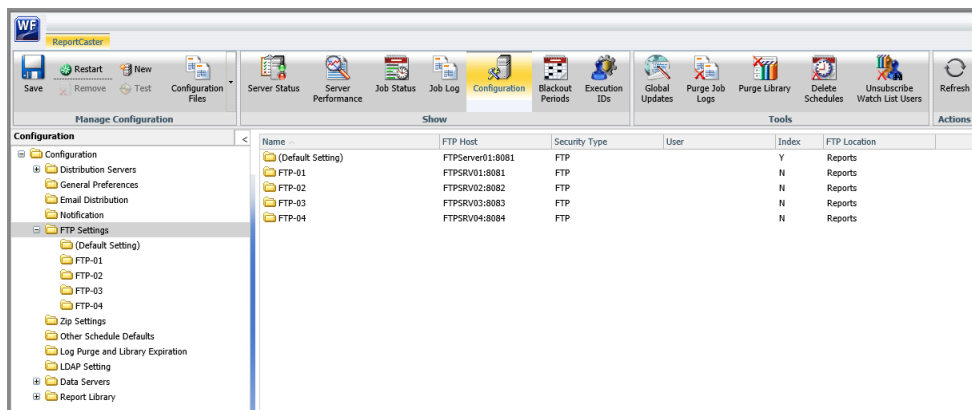
The ability to transfer scheduled WebFOCUS ReportCaster output to FTP servers enables organizations to take advantage of fast and efficient file transfer operations made possible by the less cumbersome FTP protocol, while maintaining user ID and password protected security over file transfer operations.

Understanding the FTP Settings User Interface

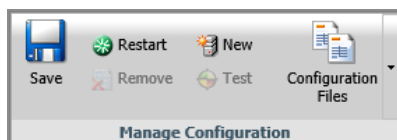
When no FTP Server configurations are defined, the FTP Settings folder contains a single folder that is identified as the (Default Setting), as shown in the following image.



WebFOCUS ReportCaster can direct report output to more than one FTP server, but if user-defined FTP setting configurations are created, an administrator must designate one of them as the default server for use with the basic and advanced scheduling tools. If your organization uses a single FTP server and chooses to limit the selection of FTP Servers to predefined FTP Settings, this is the only required FTP setting configuration. When additional FTP Server configurations are defined, individual folders for each one appear under the FTP Settings folder, as shown in the following image. You can add configurations for other FTP servers, but the default configuration is always defined in the (Default Setting) folder.



Use the options on the Configuration tab, in the Manage Configuration group, to create, update, or remove FTP Setting configuration folders, as shown in the following image.



- **New.** Opens the FTP Settings dialog box that contains the options that define a new FTP Setting configuration.
- **Save.** Saves new and updated FTP Setting configurations.

- **Remove.** Deletes FTP Setting configurations.
- **Restart.** Completes the registration of each change to the FTP Setting configurations by automatically stopping and restarting the Distribution Server.
- **Test.** Tests the connection to a selected server or repository. This option is not relevant to FTP Configurations.
- **Configuration Files.** Provides options to view and download WebFOCUS ReportCaster configuration files. This option is not relevant to FTP Configurations.

As a reminder, after making any changes to an FTP Setting configuration, you must also exit WebFOCUS ReportCaster and WebFOCUS and stop and restart the WebFOCUS Application Server in order to see the changes on the WebFOCUS ReportCaster Configuration tab.

The options in the Manage Configuration group are context-sensitive, meaning that they become available for selection only when the action they represent is relevant. For example, when you click an FTP Server folder in the left pane, the Remove, Restart, and Save options, which are all appropriate actions for existing FTP Setting configurations, are displayed in full color and become available for use.

Understanding FTP Configuration Details

When you click an individual FTP setting folder in the left pane, the right pane displays the details for that FTP Setting configuration.

An FTP setting configuration defines the name and location of a server that is equipped with an FTP client that can send and receive files using the FTP protocol. The configuration also includes the user ID and password required to access the FTP client on that server and the security protocol it requires.

The following table lists and describes the configuration settings that are available in an individual FTP Settings folder.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Name	Required	The name of the folder that identifies

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		this FTP setting configuration in the Configuration tree. This value appears only within WebFOCUS ReportCaster. You can use the actual name of the FTP Server or a different value that uniquely identifies a server configuration. The name of each FTP Setting configuration must be unique.
FTP Host	Required	The name of the FTP server used when creating an FTP schedule. If you want to designate a port number other than the default port number, use the following format: <i>hostname:port</i>.
FTP Location	Optional	The name of the FTP location (directory) used when creating an FTP schedule.
User	Required	The ID and password of the user authorized to perform FTP file transfers. To access the User settings, click the icon to the right of the User field. The User dialog box opens, where you can type the user Name and Password. Note: The Name and Password you assign to this field must also be defined in the FTP Server identified by this configuration.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
SFTP Security Plug-in	Optional	The name of a custom-written Java class that implements the WebFOCUS ReportCaster SFTP security interface that dynamically retrieves the value of a public key needed to connect to a secure FTP server. For configuration information, see Configure FTP Settings .
Create Index File with Burst Distribution	Required This option is selected, by default.	For an FTP distribution of burst reports, this option determines whether or not to create an index file when the schedule runs.
FTP Server Information		
This server requires a File Transfer Protocol (FTP).	This option is selected, by default. Note: One of the options in the FTP Server Information section must be selected.	This option specifies that the default setting in the schedule tool is to use FTP. When this option is selected, no additional security configuration is required.
This server requires a secure File Transfer Protocol over TLS/SSL (FTPS).	Optional Note: One of the options in the FTP Server Information section must be selected.	When this option is selected, FTPS is the default value in the FTP distribution schedule tool, eliminating the need to select this option each time you use the schedule tool. If you need to override this default value, you can clear the FTPS check box in the FTP Distribution Options dialog box when you create a schedule for an FTP Server

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		distribution. When this option is cleared, FTPS is not the default value, but you can still select it in the FTP Distribution Options dialog box when you create a schedule for an FTP Server distribution.
This server requires a secure SSH File Transfer Protocol (SFTP).	Optional Note: One of the options in the FTP Server Information section must be selected.	When this option is selected, SFTP is the default value for FTP distributions, eliminating the need to select this option each time you use the schedule tool. If you need to override this default value, you can clear the SFTP check box in the FTP Distribution Options dialog box when you create a schedule for an FTP Server distribution. When this option is cleared, SFTP is not the default value, but you can still select it in the FTP Distribution Options dialog box when you create a schedule for an FTP Server distribution.
Additional Check Boxes		
Don't allow user defined FTP in Schedule	Optional	If this check box is selected, the range of available selections in the FTP Server Name field in the FTP Distribution Options dialog box for basic and advanced FTP schedules is

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		limited to a list of predefined FTP Settings. Users are unable to type values directly into this dialog box in order to assign an FTP Server Setting configuration to an individual schedule. If this check box is cleared, the FTP Server Name field in the FTP Distribution Options dialog box for basic and advanced FTP schedules displays the value (Customized FTP) and users can type values directly into this dialog box in order to assign an FTP Server Setting configuration to an individual schedule. If more than one FTP setting configuration is created, a list of predefined FTP settings is also available in the FTP Server Name field, and users can select from those settings as well as type their own FTP setting configuration in the schedule itself. Note: This check box appears only on the (Default Settings) page.
Don't show in Schedule FTP list	Optional	The value in this check box is only relevant when the Don't allow user defined FTP in Schedule check box is selected in the (Default Settings) page. If this check box is selected, this FTP setting configuration does not appear

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		in the FTP Server Name list of the FTP Distribution Options dialog box for FTP Schedules or in the list of available FTP Servers for distribution directory nodes defined in the WebFOCUS Administration Console. If this check box is cleared, this FTP setting configuration does appear in the FTP Server Name list of the FTP Distribution Options dialog box for FTP Schedules and in the list of available FTP Servers for distribution directory nodes defined in the WebFOCUS Administration Console. Note: This check box only appears on additional individual FTP Settings configuration pages. It does not appear on the Default Settings page.

Deploying FTP Setting Configurations

FTP Setting configurations can be used in Basic and Advanced schedules that use the FTP or Repository distribution method. Organizations can choose to limit the selection of available FTP servers to a list of predefined configurations or to accommodate a broader range of FTP servers created for individual FTP distribution schedules by selecting or clearing the Don't allow user defined FTP in Schedule check box that appears on the (Default Settings) page.

When this check box is selected, the range of FTP Setting configurations available for FTP distributions is strictly limited to a set of predefined FTP Settings as defined under the FTP Settings folder. Users cannot define a new FTP Setting configuration for an individual FTP schedule.

When this check box is cleared, individual users can select a predefined FTP Setting configuration *or* accept the (Customized FTP) option displayed, by default, and then define a new FTP Setting configuration in the FTP Distribution Options dialog box attached to individual FTP schedules. These two options are not mutually exclusive.

The range of FTP settings available for Repository distributions using a distribution directory node is always limited to the list of predefined FTP Settings. Users cannot create an FTP setting configuration for an individual distribution directory.

When one or more additional FTP setting configurations are available, the Type option appears on the Network Location page of the Administration Console, and administrators can create distribution directory nodes that can be mapped to one of the predefined FTP Setting configurations.

However, if no additional FTP setting configurations are available, the Type option does not appear on the Network Location page of the Administration Console, and users cannot create distribution directory nodes that can be mapped to a predefined FTP Setting configuration.

The FTP configuration that appears on the (Default Setting) page is not a true IBFS node. Therefore, the presence of a configuration on this page does not make the Type option appear on the Network Location page. In order to use the FTP Configuration assigned to the (Default Setting) page with distribution directories, you must create a copy of it as an additional FTP setting configuration so that it will appear in the list of predefined FTP configurations in the FTP Distribution Options dialog box for basic and advanced schedules.

Even though the ability to create FTP setting configurations for individual FTP distributions empowers users to set up FTP distribution schedules as new FTP servers become available, this capability also permits the creation and maintenance of connections to FTP servers without the benefit of a centralized management or oversight. Therefore, to maintain full control over the list of available FTP setting configurations, we recommend that administrators select the Don't allow user defined FTP in Schedule check box and limit the configuration of FTP Setting Configurations to the Configuration page list.

The creation and deployment of predefined FTP Setting configurations is a multi-stage process that uses the following sequence:

1. Identify the FTP Server clients that can be made available in predefined FTP Setting configurations and identify full details of their location, user ID, password. and security protocol, FTP, FTPS, or SFTP.
2. Create an FTP Setting configuration that can be used, by default, in FTP distributions

on the (Default Setting) page.

3. To prevent users from creating their own FTP setting Configurations on FTP schedules, select the Don't allow user defined FTP in Schedule check box on the (Default Setting) page.
4. To allow users to create their own FTP setting configurations on FTP schedules, clear the Don't allow user defined FTP in Schedule check box on the (Default Setting) page.
5. Create FTP Setting configurations for each additional FTP Server client.
6. Create FTP Distribution Schedules and assign the predefined FTP Setting configurations to them.
7. Create distribution directory nodes on the WebFOCUS Administration Console Configuration tab and assign the predefined FTP Setting configurations to them.
8. Create Repository Distribution Schedules and assign the distribution directories that target the predefined FTP Setting configurations to them.
9. Test the FTP and Repository distribution schedules that use the predefined FTP configurations and adjust them as necessary.

Establishing a Default FTP Setting Configuration

The (Default Setting) configuration identifies the FTP server that will be used, by default, whenever you create a new FTP distribution schedule and must select from a list of predefined FTP setting configurations. If your organization chooses to use predefined FTP setting configurations, this is the first FTP setting configuration you should create, and it should remain available as long as you choose to use predefined FTP setting configurations.

You can override this default with other FTP setting configurations by selecting them from the FTP Server Name field in the FTP Distribution dialog box when you create or run an FTP distribution schedule. However, because this configuration does not define a true IBFS system node, it does not appear in the list of FTP setting configurations that can be assigned to a distribution directory node in the WebFOCUS Administration Console, making it unavailable for Repository distribution schedules.

To create or update the default FTP setting configuration, type and select new values directly into the (Default Setting) configuration page. The presence of an FTP configuration

in the (Default Setting) folder automatically identifies it as the default configuration. There is no additional check box or feature on the FTP Settings configuration page that identifies this configuration as the default configuration. If you need to update the details of the default FTP setting configuration or replace it with the details of a different server, you must type the new values directly over the existing values from the old configuration on this page.

Create or Update the Default Settings Configuration

The FTP Settings configuration defined in the (Default Setting) folder is automatically identified as the default FTP setting configuration. Use this procedure and the page that opens when you click the (Default Setting) folder to create or update this default configuration.

Procedure

1. On the start page, select the **Main Menu**, and then select **WebFOCUS ReportCaster Status** under the Quick Access section.
or
On the WebFOCUS Home Page, select **Utilities**, and then select **WebFOCUS ReportCaster Status**.
or
On the Legacy home page, click **Tools**, and then click **WebFOCUS ReportCaster Status**.
2. On the ribbon, in the Show group, click **Configuration**.
3. In the left pane, expand the **FTP Settings** folder, and then click the **(Default Setting)** folder.
4. Configure the FTP Settings in the right pane as described in [Configure FTP Settings](#).
5. Perform the following steps to configure the range of FTP Setting configurations available for basic and advanced FTP schedules:
 - a. To limit the range of available FTP setting configurations to a list of predefined configurations, select the **Don't allow user defined FTP in Schedule** check

box.

- b. To allow users to create their own FTP setting configurations in addition to the list of predefined configurations, clear the **Don't allow user defined FTP in Schedule** check box.
6. When your configuration is complete, click **OK** to save your settings.
7. When you receive a message asking if you want to save the changes that you made to the WebFOCUS ReportCaster configuration, click **OK**.
8. When you receive a message reminding you to restart the Distribution Server and reload the WebFOCUS ReportCaster Web Application for these changes to take effect, click **OK**.
9. On the ribbon, in the Manage Configuration group, click **Restart** to apply your changes.
10. Close WebFOCUS ReportCaster and sign out of WebFOCUS.
11. Stop and restart the WebFOCUS Application Server.
12. Sign in to WebFOCUS again and reopen WebFOCUS ReportCaster as described in steps 1 through 4 in order to review and confirm your changes.

Create an Additional FTP Setting Configuration

You must use the FTP Settings dialog box to create additional FTP Setting configurations, as described in this procedure. The FTP setting configurations you create using this feature are available to FTP Distribution schedules and to distribution directory nodes.

Procedure

1. On the start page, select the **Main Menu**, and then select **WebFOCUS ReportCaster Status** under the Quick Access section.

or

On the WebFOCUS Home Page, select **Utilities**, and then select **WebFOCUS ReportCaster Status**.

or

On the Legacy home page, click **Tools**, and then click **WebFOCUS ReportCaster**

Status.

2. On the ribbon, in the Show group, click **Configuration**.
3. In the left pane, click the **FTP Settings** folder.
4. On the ribbon, in the Manage Configuration group, click **New** to open the FTP Settings dialog box.
5. Configure the FTP Settings as described in [Configure FTP Settings](#).
6. When your configuration is complete, click **OK** to save your settings.
7. When you receive a message asking if you want to save the changes that you made to the WebFOCUS ReportCaster configuration, click **OK**.
8. When you receive a message reminding you to restart the Distribution Server and reload the WebFOCUS ReportCaster Web Application for these changes to take effect, click **OK**.
9. On the ribbon, in the Manage Configuration group, click **Restart** to apply your changes.
10. Close WebFOCUS ReportCaster and sign out of WebFOCUS.
11. Stop and restart the WebFOCUS Application Server.
12. Sign in to WebFOCUS again and reopen WebFOCUS ReportCaster as described in steps 1 through 4 in order to review and confirm your changes.

Edit an FTP Setting Configuration

Procedure

1. On the start page, select the **Main Menu**, and then select **WebFOCUS ReportCaster Status** under the Quick Access section.

or

On the WebFOCUS Home Page, select **Utilities**, and then select **WebFOCUS ReportCaster Status**.

or

On the Legacy home page, click **Tools**, and then click **WebFOCUS ReportCaster**

Status.

2. On the ribbon, in the Show group, click **Configuration**.
3. In the left pane, expand the **FTP Settings** folder, and click the folder you want to update.
4. Configure the FTP Settings in the right pane as described in [Configure FTP Settings](#).
5. When your edits are complete, on the ribbon in the Manage Configuration group, click **Save** to save your settings.
6. When you receive a message asking if you want to save the changes that you made to the WebFOCUS ReportCaster configuration, click **OK**.
7. When you receive a message reminding you to restart the Distribution Server and reload the WebFOCUS ReportCaster Web Application for these changes to take effect, click **OK**.
8. On the ribbon, in the Manage Configuration group, click **Restart** to apply your changes.
9. Close WebFOCUS ReportCaster and sign out of WebFOCUS.
10. Stop and restart the WebFOCUS Application Server.
11. Sign in to WebFOCUS again and reopen WebFOCUS ReportCaster as described in steps 1 through 4 in order to review and confirm your changes.

Configure FTP Settings

Procedure

1. In the FTP Settings dialog box, or on the FTP Settings page, populate the FTP Settings fields, using the following information as a guideline:
 - **Name.** Type a unique name to identify the folder for this FTP Server configuration. This name will not be used when creating an FTP schedule. Each name must be unique.
 - **FTP Host.** Type the name of the FTP Server that is targeted by this connection. This name will be used when creating an FTP Schedule.
 - **FTP Location.** Type the name of the directory on the FTP server that is

targeted by this connection. This name will be used when creating an FTP schedule.

- **User.** Type the ID and password of the user that will be used to perform file transfers to this FTP server.
 - **SFTP Security Plug-in.** If your SFTP Server uses encryption keys, you can use the SFTP Security Plug-in to provide these values. To use this plug-in, type the name of the custom-written Java class that implements the SFTP Security interface to dynamically retrieve the value of a public key needed to connect to a secure FTP server.
2. If this FTP Server should generate an index file when used in an FTP schedule, select the **Create Index File with Burst Distribution** check box.
 3. In the FTP Server Information section, click one of the following options:
 - **This server requires a File Transfer Protocol (FTP).** This is the default selection. Accept this selection if the FTP server does not require SFTP or FTPS.
 - **This server requires a secure File Transfer Protocol over TLS/SSL (FTPS).** Click this option if the FTP Server requires a secure file transfer protocol, and select the Security Mode, Protocol, and Data Connection Security settings that identify the relevant characteristics of the FTPS server connection.
 - **This server requires a secure SSH File Transfer Protocol (SFTP).** Click this option if the FTP server requires FTPS, and select the type of authentication you want for the server.

Use the Default Implementation for the SFTP Security Plug-in

Procedure

1. On the ReportCaster Console ribbon, in the Show group, select **Configuration**.
2. In the left pane, expand the **FTP Settings** folder and select the FTP Setting configuration folder that requires an SFTP Security Plug-in.
The right pane displays the FTP Settings and values for your selected configuration.
3. Enter the name of the SFTP Security Plug-in program in the SFTP Security Plug-in

field. The default program name is:

```
ibi.broker.scheduler.plugin.DefaultSFTPSecurityExit
```

For more information about the default SFTP Plug-in, refer to the `ibi.broker.scheduler.plugin` package description found in the WebFOCUS ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

4. On the ribbon, in the Manage Configuration group, select **Save**.
5. When you receive a message asking you to confirm your decision to save changes, click **OK**.
6. When you receive a message reminding you to restart the distribution server and reload the web application, click **OK**.



Note: You will reload the web application and restart the distribution server later in this procedure.

7. Stop the WebFOCUS Application Server.
8. Open a text editor and create a file called `sftp_private_key.txt`.
9. Generate an encrypted private key using the `ssh-keygen` tool.
For more information about the `ssh-keygen` tool, see the online OpenBSD manual at: <http://man.openbsd.org/OpenBSD-current/man1/ssh-keygen.1#NAME>
10. Copy and paste the text of the private key generated by the `ssh-keygen` tool to the `sftp_private_key.txt` file.
11. In your file system, navigate to the `...ibi\WebFOCUSnn\ReportCaster\cfg` directory, where *nn* is the release number of your WebFOCUS software.
If you are using a UNIX environment, the correct file path is `../ReportCaster/cfg`.
12. Save the `sftp_private_key.txt` file to the `cfg` directory.
The following image shows the `sftp_private_key.txt` file saved to the `cfg` directory.

Name	Date modified	Type	Size
dsKeystore.jks	3/8/2018 5:13 PM	JKS File	3 KB
log4j	3/8/2018 5:16 PM	XML Document	3 KB
log4j_stop	3/8/2018 5:16 PM	XML Document	2 KB
log4jUtil	3/8/2018 5:16 PM	XML Document	2 KB
rametrics	3/8/2018 5:16 PM	FEX File	1 KB
Readme	3/8/2018 5:16 PM	Text Document	1 KB
zipencrypt	3/8/2018 5:16 PM	Text Document	1 KB
log4j2	5/13/2018 10:39 PM	XML Document	10 KB
log4j2_stop	5/13/2018 10:39 PM	XML Document	2 KB
log4j2_util	5/13/2018 10:39 PM	XML Document	2 KB
sftp_private_key	6/1/2018 3:54 PM	Text Document	1 KB

13. Restart the WebFOCUS Application Server.
14. Sign in to WebFOCUS again and open the ReportCaster Console.
15. On the ReportCaster Console ribbon, in the Manage Configuration group, select **Restart** In order to restart the Distribution Server.

If the default SFTP Plug-in is in use, the Distribution Server will attempt to authenticate to the SFTP Server using the private key found in the sftp_private_key.txt file for any scheduled distribution directed to an FTP server that uses SFTP authentication.

Remove an FTP Setting Configuration

Procedure

1. On the start page, select the **Main Menu**, and then select **WebFOCUS ReportCaster Status** under the Quick Access section.
or
On the WebFOCUS Home Page, select **Utilities**, and then select **WebFOCUS ReportCaster Status**.
or
On the Legacy home page, click **Tools**, and then click **WebFOCUS ReportCaster Status**.
2. On the ribbon, in the Show group, click **Configuration**.
3. In the left pane, expand the **FTP Settings** folder, and click the folder you want to remove.
4. On the ribbon, in the Manage Configuration group, click **Remove**.

5. When you receive a message asking if you want to save the changes that you made to the WebFOCUS ReportCaster configuration, click **OK**.
6. When you receive a message reminding you to restart the Distribution Server and reload the WebFOCUS ReportCaster Web Application for these changes to take effect, click **OK**.
7. On the ribbon, in the Manage Configuration group, click **Restart** to apply your changes.
8. Close WebFOCUS ReportCaster and sign out of WebFOCUS.
9. Stop and restart the WebFOCUS Application Server.
10. Sign in to WebFOCUS again and reopen WebFOCUS ReportCaster as described in steps 1 through 4 in order to review and confirm your changes.

The folder for the FTP Settings configuration no longer appears in the left pane.

Zip Settings

The Zip Settings folder in the Configuration tab contains settings for adding an extension to a distributed Zip file, the Zip encryption to use for distribution, and defining a Zip encryption password plug-in.

The Zip Settings folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Add Zip Extension to Filename if Not Specified	Required. By default, this option is selected.	Controls whether or not the .zip file extension will be automatically appended to the Zip file name entered by the user in a schedule distributed by email or FTP. Select this option if you want to automatically append .zip to the entered file name. Do not select this option if you want to

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		use the file name as entered by the user and not have .zip automatically appended to the file name.
Zip Minimum with Email Distribution	Required. The default size is in KB and set to 0.	Select either MB or KB and customize the size of your file using the up and down arrows. .
Zip Encryption Password Plug-in	Required. Default value is None.	Global setting that enables you to password protect and encrypt scheduled output distributed in a Zip file. This setting controls how passwords are obtained by the Distribution Server. The zip encryption is AES 256. For more information, see Configure the Default Zip Encryption Password Plug-in. Possible values are: • None. Do not use a plug-in to return the password for Zip protection. When set to None, you have the option to use the Zip encryption password feature by embedding the password in either a Dynamic Distribution List or a Distribution File rather than using a plug-in. • Default. Use the provided default plug-in to return a password for the Zip encryption password feature.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		• Custom. Use the provided custom plug-in named in the Zip Encryption Pwd Plug-in Name setting.
Zip Encryption Password Plug-in Name	Required when Zip Encryption Password Plug-in setting is Custom.	Type the name of a custom written plug-in that will return passwords. This plug-in must be available to the Distribution Server.
Zip Encoding	Optional.	Specifies an encoding other than the default encoding of the WebFOCUS ReportCaster Distribution Server platform. The encoding specified must match the encoding used by WinZip or any other Zip utility installed on the Distribution Server. Note: This setting is also available in the Administration Console.
Maximum Concurrent Compressions	Optional The default value is zero (0).	The total number of compression operations that the Distribution Server will perform simultaneously. If many running jobs include a compression operation (for example, zipping the output before sending), the compression operations could consume all of the available resources on the Distribution Server. You can lower this number to prevent this from occurring.
Use Distributed	Optional.	If this box is checked, then when a

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Filename for FTP Archive Filename if Archive Filename not Specified in Schedule		schedule is created that uses FTP as the distribution method and the archive file name is left blank, the Distribution Server will use the name found in the FTP Distribution List as the name of the archive file to be distributed.

Using the Zip Encryption Protection Default Plug-in

The default plug-in provided with WebFOCUS ReportCaster enables the encryption password to be associated with the where the scheduled report resides. For information on customizing a Zip Encryption Protection Plug-in, see [Configure the Default Zip Encryption Password Plug-in](#).

For more information about the Zip Encryption Password plugin, see the `ibi.broker.scheduler.plugin` description found in the ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

The plug-in delivers the password to the Distribution Server at schedule execution time, where the output is then encrypted and zipped. To use the default plug-in, choose **Default** for the Zip Encryption Password Plug-in setting. The default plug-in references the password file, `zipencrypt.txt`, for the domain and password. During installation, an empty version of this file is included in the directory.

The password statement in this file must be in the following format:

```
domain, domainhref, password,$
```

where:

domainhref

Is the location of the HTML page (for example, untitled/untitled.htm) that contains the WebFOCUS ReportCaster Repository folder.

password

Is the password to open content from the associated domain.

i Note: The WebFOCUS ReportCaster log will indicate that encryption was used.

The guidelines for using the default plug-in are:

- The zipencrypt.txt file must be in the directory.
- The zipencrypt.txt file must contain the WebFOCUS ReportCaster Repository folder of the WebFOCUS ReportCaster Repository report.

i Note: Since a WebFOCUS ReportCaster Repository folder is required to use the Zip Encryption Password Plug-in, attempting to enter a task other than a WebFOCUS ReportCaster Repository report will result in a failure to distribute the output of that task.

- If the zipencrypt.txt file contains an entry with the , but no password, then the output is not encrypted and will be zipped or not zipped according to the Zip option selected in the schedule when it was created.
- If both the and a password are in the password file, then the output is zipped regardless of the Zip option selected in the schedule when it was created.

To edit the zipencrypt.txt password file:

1. From the bin directory on the Distribution Server, run the decode utility, **decdpws**.

i Note: Once the decdpws utility is run, a log file named decdpws.log will be created in the directory.

2. Make the necessary additions or edits, such as adding a domain or changing the password.
3. Run the encode utility, **encdpws**, to encrypt the file.

i Note: Once the encdpwds utility is run, a log file named encdpwds.log will be created in the directory.

For more information about the Zip Encryption Password plugin, see the ibi.broker.scheduler.plugin description found in the ReportCaster API Specifications document, located at <https://webfocusinfocenter.informationbuilders.com/javadoc/rcaster/index.html>.

Configure Zip Settings

Procedure

1. From the Tools menu, click **WebFOCUS ReportCaster Status**.
2. Click the **Configuration** button.

i Note: Authorized users can also access the WebFOCUS ReportCaster Configuration tool from the Administration Console.

3. In the left pane, select the **Zip Settings** folder.
4. Populate the Zip Settings fields using the information provided in the preceding tables.
5. If you want to produce zipped output that is encrypted and password protected, you can use the Zip Encryption Password Plug-in. To use your own program to supply the password, select **Custom** from the drop-down list and enter the name of the program in the Zip Encryption Password Plug-in Name field. To use the default, select **Default**. For more information, see [Configure the Default Zip Encryption Password Plug-in](#).
6. Click **Save**.

Configure the Default Zip Encryption Password Plug-in

Procedure

1. From the Tools menu, click **WebFOCUS ReportCaster Status**.
2. Click the **Configuration** button.
3. In the left pane, select the **Zip Settings** folder.
4. From the Zip Encryption Password Plug-in drop-down list, select **Default**.
The default implementation requires that Inline Email be disabled.
If you click **OK**, Inline Email is automatically disabled.
5. Click **Save**.
6. In the directory, create the zipencrypt.txt file that contains the passwords used by the Zip Encryption Password Plug-in.

This file has the following structure:

```
Domain, domainhref, Password,$
```

where the first column is the word Domain, the second column identifies the folder containing the report to be scheduled, and the third column is the password.

i Note: Only WebFOCUS ReportCaster procedures can be scheduled when this plug-in is configured. If a password is found, the output is encrypted. If a password is not found, the output is zipped but not encrypted.

7. Restart the Distribution Server.

Other Schedule Defaults

The Other Schedule Defaults folder in the Configuration tab contains settings for Schedule End Date and Schedule End Time.

i Note: Depending on your time zone, the default Schedule End Date may be set to Jan 1, 2100.

The following table lists and describes the configuration settings available in the Other Schedule Defaults folder.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Schedule End Date	Required.	Clicking the drop-down menu displays a calendar where you can select the schedule end date.
Schedule End Time	Required.	Manually, you can enter an end time for the schedule. Alternatively, use the arrows to assign a schedule end time.

Log Purge

The Log Purge folder in the Configuration tab contains settings for purging log files, log purge periods, and log purge times.

The Log Purge folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Purge Log at Distribution Server Start	Optional. By default, the check box is unchecked.	When this check box is selected, log reports for the <i>prior</i> number of days defined in the <i>Log Purge Period (Days)</i> setting are automatically deleted when the Distribution Server is restarted from the command prompt.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: - Logs created on the same day as the server restart are <i>not</i> purged by this operation. - This option does <i>not</i> apply to server restarts initiated from the ReportCaster Console. - The log purge operation activated by this option is independent of the scheduled log purges established by the <i>Log Purge Time</i> setting.
Daily Scheduled Log Purge section:		
Log Purge Period (Days)	Optional.	Automatically purges individual log reports when they are older than a set number of days. To disable daily scheduled log purges, set the Log Purge Period (Days) value to 0. Note: This setting is also available in the Administration Console.
Log Purge Time	Optional.	Time at which log purging occurs. Note: This setting is also available in the Administration Console.

LDAP Setting

ReportCaster can be configured to retrieve email address information from an LDAP data source. The leading mail server software vendors use LDAP for storage of email information. This includes Active Directory on Windows platforms.

The LDAP Setting folder in the Configuration tab contains settings to define LDAP server connection and security, as well as LDAP email settings.

The LDAP Settings folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
General Setting section		
Active Directory	By default, this option is not selected.	Select if you are using the Active Directory technology for LDAP. Do not select if you are using any other technology for LDAP.
Secure Connection (SSL)	By default, this option is not selected.	Indicates whether or not SSL (Secure Sockets Layer) is used to communicate with the LDAP server.
LDAP Host	There is no default value.	Host name or IP address of your LDAP directory server.
LDAP Port	Default value is 389.	Port on which the directory server listens.
LDAP Search Base	There is no default value.	Filter for LDAP searches. Only the subtree below the search base is available for LDAP queries. For example, dc=ibi, dc=com.
Search Time Out	Default value is 120.	Time, in seconds, that ReportCaster can search an LDAP data source before timing out.
Security Principal	No default value.	Service account of the user performing authentication. The user must have sufficient access rights to locate user entries in the directory. Select the icon to the right of this option to open the User dialog box, where you can

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		type a user name and password.
LDAP Email Setting section		
Email LDAP Enabled	By default, this option is not selected.	Indicates whether ReportCaster is enabled to retrieve email address information from an LDAP data source.
Email Map	Default value is mail.	Attribute type for email entries.
Email User Filter	Default value provided is dependent on the LDAP Type selected.	Filter for email entries to be retrieved. For example: <pre> (& (mailnickname=*) ((&(objectCategory=person) (objectClass=user)(!(homeMDB=*)) (!(msExchHomeServerName=*)) (&(objectCategory=person) (objectClass=user)((homeMDB=*) (msExchHomeServerName=*)) (&(objectCategory=person) (objectClass=contact)) (objectCategory=group) (objectCategory=publicFolder)))) </pre>
First Name Map	Default value is givenName.	Attribute for first name entries.
Last Name Map	Default value is sn.	Attribute for last name entries.

Data Servers Settings

The Data Servers folder in the Configuration tab contains settings to configure the Reporting Servers associated with WebFOCUS ReportCaster. Using the configuration

settings in this folder, you can also configure multiple Reporting Servers with WebFOCUS ReportCaster.

i Note: Data Server connection information is stored in the WebFOCUS Client, and not in WebFOCUS ReportCaster. WebFOCUS ReportCaster runs scheduled procedures through the WebFOCUS Client which is installed with the Distribution Server. When a WebFOCUS ReportCaster job is executed by the WebFOCUS Client, the alternate deferred server is used if an alternate deferred server is defined. For more information about configuring alternate deferred servers, see the ibi™ WebFOCUS® *Security and Administration* technical content.

The Data Servers folder contains the following configuration settings.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Settings for the Data Servers folder:		
Graph Agents	The default value is 1.	Optimizes the processing of graphs. Due to performance considerations, we recommend configuring this setting to 1 Graph Agent for each concurrent graph report. However, your own internal testing should determine the Graph Agent value that best suits the business needs of your organization.
Graph Servlet URL	Optional. There is no default.	Overrides the default graph server setting and configures graph image files to be created on the Application Server. Type the following value

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		<pre data-bbox="1052 352 1409 520">http:// hostname/context_ root /IBIGraphServlet</pre> where: hostname Is the host name of the Application Server where the WebFOCUS Client is installed. context_root Is the site-customized context root for the WebFOCUS web application deployed on your Application Server. The default is . This setting is available for WebFOCUS Reporting Server and WebFOCUS procedures. This setting should not be used when web server security is enabled. This includes Basic authentication, IWA, SSL, and third-party security products (such as SiteMinder). In these cases, the web server security settings can prevent

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		WebFOCUS from creating the graph.
Excel Servlet URL	Optional.	Specifies the application server to be used to zip the file components that comprise an EXCEL® 2007 file (.xlsx) as follows: <pre>&URL_ PROTOCOL:// servername / alias /IBIEXCELSERVURL</pre> where: URL_Protocol Is HTTP. servername Is the name of the application server where the WebFOCUS Client is installed. alias Is the context root of the WebFOCUS application. The default is . This setting is available for the WebFOCUS Reporting Server and WebFOCUS procedures. This setting

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		should not be used when web server security is enabled. This includes Basic authentication, IWA, SSL, and third-party security products (such as SiteMinder). In these cases, the web server security settings can prevent WebFOCUS from creating the Excel 2007/2010 file.
FOCEXURL/FOCHTMLURL	Default value is <code>http://localhost:8080</code>	Specifies the fully-qualified URL, including host name and port of the FOCEXURL/FOCHTMLURL. If running with SSL security, update the URL to specify https.
Settings for an individual Data Server:		
Name	Required.	Name of the selected Data Server. Note: Data Server names are case-sensitive. Data Servers are defined in the WebFOCUS Client as uppercase so you should also define Data Servers as uppercase in WebFOCUS ReportCaster.
Default	Required.	This option is selected by

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		default.
Set FOCEXURL/ FOCHTMLURL in the scheduled procedure	Required.	This setting is selected, by default. If this setting is not selected, the Distribution Server will not set the value of FOCEXURL or FOCHTMLURL for a scheduled procedure. Therefore, when cleared, if FOCEXURL or FOCHTMLURL is already set in the edasprof.prf file, this setting remains in effect, unless it is overridden in the scheduled procedure.
Security section		
Security Type		Static. A valid Execution Id and password is supplied in the User setting. When creating a schedule, you cannot specify an Execution Id and password. User. A valid Execution Id and password must be specified when creating a schedule. Shared. When creating a schedule, the user ID and password is internally assigned as the Execution Id and password.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: Since the actual password is not stored in the WebFOCUS repository, the Shared configuration can only be used when a password is not required to connect to the WebFOCUS Reporting Server. Trusted. The Execution Id is the schedule owner and no password is sent to the WebFOCUS Reporting Server when schedules run. Note: The Reporting Server must be a configured to accept a Trusted connection when the Trusted option is selected.
User	Required if Security Type is set to Static.	Default Execution Id and password. To access the ID and password, select the icon to the right of the User field. The User dialog box opens, where you can type the user name and password.
Graph section		
Graph Engine	Required. The value is GRAPH53.	Controls which graph

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		engine to use for server-side graphics. By default, this specifies the GRAPH53 setting.
Headless	By default, this option is not selected.	Determines whether a graphics card exists on the WebFOCUS Reporting Server. When not selected (the default), a graphics card exists on the server. When selected, no graphics card exists on the server.
Maximum Connection/Threads	Required. The default connection is 3.	Maximum number of connections available to the WebFOCUS Reporting Server. You can specify any maximum that can be supported by your hardware and memory.

Configuring Reporting Servers With ReportCaster

You can configure multiple Reporting Servers with ReportCaster through the Data Server folder in the ReportCaster Configuration tab. Although the installation program automatically populates values for the default EDASERVE server, all additional Reporting Servers must be added to the configuration manually.

i Note: If the default WebFOCUS Reporting Server is changed on the Client, then the change will not be effective until the period specified by the IBFS Cache Cleaner service or until the Distribution Server is restarted. If the Distribution Server is installed on another machine with a separate copy of the Client, then a change to the default WebFOCUS Reporting Server will not be effective until the same change is made on the Client installed on the same machine as the Distribution Server.

Add a ibi WebFOCUS Reporting Server

Procedure

1. In the left panel of the Configuration tab, select the **Data Servers** folder, then select **New** in the toolbar.

i Note: The default Data Server names are SERVER, SERVER 2, SERVER 3, and so on.

2. From the Available Data Servers dialog box, select one or more Data Servers, and click **OK**. You can optionally select the **Select All** check box.
3. Double-click the new server node in either the Data Servers folder in the left panel or the server list in the right panel.

The right panel displays the default properties for the selected server .

4. Provide values for the appropriate settings.

In the Name field, verify the name of the server you want to add to the ReportCaster configuration is the same as the NODE setting for that server specified in the WebFOCUS Client Server Connections configuration. You can review the WebFOCUS Client Server Connections by accessing the Administration Console and selecting Reporting Servers within the Configuration tab.

Optionally, provide values for the Security Type and Maximum Connections settings or leave the default values in place.

You can also optionally set the Data Server being added to be the default Data Server when new schedules are created, specify not to have the FOCXURL and

FOCHTMLURL settings automatically added when scheduled jobs run, and specify that the Data Server does not have a graphics card, is Headless.

5. To implement the changes in Report Broker, in the Configuration tab toolbar, select **Save**, then **Restart**.

Result



Caution: We recommend that you avoid changing the name of a WebFOCUS Reporting Server, since all existing jobs on that server will no longer run.

Report Library Settings

The Report Library folder in the Configuration tab contains settings for Library distribution. The Report Library folder also contains the Additional Library Settings and Watch List Settings folders. You can specify the Library Access Option in the Additional Library Settings folder, and set library watch list options in the Watch List Settings folder.

The Report Library folder contains the following configuration settings. In addition, the Report Library version expiration processing occurs one hour after the time specified by the **Log Purge Time** setting located in the settings folder.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Settings for the Report Library Folder:		
Library Distribution Options	Required.	Provide the ability to restrict the Access Options or Email for Library option that appear in WebFOCUS when distributing scheduled output to the Report Library.
Default Library URL for Email Notification	Required. Configured during the Distribution Server installation. Default value is	URL included in the email notification that enables you to access specific content in the Report Library. This is the Library URL value in the

Setting	Optional or Required/Default Value	Descriptions and Possible Values
	http:// <i>hostname:port</i> /ibi_apps/library/libreport.jsp (where <i>hostname</i> is the host name of the WebFOCUS ReportCaster web application. Specify the <i>port</i> only if it is not the default value of 8080).	Distribution tab of the Basic Scheduling Tool and the Advanced Scheduling Tool when the distribution method is Library and the Send an Email after Report saved to Library option is selected. Note: If this field is blank, then no report ID or burst values are sent with the email notification.
Use Default Library URL for Email Notification	Required.	Selected. The Distribution Server will always use the URL in the WebFOCUS configuration file when sending notifications. Not selected. The Distribution Server will not automatically use the URL in the WebFOCUS configuration file when sending notifications. The URL value that is specified in the schedule is used. Note: Javascript in the output of a URL task distributed to the Report Library may cause a script error when the report is opened from a Library notification email.
Send Report Id And Version With Notification Email	Required.	Selected. Report ID and burst values are sent with the email notification of the distribution. Not selected. Report ID and burst values are not sent with the email notification of the distribution.
Select Compression	By default, this option is not selected.	Selected. WebFOCUS will compress files stored in the Report Library.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Option in Schedule by Default		Not selected. WebFOCUS will not compress files stored in the Report Library.
Settings For The Additional Library Settings folder:		
Library Expiration section		
Version	Selected by default.	The Report Library stores the output for the most recent number of versions specified. You can indicate a numeric value up to 9999. Use the up and down arrows to select the number of versions.
Day	Optional. Version is the default Library Expiration option.	The Report Library stores the report for the number of day(s) specified. You can indicate a numeric value up to 9999. Use the up and down arrows to select the number of days.
Week	Optional. Version is the default Library Expiration option.	The Report Library stores the report for the number of week(s) specified. A numeric value up to 9999. Use the up and down arrows to select the number of weeks.
Month	Optional. Version is the default Library Expiration option.	The Report Library stores the report for the number of month(s) specified. A numeric value up to 9999. Use the up and down arrows to select the number of months.
Year	Optional.	The Report Library stores the report for

Setting	Optional or Required/Default Value	Descriptions and Possible Values
	Version is the default Library Expiration option.	the number of year(s) specified. A numeric value up to 9999. Use the up and down arrows to select the number of years.
Never Expire	Optional.	The Never Expire option is enabled by default. Click the Enabled checkbox to disable this option. This option controls the option to select Never Expire when scheduling a report to run using the Report Library option.
Library Access Option section		
Private (Accessible only to the owner)	Optional.	Only the Owner of the schedule is authorized to access the Library report. This is the default value.
Published (Accessible according to WebFOCUS ReportCaster security policy)	Optional.	All users that are authorized to view the Library report in the folder location it is stored in can access the report. The destination folder of the Library report must be a published folder and the schedule owner must be authorized to publish content in this folder.
Shared (Appears under Shared Content Folder)	Optional.	All users that are authorized to view the Library report in the folder location it is stored in can access the report. The report appears under a Shared Content folder.
Shared with (Appears under	Optional.	Only the groups or users defined in the Access List, and the owner of the

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Shared Content folder according to Library Access List)		schedule, are authorized to access the report. The report appears under a Shared Content folder.
InfoSearch section		
Index Library Output	Optional. By default, this check box is not selected.	Select this check box if you want future Report Library distributions to be added to a searchable index. If this option is enabled, all future Report Library distributions will be searchable using InfoSearch. When a schedule distributes a report to a Report Library while this option is selected, the log report of the schedule will indicate that the Library output was fed to Magnify, a WebFOCUS search software. For more information, see the Understanding InfoSearch technical content.
Settings for the Watch List Settings folder:		
Enable Library Watch List	This check box is selected by default.	Enabled. When the user right-clicks a Library Report in the Repository, the Subscribe option is made available, allowing a user to subscribe to the Library Report. Not Enabled. When the a user right-clicks a Library Report in the Repository, the Subscribe option is hidden.
Email From	Optional.	Name of either the person, department, group, and so on, that is sending the

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Watch List email notification. This notification informs the recipient that a new version of a report procedure (FEX) on the Watch List has been sent to the library. The notification includes the report job description and a link to the report procedure (FEX).
Email Message	Optional.	Message in the body of the Watch List notification email.
Email Reply Address	Optional.	Email address that will receive any reply responses from the Watch List notification email.
Email Subject	Optional.	Text that will appear in the Watch List notification email subject line.
Notify Mode	Optional. The default value is Watch List Notification Only.	If the report schedule is set to send an email notification when the report procedure (FEX) is saved to the library and the report procedure (FEX) is subscribed to the Watch List, then: • Watch List Notification Only. You will only receive the Watch List notification email. • Watch List and Schedule Notification. You will receive both the schedule library notification email and the Watch List notification email. • No Watch List Email Notification. You will receive no Watch List email notifications.

Restricting Library Distribution Options

The Library Distribution Options enable you to select the Library Access options and Email for Library options available to users in the Basic Scheduling tool and Advanced Scheduling tool when distributing scheduled output to the Report Library.

Restrict Library Distribution Options

Procedure

1. In the WebFOCUS Configuration tab, select the Report Library folder.
2. Click the icon to the right of the Library Distribution Options field.

The Library Distribution Options dialog box opens.

The following Library Distribution Options are available.

Library Access. Designates the options that appear in the Access Type drop-down menu in the Basic Scheduling tool. The available options are:

- **Owner (Private).** When selected, the Owner (Private) option appears.
- **Share to Everyone.** When selected, the Share to Everyone option appears.
- **Access List (Share Advanced).** When selected, the Access List (Share Advanced) option appears.
- **Published.** When selected, the Published option appears.

i Note: An authorized user can change the Shared or Published status of a Library item from the right-click menu of the item in the Resources tree. If a Library item is originally created with a status of Private and is subsequently changed to Shared or Published from the Resources tree, the Access Option Private in the schedule will not be applied at schedule execution time. This only occurs in cases where the schedule that creates subsequent versions of the Library report is not changed to reflect this updated status. The Library item will retain the updated Shared or Published status and a warning message will be displayed in the schedule log indicating this fact.

Library Email. Designates who has access to the email notification option, Send an Email after report procedure (FEX) saved to Library, in the Basic Scheduling tool. The available options are:

- **Owner (Private).** When selected, the email notification option is available when the Access Type, Owner (Private) is selected.
- **Share to Everyone.** Disabled. Library email notification is not available when the Access Type, Share to Everyone is selected.
- **Access List (Share Advanced).** When selected, the email notification option is available when the Access Type, Access List (Share Advanced) is selected.
- **Published.** Disabled. Library email notification is not available when the Access Type, Published is selected.

 **Note:** The Library Email option is available only when the corresponding Library Access option is selected.

3. Click **OK** to save the changes and exit the Library Distribution Options dialog box. You can also click **Cancel** to cancel the changes and exit the dialog box.

Using Blackout Periods

Blackout Periods are those dates and times on which schedules will not run and cannot be set to run. A user authorized to access the Blackout Periods tool can view, define, update, import, extract, and delete blackout periods.

To view schedule blackout periods, select **Blackout Periods** from the Show group in the Console. The Blackout Periods interface provides a calendar in the left panel and the right panel lists the blackout dates you are authorized to manage.

can add new blackout periods, delete blackout periods, replace the description of existing blackout periods, import blackout period information defined within a file, and extract existing blackout period information to a file for future use. In the WebFOCUS ReportCaster Blackout Periods interface, these tasks can be completed using the following features:

- The Blackout Date and Time dialog box, accessed from the New and Edit buttons in the Manage Blackout Periods group.
- The Import Dates dialog box, accessed from the Import button in the Manage

Blackout Periods group.

- The Extract Blackout Dates dialog box, accessed from the Manage Blackout Periods group.

You can change the month or year using the arrows at the top of the calendar. Dates only appear as available or unavailable. You can show or hide the left panel by clicking the arrow in the top-right corner of the left panel.

Blackout Period Configurations

Every type of Blackout Period profile shares the same basic settings: Group Assignment, Name, Description, Details, and Blackout Time. Within that basic configuration, there are four types of Blackout Periods that accommodate differing scheduling requirements. These include:

- **Weekly Blackout Periods.** Recur on a specified day or days of the week.
- **Monthly Blackout Periods.** Recur on a specified monthly date or dates.
- **Single Day Blackout Periods.** Occur only once on a specified date.
- **Every Day Blackout Periods.** Recur at a specified time every day.

This variety of profiles enables you to build blackout periods into your reporting schedule that accommodate those regularly recurring and special one-day events that would cause you to suspend reporting.

Basic Blackout Period Settings

The Blackout Date and Time dialog box contains settings that define the timing and frequency of a scheduled Blackout Period. There are four variations of this dialog box to accommodate the Weekly, Monthly, Single Day, and Every Day frequency options.

The following table describes settings in the Global Blackout Date and Times profile.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Group	Displays the name (Global).	Displays the name (Global).
Name	Optional. By default displays the name: Blackout-[Current Date] [Current Time] For example: Blackout-Jun 26 2015 10:27 AM	A descriptive name for the Blackout Date and Time profile. You can modify the default name by clicking within the Name field.
Description	Optional.	A detailed description of the Blackout Date and Time profile.
Details Label	Assigned to the profile after creation.	A summary of the detailed times and frequency of the Blackout Period. This is a narrative description of the selections you make in the Weeks, Days, Months, and Blackout Time fields. WebFOCUS ReportCaster creates this description automatically when you save the profile, and updates it when you save changes to it. You cannot create, edit, or delete it directly.
Blackout Time check box	By default this check box is cleared.	Selected. The Blackout Period covers the hours specified in the Start (Time) and End (Time) fields. Not Selected. The Blackout Period covers the entire day.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		Note: If you change a profile from Single Date to any other frequency setting, you must clear this check box if the blackout period is to cover the entire day.
Start (Time)	Optional. By default, displays the current hour and minute.	The Hour and Minute in which a Blackout Period is to begin. This value is relevant only if the Blackout Time check box is selected.
End (Time)	Optional. By default, displays the time two hours <i>after</i> the current hour and minute.	The Hour and Minute in which a Blackout Period is to end. This value is relevant only if the Blackout Time check box is selected.
Frequency	Required. By default, the Weekly option is selected.	Weekly. Blackout periods that recur on a specified day of the week. Monthly. Blackout periods that recur on a specified monthly date. Single Day. Blackout periods that occur once on a specified date. Every Day. Blackout periods that recur at a specified time every day.

Configure a Blackout Period

To configure a blackout period:

Procedure

1. From the Manage Blackout Periods group on the ribbon, click **New**.
The Blackout Date and Time dialog box opens.
2. Accept the default Name assigned to the Blackout Period profile or enter a new value for Name.
3. Type a description for the Blackout Period profile in the Description field.
4. If this blackout period must cover the entire day, leave the Blackout Time check box cleared and skip to step 7.
5. If this blackout period must be limited to a range of hours within a day, select the Blackout Time check box and configure the start and end time for the Blackout Period.
For more information, see [Using Blackout Periods](#).
6. Click the appropriate frequency option:
 - **Weekly**. Establish the frequency for the blackout period. For configuration information, see [Using Blackout Periods](#).
 - **Monthly**. Establish the frequency for the blackout period. For configuration information, see [Using Blackout Periods](#).
 - **Single Day**. Select the date for the blackout period. For configuration information, see [Using Blackout Periods](#).
 - **Every Day**. Establish the hours for the daily blackout period. For configuration information, see [Using Blackout Periods](#).
7. Review your configuration.
 - If your configuration of dates and hours is unacceptable, the OK button will not respond when you attempt to click OK. Adjust your configuration and refresh the profile by clearing and reselecting the recurring check boxes.
 - If your configuration is acceptable, the OK button will be available, and the Details label will include a description summarizing your selections.
8. When your configuration is complete, click **OK**.

An entry for the Blackout Profile appears in the right pane of the Blackout Dates window and the Blackout Date Calendar in the left pane highlights the new blackout dates.

Configuring Weekly Blackout Periods

The Weekly Blackout Period configuration bases its recurrence on a specified day of the week. It suits events that recur as part of a weekly schedule, regardless of the date on which that day falls.

Even though the name implies that this Blackout Period occurs only once a week, Blackout Periods using the weekly configuration can occur more or less frequently.

The tools in this configuration enable you to specify:

- The day, or days, of the week on which the blackout period will occur.
- The week, or weeks, of the month in which the blackout period will occur.
- The month, or months, of the year in which the blackout period will occur.

Instead of requiring you to enforce blackout periods on the same day each and every week, this flexible configuration enables you to schedule Blackout Periods that occur more than once a week. It also enables you to configure Blackout Periods that skip one or more weeks in a month or skip one or more months in a year.

Weekly Blackout Period Settings

If you select the Weekly option, the Blackout Date and Time dialog box displays a unique set of options that enables you to schedule Blackout Periods for specified days of the week.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
On Week of the	Required (At least one selection from	The week of the month check boxes list ordinal weeks of the

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Month Check Boxes (Left Column)	this column.)	month. When you select one, you define the week of the month in which this blackout period is to occur. That is, the first week of the month, the second week, and so on. You can select one or more individual weeks. The Select All check box automatically selects every week of the month, establishing a blackout period that takes place every week in a month.
On Days of the Week check boxes (Right Column)	Required (At least one selection from this column).	The day of the week check boxes list the days of the week. When you select one, you define the day of the week in which this blackout period will occur. That is, on Monday, Tuesday, and so on. You can select one or more individual days. The Select All check box automatically selects every day of the week, establishing a blackout period that takes place every day of your selected weeks in the month.
Months	Required (At least one selection from this group).	The Month check boxes list the months of the year. When you select one, you define the month

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		of the year in which this weekly black out period will occur. That is, in January, February, and so on. You can select one or more individual months. The Select All check box automatically selects every month of the year, establishing a blackout period that takes place during every month on your selected week and day.

Configure Weekly Blackout Period Settings

To configure weekly blackout period settings:

Procedure

1. From the Blackout Date and Time dialog box, click **Weekly**.

The dialog box displays check boxes that support the Weekly frequency schedule.

i Note: In order to enable the **OK** button and save the profile, you must select at least one week, day, and month check box.

2. Select the check boxes for the week or weeks of the month in which the Blackout Period is to occur, or click **Select All** to select every week automatically.
3. Select the check boxes for the day or days of the week on which the Blackout Period is to occur, or click **Select All** to select every day of the week automatically.
4. Select the check boxes for the month or months in which the Blackout Period is to occur, or click **Select All** to select every month automatically.

Configuring Monthly Blackout Periods

The Monthly Blackout Period configuration bases its recurrence on a specified monthly date. It suits events that recur on the same date, regardless of the day of the week on which that date falls.

Even though the name implies that this Blackout Period occurs only once a month, Blackout Periods using this configuration can occur more or less frequently. They can occupy the entire day, or they can be limited to a range of hours within a single day.

The tools in this configuration enable you to specify:

- The day, or days, of the month on which the blackout period will occur.
- The month, or months, of the year in which the blackout period will occur.

Instead of requiring you to enforce blackout periods on the same day of the month, each and every month, this flexible configuration enables you to schedule Blackout Periods that occur more than once a month. It also enables you to configure Blackout Periods that skip one or more months.

Monthly Blackout Period Settings

If you select the **Monthly** option, the Blackout Date and Time dialog box displays a unique set of options that enables you to schedule Blackout Periods for specified dates of the month.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
Days	Required.	The Days check boxes list the dates within a month. When you select one, you define the day of the month on which this blackout period will occur. That is, on the first day of the month, the second, the third, and so on. You can select one or more individual dates.

Setting	Optional or Required/Default Value	Descriptions and Possible Values
		The Select All option automatically selects every day of the month, establishing a blackout period that takes place every day during your selected months.
Months	Required.	The Months check boxes list the months of the year. When you select one, you define the month in which this black out period will occur. That is, in January, February, and so on. You can select one or more individual months. The Select All option automatically selects every month of the year, establishing a blackout period that takes place during every month on your selected day or days.

Configure Monthly Blackout Period Settings

To configure monthly blackout period settings:

Procedure

1. From the Blackout Date and Time dialog box, click **Monthly**.

The Blackout Date and Time dialog box displays the check boxes that support the Monthly frequency.

i Note: At a minimum, you must select a check box for one day and a check box for one month. Until you do, the OK button will be unavailable, and you will be unable to save the profile.

2. Select the check boxes for the day or days of the month on which the Blackout Period is to occur, or click **Select All** to select every date in the month automatically.
3. Select the check boxes for the month or months in which the Blackout Period is to occur, or click **Select All** to select every month automatically.

Configuring Single Day Blackout Periods

Single Day Blackout Periods occur once, on a single, specified date. They can occupy the entire day, or they can be limited to a range of hours within a single day.

Single Day Blackout Period Settings

If you select the **Single Day** option, the Blackout Date and Time dialog box displays a copy of the Blackout Dates calendar, which enables you to select a single date for a scheduled Blackout Period.

Configure Single Day Blackout Period Settings

Procedure

1. From the Blackout Date and Time dialog box, click **Single Day**.
The dialog box appears, displaying the calendar automatically set to the current date.
2. Click the single arrows to change the month and click the double arrows to change the year.
3. When you have found the month and year for the scheduled single day blackout period, click on the date on which you want the Blackout Period to occur.
The calendar highlights the new date.

Configuring Every Day Blackout Periods

Every Day Blackout Periods recur every day. To prevent Every Day Blackout Periods from blocking the release of any reports, you must limit them to a range of hours within the day.

Every Day Blackout Period Settings

If you select the **Every Day** option, the Blackout Date and Time dialog box limits its display to the Beginning and End time for the Blackout Period. No other options are relevant.

Configure Every Day Blackout Period Settings

Procedure

1. From the Blackout Date and Time dialog box, click **Every Day**.

The Blackout Time check box is selected automatically, and the dialog box displays a note reminding you to select the start and end time.

The Start time is automatically set to the current time, and the End time is automatically set to a value two hours later.

2. To change the Start or End Time values, see [Using Blackout Periods](#).

Configure a Start Time and End Time for a Blackout Period

From the Blackout Date and Time dialog box:

Procedure

1. To change the hour of the start time, click in the **Hour** section of the Start field.
 - a. Click the up or down arrow to move the value ahead one hour or back one

hour, respectively.

- b. You can also type the hour in this section, but be careful to stay within the twelve hour range. If you enter a value outside of this range, the dialog box will automatically recalculate your value in terms of a twelve hour clock. For example, 44 hours would become 8. $(44-(12 \times 3)) = (44-36) = 8$
 - c. Ensure that the start time is earlier than the end time.
2. To change the minutes of the start time, click in the **Minutes** section of the Start field.
 - a. Click the up or down arrow to move the value ahead one minute or back one minute, respectively.
 - b. You can also type the minutes in this section, but be careful to stay within the sixty minute range. If you enter a value outside of this range, the dialog box will automatically recalculate your value in terms of the number of minutes within an hour. For example, 88 minutes would become 28. $(88-60 = 28)$.
 - c. Ensure that the start time is earlier than the end time.
3. To change the start time from AM to PM, click in the AM/PM section of the Start field.
 - a. Click the up arrow to move from AM to PM.
 - b. Click the down arrow to move from PM to AM.
 - c. You can also type AM or PM directly into this section.
4. To change the hour of the end time, click in the **Hour** section of the End field.
 - a. Click the up or down arrow to move the value ahead one hour or back one hour, respectively.
 - b. You can also type the hour in this section, but be careful to stay within the twelve hour range. If you enter a value outside of this range, the dialog box will automatically recalculate your value in terms of a twelve hour clock. For example, 44 hours would become 8. $(44-(12 \times 3)) = (44-36) = 8$.
 - c. Ensure that the end time is later than the start time.
5. To change the minute of the end time, click in the **Minutes** section of the End field.
 - a. Click the up or down arrow to move the value ahead one minute or back one minute, respectively.

- b. You can also type the minute in this section, but be careful to stay within the sixty minute range. If you enter a value outside of this range, the dialog box will automatically recalculate your value in terms of the number of minutes within an hour. For example, 88 minutes would become 28. $(88-60 = 28)$.
 - c. Ensure that the end time is later than the start time.
- 6. To change the end time from AM to PM, click in the **AM/PM** section of the End field.
 - a. Click the up arrow to move from AM to PM.
 - b. Click the down arrow to move from PM to AM.
 - c. You can also type AM or PM directly into this section.

 **Important:** You must use the right or left arrow keys to move between the Hour, Minutes, and AM/PM sections of the Start and End fields.

If you try to use the Tab key to move between sections, you will move down to the next option instead of across to the next section of the Start or End field.

For example, if you use the Tab key to move from the Hours section of the Start field, you will move down to the Hours section of the End field, not over to the Minutes section of the Start field. To move right, you must use the right direction key instead.

Similarly, the Shift+Tab key combination will move you to the previous option, not back to a previous section within the Start or End field. To move left, you must use the left direction key instead.

Delete a Blackout Period Profile

Procedure

1. In the left pane of the Blackout Dates dialog box, click the folder for the Group to which the Blackout Period profile you want to delete is assigned.
2. In the right pane, click the entry for Blackout Period profile you want to delete.
3. On the ribbon, in the Manage Blackout Periods group, click **Delete**.
4. When you receive a confirmation message, click **Yes**.

Your newly deleted entry disappears from the right pane and the dates assigned to

that entry are no longer highlighted on the Blackout Dates calendar in the left pane.

Importing Blackout Periods

You can use the Blackout Period Import operation to automate Blackout Period management tasks. Using a properly formatted import file with this tool, you can:

- Create new Blackout Period profiles.
- Remove Blackout Period profiles.
- Replace Blackout Period information.
- Perform the actions specified in an uploaded file.

The source file for the import contains the following information about a Blackout Period Profile:

- **Date.** The date on which the Blackout Period profile becomes effective. This date can be omitted for Every Day Blackout Period profiles.
- **Start Hour.** The time (HH:MM:SS) at which the Blackout Period becomes effective. This value is optional for all but Every Day Blackout Period profiles.
- **End Hour.** The time (HH:MM:SS) at which the Blackout Period ceases to be effective. This value is optional for all but Every Day Blackout Period profiles.
- **Description.** A detailed description of the Blackout Period profile.
- **Name.** The unique name assigned to a Blackout Period profile.

 **Note:** Additional Codes precede entries for Weekly or Monthly Blackout Period profiles. For more information, see [Using Blackout Periods](#) and [Using Blackout Periods](#).

The task you select when you run an import operation determines the way in which WebFOCUS ReportCaster uses the information in the source file for the Import.

If you select:

- **Add**, the import creates new Blackout Period profiles from the records in the import source file.
- **Remove**, the import compares date and additional information in import file records

to that of existing Blackout Period profiles and removes those profiles that match the file records.

- **Replace**, the import compares date information in import file records to that of existing Blackout Period profiles and adds Name and Description information to them.
- **Use the actions specified in the file**, the import runs the add, remove, and replace operations as required by commands included in the Import file along with entries for the Blackout Period profiles affected by them.

The automation of these tasks frees you from manually creating, updating, or deleting Blackout Period profiles when operational changes, such as monthly, quarterly, or annual operation schedule updates, require a sweeping review and revision of your reporting schedule.

For example, at the start of the year, you have a file containing the dates and names of all scheduled holidays that must be incorporated into your reporting schedule. The Blackout Period Import enables you to import that file and establish the holiday blackout schedule for an entire year in a single operation. Without the import you would have to create a Single Date Blackout Date and Time profile for each holiday in the coming year.

Viewing Blackout Period Import File Format

Even though entries in the Import File format for Blackout Period records use the same basic structure, each profile type contains minor variations that identify the type of Blackout Period profile WebFOCUS ReportCaster must create from the entry details.

Single Date Blackout Period Import File Entry Layout

You can import Single Date Blackout Date and Time profiles from a flat file that lists the information for each profile on a separate line. Each line must follow the following layout:

For example:

```
#Schedule Blackout Date Extract created 161004 102629 by admin
#for date range:(All)
#Dates Extracted from Group: administrators
##BLACKOUT DATE: yyyyMMdd/HH:mm:ss|HH:mm:ss description|name
##BLACKOUT TIME: /HH:mm:ss|HH:mm:ss description|name
##BLACKOUT PATTERN:
[101000000000/00000000000000000000000000000001]/HH:mm:ss|HH:mm:ss
description|name
##BLACKOUT PATTERN: [101000000000/00001:0001000]/HH:mm:ss|HH:mm:ss
description|name
[000001000000/01000:0000100]/11:44:00|15:44:00 Administrators February
4, 2016|Blackout-Feb 4 2016 11:25 AM
```

- Dates use the format YYYYMMDD
- Hours use the format HH:MM:SS
- You can omit the hours to schedule an all day blackout.

The Weekly, Monthly, and Every Day Blackout Date and Time profiles use a variation of this format.

Weekly Blackout Period Import File Entry Layout

You can import Weekly Blackout Date and Time profiles from a flat file that lists the information for each profile on a separate line. Each line must follow the following layout:

```
[Blackout Pattern] [Description] |[Name]
```

For example:

```
[111111111111/10000:0000010]/17:00:00|23:59:00 Report Blackout First
Friday of Every Month 5:00 PM to 11:59 PM|First Friday Afternoons
```

This information identifies the entry as a Weekly Blackout Period, and includes its Description and Name. The Blackout Pattern indicates the selected Month(s) and Selected Day(s) of the Week. A '1' means that a month or day is selected. A '0' means that a month or day is not selected.

Monthly Blackout Period Import File Entry Layout

You can import Monthly Blackout Date and Time profiles from a flat file that lists the information for each profile on a separate line. Each line must follow the following layout:

```
[Blackout Pattern]/[Start Hour]|[End Hour] [Description]|[Name]
```

For example:

```
[111111111111/10000:0000010]/17:00:00|23:59:00 Report Blackout First  
Friday of Every Month 5:00 PM to 11:59 PM|First Friday Afternoons
```

This information identifies the entry as a Monthly Blackout Period, and includes its Description and Name. The Blackout Pattern indicates the selected Month(s) and Selected Day(s) of the Month. A '1' means that a month or day is selected. A '0' means that a month or day is not selected.

Every Day Blackout Period Import File Entry Layout

You can import Every Day Blackout Date and Time profiles from a flat file that lists the information for each profile on a separate line. Each line must follow the following layout:

```
/[Start Hour]|[End Hour] [Description]|[Name]
```

For example:

```
/21:04:00|23:04:00 Every Day Blackout between 3:00 PM and Midnight|Daily  
Afternoon Blackout
```

This information identifies the entry as an Every Day Blackout Period and includes its Description and Name.

Add Blackout Period Profiles Using an Import File

To add a Blackout Period profile through the import utility is to create a new Blackout Period profile from information in the import file. Your Import file must therefore contain records for all Blackout Period profiles you want to add to WebFOCUS ReportCaster through this import operation.

Procedure

1. In the Blackout Dates pane, click the folder of the group for which you are importing Blackout Period profiles.

2. On the ribbon, in the Manage Blackout Periods group, click **Import**.

The Import Dates dialog box opens.

3. In the File Name field, type the full path to the file, or click **Browse** or **Choose File** and navigate to the file you want to import.

i Note: When viewed in Internet Explorer, the dialog box displays a Browse button to the right side of this field, and the field displays no text. When viewed in Google Chrome, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file chosen. When viewed in Firefox, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file selected.

4. In the File Name field, type the full path to the file, or click **Choose File** and navigate to the file you want to import.

5. Click **Add**, and click **OK**.

The Import Blackout Data dialog box opens, listing details of the new Blackout Profiles based on each entry in the Import file.

6. Click **Add** to add the new Blackout Period profiles listed in the Import Blackout Data dialog box to the Blackout Dates Calendar and Group entries.

A message displays, informing you that the blackout dates have been successfully imported.

7. Click **OK**.

The Blackout Dates calendar highlights the newly imported Blackout Period Dates in the left pane of the Blackout Dates window, and entries for the new Blackout Period profiles appear in the right pane.

Replace Blackout Periods Using an Import File

To replace a Blackout Period profile through the import utility is to add updated information to its Name and Description fields. To ensure that the import-based update affects the proper profiles, your import file must contain records whose dates match those of the existing Blackout Period profiles that must be enriched by this Import operation.

Procedure

1. In the right pane of the Blackout Dates dialog box, select the group for which you are importing Blackout Period profiles.
2. On the ribbon, in the Manage Blackout Periods group, click **Import**.
The Import Dates dialog box opens.
3. In the File Name field, type the full path to the file, or click **Browse** or **Choose File** and navigate to the file you want to import.

i Note: When viewed in Internet Explorer, the dialog box displays a Browse button to the right side of this field, and the field displays no text. When viewed in Google Chrome, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file chosen. When viewed in Firefox, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file selected.

4. Click **Replace**, and then click **OK**.
The Import Blackout Data dialog box opens, listing the details from each entry in the Import file that will be added to their corresponding Blackout Period profiles.
5. Click **Replace** to add new the information listed in the Import Blackout Data dialog box to the designated Blackout Period profiles.
A message displays, informing you that the blackout dates have been successfully imported.
6. Click **OK**.

Enriched entries for the updated Blackout Period profiles appear in the right pane.

Remove Blackout Periods Using an Import File

Removing a Blackout Period profile through the import utility deletes it. To ensure that the import-based deletion affects the proper profiles, your import file must contain records whose dates match those of the existing Blackout Period profiles that are to be deleted by this Import operation.

Procedure

1. In the Blackout Dates tab pane, select the group containing blackout period profiles that must be removed.
2. On the ribbon, in the Manage Blackout Periods group, click **Import**.
The Import Dates dialog box opens.
3. In the File Name field, type the full path to the file, or click **Browse** or **Choose File** and navigate to the file you want to import.

i Note: When viewed in Internet Explorer, the dialog box displays a Browse button to the right side of this field, and the field displays no text. When viewed in Google Chrome, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file chosen. When viewed in Firefox, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file selected.

4. Click **Remove**, and then click **OK**.
The Import Blackout Data dialog box opens, listing details from each entry in the import file that successfully matched an existing Blackout Period profile.
5. Click **Remove** to delete those Blackout Period profiles listed in the Import Blackout Data dialog box.
A window opens, informing you that the blackout dates have been successfully imported.
6. Click **OK**.
Blackout Period profiles removed by this operation are no longer highlighted in the

left pane of the Blackout Dates window or as entries for the new Blackout Period profiles in the right pane.

Manage Multiple Blackout Period Updates Using an Import File

The *Use the actions specified in the file* option allows the import process to add, remove, and replace multiple Blackout Period profiles in a single operation. Your Import file must therefore contain the all necessary commands followed by entries representing Blackout Period profiles that must be added, removed, or replaced by the import operation.

Procedure

1. In the right pane of the Blackout Dates dialog box, select the group for which you are managing Blackout Period profiles.

2. On the ribbon, in the Manage Blackout Periods group, click **Import**.

The Import Dates dialog box opens.

3. In the File Name field, type the full path to the file, or click **Browse** or **Choose File** and navigate to the file you want to import.



Note: When viewed in Internet Explorer, the dialog box displays a Browse button to the right side of this field, and the field displays no text. When viewed in Google Chrome, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file chosen. When viewed in Firefox, the dialog box displays a Browse button to the left side of this field, and the field contains the text, No file selected.

4. Click **Use the actions specified in the file**, and then click **OK**.

The Import Blackout Data dialog box opens, listing details from each entry in the Import file and a note about its proposed update.

5. Click **OK**.

6. When you receive the *Blackout Dates have been successfully imported* message, click **OK**.

The Blackout Dates calendar highlights the dates of the newly imported Blackout

Periods in the left pane of the Blackout Dates window. Entries for the new and enriched Blackout Period profiles appear in the right pane. Calendar highlights and entries for profiles removed by the Import no longer appear.



Note: You will be unable to use the Edit command to update Blackout Period profiles created from a direct file import. You will be required to update these profiles using the Replace option in the Import operation.

Extracting Blackout Period Profiles

You can extract existing blackout period profile information from the WebFOCUS ReportCaster Development Interface to a .txt file.

A direct file extract minimizes the time it would take to transfer information about multiple Blackout Periods to a text file that can serve as a backup of your Blackout Calendar configuration or as the source of an import to an external system for reporting or auditing purposes.

For example, if your group is required to maintain a backup copy of blackout dates for the coming six months, the extract operation enables you to transfer the Description, Date, and Name of all scheduled blackout periods during that time. You can recreate basic information about these profiles from the backup file in an emergency, shortening the time required to reconstruct your reporting schedule.

Extracting File Formats

The Import and Extract file operations use the same layout and format conventions. The Extract file contains additional comments that document the range of dates selected for the extract and templates for the format of the entries it contains.

For more information about each entry type layout, see [Using Blackout Periods](#).

Extract Schedule Blackout Period Profiles to a File

To extract schedule blackout period profiles:

Procedure

1. In the Blackout Dates pane, select the group from which you are extracting blackout period profiles.

2. In the Manage Blackout Periods Toolbar group, click **Extract**.

The Extract Blackout Dates dialog box opens. The Group Name from which you are extracting the blackout dates appears at the top of the dialog box.

3. Select one of the following from the Date Range Options:

- **All** to extract all currently saved blackout period profiles.
- **Date Range** to specify the range of dates containing scheduled blackout period profiles that you want to extract.

If you select Date Range, type or select the Start Date and End Date. To select a date, click the down arrow next to the field. A calendar opens, from which you can choose a date.

4. Click **OK**.

5. To open the file, click the **Open** button when your browser presents it.

A window opens, displaying the contents of the extracted content profiles.

You can save and close the file using the commands in the File menu.

6. To accept an automatic download of the extract file, click the **Save** button (users of Google Chrome need only close the page displaying the new file name).

You can later retrieve the file from the Downloads folder of your computer, rename it if necessary, and save a copy of it in another folder for archival or other purposes.

7. To rename and save the file in a different location, click the **Open** or **Open With** button, and select the **Save As** command from the program that opens the file.

8. From the Save As window, navigate to the folder in which you want to save the file, rename the file if necessary, and click **Save**.

You can close any additional web pages that may remain open after you save the file.

i Note: The default extract file name is *rcbdextract_GroupName_YYMMDD_HHMMSS.txt*, where *GroupName* is the name of the group from which the blackout dates are extracted, YYMMDD and HHMMSS are the date (year, month, day) and time (hour, minute, second) that the file was created.

Controlling When Schedules Run After Blackout Periods

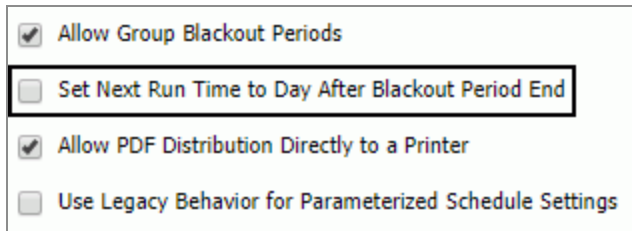
You can now use the **Set Next Run Time to Day After Blackout Period End** option, to ensure that your schedules will run automatically the day after a Blackout Period ends, rather than waiting for the next scheduled recurrence.

Using the ReportCaster scheduling tools you can specify when a report or other type of task is run, the format in which to create the output, how it will be distributed, and how often the report should be run. However, if an authorized user in your organization defines a Blackout period that occurs at the same time as your report is scheduled to run, by default, your schedule will terminate, and will run again according to the recurrence settings you configured for the schedule.

For example, you have created a schedule that distributes reports every Wednesday, while another user in your organization has configured Blackout Periods that correspond to all holidays. By default, if a holiday occurs on a Wednesday, when your reports are scheduled to run, they will terminate for that week, and run again the next Wednesday, unless you use the **Set Next Run Time to Day After Blackout Period End** option to automatically run the reports at the same time the following day.

Once you select this option, it immediately applies to any schedules that run during a blackout period.

To access the **Set Next Run Time to Day After Blackout Period End** option, navigate to the ReportCaster Console. On the ribbon, in the Show group, click the **Configuration** button to display the Configuration options for the Console. In the side panel, click the **General Preferences** folder to display this check box, as shown in the following image.



☒ Allow Group Blackout Periods
☐ **Set Next Run Time to Day After Blackout Period End**
☒ Allow PDF Distribution Directly to a Printer
☐ Use Legacy Behavior for Parameterized Schedule Settings

To enable this option, select the **Set Next Run Time to Day After Blackout Period End** check box. Then save and restart ReportCaster from the Manage Configuration group on the ribbon. This option is disabled, by default.

Verify the Next Run Time of Your Schedule

You can verify that your schedule will run the day after a Blackout Period in the ReportCaster Explorer. Here, you can view the run time information for your schedule.

Procedure

1. Launch the ReportCaster Explorer.
2. On the Explorer toolbar, click the **Change your filter** button and click **Schedule** to only view schedules saved in the Repository.
3. In the side panel, select the folder or subfolder that contains your schedule to display all saved schedules contained in the folder.

In the Next Run Time column, the next run time of your schedule displays.

i Note: If the schedule has just been run, you may need to refresh your view. Wait a few minutes, and click the **Refresh** button to display the updated next run time of the schedule.

The following image shows an example of run time information for a schedule that was due to run during a blackout period.

Last Time Executed	Last Job Status	Next Run Time
6/13/18 11:33 AM	Error	6/14/18 11:33 AM

Since the schedule was terminated, this event is recorded as an error in the Last Job Status column. However, since the **Set Next Run Time to Day After Blackout Period End** option was set before the schedule ran, the next run time for the

schedule shows as the next day, at the same time.

Related Resources:

- **Using Blackout Periods**
- **Using the ReportCaster Console**

Execution IDs

An Execution ID is a valid user ID that is used to connect to the WebFOCUS Reporting Server, FTP server, or web server to run a schedule task. When an Execution ID is created, changed, or deleted on a server, it must also be created, changed, or deleted in the Repository table that stores Execution ID credentials. Similarly, when the password for an Execution ID is changed on the server, the password for that Execution ID must also be changed in the Repository tables. Exceptions are when Execution credentials are Trusted.



Note:

- If an Execution ID is required, the Execution ID password is validated when a schedule is created, and when the task of an existing schedule is edited. If the task of an edited schedule is not opened and the password is incorrect, the schedule fails during execution. This failure is recorded in the schedule job log.
- Execution IDs and passwords cannot be imported or exported through the Change Management utility. A new Execution ID and password must be created on the selected system.
- Changing the password of an FTP user applies to all schedules that use that user ID for that FTP server and schedule owner.

To view a list of Execution IDs in the ReportCaster Development interface, click the **Execution IDs** tab.

From this tab, you can:

- Create a new Execution ID.
- Open an existing Execution ID to view its properties.
- Delete an Execution ID.
- Refresh the list of Execution IDs.

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

Create a New Execution Id

To create a new Execution ID:

Procedure

1. Select the user folder in the Resources tree for which you are creating the Execution ID or select the Execution ID folder to be able to select the user from within the Execution ID Editor.
2. On the toolbar of the Manage Execution Ids tab, click **New**.
The Execution Id Editor opens.
3. Specify the following parameters:

- a. **Owner List.** Select the user by whom the Execution Id will be owned.
Note: This option is disabled and displays the owner when a user folder was selected prior to selecting **New**.
- b. **Execution Id.** Type a valid Execution Id.
- c. **Server Type.** Select the type of server from the drop-down list. Selections are WebFOCUS Reporting Server, FTP, or WEB.
- d. **Server Name.** From the Server Name drop-down list, enter or select the name of a WebFOCUS Reporting Server with which the credentials will be associated or enter the FTP or web server name.

i Note: The Reporting Servers are defined in the ReportCaster configuration.

- e. **Password.** Type the password for the user ID. Note that you are not creating this password on the specified server; you are entering the existing password into the Repository table that stores Execution Id information.

- f. **Confirm Password.** Retype the password.
4. Click **OK** to create the Execution Id in the Repository table or click **Cancel** to cancel the request.

Change an Execution Id Password

To change an Execution Id password:

Procedure

1. From the list of Execution Ids, select the Execution Id whose properties you want to change (for example, admin).
2. In the right pane, double-click on the Execution Id or click **Edit**.
The Execution Id Editor opens.
3. Specify the following information:
 - a. **Password.** Enter the password for the Execution Id. This password must match the current password for this user ID on the server that appears in the Server Name field.
 - b. **Confirm Password.** Reenter the password.
Changing the password using ReportCaster does not change the password on the specified server.
4. Click **OK** to change the Execution Id or password values in the Repository tables. A message appears confirming that the values have been changed.

Delete an Execution Id

To delete an Execution Id:

Procedure

1. Select the Execution Id you want to delete.
2. Click **Delete**. A message appears asking for confirmation to delete the selected Execution Id.

3. Click **OK**.

Result

After the Execution Id is deleted, a scheduled job that requires this Execution Id on the specified server will not run unless the schedule is modified to use a valid Execution Id. If you modify the Execution credentials for a single schedule that specifies the deleted Execution Id, ReportCaster makes this modification for all schedules that specify the deleted Execution Id.

Global Updates

Authorized users can make global updates for the values stored in schedules and Distribution Lists. Using the Global Updates interface, the following settings can be updated:

- Mail Server
- FTP Server
- Printer
- Email Address
- Email From
- Data Server
- Notification Type
- Notification Reply Address
- Notification Subject
- Notification Brief Message To
- Notification Full Message To
- First Pre-Processing Procedure
- Second Pre-processing Procedure
- First Post-processing Procedure
- Second Post-processing Procedure

Global Updates are logged in the globalUpdates log file located in the Administration Console. Global Updates are logged, by default. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

Make a Global Update for a Mail Server

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **Mail Server** (the default).
2. Type the existing Mail Server in the **Old Value** box.
3. Type the new Mail Server in the **New Value** box.
4. Click **Update** to update the new Mail Server value in schedules and Distribution Lists.

Make a Global Update for an FTP Server

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **FTP Server**.
2. Type the existing FTP Server in the **Old Value** box.
3. Type the new FTP Server in the **New Value** box.
4. Click **Update** to update the new FTP Server value in schedules and Distribution Lists.

Make a Global Update for a Printer

Procedure

1. In the Global Update interface, click the **Setting** drop-down list and select **Printer**.
2. Type the existing Printer in the **Old Value** box.

3. Type the new Printer in the **New Value** box.
4. Click **Update** to update the new Printer value in schedules and Distribution Lists.

Make a Global Update for an Email Address

Procedure

1. In the Global Update interface, click the **Setting** drop-down list and select **Email Address**.
2. Type the existing Email address in the **Old Value** box.
3. Type the new Email address in the **New Value** box.
4. Click **Update** to update the new Email address value in schedules and Distribution Lists.

Make a Global Update for an Email From

Procedure

1. In the Global Update interface, click the **Setting** drop-down list and select **Email from**.
2. Type the existing Email from in the **Old Value** box.
3. Type the new Email from in the **New Value** box.
4. Click **Update** to update the new Email from value in schedules and Distribution Lists.

Make a Global Update for a Library URL

Procedure

1. In the Global Update interface, click the **Setting** drop-down list and select **Library URL**.

2. Type the existing Library URL in the **Old Value** box.
3. Type the new Library URL in the **New Value** box.
4. Click **Update** to update the new Library URL value in schedules and Distribution Lists.

Make a Global Update for a Data Server

Procedure

1. In the Global Update interface, click the **Setting** drop-down list and select **Data Server**.
2. Type the existing Data Server in the **Old Value** box.
3. Type the new Data Server in the **New Value** box.
4. Click **Update** to update the new Data Server value in schedules and distribution lists.

Make a Global Update for a Notification Type

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **Notification Type**.

The notification options are:

- **Never.** WebFOCUS ReportCaster will not send a notification of the schedule status under any circumstances. This is the default value.
- **Always.** Send a notification each time the schedule runs.
- **On Error.** Only send a notification when there is an error running the schedule.

For more information, see [Notification Options in the Basic Scheduling Tool](#)

2. Select the existing value in the Old Value box.
3. Select the new value in the New Value box.

If the Old Value is Never, then the Reply Address, Subject, Brief Message To, and Full

Message To fields will display. Provide each field with the necessary information.

4. Click **Update** to update the new Notification Type value in schedules and Distribution Lists.

Make a Global Update for a Notification Reply Address

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **Notification Reply Address**.
2. Type the existing Notification Reply Address in the **Old Value** box.
3. Type the new Notification Reply Address in the **New Value** box.
4. Click **Update** to update the new Notification Reply Address value in schedules and Distribution Lists.

Make a Global Update for a Notification Subject

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **Notification Subject**.
2. Type the existing Notification Subject in the **Old Value** box.
3. Type the new Notification Subject in the **New Value** box.
4. Click **Update** to update the new Notification Subject value in schedules and Distribution Lists.

Make a Global Update for a Notification Brief Message To

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **Notification Brief Message To**.
2. Type the existing Notification Brief Message To in the **Old Value** box.
3. Type the new Notification Brief Message To in the **New Value** box.
4. Click **Update** to update the new Notification Brief Message To value in schedules and Distribution Lists.

Make a Global Update for a Notification Full Message To

Procedure

1. In the Global Updates interface, click the **Setting** drop-down list and select **Notification Full Message To**.
2. Type the existing Notification Full Message To in the **Old Value** box.
3. Type the new Notification Full Message To in the **New Value** box.
4. Click **Update** to update the new Notification Full Message To value in schedules and Distribution Lists.

Make a Global Update for the First Pre-Processing Procedure

Procedure

1. In the Global Updates dialog box, click the **Setting** drop-down list and select **First Pre-processing Procedure**.
2. Type the existing First Pre-processing procedure in the **Old Value** box.
3. Type the new First Pre-processing procedure in the **New Value** box.
4. Click **Update** to update the new First Pre-processing Procedure value in all schedules.

Make a Global Update for the Second Pre-Processing Procedure

Procedure

1. In the Global Updates dialog box, click the **Setting** drop-down list and select **Second Pre-processing Procedure**.
2. Type the existing Second Pre-processing Procedure in the **Old Value** box.
3. Type the new Second Pre-processing Procedure in the **New Value** box.
4. Click **Update** to update the new Second Pre-processing Procedure value in all schedules.

Make a Global Update for the First Post-Processing Procedure

Procedure

1. In the Global Updates dialog box, click the **Setting** drop-down list and select **First Post-processing Procedure**.
2. Type the existing First Post-processing Procedure in the **Old Value** box.
3. Type the new First Post-processing Procedure in the **New Value** box.
4. Click **Update** to update the new First Post-processing Procedure value in all schedules.

Make a Global Update for the Second Post-Processing Procedure

Procedure

1. In the Global Updates dialog box, click the **Setting** drop-down list and select **Second Post-processing Procedure**.
2. Type the existing Second Post-processing Procedure in the **Old Value** box.
3. Type the new Second Post-processing Procedure in the **New Value** box.
4. Click **Update** to update the new Second Post-processing Procedure value in all schedules.

Purge Job Logs

The Purge Job Logs functionality provides on-demand options for purging logs, including the ability to specify a number of days (past) for which to purge job logs. For example, if you want to purge job logs for the past month, you would use the default number of days, which is 30. You can also specify an option for traces: Default Traces, No Traces, or Trace On.

Purge Job Logs on Demand

Procedure

1. From the Tools group in the ReportCaster Console, click **Purge Job Logs**.
The Purge Job Logs dialog box displays.
2. In the **Purge Job Logs older than (days)** field, accept the default number of days or specify another value. The default number of days is 30.
3. Under Trace Options, you can accept the default of *Default Traces*, or select **No Traces** or **Trace On**.
4. Click **OK**.

Delete Schedules

The Delete Schedules functionality provides on-demand options for deleting all inactive or nonrecurring schedules. You can also specify an option for traces: Default Traces, No Traces, or Trace On.

i Note: You must be authorized to delete inactive or nonrecurring schedules on-demand. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

Delete Inactive and Nonrecurring Schedules on Demand

Procedure

1. From the Tools group, in the ReportCaster Console, click **Delete Schedules**.
The Delete Inactive and/or Nonrecurring Schedules dialog box displays.
2. In the Delete Inactive and/or Nonrecurring Schedules dialog box, you can choose to delete inactive schedules, nonrecurring schedules, or both inactive and nonrecurring schedules.
3. Under Trace Options, you can keep the default of **Default Traces**, or select **No Traces** or **Trace On**.
4. Click **OK**.

Using the Command Prompt Interface to Delete Schedules

Optionally, you can delete inactive or nonrecurring schedules using the Windows command prompt *purgesched* utility. This utility is also available on UNIX.

Run the Delete Inactive and Nonrecurring Schedules Utility

Procedure

1. On a Windows system, open the command prompt and navigate to the directory **drive:**\\ibi\\WebFOCUS**nn**\\ReportCaster\\bin, where **drive** is the drive that your WebFOCUS software is saved on, and **nn** is the version number of your WebFOCUS software.
2. Type **purgesched**.
3. Press the Enter key.
The ReportCaster Schedule Purge Utility Operation displays.
4. Type a valid Administrator ID and password.
5. Press the Enter key.
The delete all inactive schedules prompt displays.
6. If you want to delete all inactive schedules, type **Y**. If not, type **N**.
7. Press the Enter key.
The delete all non-recurring schedules prompt displays.
8. If you want to delete all nonrecurring schedules, type **Y**. If not, type **N**.
9. Press the Enter key.
The confirmation prompt displays.
10. To confirm your schedule deletion choices, type **Y** to continue, or type **N** to decline.
11. Press the Enter key.
If you typed **Y**, the utility will proceed to delete your selected schedules, and processing is logged to the file purgesched.log in the ...ReportCaster\\log directory. If you typed **N**, the selected schedules will not be deleted.

Creating and Maintaining Distribution Lists

Distribution lists are a simple way to distribute content to multiple recipients by naming a list stored in a repository that contains individual recipients, rather than entering each recipient individually into a schedule. Distribution list helps in reducing the time to send information to a set of users. You can create a Distribution List, you can import the previously created list, or you can use the published list, which is created by others. You can create a Distribution List using three methods, email, FTP, and printer. You can share your Distribution List or change the copyright to manage it or publish it to make it available to other users.

Following are the types of Distribution List:

- **Email:** In the email method, you can create a list of emails that can be used to send the information together.
- **FTP:** In the FTP method, you can create a list of FTP locations that can be used to send the information together.
- **Printer:** In the Printer method, you can create a list of Printer by providing their server name or IP address, which can be used to send the information together.

 **Note:** If you have an LDAP data source, you can access an email information that is stored in it by configuring the LDAP Email Setting in the ReportCaster Console Configuration tool. Once configured, you can select email addresses from within the email address book of your company, eliminating the need to type them in manually. For more information on using this feature, see [LDAP Setting](#).

Creating a Distribution List

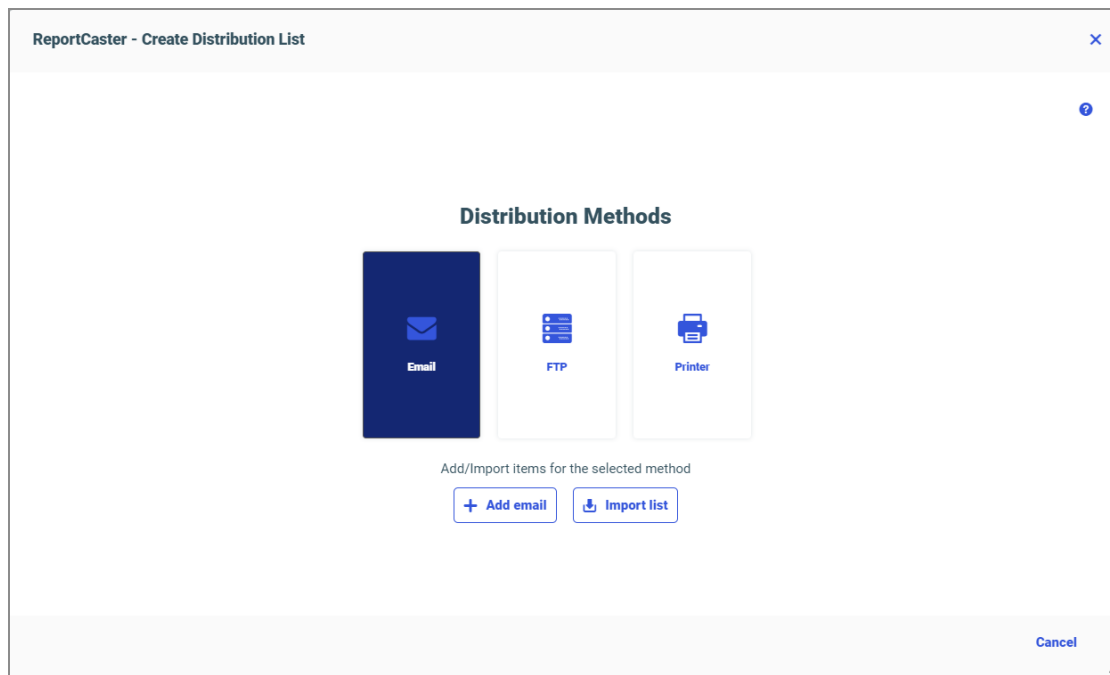
Use the following steps to create a Distribution List:

Procedure

1. Click the **Start Something New** button

, and select the **Create Distribution** option from the Reportcaster section.

2. **Create Distribution List** dialog opens, as shown in the following image.



3. Select the distribution method for the Distribution List. Email is the default distribution method.
 - If you select Email, see [Adding Email](#).
 - If you select FTP, see [Adding FTP](#).
 - If you select Print, see [Adding Printer](#).
4. Click the **Ok** button.
5. You can import your existing list also by clicking the **Import list** button . For more information, see [Importing a List of Members to Create Distribution List](#).
6. Enter the **Title**, **Name**, and **Summary**. Click the **Save** button and provide the workspace location to save the Distribution List as shown in the following image.

Save

Workspaces > My_Workspace > My Content

Search My Content

Items

Email Distribution list

Title: Distribution List Temp

Name: distribution_list_temp

Summary: This is a temporary distribution list.

Cancel Save

**Note:**

- The maximum length of a title value for a file is 256 characters.
- If the title of your file has the same name of an existing file in the folder, you receive a message asking if you wish to replace the file.

Adding a Member in the Distribution List

These are the ways that you can add a member in the Distribution List.

- [Adding Email](#)
- [Adding FTP](#)
- [Adding Printer](#)

Adding Email

1. Click the **Add email** button

[+ Add email](#) in **Distribution Methods** dialog.

2. **Add Email** dialog opens, click the **New email** button [+ New email](#) to start adding an email member. You need to specify the pattern by clicking the dropdown list, burst value and email addresses of the recipients as shown in the following image.

☐	Pattern	Burst Value	Email
☐	Wildcard ▼	1	temp1@gmail.com x temp3@gmail.com x
☐	Wildcard ▼	2	temp2@gmail.com x

3. You can also add members from the existing list. For more information, see [Adding Member from the Existing List](#).
4. You can specify multiple email addresses within a single address field. For more information, see [Specifying Multiple Email Addresses](#).
5. Click the **OK** button.
6. **Create Distribution List** dialog opens, you can add more email by clicking the **New email** button [+ New email](#), or import an existing list click the **Import List** button [Import list](#) as shown in the following image.

Note: You can also switch the **Method** from the dropdown list, but if you change the method it removes all the existing values.

ReportCaster - Create Distribution List

Method: Email

+ Add email Import list Export list

Total members: 2

	Burst Value	Email
☐	1	"temp1@gmail.com; temp3@gmail.com"
☐	2	"temp2@gmail.com"

Cancel Save

7. After adding all the members, click the **Save** button.

- Note:**
- The maximum number of email addresses you can specify in a Distribution List is 9999 and the maximum characters in an address line is 800.
 - In the Email Delivery, if Restrict Email Domains option is set to yes in the Server Configuration tool, then only those email domains (the portion of the email address following the at (@) symbol) listed in Allowed Email Domains (also in the Server Configuration tool) are valid email recipients.

Adding FTP

- Click the **Add FTP location** button  in **Distribution Methods** dialog.
- Add FTP Location** dialog opens, click the **New FTP location** button  to start adding an FTP member. You need to specify the pattern by clicking the

dropdown list, burst value and the location of the FTP folders that hold the report (including the extension) of the recipients as shown in the following image.

☐	Pattern	Burst Value	FTP Location
☐	Wildcard ▼	1	ftp://ftp.dummyftp1.com/
☐	Wildcard ▼	2	ftp://ftp.dummyftp2.com/

3. You can also add members from the existing list. For more information, see [Adding Member from the Existing List](#).
4. Click the **OK** button.
5. **Create Distribution List** dialog opens, you can add more FTP location by clicking the **New FTP location** button , or import an existing list click the **Import List** button  as shown in the following image.



Note: You can also switch the **Method** from the dropdown list, but if you change the method it removes all the existing values.

ReportCaster - Create Distribution List

Method: FTP

[+ Add FTP location](#) [Import list](#) [Export list](#)

Total FTP locations: 2

☐	Burst Value	FTP Location
☐	1	"ftp://ftp.dummyftp1.com/"
☐	2	"ftp://ftp.dummyftp2.com/"

[Cancel](#) [Save](#)

6. After completing all the changes, click the **Save** button.

Adding Printer

1. Click the **Add Printer** button [+ Add printer](#) in **Distribution Methods** dialog.
2. **Add Printer** dialog opens, click the **New printer** button [+ New printer](#) to start adding a printer member. You need to specify the pattern by clicking the dropdown list, burst value and the printers server name or IP addresses as shown in the following image.

i Note: In the Printer input field, specify the printer using the queue@printserver format where queue is the server name and print server is the host name or IP address of the printer. Although ReportCaster supports specifying only the print server (host name or IP address), we recommend that you specify both the print queue and print server. (ReportCaster differentiates between the printer queue and the printer server by detecting the presence of the '@' separator.)

Add Printer

New (2) Existing List (0)

+ New printer

Import list

☐	Pattern	Burst Value	Printer
☐	Wildcard	1	queue@printserver1
☐	Wildcard	2	queue@printserver2

Cancel OK

3. You can also add members from the existing list. For more information, see [Adding Member from the Existing List](#).
4. Click the **OK** button.
5. **Create Distribution List** dialog opens, you can add more FTP location by clicking the **New printer** button , or import an existing list click the **Import List** button  as shown in the following image.

i Note: You can also switch the **Method** from the dropdown list, but if you change the method it removes all the existing values.

ReportCaster - Create Distribution List

Method
Printer

+ Add printer Import list Export list

Total printers: 2

☐	Burst Value	Printer
☐	1	"queue@printserver1"
☐	2	"queue@printserver2"

Cancel Save

6. After completing all the changes, click the **Save** button.

Adding Member from the Existing List

Following are the steps for Importing Email Distribution List, these steps are the same for FTP and Printer also.

1. Click the **Existing List** option in the **Add Email** dialog.
2. You can select the Distribution List from the dropdown menu.
3. Select the members that you want to import, and click the **Add selections to the selected option list** button  as shown in the image.

Add Email

New (0) **Existing List (2)**

Add emails from existing distribution lists

IBFS:/WFC/Repository/My_Workspace/~admin/email_distribution_list.adr

Filter

☐	Burst Value	Email
☐	1	temp1@gmail...
☐	2	temp2@gmail...

> <

Clear List

Cancel OK

4. You can see that the selected members are moved to the right side. You can modify or remove the members by selecting and clicking the **Remove selections from the selected option list** button .
5. Click the **Ok** button, and you can see that your members are added on the **Create Distribution List** dialog.

Editing a Distribution List

You can edit your existing Distribution List if you are authorized to access the Distribution List tool, you can view and edit the Distribution Lists of which you are the owner. If the Distribution List is owned by a group or is published, you have to be authorized to edit it.

Following are the steps to edit a Distribution List:

Procedure

1. Open the Workspaces area of the start page or the WebFOCUS Home Page, right-click the Distribution List you want to edit, and select Edit or double-click the list.

2. The properties of the selected Distribution List display, as shown in the following image.

ReportCaster - temp_list Distribution List

Method
Email

+ Add email Import list Export list

Total members: 2

☐	Burst Value	Email
☐	1	"temp@gmail.com"
☐	2	"temp2@gmail.com"

Cancel Save

3. From this dialog, you can perform the following:

- Select the members that you want to edit by selecting the checkbox. You can edit the members by right click the member and select **Edit** or clicking the **Edit** icon .
- Click the **ADD** button to add a new member to the Distribution List. The Add New Member dialog appears. For more information, see [Adding a Member in the Distribution List](#).
- Import a Distribution List by clicking on the **Import list** button . For more information, see [Importing a List of Members to Create Distribution List](#).
- Export a Distribution List by clicking on the **Export list** button . For more information, see [Exporting a Distribution List](#).
- Delete a Distribution List member by selecting the item to be deleted, then

click the **Delete** icon .

i Note: In the Allowed Email Addresses and Domains dialog in the ReportCaster Console, if the Restricted user input with this list checkbox has been selected, user input of email addresses is restricted to a list of allowed email domains and addresses. For more information, see [Validating Allowed Email Domains and Addresses](#).

4. When you have completed your changes, click **Save**.

i Note: If the title of your file has the same name of an existing file in the folder, you receive a message asking if you wish to replace the file.

To exit the editing dialog without making changes, click **Close**.

Exporting a Distribution List

You can export the Distribution List in your system, so that you can use that list by importing it on the other Distribution List. You can share that Distribution List with others.

Following are the steps to export a Distribution List.

Procedure

1. Open the Workspaces area of the start page or the WebFOCUS Home Page, right-click the Distribution List you want to edit, and select Edit or double-click the list.
2. The properties of the selected Distribution List display, as shown in the following image.

3. Click the **Export List** button , a pop-up display as shown in the following image.

4. Click **OK** to export the file in your system.

Accessing a Distribution List

Sharing your private Distribution Lists allows you to permit groups and users to see its content and use it in schedules while you retain ownership. Authorized users can share their private Distribution Lists with groups and users with whom they are permitted to

share. The Distribution List can be accessed by users authorized to access the folder in which the shared Distribution Lists are located.

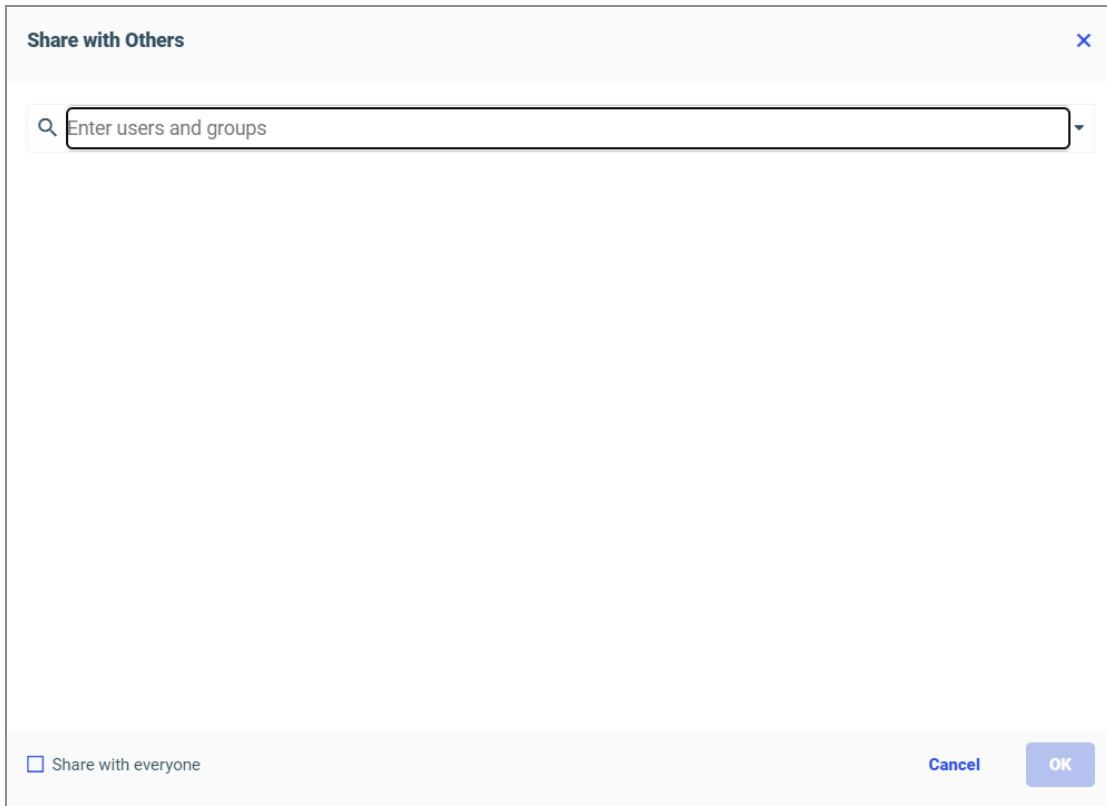
Authorized users can publish and unpublish Distribution Lists to make them available to users authorized to access the folder in which they are located. Publishing requires the folder and item that is located in to be published. If the folder is subsequently unpublished, all items in that folder are unpublished. See the *ibi™ WebFOCUS® Security and Administration Manual* for additional information on publishing and sharing folders and items.

From the Hub or the WebFOCUS Home Page, if you are authorized to share your private content saved in a My Content folder, you can share a Distribution List with users authorized to access the folder in which the Distribution List is located by right-clicking the folder or Distribution List and clicking Share.

If you are authorized for advanced sharing, you can share your private content saved in a My Content folder with specific groups and users with whom you are authorized to share by performing the following steps.

1. Right-click the Distribution List that you want to share and click **Share With**.

The Share with others dialog displays, as shown in the following image.



2. Click the dropdown arrow on the search box to display the filters for the users or groups that you want the option to select. You can filter your search results by users, by groups or by both.
3. After you select a filter, begin typing in the search box to display the users or groups that are available for selection. Click a user or group to add it to the list of users or groups that can view the Distribution List.
4. When you are finished selecting users or groups to share your Distribution List with, click **OK**.

Publishing Distribution Lists

Publishing Distribution Lists is an easy way to make your list available to others, so that they can use it in their scheduling tasks. A domain must be published to publish items within the domain, including Distribution Lists. Published items or folders display in color, while unpublished items or folders display in black and white.

Following are the steps to publish a Distribution List:

Procedure

1. Go to the start page or the WebFOCUS Home Page.
2. Right-click on the workspace that contains the Distribution List that you want to publish.
3. Click publish.
4. To unpublish the workspace, click Unpublish.

Set Security Rules on a Distribution List

Authorized users can set security for unpublished Distribution Lists, allowing other groups or individual users to access and manage the lists. For more information, see the *ibi™ WebFOCUS® Security and Administration*.

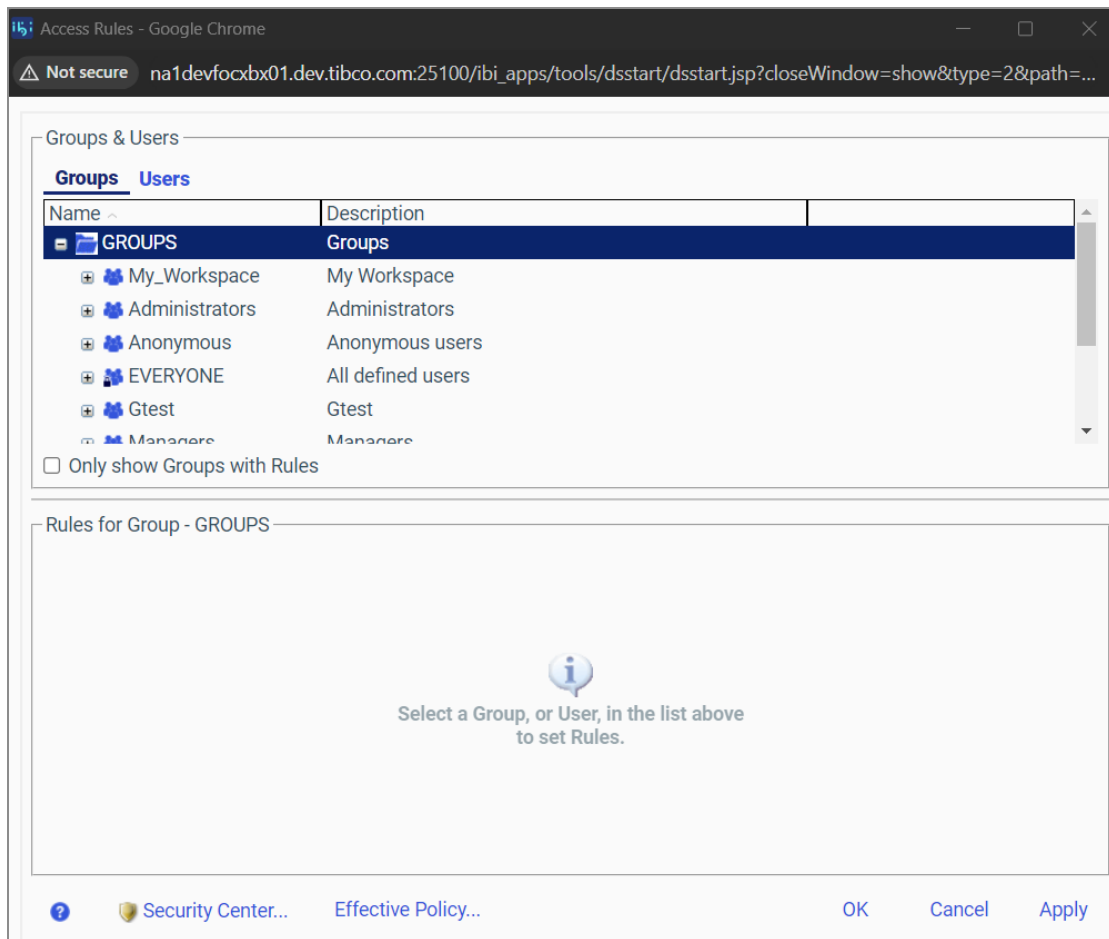


Note: Authorized users can review the Security Policy by right-clicking the Distribution List, selecting Security, and then selecting Effective Policy.

Procedure

1. Select the workspace containing the Distribution List, or the unpublished Distribution List itself for which you want to set security.
2. Right-click and point to Security and then click **Rules**.

The Access Rules dialog displays, as shown in the following image.



3. In the Groups tab, click the group or individual users to whom you would like to grant access to the Distribution List. Optionally, click the Only show Groups with Rules checkbox to only display groups that have rules that have already been set. The roles for a selected group appear in the Rules for Group section.
4. Optionally, in the Rules for Group section, click the Roles: Dropdown list to only display specific roles.
5. Optionally, click the Only show Rules that have been set checkbox to filter the list of available roles even further.
6. Select the role that defines the functional capabilities for which to set the access level.
7. Choose the access level in the Access dropdown list. Following are the options that you can set:

- **Not Set.** Access is not specifically set. Access is determined by inherited rules.
 - **Permitted.** Allows the functionality of the selected role as specified in the Apply To dropdown list. You can select Folder and Children, Folder Only, or Children Only.
 - **Denied.** Denies the functionality of the selected role at the level specified in the Apply To dropdown list. You can select Folder and Children, Folder Only, or Children Only.
 - **Over Permitted.** Overrides a denied access level to allow the functionality of the selected role at the level as specified in the Apply To dropdown list. You can select Folder and Children, Folder Only, or Children Only.
 - **Clear Inheritance.** Erases all previously defined rules for the selected role at the level specified in the Apply To dropdown list. You can select Folder and Children, Folder Only, or Children Only.
8. Click the Users tab to display the list of individual users to whom you would like to grant access to the item. Optionally, click the Only show Users with Rules checkbox to only display users that have rules that have already been set.
The roles for a selected user appear in the Rules for User section.
 9. Optionally, in the Rules for User section, click the Roles: Dropdown list to only display specific roles.
 10. Optionally, click the Only show Rules that have been set checkbox to filter the list of available roles even further.
 11. Select the role that defines the functional capabilities for which to set the access level.
 12. Choose the access level in the Access dropdown list, as described in Step 7.
 13. Click Apply.
 14. Click OK, your security setting updates are now saved for your Distribution List.

Bursting a Report

Instead of distributing an entire report from a scheduled report procedure (FEX), you can use the WebFOCUS ReportCaster burst feature to break the report into sections to be distributed separately to the same or different destinations. Bursting enables you to target

relevant sections of a report to individual users. Each report section is saved to a separate file.

If you are distributing a burst tabular report, the burst value is determined by the first BY field. If you are distributing a burst 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 the values referenced by the TABLE or GRAPH request.

You can send several report sections to one recipient by specifying the destination of that recipient (email addresses, FTP server locations, and files or printers) for each section you want to send. You can also send several report sections to one destination. 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 enable the bursting option within the Task for a schedule. The burst values specified in the Burst Value column in the Distribution List are ignored unless the Task specifies to burst the report.
- Report names containing more than 60 National Language Support (NLS) characters are truncated to 60 characters prior to distribution. This prevents a report name from becoming corrupted when the report is emailed.
- Before distributing a coordinated infographic procedure as an inline email message, you must select the Burst Report checkbox in the scheduling tool. Infographic procedures that are not coordinated cannot be burst.
- If you choose to distribute your reports as inline email messages, when an email recipient receives a chart or infographic distribution that contains more than one burst value, the multiple charts or infographics display inline.

Specifying Burst Values in a Distribution List

You can specify sort field burst values and destinations (email addresses, FTP, or printers) when creating or editing a Distribution List.

Using the primary sort field values (Northeast Sales, South Sales, and Midwest Sales), the email address of each representative is associated with the relevant sales report data. Since Chuck Hill needs only the data for the Northeast branch, the sort value Northeast is

listed in the Burst Value column and is associated with his email address in the E-mail column.

However, Tom Gregory works in both the Midwest and South regions. Since he requires data for both regions, his email address is listed in the E-mail column twice, next to a Burst Value column entry for each region.



Note:

- You can click a column heading to sort the data in that column.
- You can specify multiple email addresses on a single address line. For details, see [Specifying Multiple Email Addresses](#).

Considerations When Distributing a Burst Report Using FTP

When distributing a burst report using FTP, consider the following:

- When using a format of HTML, PDF, or EXL2K, an index page for the burst report output is generated.
- The index page for FTP distribution 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 burst report output distributed using FTP are incorrect when specifying BASEURL in the scheduled procedure. This is because WebFOCUS ReportCaster does not parse and evaluate the procedure code of the scheduled job. To resolve this, 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, burst report output distributed using FTP is created in sequential data sets having the following qualifiers:
 - **High-level Qualifier:** User ID specified for the FTP Server.
 - **Additional Qualifiers:** Location value in the Distribution tab and files supplied in a Distribution List.

To send burst output to a partitioned data set, specify an existing partitioned data set as Location and specify member names, without extensions, in the Distribution List File column. For example, `highlevelqualifier.location.file`.

- On z/OS, 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.

- On z/OS, the index page is generated with extra characters preceding the burst values. The links on the page to the report sections are correct.

Bursting Guidelines and Limitations

When a schedule task specifies to burst a report procedure (FEX), all data values generated for each burst section are returned to the Distribution Server.

- For the Repository and Report Library distribution methods, each burst section is distributed to the repository. The owner of the schedule must have write access to the repository folder specified in the schedule when the scheduled job runs for the report output to be successfully distributed. Access to the report sections is controlled by the repository security rules that are created when the report is distributed.
- For the email and printer distribution methods, specific burst sections are distributed based on the burst values specified when creating the Distribution List or Single Address used by the schedule.

The following are the guidelines and limitations that apply to the burst feature:

- **Case.** Burst values are case-sensitive.
- **Keywords.** Burst values can contain the following keywords:
 - **Wildcard Characters.** Use an asterisk (*) and a question mark (?) as wildcards to represent characters at the beginning, end, or middle of the burst values. The asterisk represents one or more characters, while the question mark represents any single character. Precede each instance of a burst value using a wildcard with the wildcard keyword enclosed in brackets followed by a colon, [wildcard]: as shown in the following examples.
 [wildcard]:abc* = all values that start with 'abc'.
 [wildcard]:a?c = all three-character values that start with 'a' and end with 'c'.
 [wildcard]:a?c* = all values that start with 'a' and have a 'c' as the third character.



Note: Wildcards in a distribution list are not supported with FTP.

- **Java Regular Expressions.** Use to identify strings of text. Precede each

instance of a burst value using a Java regular expression with the regular expression keyword enclosed in brackets followed by a colon, [regex]: as shown in the following examples.

[regex]:[bcr]at = values that are bat, cat, or rat.

[regex]:[^bcr]at = any value that is not bat, cat, or rat.

- **Default Distribution.** You can provide a default destination for burst values that are not specified in the Distribution List. To do this, enter the following in the burst value column of the Distribution List.

[elsesend] = reports for burst values not contained in the Distribution List sent to the named recipient.

- **'%BURST' Syntax.** You can include a burst value in the name of a distributed file by using the '%BURST' syntax in the name. The use of '%BURST' is not supported in a zip file name when the Packet email setting is Yes.

The following are example members in an email Distribution List that illustrate the use of the wildcard and default distribution keywords in burst values.

Burst Value	Address
[wildcard]:*an*	sml@company.com
England	ray@company.com
[elsesend]:	jt@company.com

Using a scenario where the report output from a scheduled report procedure (FEX) is burst on the Country field that contains the values of Germany, USA, France, Canada, Italy, Chile, England, and Japan, then:

- Report information for Germany, France, Canada, England, and Japan delivered to sml@company.com.
- Report information for England delivered to ray@company.com.
- Report information for USA, Italy, and Chile delivered to jt@company.com.

You must not leave the burst value blank. This value is used to name the report file, and if no value is assigned to this parameter, you receive an error and terminate the

distribution.

If you assign a value that includes a keyword or wildcard character that might result in a blank value in one or more instances, code the procedure to assign a special value as a substitute to ensure that all instances of the burst value must not be blank.

- **Formats.** All formats support bursting except XML and EXCEL. Each burst section of the report output from a scheduled report procedure (FEX) named *burstvalue_filename.format* (for example, Northeast_Sales.pdf).
- **ACROSS command.** This command is not evaluated as a primary sort field. To burst report output from a scheduled report procedure (FEX), you must also include a BY field. Bursting occurs on the BY field.
- **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 output from a scheduled report procedure (FEX), and a SUBFOOT for only the last page of the report output from a scheduled report procedure (FEX). When bursting report output from a scheduled report procedure (FEX), 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
```

- **AnV field types.** Bursting is not supported on a field with the AnV (where *n* is an integer value) field type.

Creating an External Distribution File

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 might want to create an external distribution file consisting of multiple recipients. The external distribution file can then be assigned to any schedule. An external distribution file is functionally similar to a distribution list except it is created outside of WebFOCUS ReportCaster.

In addition, you can include a password in a distribution file. If you include a password in a distribution file, the distribution output is encrypted in a password-protected Zip file if the Zip option is selected. This option is only available if the WebFOCUS ReportCaster Server

Configuration option, Zip Encryption Password Plug-in, is set to none. When the WebFOCUS ReportCaster Server Configuration option, Zip Encryption Password Plug-in, is set to default or to a custom value, passwords in a distribution file are ignored because the plug-in provides passwords.

How to Create an External Distribution File

The external distribution file must contain comma-delimited records, where the maximum length of each record is 800 characters. Records must end with a comma followed by a dollar sign (,\$). Each record must be typed on a separate line in the file. The file should also have a preface that includes the distribution method for the file.

- To specify the distribution method, enter it as a value to the METHOD before you list the recipients, in the following format:

```
##METHOD=methodname
```

Where the methodname is one of the following:

- **EMAIL:** It is for an email distribution list.
- **FTP:** It is for an FTP distribution list.
- **PRINT:** It is for a printer distribution list.
- To specify a record for a non-burst procedure, use the following format:

```
distributiondestination,,,$
```

Where: distributiondestination is a valid email address, FTP file name, or printer.

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

```
distributiondestination,burstvalue,$
```

Where: distributiondestination is a valid email address, FTP file name, or printer.

burstvalue is a valid burst value for the report being scheduled.

You must not leave the burst value blank. This value is used to name the report file, and if no value is assigned to this parameter, you receive an error and terminate the distribution.

If you assign a value that includes a keyword or wildcard character that might result in a blank value in one or more instances, code the procedure to assign a special value as a substitute to ensure that all instances of the burst value should not be blank.

✓ **Tip:** You can specify multiple email addresses within a single record of an external distribution file. For details, see [Specifying Multiple Email Addresses](#).

To specify a password for Zip output distribution, include the following statement to enable encryption and record format:

```
#encryption enabled
distributiondestination,burstvalue,password,$
```

Where: password is the value to be used as the password to access the Zip file.

i Note:

- The encryption-enabled statement is not case-sensitive.
- If you include the encryption-enabled statement in your distribution file, then the burst values in the distribution file cannot contain commas.
- If you include the encryption-enabled statement in your distribution file, do not use commas in passwords.
- The burst value is optional. If you are not including a burst value, be sure to add two commas between the distribution method and password value. For example:

```
mcr@company.com,,XTG2,$
```

The following is an example of a distribution file that contains the encryption-enabled statement and several records that include password values to be passed to the Distribution Server:

```
##METHOD=EMAIL
#encryption enabled
mcr@company.com,England,abcd,$
jsmith@company.com,Australia,rrrAx,$
rable@company.com,France,UtLRzet,$
tom@gadgetco.com,Italy,mOmPP,$
```

i Note: In the Allowed Email Addresses and Domains dialog in the ReportCaster Console, if the **Restrict user input with this list** checkbox has been selected, user input of email addresses is restricted to a list of allowed email domains and addresses. For more information, see [WebFOCUS ReportCaster Configuration](#).

Automatically Delete an External Distribution File

You can configure ReportCaster to automatically delete external distribution files after a schedule runs.

Following are the steps to automatically delete an External Distribution File:

Procedure

1. Create a blank text file named fileaddr.txt in the cfg directory under the ReportCaster installation directory, for example C:\ibi\WebFOCUS82\ReportCaster\cfg.
2. Create a directory named addrpath on the same machine as the Distribution Server, for example, C:\ibi\WebFOCUS82\ReportCaster\addrpath that holds the deleted distribution files.
3. Edit the fileaddr.txt file to include the fully qualified directory path to the external distribution files to be deleted, for example, C:\ibi\WebFOCUS82\ReportCaster\addrpath. A slash at the end of the directory path is optional. If an invalid directory path is specified in fileaddr.txt, no external distribution files are deleted.
4. Place the external distribution files that you want automatically deleted when a schedule runs in the directory created in step 2, for example, the C:\ibi\WebFOCUS82\ReportCaster\addrpath directory.
5. Modify your schedules so that the external distribution files are retrieved from the directory created in step 2 (for example, the C:\ibi\WebFOCUS82\ReportCaster\addrpath directory).

Importing a List of Members to Create Distribution List

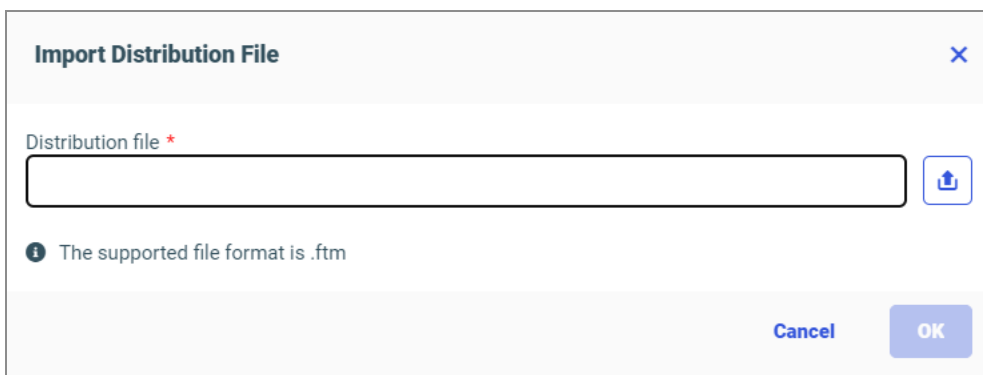
You can create Distribution Lists by importing members from an existing Distribution List file without entering individual members manually. Before you import a list, confirm that it meets the requirements for a Distribution List, such as comma-delimited records. This ensures that the list imports successfully.

In addition to the minimum Distribution List requirements, your file can contain other information, such as descriptions, summaries, and types of Distribution Lists. This information can be used to populate any respective fields when you import the file. For more information on how to configure a Distribution List file, see [Creating an External Distribution File](#).

Note: A Distribution List file containing special characters must be encoded in UTF-8 before it is imported.

Procedure

1. Click the **Start Something New** button , and select the **Create Distribution** option from the Reportcaster section.
2. Click the **Import** list button  on the Create Distribution list dialog.
3. The **Import Distribution File** dialog opens as shown in the following image.



The image shows a dialog box titled "Import Distribution File" with a close button (X) in the top right corner. Inside the dialog, there is a label "Distribution file *" followed by a text input field. To the right of the input field is an "Upload" button with a file icon. Below the input field, there is a message: "The supported file format is .ftm". At the bottom right of the dialog, there are two buttons: "Cancel" and "OK".

4. Click the **Upload** button , and select your distribution file from your file system.
5. Make sure that the file should be in .ftm format.

6. Click **Ok**, create distribution file dialog opens with the imported content.
7. Optionally, you can modify the imported Distribution List.
8. Enter the **Title**, **Name**, and **Summary**. Click the **Save** button and provide the workspace location to save the Distribution List.

Creating a Dynamic Distribution List

A Dynamic Distribution List 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, ibi™ FOCUS® data source, or LDAP). You must code a WebFOCUS procedure (FOCEXEC) that is available to the path of the server defined in either the server profile (edasprof.prf) or the user 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.

As an option, you can include a password in a Dynamic Distribution List. If you include a password in a Dynamic Distribution List, it is used to encrypt the distribution output in a password protected Zip file if the Zip option is selected. This option is only available if the ReportCaster Server Configuration option, Zip Encryption Password Plug-in, is set to none. When the ReportCaster Server Configuration option, Zip Encryption Password plug-in, is set to default or to a custom value, the passwords in a Dynamic Distribution List are ignored because the plug-in provides passwords.

 **Note:** There is no limit on the number of burst values that you can specify in a Dynamic Distribution List.

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

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

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

```

SET ASNAMES=ON
TABLE FILE MYADDR
PRINT BURST_VALUE AS 'VALUE'
EMAIL_ADDRESS AS 'DEST'
ON TABLE PCHOLD
END

```

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

```

SET ASNAMES=ON
TABLE FILE MYADDR
PRINT EMAIL_ADDRESS AS 'DEST'
ON TABLE PCHOLD
END

```



Note: If the column names are not VALUE and DEST in the Master File, you must add a SET ASNAMES=ON qualifier before the TABLE FILE statement in the procedure.

- The following is an example of how you can implement the password protection of a zipped distribution. The following Master File contains a password for zipped distribution.

```

FILE=MYADDR,SUFFIX=FIX
SEGNAME=SEG01,SEGTYPE=S02
FIELDNAME=BURST_VALUE,BURST,A50,A50,$
FIELDNAME=EMAIL_ADDRESS,EMAIL,A40,A40,$
FIELDNAME=PASSWORD,PWD,A12,A12,$

```

- The following sample procedure includes a password column along with the destination and burst value columns.

```

SET ASNAMES=ON
TABLE FILE MYADDR
PRINT BURST_VALUE AS 'VALUE'
EMAIL_ADDRESS AS 'DEST'
PASSWORD AS 'PASS'
ON TABLE PCHOLD
END

```

i Note: In the Allowed Email Domains and Addresses dialog in the ReportCaster Console, if the **Restrict user input with this list** checkbox has been selected, user input of email addresses is restricted to a list of allowed email domains and addresses. For more information, see [Validating Allowed Email Domains and Addresses](#).

Generating a Dynamic Distribution List From ibi WebFOCUS Repository Procedures

You can create Dynamic Distribution List procedures using your personal text editor, or using the text editor available in the WebFOCUS user interface. When assigning the Email Distribution option to a schedule, select the Dynamic Distribution List from the Repository Procedure option to choose a Dynamic Distribution List procedure stored in the Repository. While not all users may have access to the Reporting Server, where Dynamic Distribution List procedures can also be stored, most users are allowed to access the Repository.

Following are the steps to select a Dynamic Distribution List Procedure from the Repository.

Procedure

1. Begin creating a schedule that uses email distribution. When you are on the Distribution interface, navigate to the Distribution Information section and click the **Type:** dropdown list to display all email distribution options.
2. Click the **Dynamic Distribution List from Repository Procedure** option, as shown in the following image.

New Distribution Method - Email

Distribution name *
 ☒ Enable

General **Options**

Distribution Information

Type
 ▼

- Distribution List
- Distribution File
- Email Address(s)
- Dynamic Distribution List from Server Procedure
- Dynamic Distribution List from Repository Procedure**

To *

Cc

Bcc

Email Information

Select the inline message
☐

☒ Message

Cancel Add

3. Click the **To** button to display the Dynamic Distribution List from the Repository Procedure dialog.

4. Click the **Browse** button to search for a Dynamic Distribution List saved in your Repository. When you find your list, select it and click Open.

The file path of your list is added to the Procedure Name field. The Server Name field is filled out by default, which displays the server for the list you select.

5. In the **Execution ID** field, enter the Execution ID to use for this procedure.

6. Click the **Password** button to enter a password for the Execution ID.

7. When you are done entering your settings, click **OK**.

8. Complete the remaining settings required for your schedule. For more information, see [Creating a WebFOCUS ReportCaster Schedule](#).

When the schedule runs, the schedule distributes information to the users listed on the chosen Dynamic Distribution List.

Related Resources:

- [Creating a WebFOCUS ReportCaster Schedule](#)

Specifying Multiple Email Addresses

When creating a schedule or Distribution List, you can specify multiple email addresses within a single field, row, or record.

When creating a schedule or Distribution List, you can separate each email address with a semicolon (;).

If you are using a Distribution List, where commas (,) are used as separator, then it is also treated as semicolon (;).

The multiple email addresses appear in the To line of a single email when the scheduled output is distributed.

i Note:

- To distribute separate emails for each address, specify the email addresses on separate lines within the Distribution List.
- In the Allowed Email Domains and Addresses dialog in the ReportCaster Console, if the Restrict user input with this list checkbox has been selected, user input of email addresses is restricted to a list of allowed email domains and addresses. For more information, see [Validating Allowed Email Domains and Addresses](#).

Following are the ways to Specify Multiple Burst Email Addresses:

- If you are using the default configuration (Packet Email = YES), one email is distributed for multiple burst values specified for the same email address. The email address values specified on each row are treated as a string that is a key. If there are multiple rows with the same address value (key), one email is distributed with all the

burst values. For example, consider the following Distribution List:

Burst Value Address

A	user1@abcd.com;user2@abcd.com
B	user1@abcd.com
C	user1@abcd.com

In this example, user1@abcd.com receives two emails when the scheduled output is distributed. In the first email, user1@abcd.com; user2@abcd.com appears in the email To line and one attachment is distributed for burst value A. In the second email, user1@abcd.com appears in the To line and two attachments are distributed, one for burst value B and one for burst value C.

- If you are using the configuration that specifies to distribute a single email for each row (Packet Email = NO), then the following behavior occurs for our example. Three separate emails are distributed. In the first email, user1@abcd.com; user2@abcd.com appears on the To line and one attachment is distributed for burst value A. The second email is sent to user1@abcd.com with one attachment for burst value B. The third email is sent to user1@abcd.com with one attachment for burst value C.
- If a schedule has multiple tasks and Packet Email = BURST, then for each burst value the output of all of the tasks is combined and distributed. In our example, three separate emails are distributed. In the first email, user1@abcd.com; user2@abcd.com appears on the To line and all output from the multiple tasks for burst value A are distributed. The second email is sent to user1@abcd.com with all output from all tasks for burst value B. The third email is sent to user1@abcd.com with all output from all tasks for burst value C.
- Another consideration is when using the default configuration (Packet Email = YES) and the same burst value is specified multiple times for the same Address (key) value. For example, consider the following Distribution List:

Burst Value Address

A	user1@abcd.com;user2@abcd.com
B	user1@abcd.com
B	user1@abcd.com

In this Distribution List, only two emails are distributed for user1@abcd.com. In the first email, user1@abcd.com; user2@abcd.com appears in the To line and the attachment is for burst value A. In the second email, user1@abcd.com appears in the

To line and the attachment is for burst value B. The third row in the Distribution List is ignored since it contains the same key and the same burst value, B, as the second row.

As a best practice, be sure to review your distribution information to make sure you have not duplicated the same burst and address value pairs.

Specifying Multiple Non-Burst Email Addresses

Consider the following sample Distribution List, which does not contain burst values:

Address

```
user1@abcd.com;user2@abcd.com  
user1@abcd.com  
user2@abcd.com  
user3@abcd.com  
user1@abcd.com;user2@abcd.com;user3@abcd.com
```

In this Distribution List, an email is distributed for each address line regardless of whether Packet Email is set to YES or NO. This is because each address value is unique. For the first email, user1@abcd.com; user2@abcd.com appears in the To line and the attachment is for the full report output from a scheduled report procedure (FEX). The second email is distributed to user1@abcd.com, and so on.

If one of the address lines is repeated in the Distribution List (for example, if user3@abcd.com is added as the sixth line in the example Distribution List), the behavior would work as follows. If Packet Email = YES, only one email is distributed for user3@abcd.com. However, if Packet Email = NO, two separate emails are distributed to user3@abcd.com.

Creating a WebFOCUS ReportCaster Schedule

With a WebFOCUS ReportCaster Schedule, you can choose when to run a report, its output format, and the distribution method. This topic describes the WebFOCUS ReportCaster Scheduling tool and the different methods to create a schedule.

About the Scheduling Tool

The scheduling tool automates the generation of reports (in different formats) and their distribution. You can set up specific times for reports to run, ensuring that relevant information is delivered to stakeholders promptly without manual intervention. It enhances the efficiency of reporting processes in WebFOCUS. WebFOCUS Client security authorization controls whether you can access the application content stored in the Repository and the Scheduling tools. The following image displays the Scheduling Tool interface.

ReportCaster - Create Schedule

Task

Distribution

Recurrence

Properties

Log Reports

Name	Type	Scheduling Object	Alert	Burst	Enable

When you create a schedule, you must specify a task that will run when the schedule starts.

Cancel Run Save

You can create a schedule by using the following methods:

- By right-clicking any file from the workspace and selecting **Schedule**.
- By selecting **Start Something New** , and then select **Create Schedule**.

The first method only allows you to create a schedule with a WebFOCUS Report type task. While the second method allows you to create different types of tasks. These include WebFOCUS Reporting Server procedures (FEX), files accessible to the Distribution Server or from an FTP server, and fully qualified URLs to submit to a web or application server. In addition, the selection of tasks and schedule distribution methods and destination is within the Scheduling tool.

The vertical navigation bar groups the scheduling options into the following categories:

- **Task:** Offers view and edit the tasks associated with the schedule.
- **Distribution:** Offers view and edit the distribution methods associated with the schedule.
- **Recurrence:** Provides run-time intervals for distribution and repeat options.
- **Properties:** Provides **job priority level**, **no report to distribute**, and **notification** options for the schedule.
- **Log Reports:** To give details of each time the schedule is run.

Task

You can use the Task option to select the type of report for the schedule to distribute. On the Task tab, you can create multiple tasks.

When you click the dropdown arrow of the **Create new task**  icon, you can select from all task types such as:

- [WebFOCUS Report](#)
- [WebFOCUS Server Procedure](#)
- [WebFOCUS Schedule](#)
- [File](#)
- [FTP](#)

- [URL](#)

All the tasks you created, are populated in the task window. You can also enable or disable the tasks from the same window. When you select a particular task, the following options are enabled:

Option	Functionality
Move task up 	Moves the selected task one place up the list.
Move task down 	Moves the selected task one place down the list.
Delete task 	Deletes the selected task.
Duplicate task 	Duplicates the selected task.
Edit task 	Edit the selected task.



Note: The WebFOCUS Client Universal Profile is run by WebFOCUS ReportCaster when you run the WebFOCUS Repository procedure or WebFOCUS Reporting Server procedure. For more information, see the ibi™ WebFOCUS® Security and Administration guide.

WebFOCUS Report

The WebFOCUS Report task type is used when a procedure (FEX) file from the repository as the report in the schedule. The WebFOCUS Report task window contains the following tabs: **General**, **Parameters**, **Pre-Post Procedures**, and **Advanced Task Settings**.

General tab

The General tab has the following options:

Option	Description
Procedure	Specifies the pathname for the procedure
Server name	Contains the server associated with the selected procedure
Execution ID	Contains the Execution ID associated with the procedure Note: You can also create Execution ID by selecting the plus icon next to the textbox.
Password	Contains the password for the associated Execution ID
Report Properties	Contains two checkbox fields: • Make It a Burst Report: Enables you to burst the reports. For more information, see Bursting a Report • Override the format specified in the procedure: Contains different formats to override the default format of the procedure Save report as: You can provide a title for the report in this field

For a compound report using the SET COMPOUND OPEN syntax, choose **Override the Format Specified in the Procedure** and specify the format when scheduling the report. Otherwise, the report is not be distributed. Compound reports produced by the WebFOCUS and WebFOCUS App Studio reporting tools do not require that the **Override Format Specified in the Procedure** checkbox be selected.

- FLEX, VISDIS, and VISDISAE report output formats are no longer supported. When editing a task with these formats, you can modify the output format in the opening dialog.
- If you click OK, and the output format of the report is set to FLEX, the task output is saved as AHTML.
- If you click OK, and the output format of the report is set to VISDIS or VISDISAE, the task output is saved as HTML.
- If you click Exit, the output format is not changed, and any changes that you made to the task are not saved.

When an existing WebFOCUS Server Procedure or WebFOCUS Report task is opened, if the **Override the Format Specified in the Procedure** checkbox is selected, the list of formats

displays. If you clear the **Override the Format Specified in the Procedure** checkbox, the list of formats does not display.

When an existing WebFOCUS Server Procedure or WebFOCUS Report task is opened, if the **Override the Format Specified in the Procedure** checkbox is not selected, the list of formats does not display. If you select the **Override the Format Specified in the Procedure** checkbox, the list of formats displays.

Parameters tab

Specifies values for parameters that are required at run time by the report procedure (FEX) being scheduled. You can customize a report and control its execution with parameters.

When setting up a scheduled report (FEX), utilize the Schedule Task Parameters section. Provide values for report procedure parameters or add a parameter with a specified name and value to the schedule.

Considerations When Specifying Parameter Values

The following are considerations when specifying parameter values for a procedure:

- The maximum number of characters for each individual parameter value is 3200. You can store multiple values for a single parameter. Multiple values for a parameter are stored as one entry, which must not exceed the 3200 maximum character limit.
- WebFOCUS ReportCaster displays the description for the parameter when it is specified in the procedure. Otherwise, WebFOCUS ReportCaster displays the parameter name.
- WebFOCUS ReportCaster displays default variable values, as well as static or dynamic single-select and multiselect lists.

Note:

- The No Selection option is displayed for dynamic multiselect lists. When selected, this option does not perform any data selection test on that field.
 - WebFOCUS ReportCaster does not support using the -HTMLFORM command to create a dynamic selectable list of parameter values.
- WebFOCUS ReportCaster displays global variables that are used in FILTERS defined in

Master File and referenced by a procedure. For example, if a Master File contains:

```
FILENAME=CAR,SUFFIX=FOC
VARIABLE NAME=&&COUNTRY1, USAGE=A10, DEFAULT=ENGLAND,$
FILTER FILTER1=COUNTRY EQ '&&COUNTRY1'; $
```

And the procedure being scheduled contains:

```
WHERE FILTER1
```

Then WebFOCUS ReportCaster displays COUNTRY1 in the Parameters window.

- WebFOCUS ReportCaster does not prompt for variables with defaults set by the -DEFAULTH command. The purpose of the -DEFAULTH command is to assign a default value to amper variables and not be dynamically prompted for that variable.
- WebFOCUS ReportCaster does not prompt for the value of its internal variables that are set by the Distribution Server at schedule execution time. For example, &DSTOWNER is the user ID of the schedule owner. If this parameter is used in a scheduled procedure, the Distribution Server sets its value to the schedule owner at the time of execution. This makes it accessible. However, the scheduling tool does not prompt for this value in the Task Parameters dialog.
- When specifying parameters with special characters (for example, %, &, |):
 - If you are specifying the entire WHERE condition as the parameter value, you must enclose the value in two single quotation marks rather than a double quotation mark. For example, “WHERE CAR NOT LIKE MOTO%”.
 - If you are only specifying a value as the parameter value, you do not need to enclose the parameter value within quotation marks. For example, O&DINFO.
- If you want to specify parameter values in a pre-processing or post-processing procedure, these must be typed in by selecting the Pre/Post-RPC tab. See [Schedule Pre-Processing and Post-Processing Procedures](#) for information about schedule pre-processing and post-processing procedures.
- If a parameter is saved for a schedule, WebFOCUS ReportCaster is shown in the parameter list. During the schedule run, it is submitted to WebFOCUS Reporting Server even if it is no longer in the original report. To remove the parameter from the schedule information, edit the schedule and delete the parameter. For information on how to delete a parameter from a schedule, see [Deleting a Parameter](#).
- Avoid using parameter values with special characters in the schedule settings that

involve an output file name, as file names cannot include special characters. Examples of affected schedule settings include the Save Report As value, the Report Name value for single-file FTP distribution, and the Zip File Name.

- A FEX can be coded to set the display value for any value. For example, if a value is named ENGLAND, the display value can be set to display as England.

Specifying a Default Parameter Value

Specifying default parameter values can be done with the `-DEFAULT` or `-DEFAULTH` command or within the `WHERE` statement. Default values specified with the `-DEFAULTH` command are not prompted for.

The following procedure sets a default value of NY for the STATE (2-3 letters for US State) parameter.

```
-DEFAULT &STATE=NY
TABLE FILE GGSales
SUM DOLLARS UNITS
BY CATEGORY
BY ST
BY PRODUCT
ON TABLE SUBHEAD
"Product Sales Report"
WHERE ST EQ '&STATE.2-3 letters for US State.'
END
```

The parameters that have default values defined in the report procedure (FEX) are listed on the Parameters tab in the Value column. When parameters are stored in a schedule, WebFOCUS ReportCaster adds a `-SET` for the parameter to the schedule procedure sent to the WebFOCUS Reporting Server to be run. A `-SET` command overrides a value specified in a `-DEFAULT` command.

To use a value other than the default value at schedule execution time, so that it is used even if the procedure is changed, click the parameter and change the parameter value within the Parameter Properties section. Enter a value for the parameter in the value field to specify values for simple parameters. Static and dynamic parameter types also enable the selection of a single or multiple values, as explained in the following examples.

When parameters are stored in a schedule, WebFOCUS ReportCaster adds `-SET` for the parameter to the schedule procedure sent to the WebFOCUS Reporting Server to be run. A `-SET` command overrides a default value specified in a `-DEFAULT` command.

Adding a Static Single-Select List of Parameter Values

The following procedure provides a list of static values that are valid for the CATEGORY (Category) parameter.

```
-DEFAULT &STATE=NY
TABLE FILE GGSales
SUM DOLLARS UNITS
BY ST
BY CATEGORY
BY PRODUCT
ON TABLE SUBHEAD
"Product Sales Report"
WHERE ST EQ '&STATE.2-3 letters for US State.'
WHERE CATEGORY EQ '&CATEGORY.(Coffee,Food,Gifts).Category.'
END
```

Adding a Dynamic Single-Select List of Parameter Values

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

```
-DEFAULT &STATE=NY;
TABLE FILE GGSales
SUM DOLLARS UNITS
BY ST
BY CATEGORY
BY PRODUCT
ON TABLE SUBHEAD
"Product Sales Report"
WHERE ST EQ '&STATE.2-3 letters for US State.'
WHERE PRODUCT EQ '&PRODUCT.(FIND PRODUCT IN GGSales).Product
Name.'
END
```

Adding a Static Multiselect List of Parameter Values

The following procedure provides a static multiselect list of values that are valid for the CATEGORY (Category) field.


```

-DEFAULT &STATE=NY
TABLE FILE GGSales
SUM DOLLARS UNITS
BY ST
BY CATEGORY
BY PRODUCT
ON TABLE SUBHEAD
"Product Sales Report"
WHERE ST EQ '&STATE.2-3 letters for US State.'
WHERE CATEGORY EQ '&CATEGORY.(OR(Coffee,Food,Gifts)).Category.'
END

```

Adding a Dynamic Multiselect List of Parameter Values

The following procedure provides a dynamic multiselect list of values that are valid for the PRODUCT field. This list is dynamically populated with values from the GGSales data source.

```

-DEFAULT &STATE=NY;
TABLE FILE GGSales
SUM DOLLARS UNITS
BY ST
BY CATEGORY
BY PRODUCT
ON TABLE SUBHEAD
"Product Sales Report"
WHERE ST EQ '&STATE.2-3 letters for US State.'
WHERE PRODUCT EQ '&PRODUCT.(OR(FIND PRODUCT IN GGSales)).Product
Name.'
END

```

Using Parameter Values to Burst Analytic Documents and Compound Reports

In addition to the ability to distribute sections of a single report to individual users using standard bursting, You can distribute sections of reports by using a filter with a static or dynamic multi-select parameter.

Analytic documents, which are compound reports that contain interactive reports, and reports that use an Excel format output, can be burst by using the parameter values saved

in these reports. You can also burst Excel reports that contain a table of contents. You can burst these reports using a field other than the first BY field.

**Note:**

- The **Repeat task for each selected value** checkbox only displays for static or dynamic multiselect parameters.
- At least one parameter value must be selected.
- If the All Values checkbox is selected, the term _FOC_NULL appears in the Value field of the Task Parameters dialog. The server then performs a WF Describe at run time to generate the list of values for the parameter.
- The **Repeat task for selected value** feature can only be applied to one parameter at a time.
- If the **Make it a Burst Report** checkbox within the Task tab is selected first, then the Repeated Task for Each Selected Value checkbox is disabled and cannot be selected. The two bursting methods cannot be combined in one schedule.
- If the **Repeat task for each selected value** checkbox is selected on the Parameter Value dialog, then the **Make it a Burst Report** checkbox within the Task tab becomes the **Burst Report by Parametrized Report Filter** checkbox. This checkbox is automatically selected and cannot be cleared unless the **Repeat Task for Each Selected Value** checkbox is cleared.

Bursting an Analytic Document or Excel Compound Report with Filtered and Unfiltered Reports

When creating an analytic document or Excel compound report with both filtered and unfiltered reports, only the filtered reports are configurable for bursting. If you access Task Parameters for this compound report via the scheduling tool, any parameter edits only affect the filtered report. In other words, you can assign values to a parameter exclusively in the filtered report. When scheduling the burst of a compound report with the **Repeat task for each selected value** checkbox selected, reports with filters burst according to the chosen parameter values.

Bursting an Analytic Document or Excel Compound Report with Only Filtered Reports

Reports in an analytic document or Excel compound report with only filtered content are burst-compatible when bursting is attempted.

Deleting a Parameter

Ensure that the parameters you delete while scheduling a report procedure (FEX) are handled appropriately for the successful execution of the scheduled job:

- A default value is specified in the report procedure (FEX) being scheduled.
- A value is dynamically assigned to the parameter by the report procedure (FEX) processing when the scheduled job runs on the WebFOCUS Reporting Server.
- The parameter is not referenced when the report procedure (FEX) is processed by the WebFOCUS Reporting Server.

To remove a parameter from the schedule information, select it in the parameter table, and click the Delete button.

Creating a New Parameter

If you want to send a parameter and value in a scheduled job that is not defined in the report procedure, create a parameter in the Task Parameters dialog. Parameters referenced during processing by the Reporting Server must be assigned a value for the scheduled job to run successfully. The schedule job **Log Reports** contains information when required parameter values are not provided.

Selecting a Report Format

Use the following guidelines when selecting a format:

- The formats that support bursting are AHTML (except for FML reports), ALPHA, COM, COMMA, COMT, DHTML (except for FML reports), DFIX, DOC, EXL07, EXL2K, EXL2K

FORMULA, EXL2K TEMPLATE, EXL97, GIF, HTML and HTML ODP (except for FML reports), JPEG, PDF, PNG, PPT, PS, SVG, TAB, TABT, and WP. Coordinated compound reports can only be burst with DHTML, PDF, and PPT formats.

- When a format is selected, WebFOCUS ReportCaster automatically adds an appropriate file extension to the output file name in the Save As field. In certain cases, you must manually change the extension added by WebFOCUS ReportCaster. For example, you must change the extension to .htm if the schedule format is DHTML and the report output is not a web archive file. If you select the format HTML in the schedule and the report output is a web archive file, you must change the extension to .mht. If you select the format EXL07 TEMPLATE in the schedule and the specified template is a macro-enabled template, you must change the extension to .xlsm. For more information about DHTML and EXL07 TEMPLATE formats, see WebFOCUS ReportCaster Formats for Scheduled Output.
- The WP, DOC, and PS formats support printing. The PDF format supports printing when WebFOCUS ReportCaster is configured to enable PDF to print and the printer is configured with the appropriate driver. For more information, see ReportCaster Configuration.
- When a format is selected using the **Override the Format Specified in the Procedure** option, only the DHTML, DOC, GIF, HTML, JPEG, PNG, SVG, and WP formats can be distributed as an inline email message. When the Override the Format Specified in the Procedure option is not used and inline is selected, the output is distributed as an attachment if the format does not support inline distribution. Additionally, when distributing a report inline, the appearance of the report can be affected by the email server, or potentially blocked. Review the restrictions for your mail server provider before utilizing reporting formats and options that utilize JavaScript™, embedded images, and referenced CSS.

Pre-Post Procedures tab

Allows you to specify the procedures that should be run before or after the scheduled task is run.

Schedule Pre-Processing and Post-Processing Procedures

If you are scheduling a WebFOCUS Server procedure or report procedure (FEX), you can schedule a maximum of two pre-processing and post-processing procedures. The pre-processing and post-processing procedures that you schedule can reside on the Reporting Server or in the WebFOCUS Repository.

i Note: All WebFOCUS ReportCaster internal variables, which start with &DST, are passed to pre-processing and post-processing procedures so that they are available for application-specific logic. For more information, see ReportCaster Variables.

Advanced Task Settings tab

The **Advanced Task Settings** tab provides access to the Additional FOC Errors to be Processed as Warnings dialog, where you can specify one or more FOCUS® error message numbers, separated by a semi-colon. If one of these FOCUS error numbers is encountered during schedule execution, WebFOCUS ReportCaster processes it as a warning rather than an error. For example, if a FOC1517 error is generated by the procedure, add 1517 to the text box to convert this error to a warning. This means that if a report is produced, it is distributed in spite of the FOCUS error number. It also means that this FOCUS error number does not trigger an error notification if the schedule is configured to notify on error.

i Note: You can also use a comma but it is interpreted as semi-colon and is saved as semi-colon.

The **Advanced Task Settings** tab also provides an option to set or override the output language using the **Output report locale** dropdown. The default value is highlighted in the dropdown.

i Note: If the output report locale is specified within the fex using the SET LANG= command, then, it overrides any other locale settings.

Using Amper Variables as Parameter Values

When a parameterized report is scheduled, you can set the value of a parameter to a variable, rather than a literal value. This ability reduces the need for a schedule to be updated before it is run. For example, instead of editing a schedule daily to display up-to-date information, a report can be scheduled to always display the date of the day that it is running. This is done by setting the value of the parameter as &YYMD. In the Task Parameters dialog, there is a checkbox labeled. The value contains a system variable.

This checkbox is cleared by default. When this checkbox is selected, a string beginning with the ampersand character is processed as a variable. When this checkbox is cleared, the ampersand character is then processed as a literal value. This feature works with both system variables, and global variables that have been set in the Reporting Server global profile edasprof.prf.

Using the &YYMD Variable as a Parameter Value

The following syntax is a sample report procedure (FEX) that contains date parameter values that can be used with the &YYMD variable.

```
-*COMPONENT=Define_wf_retail
DEFINE FILE retail_samples/wf_retail
Sale_Date/YYMD='&Sale_Date.Sale Date: Use &|YYMD in Schedules.' ;
Last_Year/YYMD=Sale_Date - 365 ;
Two_Years_Ago/YYMD=Last_Year - 365 ;
Quantity/D12.2=IF WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_DATE EQ Sale_Date
THEN
WF_RETAIL.WF_RETAIL_SALES.QUANTITY_SOLD ELSE 0 ;
Prior_Year/D12.2=IF WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_DATE EQ Last_
Year THEN
WF_RETAIL.WF_RETAIL_SALES.QUANTITY_SOLD ELSE 0 ;
Two_Years_Past/D12.2=IF WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_DATE EQ Two_
Years_Ago
THEN WF_RETAIL.WF_RETAIL_SALES.QUANTITY_SOLD ELSE 0 ;
END
ENGINE INT CACHE SET ON
SET PAGE-NUM=NOLEAD
SET SQUEEZE=ON
-DEFAULTH &WF_HTMLLENCODE=ON;
SET HTMLLENCODE=&WF_HTMLLENCODE
SET HTMLCSS=ON
-DEFAULTH &WF_EMPTYREPORT=ON;
SET EMPTYREPORT=&WF_EMPTYREPORT
-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE retail_samples/wf_retail
SUM Sale_Date AS 'Sale,Date'
Quantity AS 'Quantity Sold'
Last_Year AS 'Last,Year'
Prior_Year AS 'Quantity Sold,Last Year'
Two_Years_Ago AS 'Two,Years,Ago'
Two_Years_Past AS 'Quantity Sold,Two Years Ago'
BY WF_RETAIL.WF_RETAIL_GEOGRAPHY_STORE.BUSINESS_REGION
WHERE (WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_DATE EQ Sale_Date) OR
```

```

(WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_DATE EQ Last_Year) OR
(WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_DATE EQ Two_Years_Ago);
ON TABLE SUBHEAD
"&Company.Company Name: Use Widgets&|More in Schedules."
ON TABLE PCHOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET CACHELINES 100
ON TABLE SET GRWIDTH 1
ON TABLE SET STYLE *
INCLUDE=IBFS:/FILE/IBI_HTML_DIR/javaassist/intl/EN/combine_templates/
ENIADefault_combine.sty,$
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING, SUMMARY=&WF_
SUMMARY.QUOTEDSTRING,
ORIENTATION=LANDSCAPE, HFREEZE=OFF, $
TYPE=TABHEADING, LINE=1, JUSTIFY=CENTER, $
TYPE=TABHEADING, LINE=1, ITEM=1, OBJECT=TEXT, SIZE=14,
STYLE=BOLD+ITALIC, $
ENDSTYLE
END

```

Creating a WebFOCUS Report Task

Procedure

1. Select **Task** from **ReportCaster Create Schedule** window.
2. Select WebFOCUS Report Task from the **Show Menu** dropdown.

 **Note:** You can enable or disable the task by toggling the **Enable** checkbox

3. Provide the name of the task in the Task name text field.
4. Select the **General** tab, then follow the steps mentioned below:
 - Select the procedure that you want to use as a report from the **Procedure** file picker.

 **Note:** The server associated with the selected procedure populates in the **Server name** text field.

- You can either select an execution ID from the dropdown of the **Execution ID**

field or select the **Add a new execution ID** button to create an execution ID.

- You can select the **Make it a Burst Report** checkbox for bursting the report. For more info on bursting a report, see [Bursting a Report](#).
- You can select the **Override the format specified in the procedure** to change the format of the report.
- In the **Save report as field**, you can assign the report any name.

5. Select the **Parameters** tab, then follow the steps mentioned below:



Note: The parameters associated with the procedure populate in the parameter list.

- Select the **Add new parameters** button if you want to create a parameter.
- Select **Always use default value specified in the procedure** to use the default value.

6. Select the **Pre-Post Procedures** tab then follow the steps mentioned below:

- Select the first and second pre-processing procedures from the appropriate file picker.
- Select the first and second post-processing procedures from the appropriate file picker.

7. Select the **Advanced Task Settings** and

- Enter the errors in the **Additional FOC errors to be processed as warnings** that needs to be ignored as warnings.
- Select the report language from the **Output report locale** dropdown.

8. Select the **Add** button to add the task to the task list.

WebFOCUS Server Procedure

WebFOCUS Server Procedure is used when a procedure is selected from the server end. The task pop-up window for WebFOCUS Server Procedure is the same as that of WebFOCUS Report.

You can use parameters (amper variables) when specifying a value in the Save Report As field of a schedule. These parameters may include system variables like &YYMD or any

ampers variable, and their values are obtained from the WebFOCUS Reporting Server during the scheduled procedure execution. To use the dot file extension separator after a variable, conclude the variable with the '|' character, for example, &YYMD|.htm. Similarly, to use the ampersand character itself, follow the ampersand with the '|' character (for example, Smith&|Jones). If the WebFOCUS Reporting Server does not return a value for a scheduled parameter, the schedule fails, displaying a "No report to distribute" error. If the scheduled task is burst, you can also use the '%BURST' symbol to include the burst value in the Save Report As field. For more information on bursting a report see, [Bursting a Report](#).

To create a WebFOCUS Server Procedure task, follow the steps mentioned in the topic [Creating a WebFOCUS Report Task](#).

WebFOCUS Schedule

You can use the WebFOCUS Schedule task to configure a schedule to initiate one or more separate schedules.



Note: To use the WebFOCUS Schedule task type, you must be authorized to schedule other schedules. For more information, see the ibi™ WebFOCUS® Security and Administration guide.

The WebFOCUS Schedule Task dialog includes the following options:

General tab

Option	Description
Schedule path name	Contains the pathname of the schedule that you select to be called by the task. Click the Browse button to select a schedule from the Repository. You can view only schedules you are allowed to see, like your private schedules, or any published ones.
Priority	Displays the level of priority the schedule has when it is processed by the Distribution Server. Priority value 1 is the highest priority and 5 is the lowest priority.
Running	Provides options that define how the Distribution Server handles the selected

Option	Description
Mode	schedule you use in this task. For more information, see Running Mode Options for WebFOCUS Schedule Tasks

**Note:**

- The Distribution Server verifies that a WebFOCUS Schedule task is not running itself to avoid infinite recursion. If the Distribution Server detects that infinite recursion occurs, it stops the schedule and records the task as an error in the scheduled job log.
- Even if a schedule includes only WebFOCUS Schedule tasks without report distribution, you still need to choose a distribution method before saving the schedule.

WebFOCUS Schedule tasks that distribute schedules and create log reports of the task. These log reports are distributed in HTML format. For each distributed schedule, the job log records the job submission, job name, and a link to the job log.

Running Mode Options for WebFOCUS Schedule Tasks

You can use one of two running mode options in a WebFOCUS Schedule task. You can set WebFOCUS Schedule tasks to run immediately before other schedules in the Distribution Server queue or run independent of other schedules in the Distribution Server queue. This includes:

- **Run immediately and wait for this job to finish.** Schedules the called schedule to run immediately. The Distribution Server runs the called schedule immediately before any other queued jobs. The calling schedule waits for the called schedule to complete before running the next task.
 - **If this task fails repeat every.** If this checkbox is selected, the calling schedule retries the called schedule on encountering an error, repeating at intervals you specify for a defined number of times. The highest integer that you can use for both numerical options is 999. This option is cleared by default.
 - **Do not continue with the schedule if this task is unsuccessful.** Select this checkbox to make the calling schedule stop running if the called schedule

encounters an error. This option is selected by default.

- **Add this job to the queue.** Schedules the called schedule to run independently of any other schedules. The Distribution Server adds the schedule to the queue, respective to its priority. The calling schedule does not wait for the called schedule to complete before running the next task. If a workload distribution is configured, the selected Distribution Server makes a console call to the manager.

Parameter tab

Options	Description
Select task to view its parameters	Select any task from the dropdown to view the associated parameters
Parameter Properties	The Parameter Properties has the following options: • Type: Defines the type of the parameter ◦ Value from: You can use this field to select parameter from procedure or task. ◦ Value: Displays the value of the parameter. • Override Value: You can use this field to override a particular value to the parameter.

Overriding Parameter Values Used For Called Schedules

After you set the file path in the **Schedule Pathname** field, click the Parameters tab to show the parameters tool for the WebFOCUS Schedule task. On this tab, you have the option to override the parameters used by the called schedule. For example, if the schedule you are calling has a parameter called COUNTRY set to ENGLAND, you can replace it with FRANCE in the calling schedule.

i Note: The called schedule uses the new parameter value only when the calling schedule runs. Otherwise, the original parameter value stored in the called schedule is applied.

To override an existing parameter, select the parameter and in the **Value** field, type the new parameter value that you want the called schedule to use. Click **OK** to add the updated parameter to the WebFOCUS Schedule task.

In addition, you can set the parameter value to be used from the **Value from** dropdown list. You can select **Procedure** to use the parameter specified in the procedure. Or you can use **Task** to use the parameter specified in the task.

When you run the calling schedule task, the called schedule distributes a report using the updated parameter value.

Creating a WebFOCUS Schedule

 **Note:** To use the WebFOCUS Schedule task type, you must be authorized to schedule other schedules. For more information, see the ibi™ WebFOCUS® Security and Administration guide.

Procedure

1. Select **Task** from **ReportCasterCreate Schedule** window.
2. Select WebFOCUS Schedule Task from the **Show Menu** dropdown.

 **Note:** You can enable or disable the task by toggling the **Enable** checkbox

3. Select the **General** tab, then follow the steps mentioned below:
 - Specify the path of the schedule that you want to add to the task, or click file picker to navigate to the location of the schedule, on your system or in the Repository.
 - Choose the priority for the called schedule. Priority value 1 is the highest priority and 5 is the lowest priority.
 - Select the running mode of the called schedule.
For more information, see [Running Mode Options for WebFOCUS Schedule Tasks](#).
 - You can also enable or disable any of task from the list of tasks populated in the schedule window.

4. Select the **Parameters** tab, then follow the steps mentioned below:
 - Select a task from the dropdown to view the associated parameters.
 - From the **Value from** dropdown, select either **Procedure** or **Task** to use the associated parameter.
 - You can select any parameter and override the default value by entering the value in the **Value** field.
5. Select the **Add** button to add the task to the task list.

FTP

You can use the FTP task type when you want to create a report by pulling files from any FTP servers. The following are the options for FTP task.

Option	Description
FTP Name	- Customized FTP: this option allows you to set server and its associated username and password. Note: - Username dropdown auto-populates all the FTP execution IDs present in the Execution ID tab in ReportCaster Configuration. - The new users added using Customized FTP are added in Execution ID list. - Pre-defined FTP: This option auto populates the server and its associated username and password from WebFOCUS ReportCaster Configuration.
FTP server name	The dropdown allows you to set FTP server for Customized FTP. Note: For pre-defined FTP, it is read-only disabled.
Username	Allows you to select user for the FTP server. You can also create a new user by selecting the Add new username  icon.

Option	Description
Password	Allows you to set the password for the selected user. Additionally, you can also change the password for the user by selecting the edit icon.
Test Connection	Allows you to test the connection to the selected FTP server.



Note: If you overwrite the password in the text field, the new password is updated for the corresponding username.

While testing the connection WebFOCUS ReportCaster scheduling tool uses the following authentication methods:

Protocol	Description
This server requires FTP	Select this option when you want to run the normal FTP protocol.
This server requires a secure SSH File Transfer Protocol (SFTP)	Select This Option when you want to run SFTP protocol. Then choose the type of authentication from the Authentication dropdown list: • Password • Public Key • Public key and Password (Multi Factor)
This server requires a secure File transfer protocol over TLS/SSL(FTPS)	Select this option when you want to run FTPS protocol. In this protocol you need to set the following options: • Security Mode: You can either choose Explicit or Implicit security modes. • Protocol : Choose between Transport Layer Security(TLS) or Secure Socket Layer(SSL). • Data connection security : Choose between Private - Integrity and Privacy or Clear - neither Integrity nor Privacy.

Creating an FTP task

Procedure

1. Select **Task** from **ReportCaster Create Schedule** window.
2. Select FTP from the **Show Menu** dropdown.

 **Note:** You can enable or disable the task by toggling the **Enable** checkbox

3. Select an FTP server from the **FTP server name** dropdown.
4. Select a username from the **Username** dropdown or create a user by clicking the plus icon.
5. You can test the connection of the FTP server by clicking the **Test Connection** button.
6. Select any of the protocols that you want to use.
 - Provide the **Authentication** method if you choose SFTP. Set the **Security mode**, **Protocol**, and **Data connection security** if you choose the FTPS.
7. Provide the entire file path in the **FTP file** text box from where you want to pull the file from.
8. Select the file transfer type from the **File transfer type** dropdown.
 - You can choose either **Binary** or **ASCII** format.
9. Enter the report name in the **Save report as** text field and select the **Add** button to create the task.

File

This option is used to create task by pulling file from the distribution server to distribute the output report. The following are the options:

Option	Description
Task name	Text field to input task name
File name	Input field to provide the pathname to pull the file from.
Save report as	Text field to input the report name.
Delete the file after it is distributed	Checkbox field to delete the report once the schedule is completed.

Creating a File task

1. Provide the task name in the **Task name** text field.



Note: You can enable or disable the task by toggling the **Enable** checkbox

2. Set the complete pathname of the file you want to schedule in the **File name** field.
3. Provide the name for report in the **Save report as** field.
4. Additionally, if you want to delete the report after the schedule is run, select the **Delete the file after it is distributed** checkbox.
5. Select **Add** button to save the task.

URL

The task type which sends report based on URL provided by the user. The Distribution Server submits the URL to a web server, which runs the URL. The content is then sent back to the Distribution Server, which distributes it. The following are the options of the URL task dialog:

Option	Description
General tab	• URL Address: Field to input the URL address.

Option	Description
	• URL User ID: Displays the username associated with URL. • Password: Password field associated with URL. • Remove User ID: Removes user ID from the fields. • Save report as: Field to name the report
Parameters tab	• You can create parameters by selecting the New  icon. Provide the name and value of the parameter in the table. • You can also delete any parameters by selecting the delete  icon.

Creating a URL Task Type

1. Select URL Task from the **Show Menu** dropdown.



Note: You can enable or disable the task by toggling the **Enable** checkbox

2. Enter the URL in the **URL Address** field.
3. Provide the username and password associated with URL in the **URL User ID** and **Password** field or create a new user ID by selecting the pen icon.
4. Select the **Parameters** tab.
5. Select **New** button to add parameters.
6. Provide a name for the report in **Save report as** field.
7. Select **Add** button to save the task.

Distribution

The Distribution option in the Scheduling tool provides the options for distributing the report output. You can distribute a report output using one of the following methods:

- [Email Distribution](#)
- [FTP Distribution](#)
- [Printer Distribution](#)
- [Report Library Distribution](#)
- [Repository Distribution](#)
- Distribution methods can be limited globally (for all users) in ReportCaster configuration and for groups or individual users by security operations.
- Distribution of a WebFOCUS Repository report can be limited to the Report Library by selecting the Restricted Schedule to Library Only property. For more information, see [Restriction of the Distribution of Reports to the Report Library](#).
- Maps can be distributed to the Library and Repository only. Maps distributed by email or FTP do not open correctly.
- If you want to remove trailing spaces from reports distributed in text format, your administrator needs to add the following setting to the Administration Console Custom Settings text box: IBIWF_trimreport=YES. You can also apply this setting to affect specific report formats, for example, IBIWF_trimreport=WP.

The following options are available for distribution tab:

Option	Functionality
Create a new distribution method 	Creates new distribution method.
Do not distribute	Allows you to remove distribution for the schedule.
Move distribution method up 	Moves the selected distribution method one place up the list.
Move distribution method down 	Moves the selected distribution method one

Option	Functionality
	place down the list.
Delete distribution method 	Deletes the selected distribution method.
Edit distribution method 	Edit the selected distribution method.

All of the distribution methods populate in the distribution panel. You can also enable or disable the distribution methods by checking or unchecking the **Enable** checkbox of the associated distribution method. All three of these options can also be accessed by right-clicking any distribution method.

Email Distribution

When you distribute a report through email, you can include the report in the body of the email (known as an inline email message) or send it as an attachment. Only the DHTML, DOC, GIF, HTML, JPG, PNG, SVG, and WP formats can be distributed as an inline email message.

i Note: You must be authorized to distribute by email to create a schedule that uses email distribution.

Distributing a report as an inline email message is particularly useful when the report is distributed to mobile devices or through email systems that do not support attachments.

i Note: To send an inline email message to a fax machine, you must register your email address with a third-party email distribution provider. The features offered by providers, such as supported area codes, file formats, and requirements on the structure of email parameter values, might vary. It is important that you select a provider whose features are compatible with ReportCaster.

Considerations When Sending a Report

Following are the conditions that needs to be kept in mind.

- The availability of the inline message option when you create a schedule depends on the Inline Report Distribution setting in the WebFOCUS Configuration tool accessible from the WebFOCUS ReportCaster Console.
- The display of a report that is distributed as an inline email message can be affected by settings and restrictions of your email server or email client.
- Before distributing a coordinated infographic procedure as an inline email message, you must select the Burst Report checkbox in the scheduling tool. Infographic procedures that are not coordinated cannot be burst.
- When distributing HTML reports by email, the scheduled report (.fex) must set a fully qualified FOCEXURL and FOCHTMLURL for the report styling options defined below. These reference the JavaScript components located on the web or application server where the WebFOCUS Client is configured. The Distribution Server sets a fully qualified FOCEXURL and FOCHTMLURL for email distribution using the host name and port provided at installation time. This can be overridden by setting these values in the scheduled procedure. For example:

```
SET FOCEXURL='hostname:port/ibi_apps/'
```

```
SET FOCHTMLURL='hostname:port/ibi_apps/ibi_html'
```

Styling options include:

- Accordion reports
- Table of Contents (TOC) reports
- Peer Graphics/Data Visualization graphical reporting
- Multi-drill reports
- FREEZE options

If using SSL security, edit the URL to specify HTTPS.

- In the Allowed Email Addresses and Domains dialog in the WebFOCUS ReportCaster Console, if the Restricted user input with this list checkbox has been selected, user input of email addresses is restricted to a list of allowed email domains and addresses. For more information, see [Validating Allowed Email Domains and Addresses](#).

Considerations When Sending a Report to Multiple Email Addresses

When you create a schedule that uses email distribution, you can type email addresses in the To field. If you type multiple email addresses in the To field, you can use a semi-colon or comma symbol between each email address, to designate how the Distribution Server delivers information. For every individual email IDs in To field, separate emails are sent.

**Note:**

- Use Distribution List to send out single email to multiple email IDs in the To field.
- Commas are treated as semi-colon while saving the schedule.

Cc and Bcc Email Options

You can use the Cc and Bcc options for all types of email schedules. These options allow you to send copies of an email distribution to additional recipients, simplifying the creation of scheduled email distributions.

Individuals in the Cc list receive a copy of emails sent to each party, and their names are visible in the Cc list box included in the email, identifying them as recipients of a copy of the email created by the distribution.

Individuals in the Bcc list also receive a copy of each email sent to each part, but their names are not visible to any other recipient. The Bcc list box is not included in the email when delivered to its recipient. This list is visible only to the sender.

Email Distribution Method

The Email distribution method has the following tabs:

- **General** tab
- **Options** tab

General tab

Option	Description
Distribution Information	• Type: A dropdown option containing the various distribution types such as Distribution List, Distribution File, Email Address(s), Dynamic Distribution List from Server Procedure, and Dynamic Distribution List from Repository Procedure. • Various textboxes to add To, From, Cc, Bcc, Reply address, and Subject. • Priority dropdown to set the priority of the email. Urgent, Normal, and Low are the available options. Normal is the default value. Note: • To and Reply address are mandatory fields. • You can add multiple email IDs separated by semi-colon. • The default priority can be changed using the Email Default Priority option from ReportCaster Console.
Email Information	• Message: Textbox to add your message for the email. • Select the inline message: You can configure the inline message from ReportCaster Configuration. • File: File picker to fetch your report.
Report_compression	• Add report to zip file option allows you to compress your report. • Zip file name : Textbox to add your .zip file name. • Zip minimum size : You can set the minimum size by selecting the Override default checkbox.

Options tab

Option	Description
Email profile	Allows you to set email profile from the dropdown list. You can choose the following profiles: • Customized mail server: Allows you to configure the mail settings. • System Default : Uses the default email profile configured by WebFOCUS ReportCaster Configuration. • Pre-defined : Uses user-defined email profile.
Mail server name	Allows you to select mail server from the dropdown list.
Test Connection	Allows you to test the connection of the mail server.

Using the Email Distribution

1. From the Schedule window, select the **Distribution** option.
2. To provide the email addresses that receive the distribution, in the Type box, select one of the following methods from the list:

If you select	Then
Distribution List	Select To and select a previously configured Distribution List from the Open dialog. For more information, see Creating and Maintaining Distribution Lists .
Distribution	Type the full path and file name of the external distribution file you

If you select	Then
File	want to use for this schedule. The path and file must be accessible to the WebFOCUS Distribution Server. For more information, see How to Creating an External Distribution File .
Email Address (s)	Enter the email address or addresses of the recipients of the distribution directly into the To box.
Dynamic Distribution List from Server Procedure or Dynamic Distribution List from Repository Procedure	Select To and select the name of the procedure that contains the dynamic distribution list. You can use a Dynamic Distribution List 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). When Dynamic Distribution List is selected, the To field is enabled to facilitate the selection of the Procedure name. After a procedure is selected, you can pass a parameter on the command line of the fex. For more information, see Creating a Dynamic Distribution List and Generating a Dynamic Distribution List From ibi WebFOCUS Repository Procedures.

3. Enter email addresses directly into the Cc and Bcc box, separating them with semicolons.

i Note: The distribution server sends the same copy to all the parties in the Cc and Bcc list.

4. In the From box, your user ID appears by default. You can replace it with another value.
WebFOCUS ReportCaster does not require a value for this field, but your email system might require one.
5. In the Reply Address box, type a valid email address. If recipients reply to the email, their messages are sent to this address. If your email system is unable to deliver the content, the undeliverable output message is also returned to this address. WebFOCUS ReportCaster requires this field.
6. In the **Subject** box, type the text that you want to appear in the email subject line.

WebFOCUS ReportCaster might not require this information, but it might be needed by your email system. The value you entered in the schedule title field for the schedule is the default subject value.

7. Specify whether you want to send the report as an email attachment, or within the body of the email by selecting the **Select the inline message** option.

 **Note:** You can disable or enable this option from WebFOCUS ReportCaster Configuration.

8. You can select the task from the dropdown whose report is sent as inline message.
9. You can type a message to appear in the email body to replace the default message **Please see attachment(s)**.

 **Note:** The default message template can be changed from the WebFOCUS ReportCaster Configuration.

10. You can select a file from the WebFOCUS Repository that contains the message you want to distribute with your email distribution.
11. You can specify a value for the Packet Email or accept the default value. The Packet Email option is set to the default value configured by the Administrator. For a schedule that has a task that is burst, you can decide how many emails to send to each recipient. Options include:
 - a. **No:** Sends each attachment in a separate email.
 - b. **Yes:** Sends one email that contains all attachments.
 - c. **By Burst Values:** Sends one email with multiple attachments for each burst value.
12. Specify whether to send the report as a compressed (.zip) file by selecting or clearing the **Add Report to Zip File** checkbox.
 You have the option of converting your distributed report into a password-protected compressed file. By default, the **Add report to zip file** checkbox is not selected and the report is not being compressed. You can optionally password protect a zipped file by including a password in a Distribution File or Dynamic Distribution List. For more information, see [Creating an External Distribution File](#) or [Creating a Dynamic Distribution List](#).

13. If the **Add Report to Zip File** checkbox is selected, enter the name of the Zip file in the **Zip File Name** box.

i Note: Support of Unicode characters in a Zip file name and content within a Zip file on Windows 7 and Windows 2008 Server R2 requires the following hotfix from Microsoft: <http://support.microsoft.com/kb/2704299/en-us>. Without this hotfix, file names are corrupted after you decompress a .zip file in Windows 7 or in Windows Server 2008 R2.

14. Additionally, you can override the default minimum size (in KBs) a file must exceed before it is automatically added to a .zip file. The minimum size of the .zip file is set to the default value configured by the administrator. To automatically compress an attachment that exceeds a certain size that is different from the default, set this value to the desired size.
15. Click **Add** to save the email distribution information if Options tab is already configured. Otherwise follow the steps mentioned below in section [Setting the Mail Server Information](#).

Setting the Mail Server Information

After you specify General tab for Email distribution in the Scheduling tool, you can customize settings for Mail Server Information.

1. In the Email distribution method, click the **Options** tab.
2. Select the email profile from the dropdown list.
3. You can select any option from the list such as **Customized email server**, **System Default**, or **pre-defined** server.
4. If you choose **Customized email server**, you can change the Mail server name, and set security protocol.
 - a. If the Mail Server requires an SSL connection, select the **This server requires a secure SSL connection** checkbox.
 - b. If the Mail Server requires a TLS connection, select the **This server requires a secure TLS connection** checkbox.
 - c. If the Mail Server requires authentication, select the **This server requires authentication** checkbox.

If you select this checkbox, the **Account name** and **Password** field are enabled, allowing you to set values for these fields. Additionally you can also create a new user by selecting the  icon.

Note:

- For customized mail server, you can only configure password type authentication.
- For OAuth authentication, pre-defined mail server can be used. To configure OAuth in RC configuration, see [Configuring OAuth2 Authentication](#).
- If OAuth mail server is used, Password field label is changed to OAuth 2.0

5. Click **OK** to save the entry or click the **General** tab.

FTP Distribution

This section provides information about distributing scheduled output using the File Transfer Protocol (FTP). FTP distribution method contains the following options:

General tab:

Options	Functionality
Distribution Information	• Type: A dropdown option containing the various distribution types such as Distribution List, Distribution File, Single File, Dynamic Distribution List from Server Procedure, and Dynamic Distribution List from Repository Procedure. • Name : Field to set the distribution list based on the Type field. • Directory: Field to set the directory to distribute to.
Report Compression	The following are the compression options: • None • Create an archive file (.zip)

- **Create compressed file(s) (.zip)**
- **Create compressed file(s) (.gz)**

Zip file name: Field to enter the name for the compressed file.

Index File for Report

Index file name : Field to enter the name of the index file.

Options tab:

Option	Description
FTP Name	Allows you to set FTP profile from the dropdown list. You can choose the following profiles: • Customized FTP: Allows you to set protocol and FTP server. • Pre-defined : Uses user-defined FTP profile.
FTP Server host name	Allows you to select FTP server from the dropdown list.
Test Connection	Allows you to test the connection of the mail server.

- You must be authorized to distribute by FTP to create a schedule that uses FTP distribution.
- You can choose either Customized FTP or pre-defined. Customized FTP allows you to customize host name, username, and password. When you select a pre-defined from the FTP Server Name list, the remaining fields in the dialog are populated with the values from the predefined FTP Settings configuration.
- Credentials for FTP servers are stored on a user level when a schedule is created in the same way that WebFOCUS Reporting Server credentials are stored. The user needs to enter credentials only once for each FTP server. Those credentials are available in the Scheduling tool each subsequent time that the user creates a schedule that utilizes that FTP server for distribution.

If the FTP server requires SFTP, select the **This server requires a secure SSH File Transfer Protocol (SFTP)** checkbox. Select one of the following options to specify an

authentication method:

- Select **Password** if the server requires authentication with a user ID and password.
- Select **Public Key** to authenticate against the server using Public Key Authentication.
- Select **Public Key and Password (Multi-factor)** to authenticate using Public Key Authentication and indicate that the server requires authentication with a user ID and password.



Note:

- There is more than one format for the Public and Private key pair used for authentication to an SFTP Server. If the Public and Private key pair used by your SFTP server is in a format that is not recognized by the Distribution server, you can generate keys in the appropriate format with the sshkeygen utility on the Distribution server.
- The Private Key for the server using Public Key Authentication must be added to the sftp_private_key.txt file, which is located in the \cfg directory on the Distribution Server.

- If the FTP Server requires FTPS, select the **This server requires a secure File Transfer Protocol over TLS/SSL (FTPS)** checkbox. Options include:
 - **Security mode.** Options include **Explicit** and **Implicit** modes.
 - **Protocol.** Options include Transport Layer Security (TLS) and Secure Socket Layer (SSL).
 - **Data Connection Security.** Options include Clear security (neither Integrity nor Privacy) and Private security (Integrity and Privacy).
- When distributing HTML reports by FTP, the scheduled report (.fex) must set a fully qualified FOCEXURL and FOHTMLURL for the report styling options defined below. These reference the JavaScript components located on the web or application server where the Client is configured. The Distribution server sets a fully qualified FOCEXURL and FOHTMLURL for FTP distribution using the host name and port provided at installation time. This can be overridden by setting these values in the scheduled procedure. For example:

```
SET FOCURL='hostname:port/ibi_apps/'
```

```
SET FOHTMLURL='hostname:port/ibi_apps/ibi_html'
```

Styling options include:

- Accordion reports
- Table of Contents (TOC) reports
- Peer Graphics/Data Visualization graphical reporting
- Multi-drill reports
- FREEZE options

If using SSL security, edit the URL to specify HTTPS.

Using the FTP Distribution Option

You can use parameters (amper variables) when specifying values in the FTP settings of a schedule. These parameters can be system variables, such as &YYMD, or any amper variable for which a value is returned by the WebFOCUS Reporting Server when the scheduled procedure is run. To use the dot file extension separator after a variable, terminate the variable with the '|' character (for example, &YYMD|.htm.) Similarly, to use the ampersand character itself, follow the ampersand with the '|' character (for example, Smith&|Jones).

Conditions

- If a value for a parameter specified in a schedule is not returned by the WebFOCUS Reporting Server when the procedure runs, the schedule fails with a "No report to distribute" error.
- If the scheduled task is burst, you can also use the '%BURST' symbol to include the burst value. If the multiple reports are distributed in one archive file, the burst value is not substituted in the Zip filename.

Procedure

1. In the Scheduling tool, select the **Distributions** option.
2. Select the **Create a new distribution method** dropdown list and select **FTP**.
3. In the **Distribution Name** box, enter the name of the Distribution definition.
FTP is the default value.
4. From the **Type** dropdown list, select the method in which you provide the FTP, location, and file name or file names the report distributed to.
 - **Distribution List:** Enter the Distribution List Name. The report is sent to all FTP addresses in the selected Distribution List. For more information, see [Creating a Distribution List](#).
 - **Distribution File:** Type the full path and file name of the external distribution file that you want to use for this schedule. The path and file must be accessible to the WebFOCUS ReportCaster Distribution Server. WebFOCUS ReportCaster does not validate that the file exists. For more information, see [Creating an External Distribution File](#).
 - **Single File:** Type the name and file extension of the file that you distribute. The value contained in the Save Report As field of the schedule automatically populates the Name field. When you burst the scheduled report, WebFOCUS ReportCaster automatically adds the burst value to the end of the file name for each burst file. Optionally, you can add the '%BURST' syntax to the beginning of the file name, add a directory to the beginning of the file name, or both at the same time.

**Note:**

- For the report to distribute correctly, you must add a file extension to the name value. By default, the Single File Name value does not include a file extension. To add a file extension, you can select the **Override the Format Specified in the Procedure** checkbox and select a report format in the Task tab or type the file extension manually.
 - WebFOCUS ReportCaster does not validate the location of the file path or whether the specified file exists.
 - The maximum length of this field is 800 characters.
- **Dynamic Distribution List:** You can use a Dynamic Distribution List 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). For more information, see [Creating a Dynamic Distribution List](#).

5. In the **Directory** field, type the destination where the output must be sent.

i Note:

- You cannot create new Prepared Reports. However, all previously created Prepared Reports are supported.
- For WebFOCUS Server Procedures and Managed Reporting reports other than Prepared Reports, specify the FTP login directory and path of the user ID to whose account on the SFTP or FTP server the report is sent.
- If left blank, this specifies that WebFOCUS Server Procedures distributed using FTP is sent to the home directory of the FTP user.
- When scheduling an FTP distribution, the maximum number of characters you can specify for the directory is 255, including the full path name.

6. In the Report Compression section, specify options by which to compress the report. Select **Create an archive file (.zip)**, **Create compressed file(s)(.zip)**, **Create compressed file(s)(.gz)**, or accept the default, **None**. For more information, see [WebFOCUS ReportCaster Configuration](#).

i Note:

- The default setting for Report Compression is derived from the configuration settings. For more information, see [WebFOCUS ReportCaster Configuration](#).
- Support of Unicode characters in a Zip file name and content within a Zip file on Windows 7 and Windows 2008 Server R2 requires the following hotfix from Microsoft:
<http://support.microsoft.com/kb/2704299/en-us>
Without this hotfix, file names are corrupted after you decompress a .zip file in Windows 7 or in Windows Server 2008 R2.

7. In the **Index file name** field, specify a name for the index file of the report.

i Note: The availability of this option is dependent on your WebFOCUS ReportCaster configuration. For more information, see [WebFOCUS ReportCaster Configuration](#). For WebFOCUS 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.

i Important: You must type the name of the index in the case specific to your operating system.

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

Case	Operating System
Uppercase	z/OS
Lowercase	Windows UNIX

i Note: Index pages for burst report output contain only the burst values specified in the Distribution List.

8. Click **Add** to save the FTP distribution information if Options tab is already configured. Otherwise follow the steps mentioned below in section [Configuring the FTP Server Information by Using FTP](#).

Configuring the FTP Server Information by Using FTP

After you specify General tab for FTP in the Scheduling tool, you can customize settings for FTP server information.

Procedure

1. In the Distribution dialog, click the **Options** tab.

By default the current value for FTP Server Name and Account Name displayed.

2. You can select any option from the list such as Customized email server, System Default, or pre-defined server.
3. If you choose Customized email server, you can change the FTP Server host name, add user IDs, and set protocol.
 - a. If you select this checkbox, the **Username** and **Password** field are enabled, allowing you to set values for these fields. Additionally you can also create a new user by selecting the  icon.

4. Select any of the FTP protocol from the table:

5. If you select	then
This server requires FTP	Follows normal FTP protocol
This server requires a secure SSH File Transfer Protocol (SFTP)	Follows authentication based protocol. You have to provide the Authentication type based on the following options: • Click Password if the server requires authentication with a user ID and password. • Click Public Key to authenticate using Public Key Authentication. • Click Public Key and Password (Multi-factor) to authenticate using Public Key Authentication and indicate that the server requires authentication with a user ID and password.
This server requires a secure File Transfer Protocol over TLS/SSL (FTPS)	Follows FTPS protocol. You have to set up the Security, Protocol, and Data connection security. • In Security option, you can either select Explicit or Implicit. • In Protocol option, you can either select Transport Layer Security(TLS) or Secure Socket Layer(SSL).

- In **Data connection security** option, you can either select **Private -Integrity and Privacy** or **Clear - neither Integrity nor Privacy**.

6. Click **Add** to save.

Printer Distribution

The printer distribution method has the following option:

Option	Description
Type	Dropdown list to choose the type of file to sent to printer.
Name	Field to set the file to sent to printer.

The report formats that support printing are DOC, PDF, PS, and WP. For more information, see [WebFOCUS ReportCaster Configuration](#).

Limitations

- You must be authorized to distribute to a printer to create a schedule that uses **Printer** distribution.
- Problems may occur in printed output if the distributed reports contain UTF-8 characters.
- WebFOCUS ReportCaster always sets the printer format of a schedule with distribution to a valid format. If the default configuration of PDF as a valid print format is in place, the override format is set to PDF. Otherwise, the override format is set to DOC. You can change this format on the **Task** tab.

i Note: When you configure WebFOCUS ReportCaster to allow print distribution for PDF format, and the printer has the appropriate driver.

Using the Printer Distribution Method.

i Note: You can use parameters (amper variables) when specifying a value for the Printer Name field of a schedule. For more information on parameters, see [Considerations When Specifying Parameter Values](#).

1. Right-click a report procedure (FEX), point to **Schedule**, and then select **Printer**.

OR

Select the **Create a new distribution method** dropdown button and the select **Printer**.

2. From the **Type** dropdown menu, select the method in which you provide the file names to distribute to the printer. The options are:
 - a. **Distribution List:** The report is sent to all printers in the selected **Distribution List**.
 - b. **Distribution File:** Type the full path and file name of the **external Distribution File** that you want to use for this schedule. The path and file must be accessible to the WebFOCUS ReportCaster Distribution Server. For more information, see [Creating an External Distribution File](#).
 - c. **Printer:** Specify the printer using the queue@printserver format.

i Note: queue is the name of the printer queue and printserver is the host name or IP address of the printer. WebFOCUS ReportCaster uses the '@' separator to distinguish between the printer queue and the printer's hostname or IP address. When using ReportCaster to send output to a printer, it is better to include both the printer queue and the hostname or IP address, even though specifying only one is recommended. The maximum length of this field is 800 characters.

- d. **Dynamic Distribution List:** You can use **Dynamic Distribution List** to return in memory a list of burst values and destinations or only a list of destinations from a data source. Flat file, SQL database, FOCUS data source, and LDAP are a few such data sources. For more information, see [Creating a Dynamic Distribution List](#).
3. The **Name** field input type varies according to the **Type** of distribution selected and

as follows:

Type	Name
Distribution List	Select the file picker icon to open dialog to select a Distribution List.
Distribution File	Specify the fully qualified path and file name where the external Distribution File is located.
Printer	Specify the printer name.
Dynamic Distribution List from Server Procedure	• Select the file picker icon to open a pop-up window. • Select the procedure and enter the associated server details in the appropriate fields.
Dynamic Distribution List from Repository Procedure	• Select the file picker icon to open a pop-up window. • Select the procedure and enter the associated server details in the appropriate fields.

4. Click **Add** to save your changes.

Report Library Distribution

The Report Library provides secure access to distributed report output stored in the Repository and you can use it to save multiple versions of the same report output, set an expiration date, and keep a specified number of versions. The Report Library is only available to authorized users to access and view the Library reports in the folder location in which they are stored. The following are options available for Report Library Distribution method:

General tab:

Option	Description
Distribution Information	Folder location: File picker to choose the location to save the report. Advanced: To set advance settings for the file.
Access Options	Allows you to control who has access to the scheduled report. Following are the different options: • Private (Accessible only to the owner) • Published (Accessible according to ibi™ WebFOCUS® security policy) • Shared (Appears under Shared Content folder) • Shared with (Appears under Shared Content folder according to Library Access List) This option allows you to select an access list from the Access List filepicker. Additionally you can limit the distribution to the members of the access list by checking the Limit distribution to value in Access List.
Expiration of Reports in Library	• Expire after: You can choose when to expire the distribution. There are different options such as Version(s), Day(s), Week(s), Month(s), Year(s). • Never expire: This option allows the distribution to run continuously.

You can select the **Advanced** button from the **General** tab to set additional settings.

Option	Description
Compress Stored Report	Enables you to compress a library report when it is stored in the repository.
Enable Subfolder	Can be enabled to indicate a subfolder to which to distribute a report. If Enable Subfolder is selected, a pattern must be indicated. A pattern can contain text, parameters (amper variables), and the %BURST symbol.

Option	Description
Version Description	In the Library Advanced Options dialog, you can provide parameterized, descriptive text for each version of a report in the Report Library. The Version Description can include text, amper variables, and the '%BURST' symbol if the report is burst. The Version Description is created by the Distribution Server at the time of schedule execution. The description displays next to the version number in the Report viewer.
Category	An optional value that can be used to sort library reports within the WebFOCUS ReportCaster Explorer. For more information, see WebFOCUS® ReportCaster Explorer .

Options tab options are only enabled after you select the **Send email after report saved to library**. Following are the options:

Options	Description
Mail Server Information	• Email profile: Allows you to set email profile from the dropdown list. You can choose the following profiles: ◦ Customized mail server: Allows you to set protocol and mail server. ◦ System Default : Uses the default email profile configured by WebFOCUS ReportCaster Configuration. ◦ Pre-defined : Uses user-defined email profile. • Mail server name: Allows you to select mail server from the dropdown list. • Test Connection: Allows you to test the connection of the mail server.

Options	Description
Email for library	• Library URL : Field to display the URL address for the library. It is only readable. It is populated from WebFOCUS ReportCaster Configuration. • From: Text field to provide the from email address. Additionally, you can search for email address by selecting the pen icon. • Reply Address: Text field to provide the reply address. This is mandatory field. • Subject: Text field to provide the subject of the email. • Priority: Dropdown to set the priority. Normal is the default value. • Message: Text field to provide the message to be put in the email.

**Note:**

- You must be authorized to distribute to the Report Library to create a schedule that uses the Report Library distribution method.
- If ownership of a Report Library distribution schedule has changed, you must also change the ownership of any associated Library reports to match the new owner of the schedule.

You can send an email notification informing users authorized to access the Library report of its availability. This notifies these users each time a new version is distributed and provide a URL to access directly the new version.

When creating a schedule for distribution to the Report Library, you select the folder to which the report output to be distributed. Using the **General** tab, you can specify a subfolder to which the output to be distributed. If the subfolder does not exist, it is created dynamically during distribution of the initial schedule execution. During subsequent executions of the schedule, reports are distributed to the existing library item where it is located. You must specify a pattern to be used for the title of the subfolder when the subfolder is created. The pattern can contain text, parameters (amper variables) and, if the scheduled task is burst, the '%BURST' symbol. If the '%BURST' symbol is used, a new subfolder is created for each burst value. You can also select the option to compress a library report when it is stored in the repository.

You can also specify a category value to help you further organize the listing of library reports within the WebFOCUS ReportCaster Explorer. In the WebFOCUS ReportCaster Explorer, a Category column is available that can be selected to sort library reports by the category values.

 **Note:** A library report in XML format must be opened in a new window.

When scheduling a report procedure (FEX) stored in the Repository, the default folder location to which the report output to be distributed is the same folder location as that of the scheduled report procedure (FEX). When distributing reports to the Library, it is a best practice to create and specify a different folder location for each Library report. This precaution enables you to define and manage secure access at the folder level for report output. It also helps you avoid name conflicts when creating multiple schedules for the same report procedure (FEX), and when running burst Library reports that assign the burst value to the title of each report section that is distributed. The title value is the value that displays in the resources tree.

For example, consider a Regional Product Sales (Quarterly) report, located in a folder entitled Product Information that is scheduled to distribute burst reports by region to the Regional Product Sales (Library Reports) Library folder on a quarterly basis. The Regional Product Sales (Library Reports) folder contains a library report for each region value included in the report request results. When creating additional schedules for the Regional Product Sales report, you should create and specify a different folder location for each schedule because the burst report descriptions use the same region values.

-  **Note:**
- For an existing schedule that distributes a Library report, if you remove the current task and add a new task, a new Library item is created in the repository. When you save the schedule, a warning notifies you about creating a library item.
 - If the ownership of a schedule that uses Report Library distribution has been changed, you must correct the ownership of any associated Library reports to match the new owner of the schedule.

Consideration When Limiting Distribution to Values in an Access List

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

- All other burst values not specified in the Access List are not distributed to the library.
- This option does not alter the running of the procedure or the retrieval of records from the data source, but simply filters the burst report sections returned from the Reporting Server based on the burst values specified in the Access List.
- When the Burst this Report option is enabled and the Limit distribution to values in Access List option is not enabled, WebFOCUS ReportCaster continues to distribute all burst report sections returned by the Reporting Server to the Report Library.
- On saving the schedule, validation is performed to confirm that the schedule has the Burst this Report option enabled. If it has not been selected, a message appears reminding you that you must enable the Burst this Report option to limit distribution to values specified in an Access List, and the schedule options are redisplayed.
- The log file contains information specifying that the Limit distribution to values in the Access List option was selected. A separate log entry appears for each Access List burst value specifying whether a report section for that burst value was distributed to the library.

Restriction of the Distribution of Reports to the Report Library

You can restrict the distribution of a report (FEX), through scheduling, to the Report Library only. This applies to all reports, including those that may contain sensitive or private data, and other items for which you may want to limit distribution.

Restricting the distribution of reports to the Report Library provides you with secure access to distributed report output stored in the Repository. For reports that contain sensitive data, this eliminates the possibility of using WebFOCUS ReportCaster to schedule and distribute the information through email or any of the other WebFOCUS ReportCaster distribution methods.

To use this functionality, you must restrict the distribution of the report to the Library only using the Restricted Schedule to Library Only option on the Properties dialog for the selected report.

Library Bursting to Top-Level Folders

When creating a schedule with Report Library distribution, you can select the Domains folder in the Resources tree as the top-level folder location to which the sub-folders containing library reports are burst.

You can schedule a library report to be placed in a sub-folder without having to create the subfolder first. When you schedule a library report to be burst to a top-level folder, the distribution server will automatically create sub-folders containing the burst library reports.

A library report does not have to be distributed to a single folder. Depending on which subfolder pattern is used, a user can distribute library reports into multiple sub-folders based on the burst values defined by the chosen variable.

i Note: To burst library reports to top-level folders, you must be authorized to create sub-folders in the Domains folder.

Using the Report Library Distribution Option

1. In the Scheduling tool, select the **Distributions** option.
2. Select **Report Library** from the **Create a new distribution method** dropdown list.
3. Verify that the folder location is correct or make manual edits in the Folder Location field.

The folder location defaults to the same folder as the report procedure (FEX) being scheduled. Users can also select a different folder that they have authority to write to and create content in for the report to be distributed to that location.

i Note: As a best practice, create and specify a different folder to which the Library reports will be distributed.

4. To set optional subfolders, category, and report compression, click **Advanced**. Use the following information to set these options:
 - a. **Compress Stored Report:** Enables you to compress a library report when it is stored in the repository.
 - b. **Enable Subfolder:** Can be enabled to indicate a subfolder to which to distribute a report. If Enable Subfolder is selected, a pattern must be indicated. A pattern can contain text, parameters (amper variables), and the %BURST symbol.
 - c. **Version Description:** In the Library Advanced Options dialog, you can provide parameterized, descriptive text for each version of a report in the Report Library. The Version Description can include text, amper variables, and the

‘%BURST’ symbol if the report is burst. The Version Description is created by the Distribution Server at the time of schedule execution. The description displays next to the version number in the Report viewer.

- d. **Category:** An optional value that can be used to sort library reports within the WebFOCUS ReportCaster Explorer. For more information, see [WebFOCUS® ReportCaster Explorer](#).
5. Select **Private**, **Published**, **Shared**, or **Shared with** to determine which groups and users are authorized to access to the Library report.
If you select Shared with, click the Access List button to invoke the Open dialog from which you can select an Access List that you are authorized to access.
6. Select **Expire after** if you would like the Library Report to be deleted after the schedule is completed. **Never Expire** is the default selection.



Note: Both options in steps 5 and 6 can be configured in WebFOCUS ReportCaster Configuration.

7. Click **Add** to save the report library distribution information if **Options** tab is already configured. Otherwise follow the steps mentioned below in section [Setting the Report Library Information by Using the Report Library](#).

Setting the Report Library Information by Using the Report Library

After you specify General tab for the Report Library in the Scheduling tool, you can customize settings for Mail Server Information.

1. In the Report Library Distribution dialog, click the **Options** tab.
2. Optionally, select the **Send email after report saved to library** option to send an email notification to users that are authorized to access the Library report each time a new version is distributed.

The email message also contains the URL report content in the library. Depending on the Access option selected on the General tab, users receive one of the following notifications:

- If the Access Option is Private, Published, or Shared, the schedule owner is

notified by email when the schedule executes and output is distributed to the Library.

- If the Access Option specifies an Access List (Shared With), then each user on the Access List is notified when the schedule runs and output is distributed to the Library.
 - Groups in the Access List are not used to retrieve email addresses. Only listed users receive an email notification.
3. From the Email profile dropdown list, select any email from the profile. By default it is set to **(System Default)** profile.
 4. If you select the **Customized mail server** then the Mail server name and protocol options are enabled.
 - a. To change the Mail Server, select any of the options present in the **Mail server name** dropdown list.
 - b. Select the **This server requires a secure SSL connection** checkbox if the Mail Server requires an SSL connection.
 - c. Select the **This server requires a secure TLS connection** checkbox if the Mail Server requires a TLS connection.
 - d. Select the **This server requires authentication** checkbox if the Mail Server requires authentication.

If you select the **This server requires authentication** checkbox, the **Account Name** and **Password** button are available to set values for these respective fields.
 5. Select the **Test Connection** button to test the server.
 6. In the **From** box, type any value (for example, the name of the person creating the schedule). WebFOCUS ReportCaster does not require the field, but your email system may require the field.
 7. In the **Reply address** field, type a valid email address. If recipients reply to the email, their messages are sent to this address. If your email system is unable to deliver the content, the undeliverable output message is also returned to this address. WebFOCUS ReportCaster requires this field.
 8. In the **Subject** field, type the text you want to appear in the email subject line. WebFOCUS ReportCaster may not require this information, but it may be needed by

your email system. The value you entered in the schedule title field is the default subject value.

9. Type a message to appear in the email body.
10. Click **Add** or click the **General** tab.

Bursting Library Reports to Top-Level Folders

1. From the **Workspaces** area on the start page or the WebFOCUS Home page, select the workspace in which you want to create your schedule.
2. Select **Start Something New**, and then select **Create Schedule**.
3. Select the Distribution tab, select **Show Menu**, and then click **Report Library**.
4. Select **Browse folder location**.
5. Select the Domains folder, then select **Open**.
6. Select the **Advanced** button. The Library Advanced Options dialog opens.
7. Click Enable Sub-folder and specify a sub-folder pattern, which will be used to create subfolder titles.
For more information on [WebFOCUS® ReportCaster Variables](#)
8. Select **OK**.
9. Click the **Task** option and select the **Make it a Burst Report** checkbox.

i Note: Because the Burst Report process creates separate subfolders for each individual report that uses a different burst value, you will be unable to clear this checkbox after you create and save the Report Library distribution schedule. If you no longer need to burst your selected Report Library distribution content, you must create a Report Library distribution schedule that does not select the Burst Report checkbox.

10. Complete any other items necessary for the schedule to run properly and save the schedule.
11. From the Workspaces area on the start page or the WebFOCUS Home page, right-click the schedule you created and click **Run**.

New sub-folders containing your burst library reports are now created in the top-level folder of the workspace.

i Note: The sub-folder structure is contingent on the variable that is used.

Repository Distribution

When distributing scheduled output to Repository in the Scheduling tool, specify the Repository folder location to which to distribute the report output. The following are the options available for repository distribution:

Option	Description
Distribution name	Text field to add distribution name.
Folder location	Filepicker field to choose the Repository location to distribute the report.

i Note: You must be authorized to distribute to the Repository to create a schedule that uses Repository distribution. You must also be authorized to distribute content to your selected folder. For more information, see the *ibi™ WebFOCUS® Security and Administration* guide.

You can use the Repository file system distribution function to send reports to a directory accessible by the Distribution Server. When you distribute to the Repository with the File System is configured, you can choose a File System folder.

- i Note:**
- This method does not require an FTP server.
 - By default the Distribution Server adds timestamp(Day, Date, and Time) to the beginning of the **Save report as** value specified in the Task option unless the Do not add timestamp to the filename checkbox is selected.

The user must be granted the Distribute to File System privilege to use this distribution method. In addition, an administrator must use the WebFOCUS Administration Console to

configure file system directories for distribution. Users must be authorized to see these folders, which is done by granting users the list command on the File subsystem. For more information, see the ibi™ WebFOCUS® Security and Administration guide.

Once authorized, a user can schedule content to be distributed to a configured folder.

The best practice for recurring and bursting schedules is to create and specify a different folder location for each report being distributed for the same report procedure (FEX). This is important so the security access can be defined and managed at the folder level and when opting to burst the distributed report output because the burst value is assigned as the title value to each report section that is distributed. The title value is the value that displays in the resources tree.

When the report output is distributed using the Repository distribution option, the Day, Date, and Time information is prepended to the Save Report As value specified in the schedule task information. For example, the Schedule for the Product Packaging & Price report is assigned the default **Save Report As** value 'Product_Packaging_Price.htm' (blanks and special characters are replaced with an underscore character).

The report output distributed to Repository on Monday December 19, 2011 at 1:35pm EST is assigned the description: Mon, 19 Dec 2011 01:35 PM EST Product Packaging Price.

Using the Repository Distribution method

1. From the **Create a new distribution method** dropdown list select the **Repository** option .
2. In the **Distribution name** field, enter the name of the schedule.

 **Note:** Repository is the default value.

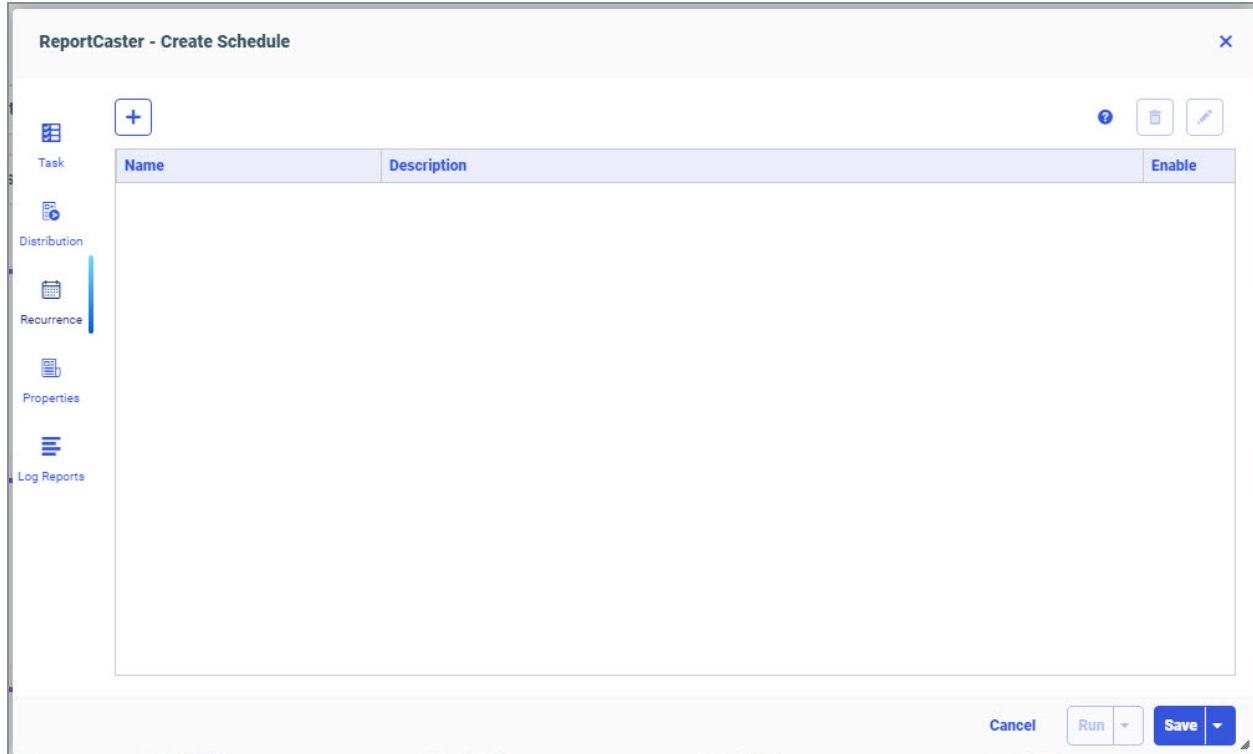
3. Verify that the folder location is correct. Use the folder location button to select a folder.

The folder location defaults to the same folder as the report procedure (FEX) being scheduled. Users can also select a different folder that they have authority to write to and create content in for the report to be distributed successfully to that location.

4. Select the **Do not add timestamp to the filename** checkbox if you do not want a time stamp to be attached to the report.
5. Select the **Add** button to save the distribution.

Recurrence

You can use the **Recurrence** option to define the frequency of distributing the schedule. You can create multiple recurrence for a schedule. The following image displays the **Recurrence** tab in the Scheduling tool. The Distribution Server ensures that content is delivered to recipients as planned by running scheduled distributions at the specified time and time zone.



The Recurrence Option Window

The recurrence option has different settings based on the options available under **Schedule runs**. The **Schedule runs** dropdown list has the following options:

- **Once**
- **On**
- **Every**

New Recurrence

Recurrence name *

Recurrence 1

☒ Enable

Schedule runs *

Once

On *

3/28/2025 4:55 AM

Time zone *

America/New_York >

The schedule runs once on March 28, 2025 at 4:55 AM EDT.

Cancel

Add

The following table displays the various options that you can set for each schedule run dropdown list item:

Schedule runs	Options
Once	On: You can choose a specific date and time for when you want the schedule to run.
On	The dates: You can choose the dates for when you want the

Schedule runs	Options
	schedule to run. • At: Allows you to set the time you want the schedule to run. Note: The time you set is common for all the dates in the The dates field. • Schedule repeats every: Allows you to repeat the schedule based on the settings provided. The settings are as follows: ◦ You can set it to repeat every 'x' minute(s) or hour(s). ◦ Until time: Allows you to set the time until you want the schedule to run repeatedly. ◦ Lasts for: Allows you to set a time limit for the schedule.
Every	• Allows you to run the schedule every 'x' minute(s), hour(s), day(s), week(s), month(s), or year(s). Each option has different settings. For additional settings, refer Every Option Settings.

Every Option Settings

The Every option additional settings are as follows:

Option	Additional Settings
minute(s)	• On: Allows you to choose the days you want to run the schedule on. • Start date and time: Allows you to set the date and time for the schedule to start. • End date and time: Allows you to set the date and time until the schedule should run.
hour(s)	• On: Allows you to choose the days you want to run the schedule on. • Start date and time: Allows you to set the date and time for the schedule to start. • End date and time: Allows you to set the date and time until the schedule should run.
day(s)	• On: Allows you to choose the days you want to run the schedule on. • Start date and time: Allows you to set the date and time for the schedule to start. • End date and time: Allows you to set the date and time until the schedule should run. • Schedule repeats every: Allows you to repeat the schedule based on the settings provided. The settings are as follows: • You can set it to repeat every 'x' minute(s) or hour(s). • Until time: Allows you to set the time until you want the schedule to run repeatedly. • Lasts for: Allows you to set a time limit for the schedule.
week(s)	• Start date and time: Allows you to set the date and time for the schedule to start.

Option	Additional Settings
month(s)	• End date and time: Allows you to set the date and time until the schedule should run. • Schedule repeats every: Allows you to repeat the schedule based on the settings provided. The settings are as follows: • You can set it to repeat every 'x' minute(s) or hour (s). • Until time: Allows you to set the time until you want the schedule to run repeatedly. • Lasts for: Allows you to set a time limit for the schedule. • On dates: Allows you set the dates you want the schedule to run every 'x' month(s). Additionally, you can also select the last day of the month or 'x' days before the month ends. • Last day of the month: Select this checkbox to run schedule at the end of the month. • days before the month ends: You can set the schedule to run x days from the last month. • On: Allows you to set the exact day of the week you want the schedule to run. You can set the exact day of the month such as The first, The second, The third, The fourth, and The last of any day of the month for the schedule to run. • Schedule repeats every: Allows you to repeat the schedule based on the settings provided. The settings are as follows: • You can set it to repeat every 'x' minute(s) or hour (s). • Until time: Allows you to set the time until you want the schedule to run repeatedly.

Option	Additional Settings
year(s)	• Lasts for: Allows you to set a time limit for the schedule. • Start date and time: Allows you to set the date and time for the schedule to start. • End date and time: Allows you to set the date and time until the schedule should run. • Schedule repeats every: Allows you to repeat the schedule based on the settings provided. The settings are as follows: • You can set it to repeat every 'x' minute(s) or hour(s). • Until time: Allows you to set the time until you want the schedule to run repeatedly. • Lasts for: Allows you to set a time limit for the schedule.

Setting up Time Zone

You can specify the date and time zone in which you want the schedule to run. You can change the time zone by selecting the **Time Zone** field. However, you can select a different time zone from the Time Zone list if you or the recipients of scheduled content are in a different time zone. When you assign a time zone to a schedule, all schedule times are defined in terms of the time zone you specify.



Note: By default, WebFOCUS assigns the time zone of the server's operating system to a new distribution schedule.

Using the Recurrence Option

1. Select **Recurrence** from the panel.
2. Select the  icon to create a recurrence.
3. Select any of the options from the **Schedule runs** dropdown list.
4. For the selected option, follow the steps mentioned below:

If you select	Then
Once	Set the date and time that you want the schedule to run by selecting the On data-picker.
On	- Select the dates that you want to run the schedule on the The dates field. - Select the time that you want to run the schedule on the At field. - If you want to repeat the schedule, then select the Schedule repeats every checkbox. - Set the field to either minutes or hours based on your requirement. - Set whether you want to run the schedule until a specified time or to run until the time runs up.
Every	- Select the format of time that you want the schedule to run from the dropdown list. - Fill in the related fields based on the options that you have chose. For

If you select	Then
	more information on every option setting, Every Option Settings

5. Select the time zone from the **Time Zone** picker.
6. Select **Save** to save the schedule.

i Note: You can verify the recurrence details you filled in from the summary on the window.

7. You can delete the selected recurrence using the  icon.
8. You can edit the selected recurrence using the  icon.

Properties

You can use the **Properties** option to set the job priority and error notification. It has **Properties** and **Email Notification Settings** sections.

Using the Properties Section

Name	Description
Enable (Scheduled job runs at specified time)	This checkbox is checked by default to indicate that the schedule is evaluated by the Distribution Server during polling for scheduled jobs. If you do not want to distribute the schedule based on its NEXTRUNTIME value, clear this checkbox.
Job Priority Level	This specifies the priority the scheduled job is given when processed by the Distribution

Name	Description
	Server. The default Job Priority Level is set to Normal - 3. However, you can use the dropdown list to set the priority level.
Schedule status if no report to distribute	This option is set to the default value configured by the Manager. To trigger error notification if no report is generated, set this value to Error . Set this option to Warning , if you do not want to trigger error notification.
Delete this schedule if it is not scheduled to run again	This checkbox allows you to specify that the schedule should be deleted after the scheduled job processing is completed if the schedule is not scheduled to run again. It is a best practice to select this option for schedules that you are not going to utilize again is recommended as it improves overall performance within the start page or WebFOCUS Home page when listing folder contents and within the WebFOCUS ReportCaster Explorer tool when listing schedules.

Using the Email Notification Settings

Use this section to set the email notification to one of the following options:

- **Never**
- **Always**
- **On error**

On selecting either **Always** or **On error** option, you have to fill in the **Reply address**, **Subject**, **Brief message to**, and **Full message to**. You can also set the priority for all three of them using the **Priority** dropdown.

Log Reports

Log reports are stylized HTML format and appear in a separate browser window. One log record is produced for each scheduled job run in the specified time frame. You can find out details about a scheduled task, like its date, time, whether it ran successfully, and who received it, by running a log report and checking its status.

Log reports allow you to see details about a job that has been distributed, like its success status, when the output was sent, its format, and how it was sent. Log reports are stylized HTML format and displayed in a separate browser window. You can search, print, or save the log report. You can access log reports either while editing a schedule in the scheduling tool or by right-clicking on a schedule in the Resources tree.

The log file accumulates information. You need to delete log records regularly to control the number of stored reports and improve the performance of displayed log information.

The list on the right shows key details about the job, like its ID, start time, duration, and status. To view a full log report for a job, double-click the job in the job list.

The log report has the following filters:

Filter	Functionality
Last executed	Shows the last run schedule.
All	Shows all log lists for all runs.
Custom	Shows log reports between the specified date and time range which the schedule ran.

The options available for Log Reports window are as follows:

Option	Functionality
Delete log report	Deletes the selected log report.
Download log report	Downloads the

Option	Functionality
	selected log report(s).
Open log report in new window	Opens the selected log report(s) in new window.
Refresh log report	Refreshes the log reports list.

When you double click any report, it opens up in a pop-up window. You can download, copy, open in a new window, or refresh the opened report.

- If the entry is in red, the schedule has ran into some error and failed.
- If the entry is in amber, there is some warnings in the schedule.

Maintaining Schedules

Maintaining a schedule allows you to edit schedule properties or delete the schedule when it is no longer needed. If a schedule contains properties that you want to use in a new schedule, the duplicate or copy option creates a template with those properties for the new schedule. You can also check the status of a schedule and run a log report to obtain detailed information about the schedule.

About Maintaining a Schedule in the Scheduling Tool

Edit

Allows you to open and edit an existing schedule.

Run

Runs the schedule.

View Log

Allows you to view a log report for one or more selected schedules.

Enable and Disable

You can enable or disable schedules in the Resources tree. This option is also found in the Properties tab of the Basic and Advanced Scheduling tools.

Duplicate

Creates a new schedule with the same properties in the same folder.

Cut

Allows you to move the schedule from the original folder to a target folder using the paste operation.

Copy

Allows you to create a new schedule by copying an existing schedule.

Copy and update paths

Allows you to copy one or more schedules from one location to another with the internal path references automatically updated to be consistent with the target location. This option is also available for charts, reports, documents, visualizations, pages, workbooks, and HTML files created in App Studio.

This feature is available when the **Enable special copy operations** check box is selected on the **Other** page of the WebFOCUS Administration Console Configuration tab

 **Note:** This feature only works when copying schedules between folders that reside on the same hierarchical level in the repository.

Create Shortcut

Allows you to create a shortcut to the schedule.

Delete

Deletes the existing schedule.

Change Title

Allows you to rename the schedule.

Publish and Unpublish

An owner of a schedule can make a schedule available to other members of the top-level folder in which the schedule resides. The schedule owner remains the execution ID.

 **Note:** The default setting is Unpublish.

Hide and Show

Once an owner publishes a schedule, they can elect to Hide the schedule from groups not authorized to create content in the folder. To hide or show a schedule, right-click on a schedule and select the **Hide** or **Show** option.

 **Note:** The default setting is Show.

Security

Properties

Editing a Schedule in the Scheduling Tool

From the Resources tree, you can edit the schedules you are authorized to access.

Edit a Schedule in the Scheduling Tool

Procedure

1. Right-click the schedule you want to edit and select **Edit**.
2. Make the required changes to the schedule. For details on the Basic Scheduling tool options, see [Creating a Schedule in the Basic Scheduling Tool](#).
3. Click **Save & Close**.

Considerations When Editing a Schedule in the Basic Scheduling Tool

- When you open a schedule that uses unavailable options, such as a distribution method, information is displayed that describes the change or changes that you must make for the schedule to use available options. Changes to the schedule cannot be saved until the schedule uses available options.
- If you selected **Run once** for the run interval, the schedule runs immediately unless you change the Start Time to a time later than the current time in your selected time zone. All other run intervals run at the next primary run-time interval of the schedule.
- You must save your changes in order to be able to run from within the scheduling tool.
- If you want your selected schedule or schedules to run immediately, click **Run**.

- When an existing schedule is opened in the Basic Scheduling tool, if the **Override the Format Specified in the Procedure** check box was selected, the list of formats displays. If you clear the **Override the Format Specified in the Procedure** check box, the list of formats does not display.
- When an existing schedule is opened in the Basic Scheduling tool, if the **Override the Format Specified in the Procedure** check box was not selected, the list of formats does not display. If you select the **Override the Format Specified in the Procedure** check box, the list of formats displays.

Copying a Schedule

For your convenience, you can copy an existing schedule for use as a template to create a new schedule.

Copy a Schedule

 **Note:** The cut, copy, and paste options display when you are authorized to use these options.

Procedure

1. From the Resources tree, right-click the schedule you want to copy and click **Copy**.
2. Right-click the folder you wish to copy the schedule into and click **Paste**.

Copy a Schedule

 **Note:** The cut, copy, and paste options display when you are authorized to use these options.

Procedure

1. From the Resources tree, click the domain or folder that contains the schedule you want to copy.
2. From the Home page, right-click the schedule you want to copy and click **Copy**.
3. Right-click the domain or folder you wish to copy the schedule into and click **Paste**.

Copy a Schedule



Note: The cut, copy, and paste options display when you are authorized to use these options.

Procedure

1. From the Workspaces area of the start page or the WebFOCUS Home Page, select the workspace or folder that contains the schedule you want to copy.
2. Right-click the schedule you want to copy and select **Copy**.
3. Right-click the domain or folder you wish to copy the schedule into and select **Paste**.

Deleting a Schedule in the Scheduling Tool

From the Resources tree, you can delete schedules using the following procedure.

Delete a Schedule in the Scheduling Tool

Note that the Delete option displays when you are authorized to delete the selected schedule.

Procedure

1. Right-click the schedule you want to delete and click **Delete**.

i Note: To select multiple schedules, use the Shift key and Ctrl key as in a standard Windows interface. A message appears asking to confirm if you want to delete the selected schedules.

2. Click **OK** to delete the schedule or schedules.

Sharing Schedules

The owner of a schedule that is located in a My Content folder can share that schedule with other users. You can set security rules only for schedules outside of a My Content folder.

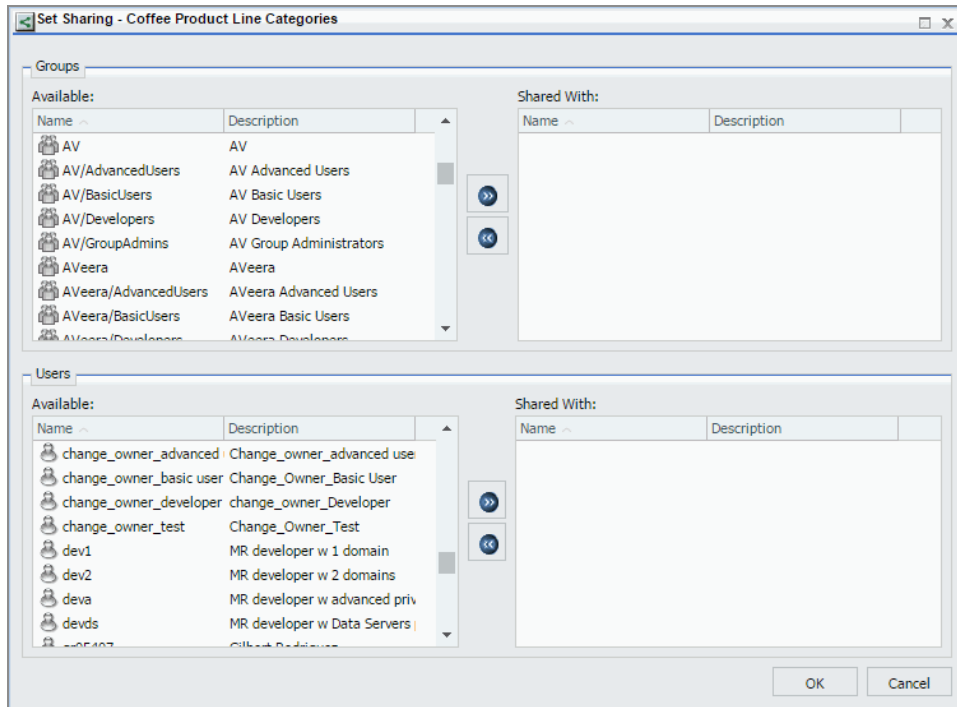
Share Schedules With Specific Groups or Users

From the Resources tree, if you are authorized to share your private content saved in a My Content folder, you can share a Schedule with users authorized to access the folder in which the Schedule is located by right-clicking the folder or schedule and clicking **Share**.

If you are authorized for advanced sharing, you can share your private content saved in a My Content folder with specific groups and users with whom you are authorized to share by performing the following steps.

Procedure

1. Right-click the schedule that you want to share and click **Share With**. The groups and users you can share with are listed in the Set Sharing dialog box, as shown in the following image.



2. Use the left and right arrow buttons to select which Groups to share the Schedule with.
3. Use the left and right arrow buttons to select which Users to share the Schedule with.
4. Click **OK**.

Share Schedules With Specific Groups or Users

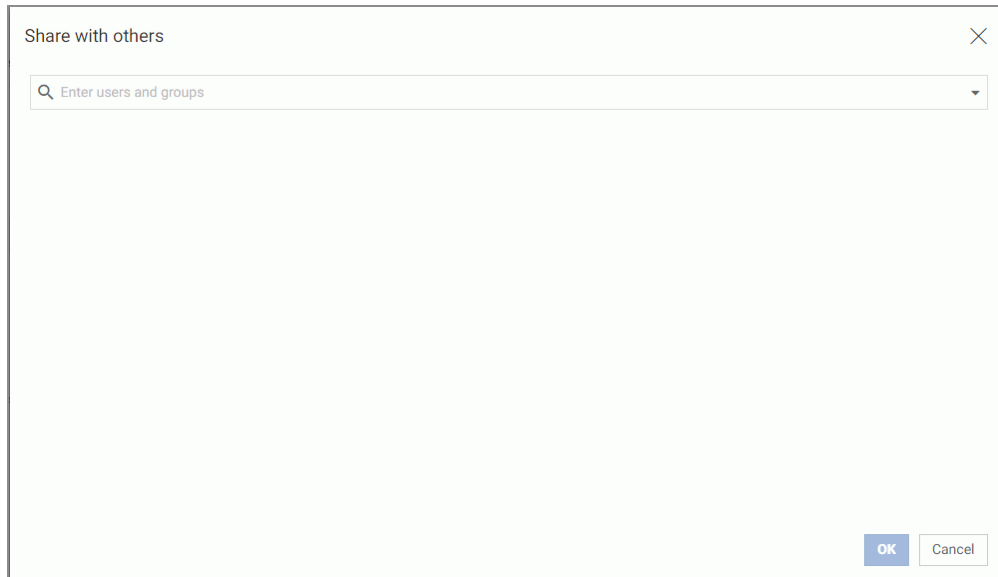
From the Workspaces area of the start page or the WebFOCUS Home Page, if you are authorized to share your private content saved in a My Content folder, you can share a schedule with users authorized to access the folder in which the schedule is located by right-clicking the folder or schedule and clicking **Share**.

If you are authorized for advanced sharing, you can share your private content saved in a My Content folder with specific groups and users with whom you are authorized to share by performing the following steps.

Procedure

1. Right-click the schedule that you want to share and click **Share With**.

The Share with Others dialog box displays, as shown in the following image.



2. Click the drop-down arrow on the search box to display the filters for the users or groups that you want the option to select. You can filter your search results by Users or by Groups.
3. After you select a filter, begin typing in the search box to display the users or groups that are available for selection. Click a user or group to add it to the list of users or groups that can view the schedule. Optionally, click the **X** on a User or Group tile to remove it from the list.
4. When you are finished selecting users or groups to share your schedule with, click **OK**.

Set Security Rules on a Schedule

Authorized users can set security for unpublished schedules, allowing other groups or individual users to access and manage the lists. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

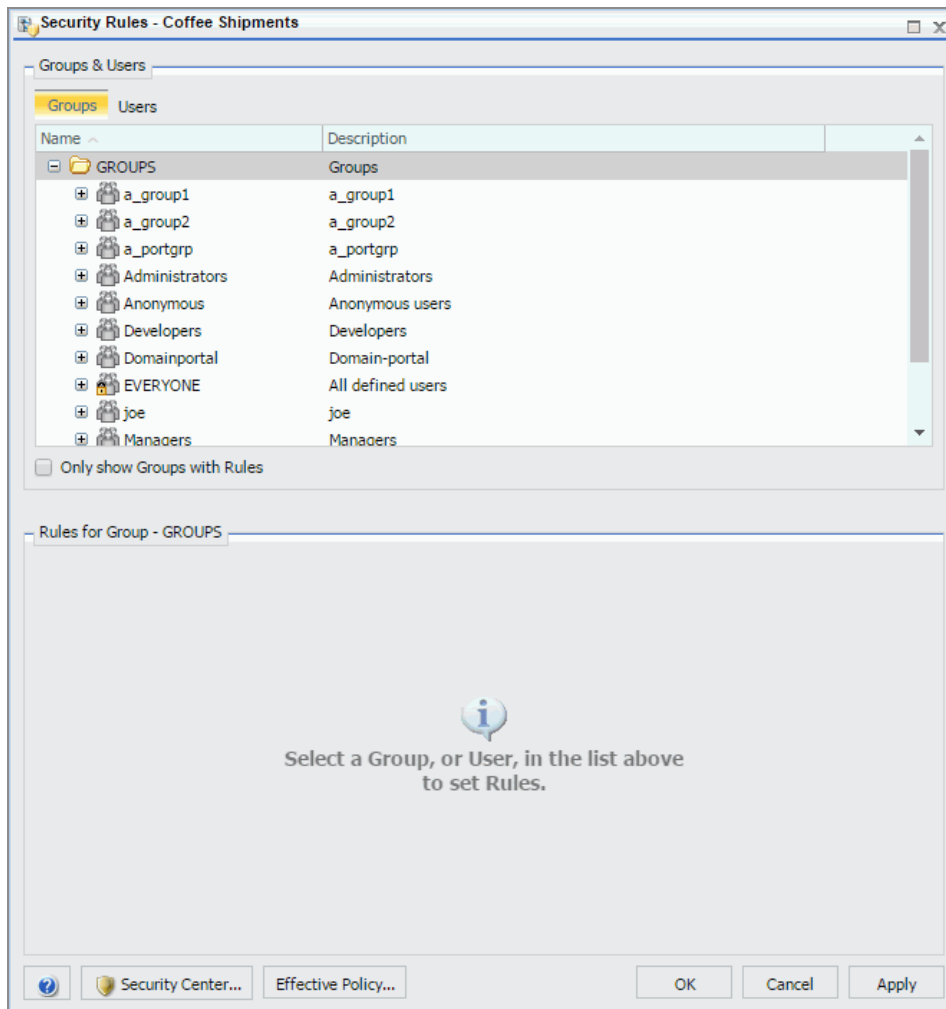


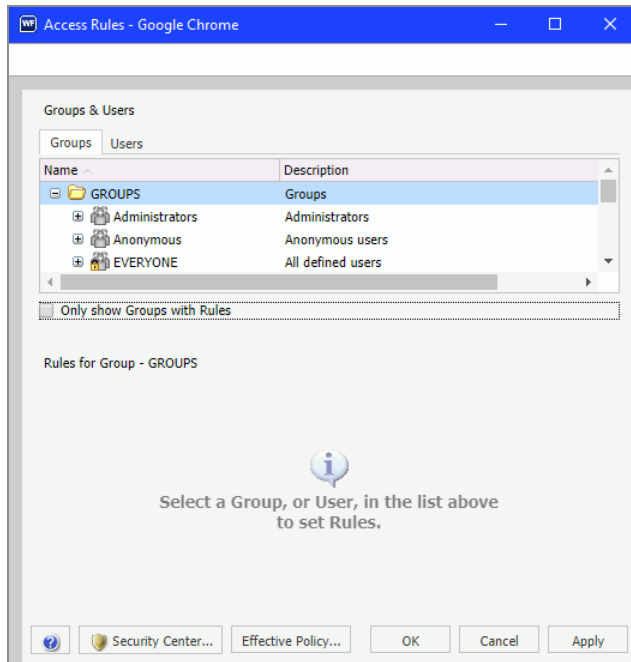
Note: Authorized users can review the Security Policy by right-clicking the schedule, selecting **Security**, and then selecting **Effective Policy**.

Procedure

1. Select the domain containing the schedule, or the unpublished schedule itself for which you want to set security.
2. Right-click and point to **Security** and then click **Rules**.

The Access Rules dialog box displays, as shown in the following image.





3. In the Groups tab, click the group or individual users to whom you would like to grant access to the schedule. Optionally, click the **Only show Groups with Rules** check box to only display groups that have rules that have already been set.

The Roles for a selected group appear in the Rules for Group section.

4. Optionally, in the Rules for Group section, click the **Roles:** drop-down list to only display specific Roles.
5. Optionally, click the **Only show Rules that have been set** check box to filter the list of available roles even further.
6. Select the Role that defines the functional capabilities for which to set the access level.
7. Choose the access level in the Access drop-down list.

Options include:

- **Not Set.** Access is not specifically set. Access is determined by inherited rules.
- **Permitted.** Allows the functionality of the selected role as specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.
- **Denied.** Denies the functionality of the selected role at the level specified in the

Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.

- **Over Permitted.** Overrides a Denied access level to allow the functionality of the selected Role at the level as specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.
 - **Clear Inheritance.** Erases all previously defined rules for the selected Role at the level specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.
8. Click the **Users** tab to display the list of individual users to whom you would like to grant access to the item. Optionally, click the **Only show Users with Rules** check box to only display users that have rules that have already been set.
The Roles for a selected user appear in the Rules for User section.
 9. Optionally, in the Rules for User section, click the **Roles:** drop-down list to only display specific roles.
 10. Optionally, click the **Only show Rules that have been set** check box to filter the list of available roles even further.
 11. Select the Role that defines the functional capabilities for which to set the access level.
 12. Choose the access level in the Access drop-down list, as described in Step 7.
 13. Click **Apply**.
 14. Click **OK**.

Your security setting updates are now saved for your schedule.

Publishing Schedules

A published schedule is visible to all users with access to the folder in which it resides. The shortcut menu options that appear on the schedule depend upon the privileges of the user that is signed in. For example, a user with the Run privilege is able to run the published schedule. When a published schedule runs, it runs as the creator of the schedule and not as the signed in user that initiated the run.

i Note: A published schedule runs as the creator of the schedule. A user that is allowed to edit a published schedule may make a change to the schedule that the creator of the schedule is not permitted to make. In this case, the schedule will fail at run time. For example, a user may change the Distribution List used in the schedule to a private Distribution List that is not available to the creator of the schedule. When the changed schedule runs, it will fail due to inability of the creator to retrieve the Distribution List from the Repository.

Publish a Schedule

From the Resources tree, you can perform the following steps to publish a schedule. The folder or domain containing the schedule must be published before the schedule can also be published.

Procedure

1. From the Resources tree, right-click the folder that contains the schedule you want to publish, and click **Publish**
2. Right-click the schedule and click **Publish**.

The schedule is published.

Publish a Schedule

From the Workspaces area of the start page or the WebFOCUS Home PageWorkspaces area of the Hub, you can perform the following steps to publish a schedule. The domain and folder containing the schedule must be published before the schedule can also be published.

Procedure

1. From the Workspaces area of the Hub or the WebFOCUS Home Page, right-click the workspace that contains the schedule you want to publish, and click **Publish**
2. If the schedule is also stored in a folder, right-click the folder that contains the schedule you want to publish, and click **Publish**

3. Right-click the schedule and click **Publish**.

The schedule is published.

Enabling or Disabling Schedules Using the Shortcut Menu Option

You can enable and disable schedules in the Resources tree or by using the ReportCaster Explorer. The Enable setting can also be accessed in the Properties tab of the Basic and Advanced Scheduling tools.



Note: You must be authorized to enable or disable schedules.

From the Workspaces area of the Hub or the WebFOCUS Home Page or ReportCaster Explorer, right-click an Enabled schedule and select **Disable** in the shortcut menu. If the schedule is already disabled, the option appears as Enabled.

For more information, see [Explorer Item Options](#) and [Explorer Item Options](#).

Tracking Schedules

Information about a schedule, such as date, time, execution status, and recipients of a distributed job, can be accessed by running a log report and checking the job status in the WebFOCUS ReportCaster Status. You can also analyze the resource utilization of schedules.

Log Reports

Log reports are stylized HTML format and appear in a separate browser window. You can search, print, or save the log report. The log report displays information according to your specifications in a separate browser window. One log record is produced for each scheduled job run in the specified time frame.

Tracking Schedules in the Console

Information about a schedule, such as date, time, execution status, and recipients of a distributed job, can be accessed by running a log report and checking the job status.

Using Schedule Logs

Log reports enable 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. Log reports can be accessed within the scheduling tool when editing a schedule or by right-clicking on a schedule from the Resources tree.

The log file accumulates information. You should periodically purge log records to manage the number of log reports stored in the Repository, as well as the performance of log report information that is displayed.

The list in the right panel provides basic information about the job execution, including the job ID, the time the job started running, the amount of time it took to complete the execution of the job, and the general status of the job. To view a full log report for a job, double-click the job in the job list.

&ECHO and -TYPE Support in Log Reports

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

 **Note:** The second -TYPE is on a single line within the report procedure (FEX).

```
-SET &ECHO='ALL';
-TYPE Regional Product Sales Forecast
-TYPE Parameter RATE is passed into report to forecast potential sales
growth
-DEFAULT &RATE = .05;
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE GGSales
SUM DOLLARS
COMPUTE GROWTH/D12.2= (DOLLARS * &RATE) + DOLLARS; AS 'Sales, Forecast'
BY REGION
BY PRODUCT
ON TABLE PCHOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE ON
ON TABLE SET STYLE *
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING,$
ENDSTYLE
END
```

Checking the Job Status

Another resource for tracking schedules is the schedule job status. The schedule status provides a list of scheduled jobs that are in the Distribution Server queue. Status information includes the schedule ID, the time it started running, and the status of the job.

To access the schedule job status information, see the Job Status tab in the WebFOCUS ReportCaster Console. For more information, see [Job Status](#).

View a Log Report

Procedure

1. From the Workspaces area of the Hub or the Home Page, right-click the schedule and select **View Log**.

The Schedule Log Options dialog box appears .

2. Specify which log report you would like to view by selecting **Last Executed**, **All**, or **Date**.

If you select **Date**, you will have the option to specify your search using start date and time and end date and time parameters.

3. Click **OK**.

The log reports that match your search criteria appear .

The log report first lists the job description for the record, which is the unique description identifier that you specified when you created the schedule. Underneath the Job Description, the left column of the log report includes the following information:

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

- **End Time.** Date and time the job finished running.

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

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

Considerations When Viewing a Log Report

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

Task and Report Names

The WebFOCUS ReportCaster Log references WebFOCUS folders and procedures (FEXs) by their path and file names and not their descriptions.

Email Addresses

WebFOCUS ReportCaster cannot validate email addresses since email validation is performed by the mail server. The log report will include any email addresses validated by the mail server and returned to WebFOCUS ReportCaster.

Burst Reports

- If a valid burst value is omitted in a Distribution List, WebFOCUS ReportCaster treats the blank value as if it is a valid burst value and no entries indicating a blank burst value appear in the log file. This will significantly reduce the size of the log file, particularly when the database contains many values for the primary field and only a small subset of those values are burst.
- If a burst value is specified in a Distribution List and it is not found in the database, the following message appears in the log file:

```
Burst Value: value is not in the database.
```

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

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

Unavailable Options

- When schedules with unavailable task types or distribution methods are not permitted to run, an error notification is triggered. The error is shown in red text within the job process log report. The log report, as well as the full and brief notifications, contains information on the unavailable options that the owner of the schedule must change.
- When schedules with unavailable task types or distribution methods are permitted to run, normal job execution occurs and a message appears in the log report indicating that existing schedules using the unavailable task types or distribution methods are able to run.

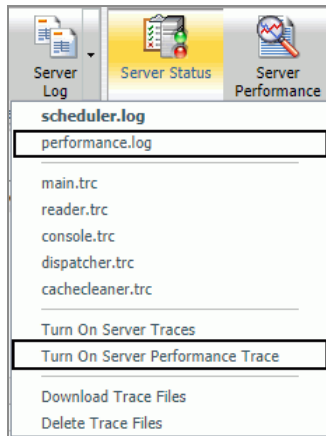
Using the WebFOCUS® ReportCaster Performance Log to Track Schedule Performance

You can use the performance log to analyze the resource utilization of schedules with WebFOCUS ReportCaster. This log records the processing duration of individual schedules and schedule components.

To access the performance log, navigate to the WebFOCUS ReportCaster Console. On the ribbon, in the Manage Server group, click the **Server Status** tab. Then click the **Server Log** drop-down arrow to view the Server Log menu.

The performance log feature is turned off by default. To activate performance log recordings, click **Turn On Server Performance Trace**.

The performance.log and Turn On Server Performance Trace options are shown in the following image.



The performance.log records the following information in each record:

- Job ID
- Schedule ID
- Schedule Name
- User ID
- Time
- Type - (Begin, End)
- Event - (QUEUED, JOB, WF_REPORTING_SERVER, DESTINATION_MAPPING, COMPRESSION, EMAIL, FTP, REPOSITORY, PRINT)
- Source - (Schedule ID, Task ID, Distribution ID)
- Server Name - (EDASERVE, FTP Server Name, Print Name...)
- Server User - (Execution ID)
- Object - Scheduled fex

Using the Report Library

The Report Library is a secure report storage and retrieval facility to which reports can be distributed with ReportCaster. To distribute a report to the Report Library, select the Library distribution option when creating a schedule. When you select the Library distribution option, you will choose who is authorized to view the Library report, the folder in the WebFOCUS Repository to distribute the report to, and set an expiration date or specify the number of versions of the report to be kept. You can also choose to send an email notification that includes the URL to the report.

About the Report Library

The Report Library provides secure access to its content, the ability to save multiple versions of the same output, and the ability to set an expiration date and control the number of versions kept in the library. When creating a schedule to distribute report output to the Report Library, the access options allow the user to specify who is authorized to access the report. The access options are the owner of the schedule, all users authorized to access the WebFOCUS Repository folder the report is stored in, or a Library Access List which specifies the groups and users who are authorized to view the report output the schedule will distribute to the Report Library.

Users authorized to view Library reports can view the most recent version or all versions of the Library report from the Resources tree accessible from the BI Portal, Library reports can also be viewed from the ReportCaster Explorer interface by selecting the Library report Filter option, located on the toolbar, to view Library reports.

When authorized with Library Management access or the ability to manage the private content of a user, a user with these privileges can manage, list, and delete Library reports. However, they cannot view Library reports.

i Note:

- If the ownership of a schedule that uses Report Library distribution has been changed, you must correct the ownership of any associated Library reports to match the new owner of the schedule.

Viewing Library Content

The Resources tree and the ReportCaster Explorer interface provide access to the Report Library reports you are authorized to view. The Report Library reports you are authorized to view are:

- Library reports that you own.
- Published in a folder from which you are authorized to access and view content.
- Shared in a folder from which you are authorized to access and view content.

i Note:

- To view a Library report within a folder, the policy of the user on the folder or report must include the opLibrary security privilege. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.
- When a Library report is accessed, the event is logged in the libraryAccess log file located in the Administration Console. Library access events are logged, by default. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

You may also be authorized to access and manage but not view the content of a Library report when you are authorized to manage the private content owned by other users.

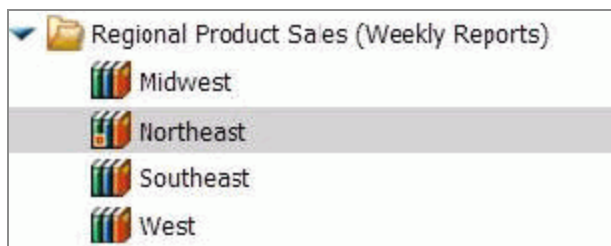
When a Library report is created, it is assigned the same Title as the schedule. When the report is burst, the Library report Title is the burst value. In addition, the access level specified in the schedule is applied to the private Library reports. If the schedule specified a Library Access List, the private Library report will be shared with the groups and users specified in the Library Access List each time the report is distributed.

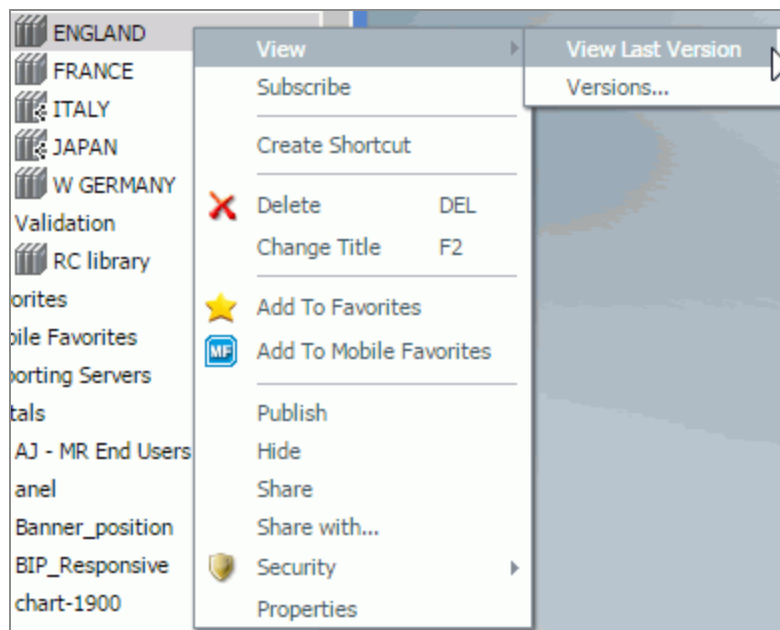
i Note: Even if you are a member of an Access List or the report is published, you can only view the output of a Library report you have been authorized to access as defined by WebFOCUS Client security.

You can view the last, most recent version or view a specific Library report version from the Resources tree or the ReportCaster Explorer. The options available for a Library report are based on the user authorization that is defined by WebFOCUS Client security. Only the owner of the Library report, users authorized to manage the private resources of another user, or users authorized to manage Library reports are authorized to delete the Library report. For additional information on WebFOCUS Client security, see the ibi™ WebFOCUS® *Security and Administration* manual.

Viewing Library Content

The Workspaces area of the start page or the WebFOCUS Home pageWorkspaces area of the Hub or the WebFOCUS Home page provides access to Library reports from a multi-level folder organization. Library reports can be in the same folder as other ReportCaster or Managed Reporting content. However, it is a best practice for burst Library reports to be in their own folder so that all the burst report sections list together in the same folder. In addition, the Title assigned to each burst report is the data value of the burst field for that report section.





When a Library report is selected, the options available are determined by WebFOCUS Client security authorization. Users can be authorized to view, track, cut, delete, share, publish, and manage the security of Library report.

The View options **View Last Version** and **Versions** allow you to view the most recent version of a Library report or to obtain a list of all versions of the Library report. You can change the default View setting for viewing Library reports in the WebFOCUS Administration Console, on the Configuration tab. For more information, see the ibi™ WebFOCUS® *Security and Administration* manual.

The following image shows the list of all versions available for the Product Packaging and Price Library report.

Version	Description	Execution Time	Expiration	Size	Format	Compressed Size
Version 5	May	9/9/2016 10:39 AM	Never	3382	HTML	
Version 4	April	9/9/2016 10:38 AM	Never	3382	HTML	
Version 3	April	9/9/2016 10:37 AM	Never	3382	HTML	

From the Library Versions listing, you can view a Library report in a new window by selecting the version of the report and then selecting the **Open** option from the toolbar or the context menu. You can also view the report in the view pane, displayed to the right of the version listing, by selecting the **Show View Pane** toolbar option. The following image shows the Product Packaging and Price report displayed in the View pane.

Version	Description	Execution Time	Expiration	Size	Format	Compressed Size
Version 2	July	9/13/2016 8:48 AM	Never	3382	HTML	
Version 1	June	9/13/2016 8:48 AM	Never	3382	HTML	

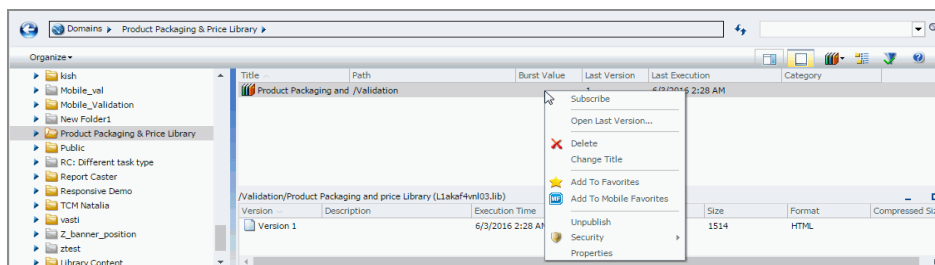
Product	Package	Size	Unit Price
Biscotti	Case	24	17.00
Coffee Grinder	Case	12	125.00
Coffee Pot	Case	8	140.00
Croissant	Case	20	28.00
French Roast	Pounds	12	81.00
Hazelnut	Pounds	16	58.00
Kona	Pounds	12	76.00
Mug	Case	24	26.00
Scone	Case	20	13.00
Thermos	Case	16	96.00

To hide the Library view pane, select the **Hide View Pane** toolbar option. The **Hide View Pane** toolbar option is highlighted when the view pane is displayed.

Viewing Library Content From the ReportCaster Explorer

The ReportCaster Explorer provides access to Library reports you are authorized to access. See the [WebFOCUS® ReportCaster Explorer](#) for information on the ReportCaster Explorer toolbar **Filter** and **List** folder options to list Library and Watch List reports with columns that provide information specific to Library reports.

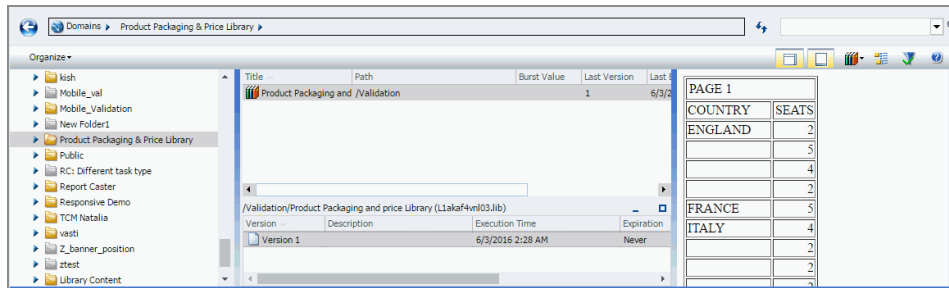
When a Library report is selected in the ReportCaster Explorer pane listing, you can click the **Show version list pane** icon to view the available versions of the report at the bottom of the dialog box. The following image shows the ReportCaster Explorer with the versions and options available for the Product Packaging and Price Library report.



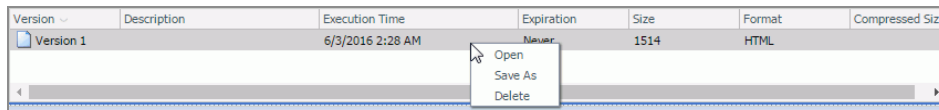
You can view the last, most recent version of the Library report by selecting the **Open Last Version** option, which will display the Library report in a new window.

You can view a specific Library report version by selecting the report version in the pane below the Library report list. When a Library report version is selected, the Library report is

displayed in the view pane to the right of the Library report list pane, as shown in the following image.



To view a Library report version in a new window, double-click the report version or right-click the report version and select the **Open** option, as shown in the following image.



Using the Library Watch List

The Library Watch List provides a quick and easy way to focus on information that is of interest to you by sending you an email when a new Library report version is available. You can add any Library report you are authorized to access to the Watch List, whether or not you own it.

Note: An administrator can unsubscribe another user from a library report on their watch list. If SMTP authentication is enabled, subscribers to the watch list are SMTP authenticated.

- For Windows, this feature can be enabled by running the unsubscribe.bat file, located in the \ibi\WebFOCUS82\ReportCaster\bin directory.
- For UNIX, this feature can be enabled by running the unsubscribe shell script, located in the /ibi/WebFOCUS8290919293/ReportCaster/bin directory.

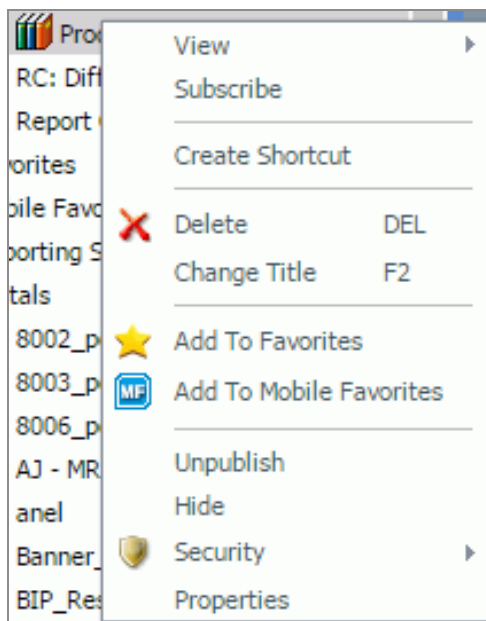
The Watch List email notification includes the report Title and a link to the report in the Report Library. Watch List email notification parameters are defined in the ReportCaster Server Console Configuration tab, under the Report Library folder. For more information, see [WebFOCUS ReportCaster Configuration](#).

You can add or remove a Library report to the Watch List using the *Subscribe* and *Unsubscribe* options available when a Library report is selected from the Resources tree or ReportCaster Explorer interface.

Note: The Subscribe option is available only if the **Enable Library Watch List** check box within the ReportCaster Console Configuration tab is selected. For more information, see [WebFOCUS ReportCaster Configuration](#).

The following examples show how to add a library report to your Watch List from the Resources tree and the ReportCaster Explorer.

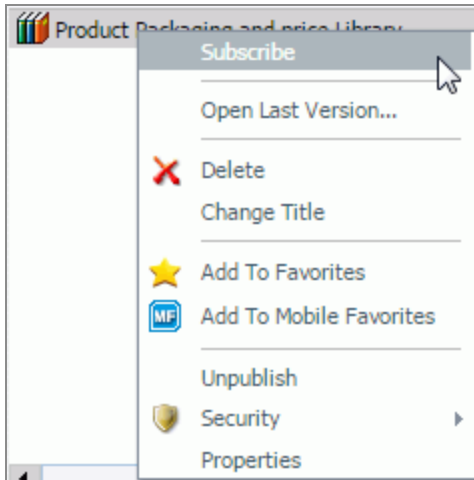
- In the Resources tree, right-click the Library report that you want to add your Watch List, and select *Subscribe* from the drop-down list. If the report is burst, subscribe to each report section you want to add to your Watch List. The following image shows the *Subscribe* option from the Resources tree, for the Product Packaging report.



- In the ReportCaster Explorer interface, select the **Library Report** Filter option located on the toolbar and the folder in the Resources tree that contains the Library reports or is the folder path that the Library reports you are authorized to access are located in. The ReportCaster Explorer **List Files** options, located on the toolbar, allow you to view Library reports within the selected folder or within the selected folder and its subfolders. For more information on Filter and List Files toolbar options, see [WebFOCUS® ReportCaster Explorer](#).

Right-click the Library report you want to add to your Watch List and select *Subscribe*

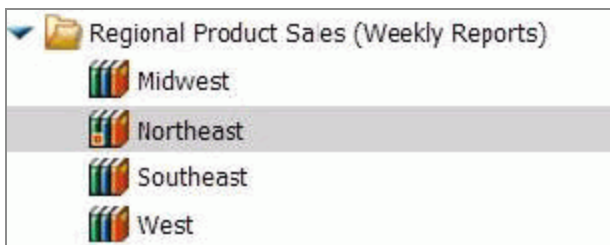
from the drop-down list. If the report is burst, subscribe to each report section you want to add to your Watch List. The following image shows the *Subscribe* option from the ReportCaster Explorer Library report list for the Product Packaging and Price Library report.



- Watch List reports display in the Resources tree and ReportCaster Explorer Library with the following image to identify it as a Watch List report:



The following image shows the Resources tree with a Regional Product Sales (Weekly Reports) folder expanded to list the burst report sections. The Northeast report section is a Watch List report.



The ReportCaster Explorer *Watch List* Filter and *List files* toolbar options allow you to quickly and easily access Watch List reports within a single folder or within a folder path. For more information, see [WebFOCUS® ReportCaster Explorer](#).

When a Watch List report is selected, the report displays in a view pane to the right of the Watch List report list.

To hide the View pane, select an empty area at the end of the Watch List report listing. You can also open the Watch List report in a separate window by right-clicking the Watch List report and selecting **Open**.

i Note: If you need to control when the View pane is displayed, access the Versions dialog box from the Resources tree by right-clicking the Library or Watch List report you want to view and selecting **View**, then **Versions**. Use the **Show View Pane** icon  located on the toolbar of the Versions dialog box to enable the display of the View pane. You can toggle to hide the View pane by clicking the **Hide View Pane** icon  on the toolbar.

To remove a report from the Watch List, do one of the following:

- In the Resources tree, right-click the Watch List report and select **Unsubscribe**.
- In the ReportCaster Explorer Library or Watch List report listing, right-click the Watch List report and select **Unsubscribe**. Click **Refresh** to clear the Watch List report icon.

Publishing Library Reports

Authorized users can publish and unpublish Library Reports to make them available to users authorized to access the folder in which the Library Report is located. Publishing requires the folder in which the item is located to be published in order to publish an item within the folder. If the folder is subsequently unpublished, all items in that folder are unpublished. For more information on Publishing folders and items, see the ibi™ WebFOCUS® *Security and Administration* manual.

i Note: The My Content folder and the content within its folder path cannot be published.

Publish Library Reports

Procedure

1. From the Workspaces area of the Hub or the WebFOCUS Home Page or ReportCaster

Explorer, select the Library Report or folder that you want to publish.

i Note: A folder must be published in order to publish items within the folder. In addition, published items or folders display in color. Those that are unpublished display in black and white.

2. Right-click the item or folder and select **Publish**.

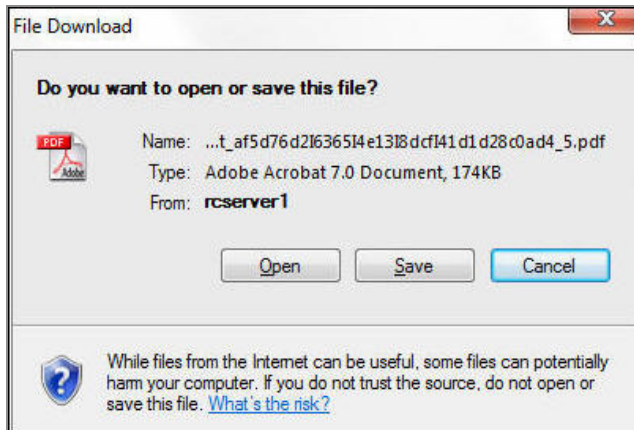
Unpublish Library Reports

Procedure

1. From the Resources tree or ReportCaster Explorer, select the Library Report or folder that you want to unpublish.
2. Right-click the published folder or item that you want to unpublish and select **Unpublish**.

Saving a Library Report

You can save a Library report to your machine using the **Save As** context menu option that is available when a Library report is selected from the Report Library Versions dialog box or the ReportCaster Explorer tree. The **Save As** context menu option downloads the Library report file to your machine. When the file is downloaded, the Windows File Download dialog box displays with the options to Open the file, Save the file, or Cancel the file download. The following image shows the file download for a PDF format Library report.



The Name value displayed in the Windows File Download dialog box is the Library report name assigned when the report was distributed to the Report library. You can change the Name value and select the location in which to save the Library report in the Windows Save dialog box that displays when the File Download Save option is selected.

Perform a Save As on a Library Report in the Business Intelligence Portal

Procedure

1. From the Workspaces area of the Hub or the WebFOCUS Home Page, select the Library report that you want to save to your machine.
2. Right-click the Library report and select **View**, then **Versions**.
3. In the Report Library Versions dialog box, right-click the Library report version you want to save and select **Save As**.

The Windows File Download dialog box displays.

4. Click **Save**.

The Windows Save dialog box displays, from which you can save the Library report to your machine.

Perform a Save As on a Library Report in the ReportCaster Explorer

Procedure

1. Open the ReportCaster Explorer.
2. From the toolbar, click the **Change your filter** button and select **Library Report**.



Note: You can also select **Watch List** if you have previously subscribed the Library report to your Watch List.

3. Select the folder in which the Library report is located or select a folder on the path to the Library report and select the **List files in selected folder and subfolders** toolbar option.
4. In the right pane, select the Library report you want to save to your machine.
5. Select the **show version list pane** toolbar option.

The versions of the Library report display in the pane below the Library report list.

6. Right-click the report version you want to save to your machine and click **Save As**. The Windows File Download dialog box displays.
7. Click **Save**.

The Windows Save dialog box displays, from which you can save the Library report to your machine.

Deleting Content From the Library

To delete content from the Library, you must be the owner of the Library report or be authorized to manage Library content or the private content of other users.

Deleting the Library report in the Resources tree does not delete all versions of a Library report. The Library report displayed in the Resources tree or ReportCaster Explorer Library report list is associated with the schedule that created the report or reports to provide you access to the Library report versions. Deleting the Library report in the Resources tree will not allow users to access existing versions of the report or reports from the Resources tree until the Library report associated with the schedule is recreated when the schedule that

created the report or reports runs again and successfully distributes a new version of the report or reports.

To delete a specific Library or Watch List report version, obtain a list of the available versions for the Library or Watch List report. A list of Library report versions can be obtained from the Resources tree and the ReportCaster Explorer as follows:

- In the Resources tree, right-click the Library or Watch List report and select the **Versions** option.
- In the ReportCaster Explorer, select **Library Reports** or **Watch List Reports** from the Filter toolbar option and in the Resources tree, select the folder in which the Library report is located. To list the files within the selected folder path, select the **List files in selected folder and subfolders toolbar** option. In the report list pane, select the report. The versions available for the selected report will display in a pane below the Library report list.

Right-click the Library or Watch List report version you want to delete and click **Delete**.

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

When all versions of a Library report are deleted, the Library report will continue to display in the Resources tree, as it is the item associated with the schedule for future distributions of the report.

A Library report remains in the Report Library until all of the following are deleted:

- All versions of the Library report (or reports) distributed by the schedule.
- Library report listed in the Resources tree folder associated with the schedule.
- Delete the schedule associated with the Library report (or reports) if you do not want any future versions of the Library report to be created.

Using Cut and Paste to Move Library Reports

You can use the Cut and Paste options to move Library reports between folders in the Repository. The ability to cut and paste a Library report is determined by your user permissions or privileges for the folders. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

Cut and Paste a Library Report

Procedure

1. From the Workspaces area of the Hub or the WebFOCUS Home Page, right-click a Library report and click **Cut**.
2. Right-click the new destination folder and click **Paste**.

The Library report now appears in the new folder.

Note:

- The schedule that generates the Library report will continue to run successfully after a Library item has been moved. However, if you edit the schedule from which the Library report was generated, you must update the Library report distribution path before saving the schedule. If the distribution path has not been updated, a warning will be issued. However, if the library report was generated from a burst schedule procedure, a warning will not be issued.
- You cannot paste a Library report into the same folder from which it was cut.

You can also move Library reports to new folders using a drag-and-drop operation. For more information, see [Using the Report Library](#).

Viewing On-Demand Paging Reports

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

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

Note: When **Library distribution** is selected, the Distribution Server adds SET WEBVIEWTARG=OFF to the procedure to control the behavior of the frames in the Library.

SET WEBVIEWTARG does not override ON TABLE SET WEBVIEWTARG. Therefore, the scheduled procedure should not contain an ON TABLE SET WEBVIEWTARG statement with a *target_frame* value specified. See the *Developing Reporting Applications* manual for additional information on the WEBVIEWTARG command and other On-demand Paging settings.

As with all Library reports, you can open the On-demand Paging report in a separate window or in the View pane from the Library Versions listing. For more information on viewing Library reports, see [Viewing Library Content](#) or [WebFOCUS® ReportCaster Explorer](#).

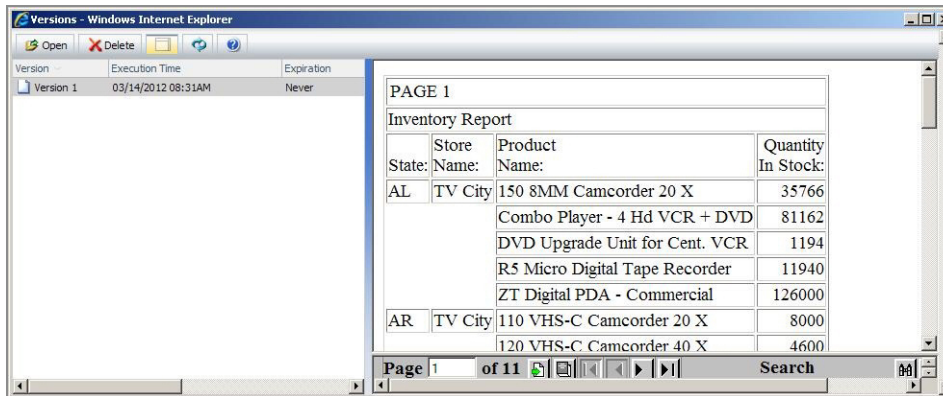
Note: When you double-click an On-demand Paging Library report in the BI Portal tree, the report displays, but is missing the Web Viewer control bar at the bottom. Select the **View** option to view the report. ReportCaster Explorer displays the report in the View pane.

The following image is an example of an On-demand Paging report opened with the Library View pane.

State:	Store Name:	Product Name:	Quantity In Stock:
AL	TV City	150 8MM Camcorder 20 X	35766
		R5 Micro Digital Tape Recorder	11940
		ZT Digital PDA - Commercial	126000
AR	TV City	150 8MM Camcorder 20 X	95376
		650DL Digital Camcorder 150 X	5944
		QX Portable CD Player	44000
		R5 Micro Digital Tape Recorder	27860
AZ	eMart	ZT Digital PDA - Commercial	294000
		150 8MM Camcorder 20 X	154986
		650DL Digital Camcorder 150 X	11888
		AR2 35MM Camera 8 X	45996
		QX Portable CD Player	308000
CA	AV VideoTown	R5 Micro Digital Tape Recorder	35820
		ZC Digital PDA - Standard	132000
		ZT Digital PDA - Commercial	378000
		150 8MM Camcorder 20 X	166908

When viewing an On-demand Paging report from the Library Versions View Pane, the Web Viewer control panel is not fully visible and displays with a vertical scroll control. This can be resolved by viewing the On-demand Paging report in a new window by selecting the

Open option from the toolbar or the context menu for the selected Library report, as shown in the following image.



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



The controls enable you to display a specific page. To display a specific page, type a page number in the Page field and press Enter, or click the **Go To** icon next to the Page field and type in a page number. The following image shows the Page field and icon in the control panel.



Display the previous or next page in a sequence by clicking the Previous and Next arrows, as shown in the following image.



Display the first or last page of the report by clicking the First Page or Last Page arrows, as shown in the following image.



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



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



Emailing a Library Report

You can email a Library report from within the Report Viewer. For more information, see [Viewing Library Content](#).

Note: This feature is only available if IBI_Email_Reports is enabled in the WebFOCUS Administration Console. For more information on configuring this option, see the *WebFOCUS Security and Administration* manual.

Email a Library Report

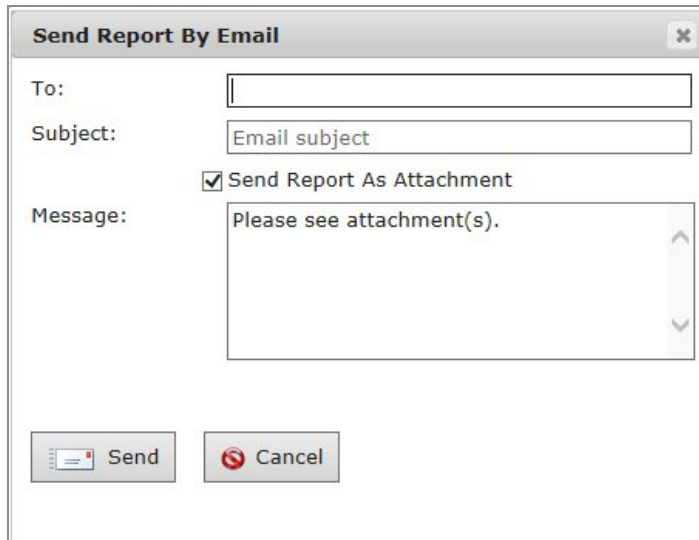
Procedure

1. From the Resources tree or the ReportCaster Explorer, open a Library report.
2. Click the **Send Report by Email** icon, as shown in the following image.



CAR	DEALER_COST
ALFA ROMEO	16,235
AUDI	5,063
BMW	49,500
DATSUN	2,626
JAGUAR	18,621
JENSEN	14,940
MASERATI	25,000
PEUGEOT	4,631
TOYOTA	2,886
TRIUMPH	4,292

The Send Report by Email dialog box displays, as shown in the following image.



The image shows a dialog box titled "Send Report By Email". It contains the following fields and controls:

- To:** A text input field.
- Subject:** A text input field containing the text "Email subject".
- Send Report As Attachment:** A checkbox that is checked.
- Message:** A text area containing the text "Please see attachment(s)".
- Buttons:** "Send" and "Cancel" buttons at the bottom.

3. In the Send Report by Email dialog box, populate the following fields:
 - **To.** Used to specify the email address of the recipients. This is required.
 - **Subject.** Allows you to indicate a subject of the message. For example, the name of the report or the subject of the report being sent. This is optional.
 - **Send Report as Attachment.** Allows you to send the report as an attachment or include the report in the email as an XML file. The default is to send the report as an attachment. This is optional.
Note: If this option is disabled, the message field is deactivated.
 - **Message.** Provides a text box into which you can enter information about the email. The default message is *Please see attachment(s)*. This is optional.
4. Click **Send**.
 A confirmation dialog box displays.
5. Click **OK**.

Viewing Parameter Values for Library Reports

When you view a Library Report through the Library Report user interface or the ReportCaster Explorer, the Parameters column displays the parameter value pairs for each version. The following image shows three Library Report versions in the Report Library user interface. Each version uses different parameter values for the same parameter

Version	Description	Execution Time	Parameters	Expiration	Size	Format	Compressed Size
Version 3		6/27/2018 6:06 PM	COUNTRY=JAPAN	Never	2579	HTML	
Version 2		6/27/2018 6:05 PM	COUNTRY=ITALY	Never	3038	HTML	
Version 1		6/27/2018 6:05 PM		Never	3038	HTML	

Searching in an On-Demand Paging Report

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

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



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



- To locate a specific string, type the string you want to search for and click the **Find** icon, as shown in the following image.

i Note: The Find functionality will locate the page that the current string is on and underline it. In order to find the string within the page, you must use the Find option in your browser.



Search in an On-Demand Paging Report

Procedure

1. Enter the string in the **Search** input box.
2. Click **Match Case** if you want to perform a case-sensitive search.
Notice that the WebFOCUS Viewer displays the Match Case button with a red line across it to indicate that it is active.
3. To begin your search, click:
 - a. **Search Backward** to search for the string from the current page back to the first page.
 - or
 - b. **Find** to search from the current page to the end of your report.

The WebFOCUS Viewer searches the report and underlines the first occurrence of the string.

i Note: The Find functionality will locate the page that the current string is on and underline it. In order to find the string within the page, you must use the Find option in your browser.

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

i Note: If multiple occurrences of the string display on the same page, the Find functionality will underline the next occurrence. When no more occurrences of the string are found, the next page that the string occurs on is displayed with the first occurrence of the string underlined.

Using the Viewer Control Panel to Search

You want to use the Viewer Control Panel to navigate a long report called Inventory Sales within State to find occurrences of the string *Digital*, a type of electronics that you sell. After you run the report, WebFOCUS displays the first page of the report in the Viewer.

1. To search for *Digital* electronics, type *Digital* in the input box and click the **Find** icon, as shown in the following image.



The screenshot shows a web browser window titled "WebFOCUS Viewer - Windows Internet Explorer". The main content area displays an "Inventory Report" titled "Store Inventory within State". The report is a table with four columns: "State:", "Store Name:", "Product Name:", and "Quantity In Stock:". The table lists inventory items for four states: AL, AR, AZ, and CA. The search term "Digital" is entered in the search box at the bottom, and the first occurrence of the word "Digital" in the product names is underlined.

State:	Store Name:	Product Name:	Quantity In Stock:
AL	TV City	150 8MM Camcorder 20 X	35766
		R5 Micro Digital Tape Recorder	11940
		ZT Digital PDA - Commercial	126000
AR	TV City	150 8MM Camcorder 20 X	95376
		650DL Digital Camcorder 150 X	5944
		QX Portable CD Player	44000
		R5 Micro Digital Tape Recorder	27860
		ZT Digital PDA - Commercial	294000
AZ	eMart	150 8MM Camcorder 20 X	154986
		650DL Digital Camcorder 150 X	11888
		AR2 35MM Camera 8 X	45996
		QX Portable CD Player	308000
		R5 Micro Digital Tape Recorder	35820
		ZC Digital PDA - Standard	132000
		ZT Digital PDA - Commercial	378000
CA	AV VideoTown	150 8MM Camcorder 20 X	166908

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The WebFOCUS Viewer returns your report with the first occurrence of your search string underlined, as shown in the following image.

WebFOCUS Viewer - Windows Internet Explorer

Inventory Report

Store Inventory within State

State:	Store Name:	Product Name:	Quantity In Stock:
AL	TV City	150 8MM Camcorder 20 X	35766
		R5 Micro <u>Digital</u> Tape Recorder	11940
		ZT Digital PDA - Commercial	126000
AR	TV City	150 8MM Camcorder 20 X	95376
		650DL Digital Camcorder 150 X	5944
		QX Portable CD Player	44000
		R5 Micro Digital Tape Recorder	27860
AZ	eMart	ZT Digital PDA - Commercial	294000
		150 8MM Camcorder 20 X	154986
		650DL Digital Camcorder 150 X	11888
		AR2 35MM Camera 8 X	45996
		QX Portable CD Player	308000
		R5 Micro Digital Tape Recorder	35820
CA	AV VideoTown	ZC Digital PDA - Standard	132000
		ZT Digital PDA - Commercial	378000
		150 8MM Camcorder 20 X	166908

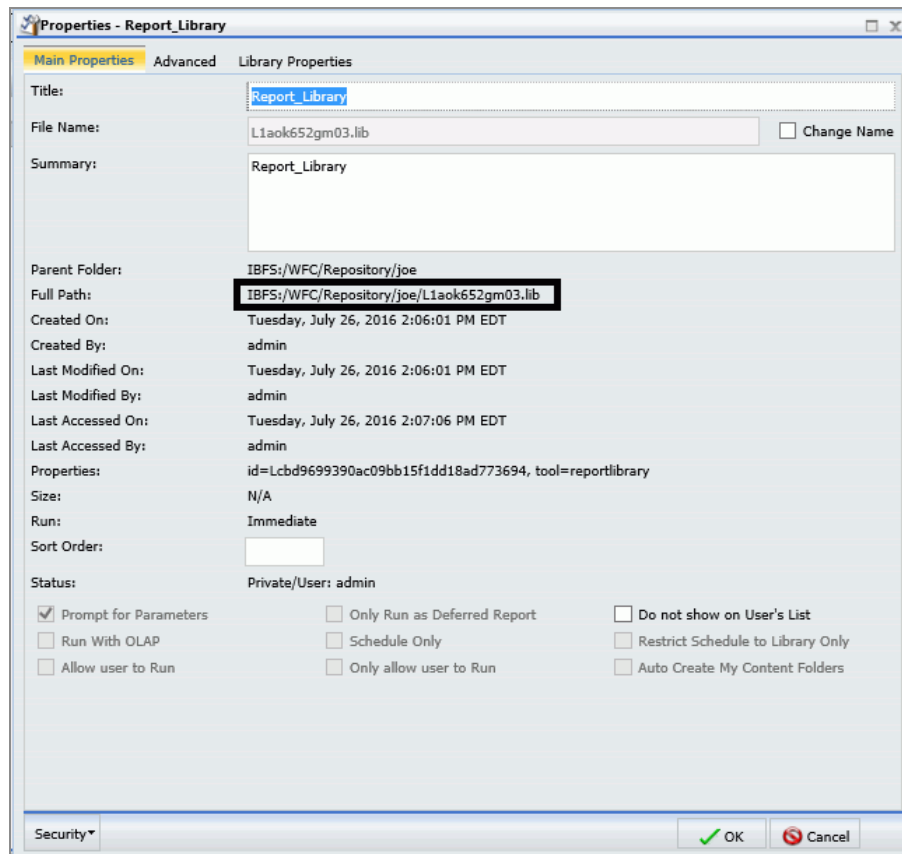
Page 1 of 36 Search Digital

- Click **Find** again to locate the next occurrence of Digital.

Note: If multiple occurrences of the string display on the same page, the Find functionality will underline the next occurrence. When no more occurrences of the string are found, the next page that the string occurs on is displayed with the first occurrence of the string underlined.

Opening a Version of a Library Report in Excel and Other Documents

You can open a version of a library report in Excel using a URL that captures the path from the properties of a library report, as shown in the following image:



The convention to use this functionality is based on the following URL components:

- **Path.** Accessible from the properties dialog box of any library report.
- **Library URL.** A standard URL that identifies the report library (http://host:port/ibi_apps/lib-report.rc).

Using the path information from the image above in combination with the Library URL, the full URL is the following:

http://host:port/ibi_apps/lib-report.rc?path=IBFS:/WFC/Repository/joe/L1ack652gm03.lib

i Note: The ? is a required component of a qualifying URL.

The resulting URL can be used to open the current version of this identified library report in Excel and other types of documents, such as Microsoft Word or an HTML page.

Creating and Maintaining Access Lists

An Access List defines the groups and users authorized to view report output distributed by a schedule to the Report Library. An Access List can be used with single or multiple schedules.

An Access List is created as a private item owned by a user and can be shared to authorize other groups and users to select it for their schedules. Users authorized to use a shared Access List will be able to share the report distributed to the Report Library by their schedule with the groups and users they are authorized to share with.

Note: Changes to an Access List are applied to a Library report that is protected by the Access List at the next execution of the schedule that creates the Library report.

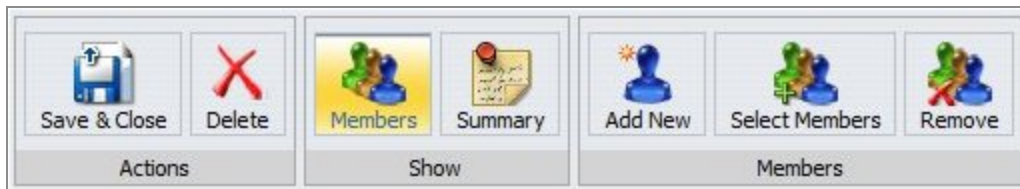
Burst Value	Member
	/Sales/GroupAdmins
	/Retail/Developers
	/Sales/Developers

Users authorized to access the Library Access List tool and save to a folder in the Workspace can:

- Create an Access List.
- Add new Members: The **+ Add member** option allows the user to enter member information. There must be at least one member specified to save a Library Access List.
- Select Members: The **Existing List** option allows the user to select members from an

existing Library Access List they are authorized to access.

- Delete a Library Access List: The owner and users authorized to manage the private content for other users are authorized to delete a Library Access List.
- Save and close a Library Access List: The user can save a Library Access List to a folder in the Workspace to which they are authorized to write.
- Edit an Access List: The user can edit an existing Access List.



Create a New Library Access List

To create a Library Access List:

Procedure

1. Select the **Create Something New**  option.
2. Select **Create Access List**.
The Library Access List window opens.
3. Select the **Add member** to add new members.

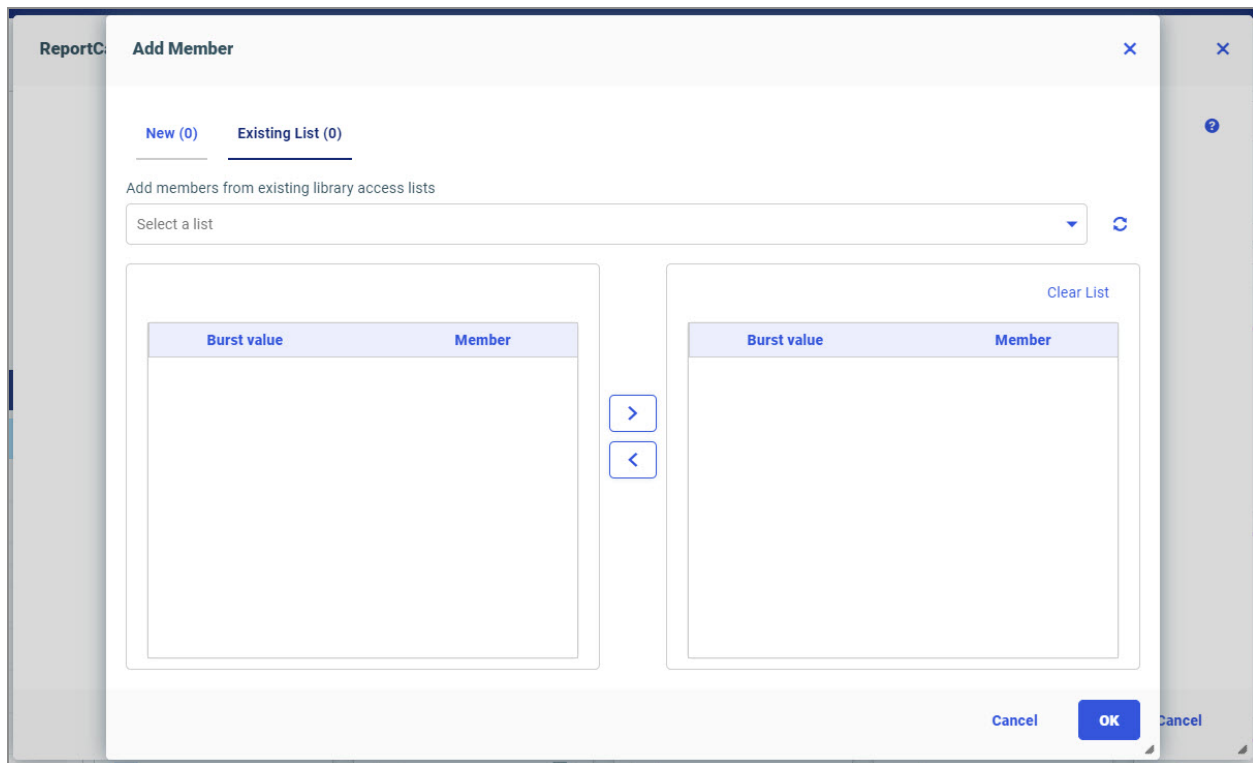
4. Select the **New** tab to add new members.
5. Select the checkbox of the members that you want to add to the list.
6. In the **Burst value** field, type an optional burst value to specify the report section to distribute to the group or user. This value is case-sensitive. The schedule for which the Access List is specified must have the Burst report option selected to limit the report distribution to the burst value specified in the Library Access List. For more information on burst values, see [Bursting a Report](#).
7. Select the **Ok** button to add them to the member list.
8. Click **Save** to save the Library Access List.

i Note:

- The maximum length of a title value for a file is 256 characters.
- If the title of your file has the same name of an existing file in the folder, you receive a message asking if you wish to replace the file.

Creating an Access List from the Existing List

The following image shows the access list window.



Procedure

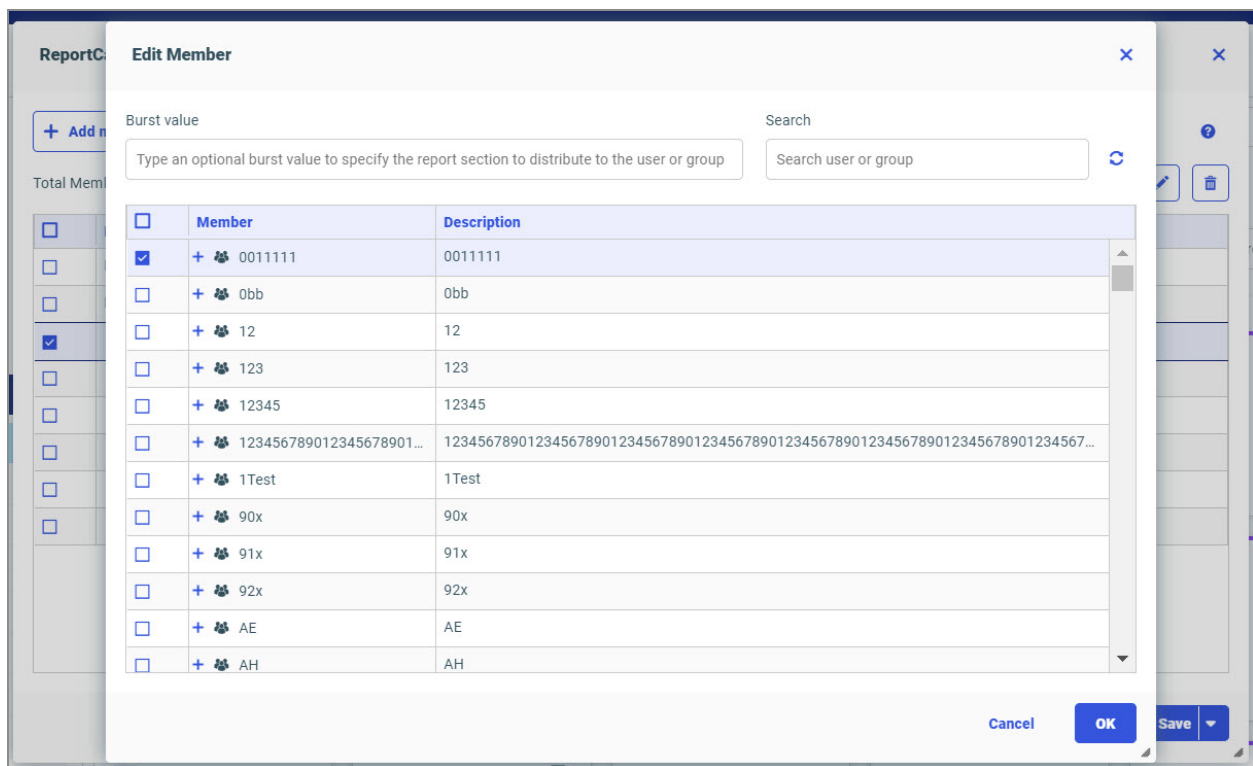
1. Select the **Create Something New**  option.
2. Select **Create Access List**.
The Library Access List window opens.
3. Select the **Add member** to add new members.
4. Select a **Existing List** tab to choose members from an existing list.
5. Select an access list from dropdown list that you want to add to the new list.
6. Select the members you want to add using the arrows.
7. In the Burst Value column, type an optional burst value to specify the report section to distribute to the group or user. This value is case-sensitive. The schedule for which the Library Access List is specified must have the Burst report option selected to limit the report distribution to the burst value specified in the Library Access List. For more information on burst values, see [Bursting a Report](#).
8. Select the **Ok** button to add them to the member list.
9. Click **Save** to save the Library Access List.

Note:

- The maximum length of a title value for a file is 256 characters.
- If the title of your file has the same name of an existing file in the folder, you receive a message asking if you wish to replace the file.

Editing an Access List

You can edit the Library Access Lists you own or are authorized to manage from the Workspaces or the ReportCaster Explorer interface by performing the following steps. Following is the edit member window.



Procedure

1. Select the Library Access List you want to edit.

2. Right-click the Library Access List and select **Edit**.
The Access List window opens up.
3. You can select the member and then select the **Edit** icon to update the list.
4. Select **Ok** to add the members to the list.
5. Optional: Select any members you to remove from the list and then select the **Delete member** icon.
6. Make any necessary changes to the Access List and select **Save & Close**.

Accessing Library Access Lists

Sharing your private Library Access Lists allows you to permit groups and users to see its content and use it in schedules while you retain ownership. Authorized users can share their private Library Access Lists with groups and users with whom they are permitted to share. The Library Access List can be accessed by users authorized to access the folder in which the shared Library Access Lists are located.

Authorized users can publish and unpublish Library Access Lists to make them available to users authorized to access the folder in which they are located. Publishing requires the folder the item is located in to be published. If the folder is subsequently unpublished, all items in that folder are unpublished. See the ibi™ WebFOCUS® *Security and Administration* manual for additional information on publishing and sharing folders and items.

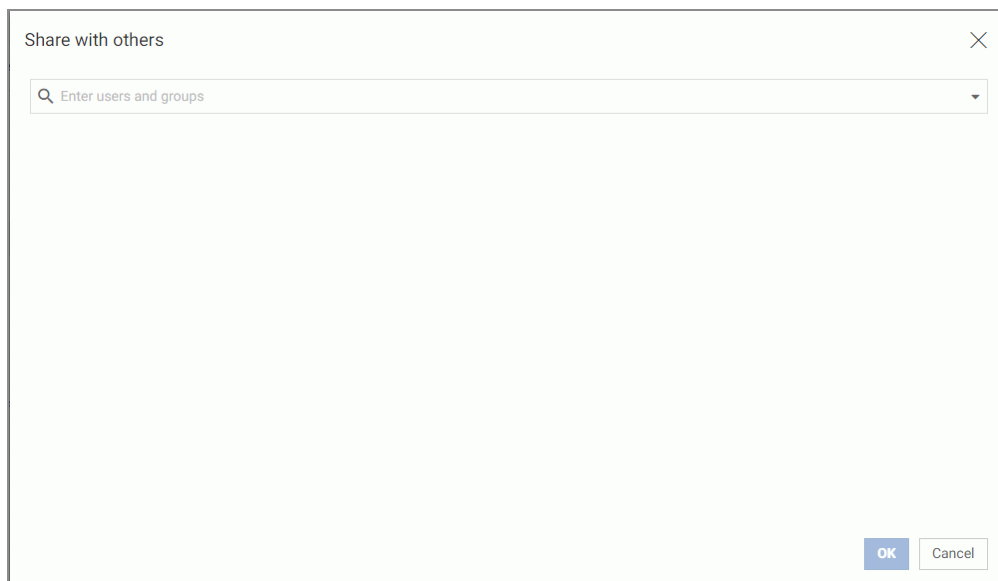
Share a Library Access List

From Workspaces area of the Hub or the WebFOCUS Home Page, if you are authorized to share your private content saved in a My Content folder, you can share a Library Access List with users authorized to access the folder in which the Library Access List is located by right-clicking the folder or Library Access List and clicking **Share**.

If you are authorized for advanced sharing, you can share your private content saved in a My Content folder with specific groups and users with whom you are authorized to share by performing the following steps.

Procedure

1. Right-click the Library Access List that you want to share and click **Share With**. The Share with others dialog box displays, as shown in the following image.



2. Click the drop-down arrow on the search box to display the filters for the users or groups that you want the option to select. You can filter your search results by Users or by Groups.
3. After you select a filter, begin typing in the search box to display the users or groups that are available for selection. Click a user or group to add it to the list of users or groups that can view the Library Access List. Optionally, click the **X** on a User or Group tile to remove it from the list.
4. When you are finished selecting users or groups to share your Library Access List with, click **OK**.

Publishing Library Access Lists

A folder must be published in order to publish items within the folder. In addition, published items or folders display in color. Those that are unpublished display in black and white.

From the Resources tree or the ReportCaster Explorer, right click the Library Access List or folder that you want to publish and click **Publish**. To unpublish the list or folder, click **Unpublish**.

Publishing Library Access Lists

A domain must be published in order to publish items within the domain, including Library Access Lists. Published items or folders display in color, while unpublished items or folders display in black and white.

From the Workspaces area of the Hub or the WebFOCUS Home Page, right click the domain that contains the Library Access List that you want to publish and click **Publish**. To unpublish the domain, and in effect the Library Access List, click **Unpublish**.

Set Security Rules on a Library Access List

Authorized users can set security for unpublished Library Access Lists, allowing other groups or individual users to access and manage the lists. For more information, see the ibi™ WebFOCUS® *Security and Administration* technical content.

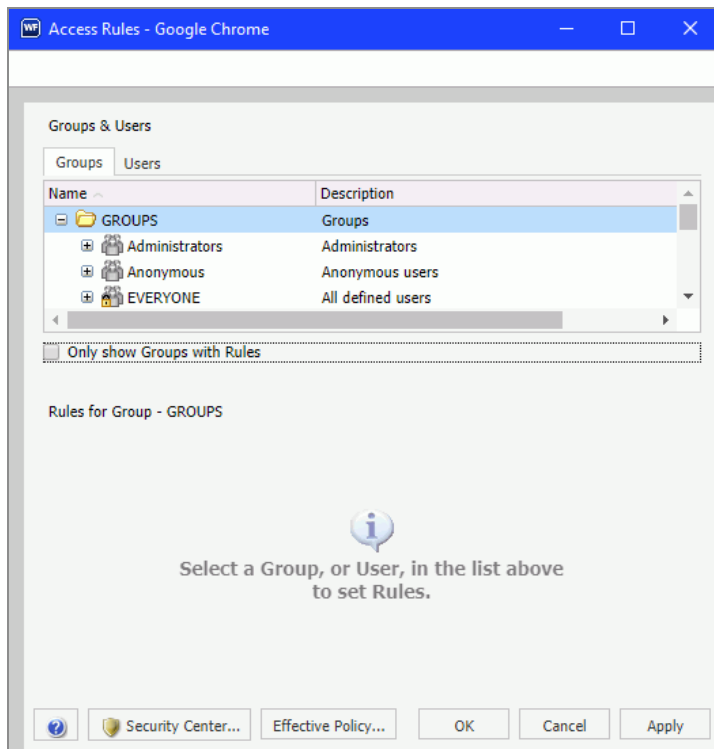


Note: Authorized users can review the Security Policy by right-clicking the Library Access List, selecting **Security**, and then selecting **Effective Policy**.

Procedure

1. Select the workspace containing the Library Access List, or the unpublished Library Access List itself for which you want to set security.
2. Right-click and point to **Security** and then click **Rules**.

The Access Rules dialog box displays, as shown in the following image.



3. In the Groups tab, click the group or individual users to whom you would like to grant access to the Library Access List. Optionally, click the **Only show Groups with Rules** check box to only display groups that have rules that have already been set.

The Roles for a selected group appear in the Rules for Group section.

4. Optionally, in the Rules for Group section, click the **Roles:** drop-down list to only display specific Roles.
5. Optionally, click the **Only show Rules that have been set** check box to filter the list of available roles even further.
6. Select the Role that defines the functional capabilities for which to set the access level.
7. Choose the access level in the Access drop-down list.

Options include:

- **Not Set.** Access is not specifically set. Access is determined by inherited rules.
- **Permitted.** Allows the functionality of the selected role as specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or

Children Only.

- **Denied.** Denies the functionality of the selected role at the level specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.
 - **Over Permitted.** Overrides a Denied access level to allow the functionality of the selected Role at the level as specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.
 - **Clear Inheritance.** Erases all previously defined rules for the selected Role at the level specified in the Apply To drop-down list. You can select **Folder and Children**, **Folder Only**, or **Children Only**.
8. Click the **Users** tab to display the list of individual users to whom you would like to grant access to the Library List. Optionally, click the **Only show Users with Rules** check box to only display users that have rules that have already been set.
The Roles for a selected user appear in the Rules for User section.
 9. Optionally, in the Rules for User section, click the **Roles:** drop-down list to only display specific roles.
 10. Optionally, click the **Only show Rules that have been set** check box to filter the list of available roles even further.
 11. Select the Role that defines the functional capabilities for which to set the access level.
 12. Choose the access level in the Access drop-down list, as described in Step 7.
 13. Click **Apply**.
 14. Click **OK**.

Your security setting updates are now saved for your Library Access List.

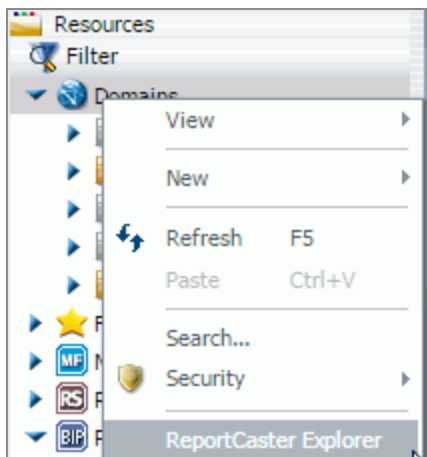
WebFOCUS® ReportCaster Explorer

The WebFOCUS ReportCaster Explorer interface helps users obtain a list of ReportCaster items. This list is displayed with details specific to the item type the user selects.

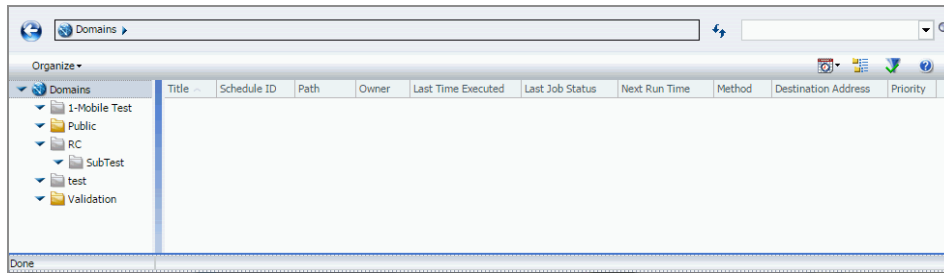
Using the WebFOCUS® ReportCaster Explorer

Access to WebFOCUS ReportCaster Explorer is controlled by the Client Security authorization model. Users can be authorized to access the WebFOCUS ReportCaster Explorer at the Repository folder or at specified lower-level folders.

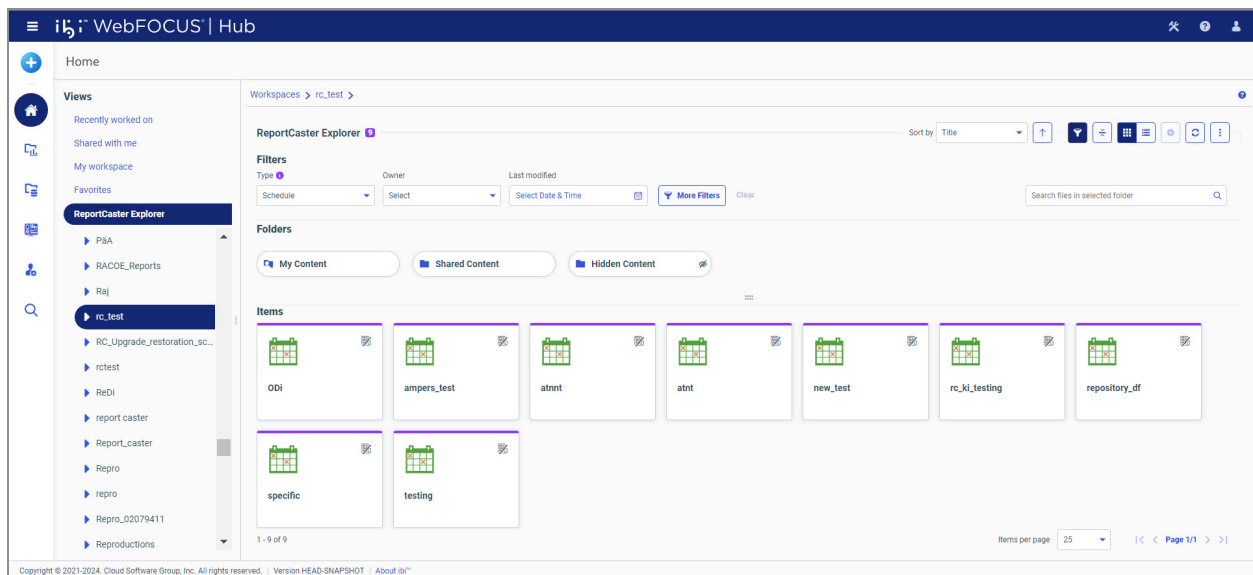
Authorized users can access the Explorer option from the context menu of a folder. The Explorer option is also available from the **Tools** menu from Legacy Homepage, located on the BI Portal Menu Bar, provided that the user is authorized to access the Explorer from the folder.



The **Resources** node is the default folder location and is expanded to list the folders that the user is authorized to access.



Note: Once the WebFOCUS ReportCaster Explorer is launched from the BI Portal, logging out or closing the BI Portal does not close the WebFOCUS ReportCaster Explorer. You must manually close the WebFOCUS ReportCaster Explorer when you log out or close the BI Portal. If you sign back in to the BI Portal with a different user name while the WebFOCUS ReportCaster Explorer is open from a previous session, the WebFOCUS ReportCaster content from the previous session will be visible and available in the WebFOCUS ReportCaster Explorer. The WebFOCUS ReportCaster Explorer is displayed in the following image.



Accessing the WebFOCUS® ReportCaster Explorer Tool

The WebFOCUS ReportCaster Explorer can be opened using one of the following methods:

- Select the WebFOCUS ReportCaster Explorer option from the **Main Menu**.
- Select the WebFOCUS ReportCaster Explorer option from the **Home button**.

Explorer Toolbar

The toolbar allows the user to change folder view, add filters, and sort files. The following table provides more information on all the options.

Option	Description
Sort by	Sorts the list of files based on the options available in the dropdown.
Ascending or Descending	Changes the order of the list.
Show or Hide Filters	Hides or shows the filters.
Switch to flat or folder view	Toggles between flat and folder view.
View as tiles or list	Toggles between tile and list view.
Select Display Columns	Add or remove specific columns to the list.
Refresh content	Refreshes the content.
Show folders	Display or hide folders.
Show empty folders	Display or hide empty folders.

Search	Search for WebFOCUS ReportCaster items within the selected directory.

The Filter function allows the user to set different filters. The following table describes the various filters.

Filter	Functionality
Type	Select the type of items to be fetched.
Owner	Filter out the files created by the selected owners. Note: The user can only select owners whose items they have access to.
Last modified	Set the time and date range, within which the items are modified.
More Filters	Provides additional filters based on the selected Type .

Type Filters and Additional Settings

Based on the type filter selected, users get additional filter options under **More Filters** as described in the following table.

Type Filter	Additional Filters
Schedule	• Schedule ID: Allows the user to search schedule by ID. • Next Run Time: Allows the user to filter out schedule based on the next runtime. These are the options: Disabled, None, and Custom Date. • Distribution Method: Allows the user to filter out schedules based on the selected distribution methods from the dropdown list. The dropdown has Email, FTP, Printer, Repository, Report Library, and No distribution options. • Last Job Status: Allows the user to filter out schedules based on the

selected last job status from the dropdown list.

- **Priority:** Allows the user to filter out schedules based on the selected priority.

Distribution List

Distribution Method: Allows the user to filter schedule based on the selected distribution methods. The dropdown has **Email**, **FTP**, and **Printer** options.

Access List

Allows the user to filter access list from the rest of the WebFOCUS ReportCaster items. **More Filters** are disabled for access list.

Report Library

- **Show Watch List Only** displays the subscribed report library items.
- **Output Format:** Allows the user to filter the report library based on the selected output format.



Note: All the selected filter are displayed below the Explorer toolbar in chips format. You can remove any filter by clearing the chip or you can use the clear button to reset the filters.

Explorer Tree

The Explorer tree provides the same folder navigation as the Resources tree that is accessible from the Workspaces. Double-click a folder or the twisty to expand or collapse a folder. Additionally, you can also navigate the folders using the breadcrumb trail in Explorer window.

Explorer Asset Viewer

The asset viewer displays all the WebFOCUS ReportCaster items specified by the selected filters and subfolders of the selected folder. The user can change the view of the assets by toggling between tile and list view. The list view provides more information on the WebFOCUS ReportCaster items. The Asset Viewer has two parts: Folder Viewer and Items Viewer. The Folder Viewer displays all the sub-folders of the selected folder. The Items

Viewer displays all the list of WebFOCUS ReportCaster items in the selected folder and sub-folder.

Explorer Schedule List Column Information

In the Explorer Asset viewer, users can view the following information about schedules they are authorized to list, as shown in the following image.

Workspaces >

ReportCaster Explorer

Filters

TypeScheduleOwnerLast modified

ScheduleSelectSelectSelect Date & Time

More FiltersClear

Search files in selected folder

Title	Path	Owner	Last Modified	Last Time Executed	Last Job Status	Next Run Time	Schedule ID	Distribution Method	Destination Address	Priority	Published	Hidden
1	BFPS/WFC/Repository/Public/1.sch	-	5/24/2024, 1:56:38 PM	6/27/2024, 12:39:23 PM	SUCCESS	None	5db526b0b36a4b4e2c993f9e0f70747c37	Report Library	OWNER	3	✓	
1	BFPS/WFC/Repository/WebFOCUS/3/1.sch	admin	6/18/2024, 12:10:30 PM	-	Disabled		5005bc539a9f0f0a6e4d8182a3a2eab0cb018f	Report Library	OWNER	3		
1_1	BFPS/WFC/Repository/Public/1_1.sch	admin	6/28/2024, 11:31:24 AM	-	Disabled		576658bde9b13a405f6f8d33ee1368bb384d	Report Library	OWNER	3		
ADV_EMAIL	BFPS/WFC/Repository/B_testadv_email.sch	admin	4/23/2024, 11:00:02 PM	5/9/2024, 11:04:02 AM	FAILURE	None	588a1715cc9e36d401e1831ea7b8f8195a005	Email	ksanappa@ibco.com	3		
ADV_FILE_TO_REP	BFPS/WFC/Repository/B_testadv_file_to_rep.sch	admin	4/23/2024, 11:31:29 PM	5/9/2024, 11:04:00 AM	SUCCESS	None	5a3aee935e7a3b4a213a02f5e6f4d36e9eb	Repository	/WFC/Repository/B_test	3		
ADV_PROG_TO_REP	BFPS/WFC/Repository/B_testadv_prog_to_rep.sch	admin	4/23/2024, 11:03:58 PM	5/9/2024, 11:03:58 AM	SUCCESS	None	5a054705a164da4213a02f5e6f4d36e9eb	Repository	/WFC/Repository/B_test	3		
ADV_URL_TO_REP	BFPS/WFC/Repository/B_testadv_url_to_rep.sch	admin	4/23/2024, 11:36:03 PM	5/23/2024, 2:20:33 PM	SUCCESS	None	5217599a5396b4a3c493749f58a47a793	Repository	/WFC/Repository/B_test	3		
Existing Schedule with Email DList	BFPS/WFC/Repository/ROLES/Existing_Schec	-	11/19/2015, 10:00:53 PM	9/9/2024, 10:12:39 AM	SUCCESS	None	528b46822a182a3f5e6f4d36e9eb3a5a25a105	Email	/WFC/Repository/ROLES	3	✓	
FTP	BFPS/WFC/Repository/ks_testftp.sch	admin	4/29/2024, 4:06:51 PM	5/22/2024, 9:59:26 PM	FAILURE	None	52ae4f6a0c055a4b0c3a742ae00272a6c2f	FTP	/WFC/Repository/ks_test	3		
FTP_HOME	BFPS/WFC/Repository/Geotestftp_home.s	admin	4/29/2024, 1:48:05 PM	5/22/2024, 9:59:26 PM	FAILURE	None	5cda785ee1158a493a9133b9d275a7a60	FTP	/WFC/Repository/Geotest	3		
GenericAmp	BFPS/WFC/Repository/AmpersinDistribution	admin	2/17/2024, 6:40:57 PM	5/22/2024, 9:59:23 PM	FAILURE	None	57175aee7a594ba2c4a81aeece4e02679f41	Email, FTP, Printer, Report	OWNER, EMAIL_TO, PRIN	3		
LIB	BFPS/WFC/Repository/B_testlib.sch	admin	4/24/2024, 12:14:31 AM	5/22/2024, 9:59:19 PM	SUCCESS	None	5459fe1aeeed45a4d1a8b91d3c5e687c0b14	Report Library	OWNER	3		
Once Managed Reporting Library	BFPS/WFC/Repository/WF_Command_Center	-	5/31/2024, 9:57:44 PM	5/22/2024, 9:59:15 PM	FAILURE	7/8/2050, 11:30:00 PM	58f8cb42ee4d4a386a43da8f6a9938a178	Report Library	OWNER	3	✓	✓
Once Managed Reporting Library	BFPS/WFC/Repository/WF_Command_Center	admin	3/11/2024, 7:42:06 PM	5/22/2024, 9:59:12 PM	WARNING	7/9/2050, 12:30:00 AM	5d81e605e077c4dc33e9347ef1caee367a47	Report Library	OWNER	3		
Once Managed Reporting Library	BFPS/WFC/Repository/wfclient_capter/once	admin	3/11/2024, 7:43:39 PM	5/22/2024, 9:59:09 PM	FAILURE	7/8/2050, 11:30:00 PM	59d9909a266a4d0793a2a8339a1723569	Report Library	OWNER	3		
Report1	BFPS/WFC/Repository/ROLES/Report1.sch	-	11/19/2015, 10:00:35 PM	5/9/2024, 10:12:39 AM	SUCCESS	None	51165a45f95f9c4c54a0759a29a4137f6a37	Report Library	OWNER	3	✓	
Report1	BFPS/WFC/Repository/ROLES/Report1.sch	admin	4/16/2015, 9:42:28 PM	5/9/2024, 10:12:39 AM	SUCCESS	None	53af15395e709a4a9f1e5b5e2a4d1656a93	Report Library	OWNER	3		
Retail Quarterly Schedule	BFPS/WFC/Repository/Infographics/Retail_S	-	5/26/2021, 12:54:06 AM	6/12/2024, 10:12:03 AM	FAILURE	None	536d2bc7f0c8ca4b08ba55e56561c23884	Email	/WFC/Repository/Infograp	3	✓	
SCH_SCH	BFPS/WFC/Repository/B_testsch_sch.sch	admin	4/23/2024, 11:39:41 PM	5/22/2024, 9:59:07 PM	FAILURE	None	5f5aef5a0a3635a408a6a3a1e53a3c85796	Repository	/WFC/Repository/B_test	3		
Scenario10	BFPS/WFC/Repository/RC_Upgrade_restorat	-	2/22/2024, 5:56:59 PM	5/29/2024, 9:52:01 PM	FAILURE	8/1/2024, 5:52:00 PM	55aef56a5b5025a40f64a97a6e0a48224	Email	ksanappa@ibco.com	3	✓	
Scenario16	BFPS/WFC/Repository/RC_Upgrade_restorat	-	2/22/2024, 4:18:38 PM	5/28/2024, 5:21:01 PM	FAILURE	8/23/2024, 5:21:00 PM	5a7f65a6a91150a41c9b628a2708b1a4e23	Email		3	✓	
Scenario21	BFPS/WFC/Repository/RC_Upgrade_restorat	-	2/23/2024, 12:53:08 PM	5/9/2024, 10:09:01 PM	FAILURE	8/31/2024, 6:09:00 PM	5a66fa9a7f189a4b4a3f69a910102a4e001	Report Library	PUBLISH	3	✓	
Scenario18	BFPS/WFC/Repository/RC_Upgrade_restorat	-	2/23/2024, 1:05:23 PM	6/21/2024, 12:05:01 AM	FAILURE	7/8/2024, 7:55:00 PM	5a5a6e4a5c039a4a7a2a18a6b45d8c29433	Report Library	/WFC/Repository/Scenario	3	✓	
Scenario6	BFPS/WFC/Repository/RC_Upgrade_restorat	-	2/23/2024, 1:07:17 PM	7/1/2024, 9:51:01 PM	SUCCESS	7/8/2024, 9:51:00 PM	5aef5709a238a4a45a5b0ba6182a4d3a3c	Repository	/WFC/Repository/RC_Upgr	3	✓	
Scenario9	BFPS/WFC/Repository/RC_Upgrade_restorat	-	2/23/2024, 1:14:04 PM	5/28/2024, 7:31:01 PM	SUCCESS	8/18/2024, 9:31:00 PM	587a48607a828baa65b4a3a1680aa1f1a25	Report Library	PUBLISH	3	✓	

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Title	Schedule ID	Path	Owner	Last Time Executed	Last Job Status	Next Run Time	Method	Destination Address	Priority
Top Ten Stores	55b1b32d3e6602a020e9ddesc1e40e0d2842	/Public	admin	8/14/17 3:25 PM	Error	8/14/17 3:25 PM	Print,Email,FTP,Repository,Library	/WFC/Repository/Public,Owner	3

Option	Description
Title.	Displays the descriptive title of the schedule.
Path.	Displays the Repository path where the schedule is stored.
Owner.	Displays the user that owns the schedule.
Last Modified.	Displays the most recent date and time on which the schedule was

	modified.
Last Time Executed.	Displays the most recent date, time, and time zone on which the schedule ran.
Last Job Status.	Displays whether the last scheduled job ran with or without an error.
Next Run Time.	Displays the next date, time, and time zone on which the schedule is set to run.
Schedule ID.	Displays the unique identification code for each schedule.
Distribution Method.	Displays the method the schedule will use to distribute the report output. Up to five distribution methods will display. Each method is separated by a comma. If there are more than five distribution methods, an ellipse displays at the end of the list.
Destination Address.	Displays the email address or location to which the report will be sent. Up to five destination addresses will display. Each destination address is separated by a comma. If there are more than five destination addresses, an ellipse displays at the end of the list.
Priority.	Displays the level of priority the schedule will have when it is processed by the Distribution Server. Priority value 1 is the highest priority and 5 is the lowest priority.
Published	Displays whether the schedule is published or not.
Hidden	Displays whether the schedule is hidden or not.

Explorer Distribution List Column Information

In the asset viewer of the Explorer, users can view the following information about Distribution Lists they are authorized to list, as shown in the following image.

Workspaces >

ReportCaster Explorer

Filters

Type

Distribution List

Owner

Last modified

Select Date & Time

More Filters

Clear

Search files in selected folder

Title	Path	Owner	Last Modified	Distribution Method	Published	Hidden
Burst the Infographic Distribution List	IBFS/WFC/Repository/Infographics/Retail_Sd	-	6/14/2019, 8:25:24 PM	Email	✓	
test	IBFS/WFC/Repository/My_Workspace/-admin	admin	2/23/2024, 5:44:15 PM	Email		
TONY	IBFS/WFC/Repository/TonyDemo/TONY.adr	-	3/10/2023, 12:12:52 PM	Email	✓	
Scenario2a_printer_dlist	IBFS/WFC/Repository/RC_Upgrade_restorati	-	2/22/2024, 4:13:57 PM	Printer	✓	
Scenario2a_printer_dlist	IBFS/WFC/Repository/RC_Upgrade_restorati	-	2/22/2024, 1:57:15 PM	Printer		
Scenario2a_dlist	IBFS/WFC/Repository/RC_Upgrade_restorati	-	2/22/2024, 1:57:15 PM	Email	✓	
REST Distribution List	IBFS/WFC/Repository/Dom/REST_Distribution	admin	10/19/2023, 1:43:12 PM	Email		
Printer_D_List	IBFS/WFC/Repository/RC_TestRC_Val/printe	admin	3/14/2024, 7:00:59 PM	Printer		
printer	IBFS/WFC/Repository/test_rchtl-admin/prn	admin	12/15/2023, 12:29:16 PM	Printer		
print	IBFS/WFC/Repository/My_Workspace/-admin	admin	12/15/2023, 8:50:28 PM	Printer		
multiple_Emails_1	IBFS/WFC/Repository/s_charts/multiple_em	admin	12/16/2023, 12:29:20 PM	Email		
multiple_Emails	IBFS/WFC/Repository/s_charts/multiple_em	admin	12/15/2023, 8:42:56 PM	Email		
GS_DL_Part1	IBFS/WFC/Repository/GlobalSearch_Part1_Na	-	2/1/2023, 4:37:07 PM	Email	✓	
GS_DL_Part2	IBFS/WFC/Repository/GlobalSearch_Part2/G	-	2/1/2023, 4:37:05 PM	Email	✓	
FTPDLIST	IBFS/WFC/Repository/test_pratk/ftp_testing	admin	2/15/2024, 12:19:04 PM	FTP		
FTP_dlist	IBFS/WFC/Repository/RC_Upgrade_restorati	-	2/22/2024, 4:04:40 PM	FTP	✓	
FTP_dlist	IBFS/WFC/Repository/RC_Upgrade_restorati	-	2/23/2024, 12:56:23 PM	FTP	✓	
FTP DList	IBFS/WFC/Repository/ats/FTP_DList.adr	admin	12/15/2023, 8:53:31 PM	FTP		
ftp dl	IBFS/WFC/Repository/Guest/test/ftp_dl.adr	admin	4/29/2024, 1:59:08 PM	FTP		
FTP_D_List	IBFS/WFC/Repository/RC_TestRC_Val/ftp_d	admin	3/14/2024, 4:27:46 PM	FTP		
FTP	IBFS/WFC/Repository/test_rchtl-admin/ftp	admin	12/19/2023, 9:40:12 PM	FTP		
FindEmail_Test	IBFS/WFC/Repository/test_rchtl-admin/fin	admin	12/19/2023, 8:06:06 PM	Email		
fdl	IBFS/WFC/Repository/keest/fdl.adr	admin	4/29/2024, 5:23:58 PM	FTP		
EmailDLIST	IBFS/WFC/Repository/test_pratk/ftp_testing	admin	2/12/2024, 12:03:52 PM	Email		
Email_dli	IBFS/WFC/Repository/P452_593299/email_d	admin	2/9/2024, 10:40:36 AM	Email		

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Option	Description
Title	Displays the descriptive title of the Distribution List.
Path	Displays the Repository path where the Distribution List is stored.
Owner	Displays the user that owns the Distribution List.
Last Modified	Displays the most recent date, and time on which the distribution list was modified.
Distribution Method.	Displays the distribution method (Email, FTP, Print) for which the content within the Distribution List is specified.
Published	Displays whether the schedule is published or not.
Hidden	Displays whether the schedule is hidden or not.

Explorer Access List Column Information

In the Assest viewer of the Explorer, users can view the following information about Access Lists they are authorized to list, as shown in the following image.

Workspaces >

ReportCaster Explorer

Filters

Type: Access List Owner: Select Last modified: Select Date & Time

Search files in selected folder

Title	Path	Owner	Last Modified	Published	Hidden
123456789	BPFS/WFC/Repository/Guest/123456789.acf	-	5/31/2024 2:29:21 PM	✓	✓
ABC - Access List	BPFS/WFC/Repository/P406_516439_043516	-	5/31/2024 2:01:44 PM	✓	
ACC1	BPFS/WFC/Repository/Focus/acc1.acf	admin	12/29/2023, 10:01:30 PM		
ACL-Test-2024	BPFS/WFC/Repository/My_Workspace/admin	admin	2/21/2024, 4:35:36 PM		
AL	BPFS/WFC/Repository/rc_test/AL.acf	admin	12/12/2023, 12:32:37 PM		
AL With Burst	BPFS/WFC/Repository/ROLES/AL_With_Burst	-	11/13/2023, 10:04:11 PM	✓	
AL With Burst	BPFS/WFC/Repository/Roles/AL_With_Burst	-	4/16/2015, 9:42:23 PM	✓	
AL With Burst	BPFS/WFC/Repository/My_Workspace-admin	admin	2/27/2024, 6:17:03 PM		
AL1	BPFS/WFC/Repository/Domain1-admin/AL	admin	10/22/2019, 11:33:16 PM		
AL1	BPFS/WFC/Repository/RC_testing/AL1.acf	admin	10/30/2023, 11:23:05 AM		
AL1	BPFS/WFC/Repository/RC_testing/Log_report	-	12/7/2023, 11:39:40 PM	✓	
AL1	BPFS/WFC/Repository/RC_testing/Report_Lib	admin	12/13/2023, 2:42:12 PM		
AL12	BPFS/WFC/Repository/rc_testing-admin/al	admin	1/4/2024, 2:53:04 PM		
AList	BPFS/WFC/Repository/al/AList.acf	admin	2/21/2023, 12:55:48 PM		
Access List	BPFS/WFC/Repository/P406_516439_043516	-	9/30/2022, 2:18:06 PM	✓	
Access List	BPFS/WFC/Repository/P406_531920/088031	admin	2/7/2023, 11:30:47 AM		
Access List	BPFS/WFC/Repository/NL_123-admin/accse	admin	12/27/2023, 4:56:23 PM		
Access List_1	BPFS/WFC/Repository/P406_531920/088031	admin	2/7/2023, 4:13:09 PM		
Access List	BPFS/WFC/Repository/P406_531920/08783C	-	4/27/2020, 10:09:09 PM	✓	
AccessList1	BPFS/WFC/Repository/ROLES/AccessList1.ai	-	11/12/2015, 10:01:15 PM	✓	
AccessList_Context	BPFS/WFC/Repository/P406_531920/078491	-	9/30/2022, 2:18:10 PM	✓	
Access_List	BPFS/WFC/Repository/P215_531921/08754E	-	1/30/2022, 6:19:59 PM	✓	
Alist	BPFS/WFC/Repository/RC_Upgrade_test/restores	-	2/22/2024, 4:19:08 PM	✓	
Alist	BPFS/WFC/Repository/RC_Upgrade_test/restores	-	2/22/2024, 4:28:48 PM	✓	
OS AL Part2	BPFS/WFC/Repository/GlobalSearch_Part2/G	-	1/17/2023, 12:48:07 PM	✓	

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Title	Path	Owner
 Access List	/Public	admin

Option	Description
Title	Displays the descriptive title of the Access List.
Path	Displays the Repository path where the Access List is located.
Owner	Displays the user that owns the Access List.
Last Modified	Displays the most recent date, and time on which the Access List was modified.
Published	Displays whether the schedule is published or not.
Hidden	Displays whether the schedule is hidden or not.

Explorer Report Library and Watch List Report Column Information

In the Explorer, users can view information about Report Library that they are authorized to list. These may or may not include Watch List reports.



Note: The information that displays for the Watch List report is identical to that of the underlying Library report. As the Watch List report is a Report Library to which the user has subscribed, the information that displays in the columns is the same. When a new version of a Report Library is available, subscribed users are notified by email.

The column headings that display for Report Library and Watch List are shown in the following image.

Title	Path	Owner	Last Modified	Last Execution	Last Version	Burst Value	Category	Output Format	Published	Hidden
ABC - Schedule1	BPFS/WFC/Repository/P400_910439_G45716	admin	6/14/2024 2:47:46 PM	2/1/2024 2:16:27 PM	2	-		HTML		
ALFA ROMEO	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:15 PM	11/10/2023 3:53:15 PM	2	ALFA ROMEO		HTML		
AUDI	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:15 PM	11/10/2023 3:53:15 PM	2	AUDI		HTML		
BMW	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:15 PM	11/10/2023 3:53:15 PM	2	BMW		HTML		
DATSON	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:15 PM	11/10/2023 3:53:15 PM	2	DATSON		HTML		
ENGLAND	BPFS/WFC/Repository/RC_testing/Dealer_Col	admin	12/4/2023 10:56:44 PM	12/4/2023 10:56:44 PM	3	ENGLAND		HTML		
FRANCE	BPFS/WFC/Repository/RC_testing/Dealer_Col	admin	12/4/2023 10:56:44 PM	12/4/2023 10:56:44 PM	3	FRANCE		HTML		
GenericAmp	BPFS/WFC/Repository/RC_testing/Dealer_Col	admin	5/22/2024 3:59:23 PM	5/22/2024 3:59:23 PM	3	-	Library_Cat	HTML		
ITALY	BPFS/WFC/Repository/RC_testing/Dealer_Col	admin	6/12/2024 6:55:29 PM	12/4/2023 10:56:44 PM	3	ITALY		HTML	✓	✓
JAGUAR	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:16 PM	11/10/2023 3:53:16 PM	2	JAGUAR		HTML		
JAPAN	BPFS/WFC/Repository/RC_testing/Dealer_Col	admin	12/4/2023 10:56:44 PM	12/4/2023 10:56:44 PM	3	JAPAN		HTML		
JAPAN	BPFS/WFC/Repository/RC_testing/Dealer_Col	admin	12/13/2023 2:47:01 PM	12/13/2023 2:47:01 PM	4	JAPAN		HTML		
JENSEN	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:16 PM	11/10/2023 3:53:16 PM	2	JENSEN		HTML		
LIB	BPFS/WFC/Repository/B_test/176454cm02	admin	5/22/2024 3:59:20 PM	5/22/2024 3:59:20 PM	5	-		HTMLS		
MASERATI	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:16 PM	11/10/2023 3:53:16 PM	2	MASERATI		HTML		
OnceManaged Reporting Library	BPFS/WFC/Repository/wfclient_adapter/L1	admin	5/22/2024 3:59:09 PM	5/22/2024 3:59:09 PM	1	-	Car Reports	HTML		
OnceManaged Reporting Library	BPFS/WFC/Repository/WF_Command_Center	admin	5/22/2024 3:59:13 PM	5/22/2024 3:59:13 PM	1	-	Car Reports	HTML		
OnceManaged Reporting Library	BPFS/WFC/Repository/wfclient_adapter/L1	admin	5/22/2024 3:59:16 PM	5/22/2024 3:59:16 PM	1	-	Car Reports	HTML		
PEUGEOT	BPFS/WFC/Repository/J4/L1/gpacm4d95g.1b	admin	11/10/2023 3:53:16 PM	11/10/2023 3:53:16 PM	2	PEUGEOT		HTML		
Report1	BPFS/WFC/Repository/ROLES/L1/wf5m01	admin	5/31/2024 10:12:45 AM	5/31/2024 10:12:45 AM	1	-		HTML		
Report1	BPFS/WFC/Repository/Roles/L1/wf5m02	admin	5/31/2024 10:12:45 AM	5/31/2024 10:12:45 AM	1	-		HTML		
Scenario3_priority3	BPFS/WFC/Repository/RC_Upgrade_restorest	admin	2/22/2024 5:52:02 PM	2/22/2024 10:52:02 PM	9			HTML		
Scenario4_priority4	BPFS/WFC/Repository/RC_Upgrade_restorest	admin	2/22/2024 5:52:02 PM	2/22/2024 10:52:02 PM	8			HTML		
Scenario6	BPFS/WFC/Repository/RC_Upgrade_restorest	admin	5/28/2024 8:06:01 PM	5/28/2024 8:06:01 PM	13			HTML	✓	
Sch	BPFS/WFC/Repository/RC_testing/Printer/L1	admin	12/8/2023 2:44:01 AM	12/8/2023 2:44:01 AM	2	-		HTML		

Title	Path	Burst Value	Last Version	Last Execution	Category	Owner
ENGLAND	/Public	ENGLAND	1	8/4/17 8:37 PM		admin
FRANCE	/Public	FRANCE	1	8/4/17 8:37 PM		admin
ITALY	/Public	ITALY	1	8/4/17 8:37 PM		admin
JAPAN	/Public	JAPAN	1	8/4/17 8:37 PM		admin
W GERMANY	/Public	W GERMANY	1	8/4/17 8:37 PM		admin

Option	Description
Title	Displays the descriptive title of the Report Library
Path	Displays the Repository path where the Report Library is located.
Owner	Displays the user that owns the Report Library.
Last Modified	Displays the most recent date and time on which the Report Library was modified.
Last Execution	Displays when the Report Library was created.
Last Version	Displays the most recent version of the Report Library. Selecting the report displays all the versions for the report in a panel below the Library report list.
Burst Value	Displays the burst value of the Report Library.
Category	Displays the category where the owner has assigned the Report Library. You can select the Category column title to sort the Library reports by the category value. The Category value is specified in the schedule information.
Output Format	Displays the output format of the Report Library.
Published	Displays whether the schedule is published or not.
Hidden	Displays whether the schedule is hidden or not.

Explorer Item Options

The options available from the context menu for ReportCaster items (Schedule, Distribution List, Access List, Library Report, and Watch List) allow authorized users to select the following functions.

For the filter type Schedule, the following table displays all the functions available.

Option	Functionality
Edit	Allows the user to edit the schedule.
Run	Allows the user to run the schedule.
View log	Allows the user to view the log of the schedule.
Disable or Enable	Allows the user to enable or disable the schedule.
Duplicate	Allows the user to duplicate the schedule.
Cut CTRL+X	Allows the user to cut the schedule.
Copy CTRL+C	Allows the user to copy the schedule.
Delete	Allows the user to delete the schedule.
Add to Favorites or Remove from Favorites	Allows the user to add the schedule to favorites or remove from favorites.
Share	Allows the user to share the schedule.
Share with	Allows the user to share the schedule with others.
Publish or Unpublish	Allows the user to publish or unpublish the schedule.
Hide or Show	Allows the user to hide or show the schedule from others.
Security	Allows the user to dictate rules and policies on the schedule. This option is only available to admin and authorized user.
Locate Item	Allows the user to locate the schedule in the repositories.
Properties	Allows the user to set the properties of the schedule.

For the filter type Distribution List, the following table displays all the functions available.

Option	Functionality
Edit	Allows the user to edit the distribution list.
View	Allows the user to view the distribution list.
Duplicate	Allows the user to duplicate the distribution list.
Cut CTRL+X	Allows the user to cut the distribution list.
Copy CTRL+C	Allows the user to copy the distribution list.
Delete	Allows the user to delete the distribution list.
Add to Favorites or Remove from Favorites	Allows the user to add the distribution list to favorites or remove from favorites.
Publish or Unpublish	Allows the user to publish or unpublish the distribution list.
Hide or Show	Allows the user to hide or show the distribution list from others.
Security	Allows the user to dictate rules and policies on the distribution list. This option is only available to admin and authorized users.
Locate Item	Allows the user to locate the distribution list in the repositories.
Properties	Allows the user to set the properties of the distribution list.

For the filter type Access List, the following table displays all the functions available.

Option	Functionality
Edit	Allows the user to edit the access list.
View	Allows the user to view the access list.
Duplicate	Allows the user to duplicate the access list.

Cut CTRL+X	Allows the user to cut the access list.
Copy CTRL+C	Allows the user to copy the access list.
Delete	Allows the user to delete the access list.
Add to Favorites or Remove from Favorites	Allows the user to add the access list to favorites or remove from favorites.
Publish or Unpublish	Allows the user to publish or unpublish the access list.
Hide or Show	Allows the user to hide or show the access list from others.
Security	Allows the user to dictate rules and policies on the access list. This option is only available to admin and authorized user.
Locate Item	Allows the user to locate the access list in the repositories.
Properties	Allows the user to set the properties of the access list.

For the filter type Report Library, the following table displays all the functions available.

Option	Functionality
View Versions	Allows the user to view the versions of the report library.
Download	Allows the user to download the report library.
Subscribe or Unsubscribe	Allows the user to subscribe the report library to watch list or unsubscribe the report library from watch list.
Delete	Allows the user to delete the report library.
Add to Favorites or Remove from Favorites	Allows the user to add the schedule to favorites or remove from favorites.

Hide	Allows the user to hide the report library.
Security	Allows the user to dictate rules and policies on the report library. This option is only available to admin and authorized user.
Locate Item	Allows the user to locate the report library in the repositories.
Properties	Allows the user to set the properties of the report library.

The following table describes the options available for the **Security**.

Option	Description
Rules	- Allows the user to set Access rights to Groups or Users. - Users can set the Access rights to be Not Set, Permitted, Denied, Over Permitted, and Clear Inheritance.
Rules on these resource	Allows the user to view rules on the selected resource and create a report of it.
Effective policy	Allows the user to view privileges and their effective policy for different users.
Owner	Allows the user to view the owner and the group to which the selected resource belongs to.

The **View Versions** option for the **Report Library** type opens up a pop-up window displaying all the versions of the selected report library. The latest version is displayed by default. The user can view any particular versions from the list. Additionally, the user can download, open in a new window, or delete a version using the **Download**, **Open in new window**, and **Delete** buttons. The same options are also available when you right click a version from the list. The following image displays the **View Versions** window.

Report to SFTP - Version 5

PAGE 1

COUNTRY	CAR
ENGLAND	JAGUAR
	JENSEN
	TRIUMPH
FRANCE	PEUGEOT
ITALY	ALFA ROMEO
	MASERATI
JAPAN	DATSUN
	TOYOTA
W GERMANY	AUDI
	DAEWU

Version List

Version	Description	Execution Time	Parameters	Expiration	Size	Output Format	Compressed Size
Version 5		2/14/2024 11:36 AM		Never	1263	HTML	0
Version 4		2/14/2024 11:35 AM		Never	1263	HTML	0
Version 3		2/14/2024 11:35 AM		Never	1263	HTML	0
Version 2		2/14/2024 11:11 AM		Never	1263	HTML	0
Version 1		2/14/2024 11:10 AM		Never	1263	HTML	0

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Close

The following table displays the details of the columns in the view versions window.

Columns	Description
Version	Displays the list of versions.
Description	Displays the description of the versions.
Execution Time	Displays the execution time of the version.
Parameters	Displays the associated parameters of the versions.
Expiration	Displays the expiration of the versions.

Size	Displays the size of the versions.
Output Format	Displays the output format of the versions.
Compressed Size	Displays the compressed size of the versions.



Using Traces

Tracing enables authorized users of WebFOCUS ReportCaster to obtain information about the internal operations of WebFOCUS ReportCaster components. Tracing a WebFOCUS ReportCaster request produces a detailed sequence of statements (stored in trace files) that describe the events as they are executed.

Enabling Tracing

You can enable and disable the Distribution Server Schedule trace by using the WebFOCUS ReportCaster Servlet Trace using the Administration Console.

Servlet Tracing

Servlet tracing enables tracing for all WebFOCUS ReportCaster servlets deployed in the web application, including the WebFOCUS ReportCaster API. Servlet tracing provides information about queries to, and maintenance of, the Repository. This includes events that occur when a schedule is created.

Access Servlet Tracing

Procedure

1. Navigate to the Administration Console.
2. Click the **Diagnostics** tab.
3. On the Diagnostics tab, under the Diagnostics folder, click **Log Files**.
4. Click the log file for which you would like to view traces.

Distribution Server Startup Trace Files

When you enable schedule tracing, the following core Distribution Server trace files are created in the directory. When a new instance of the Distribution Server starts, these trace files replace the previous trace files:

- **main.trc.** Traces the commands processed by the main Distribution Server thread. These commands include initialization, shutdown, and running a job immediately.
- **reader.trc.** Traces when the Distribution Server checks for schedules. The default polling interval is 1 minute.
- **disp.trc.** Traces the thread between the Distribution Server and the WebFOCUS Reporting Server. The number of threads is defined by the Maximum Thread setting in the . The default number of threads is 3.
- **console.trc.** Traces all communications between the WebFOCUS ReportCaster API and the WebFOCUS ReportCaster servlets to the Distribution Server.

Schedule and Report Tracing

The Distribution Server schedule tracing is enabled by setting Schedule Trace to SCHEDULE (or to SCHEDULE & REPORT if you also want to enable report tracing) in the General tab of the Console Configuration tab.

WebFOCUS ReportCaster also provides the ability to enable SCHEDULE or SCHEDULE & REPORT tracing on a per schedule basis when dynamically running the schedule on demand. When you run a schedule, the Schedule Trace setting specified in the WebFOCUS ReportCaster Configuration tool appears along with options that enable you to change the setting for this particular schedule.

Trace Files Related to Specific Jobs

When the Schedule Trace parameter is set to SCHEDULE, WebFOCUS ReportCaster produces trace files containing WebFOCUS ReportCaster Distribution Server information related to the specific job or jobs being run. Each job creates the following trace files in the directory, each with a unique Job Process ID (*Jobid*):

- **Jobid.trc** (for example, J0ud2a6kqk01.trc). Contains all information related to the execution of a job. This includes information about the scheduled procedure, distribution information, and the log creation and its contents. When SCHEDULE & REPORT traces is selected, this file also contains the report sent back from the WebFOCUS Reporting Server.
- **procedure.log** Contains distribution information, report parameters (if any), procedure code (if), or an -INCLUDE FOCEXEC (if Server Procedure).
- **Jobid.err**. If there is a processing error, WebFOCUS ReportCaster generates a *jobid.err* file containing information about why the report was not distributed successfully.
- **DistRun.trace** Contains IBFS trace information.
- **DistRun.html** Contains an .html version of the report.
- **session.log** Contains information about the IBFS session.

i Note: You can identify the Job Process ID of the target job by running a log report. For more information about log reports, see [Tracking Schedules](#) or [Job Log](#). A Job Process ID begins with a J and is followed by a series of random digits and lowercase letters.

Procedure Log File

The following Schedule trace file shows the procedure associated with the procedure log file:

```

procedure - Notepad
File Edit Format View Help
---Focexec-Start--- RequestID=DistRunReq1 URLID=DistRun ReqInfo="Run:Domain=IATest/:Fex=Report1" Lines=255
ServerNode=EDASERVE ServerUser=bigscm MonitorID=7279f4267c73f7b ClientUser=admin CurrentTime=2015-01-
13_14.06.41.695 ---
SET PCHOLD-FMT=XML

EX -LINES 23 EDAPUT FOCEXEC,Report1,C,MEM,ENGINE INT CACHE SET ON

-DEFAULTH &WF_SUMMARY='summary';
-DEFAULTH &WF_TITLE='webFOCUS Report';
TABLE FILE ibisamp/car
BY CAR.ORIGIN,COUNTRY
BY CAR.COMP,CAR
ON TABLE PCHOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE ON
ON TABLE SET CACHELINES 100
ON TABLE SET STYLE *
-INCLUDE ENIADefault_combine
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING, SUMMARY=&WF_SUMMARY.QUOTEDSTRING, $
ENDSTYLE
END

-RUN

EX -LINES 165 EDAPUT FOCEXEC,ENIADefault_combine,C,MEM,$ Copyright 1996-2011 Information Builders, Inc. All
rights reserved.
type=report,color=rgb(66 70 73),font='Trebuchet MS',size=9,grid=off,$
type=pagenum,style=italic,size=6,justify=right,$
type=tabheading,style=bold+italic,size=14,justify=center,$
type=tabfooting,style=bold+italic,size=12,justify=center,border-top=heavy,border-top-color=rgb(52 55 58),$
type=heading,style=bold,size=12,justify=center,$
type=footing,style=bold,size=10,justify=center,$
type=title,backcolor=rgb(102 102 102),color=rgb(255 255 255),style=underline+bold,$
type=data,backcolor=(rgb(255 255 255) rgb(235 235 240)),$
type=acrosstitle,border-top=light,border-bottom=heavy,border-top-color=rgb(52 55 58),border-bottom-color=rgb
(52 55 58),size=9,style=underline+bold,$
type=acrossvalue,backcolor=rgb(218 225 232),style=bold,$
type=subhead,size=10,style=bold,border-top=heavy,border-bottom=light,border-top-color=rgb(52 55 58),border-
bottom-color=rgb(52 55 58),$
type=subfoot,size=10,style=bold,border-top=light,border-bottom=medium,border-top-color=rgb(52 55 58),border-
bottom-color=rgb(52 55 58),$
type=subtotal,backcolor=rgb(200 200 200),style=bold,border-top=light,border-top-color=rgb(66 70 73),$
type=grandtotal,backcolor=rgb(66 70 73),color=rgb(255 255 255),style=bold,border-top=light,border-
bottom=heavy,border-top-color=rgb(66 70 73),
border-top-style=solid,border-bottom-style=double,$
TYPE=REPORT, OBJECT=STATUS-AREA,COLOR=white,BACKCOLOR=rgb(102 102 102),$
TYPE=REPORT, OBJECT=CURRENT-ROW,BACKCOLOR=rgb(200 200 200),HOVER-BACKCOLOR=rgb(218 225 232),$
TYPE=REPORT, GRAPHCOLOR=green,GRAPHCOLORNEG=red,$

```

Trace Error Files

When WebFOCUS ReportCaster encounters an unexpected error or abend, the following trace error files are created:

- **console.err** when the console terminates.
- **disp.err** when the dispatcher terminates.
- **main.err** when the main thread terminates.
- **reader.err** when the reader terminates.
- **Jobid.err** when there is a job processing error.

Schedule Trace File Clean Up

When the Schedule Trace setting is turned OFF, the files and folders in the Distribution Server /temp directory, and the schedule trace files J*.* in the /trc directory, are deleted when you start the Distribution Server. Therefore, if you want to keep any of these files,

you must either back them up or make sure that schedule tracing is enabled (meaning that Schedule Trace is set to either SCHEDULE or SCHEDULE & REPORT in the).

Resource Analyzer Support

ReportCaster supports Resource Analyzer. When ReportCaster runs Server Procedures or a WebFOCUS Report (Managed Reporting), it sends commands to the WebFOCUS Reporting Server. Resource Analyzer then retrieves these commands for the purpose of monitoring the resources used to create the output to be distributed by ReportCaster. If you are not using Resource Analyzer, the commands are ignored by the Reporting Server.

You can view these commands in the schedule trace file for the specific job (provided that schedule tracing is enabled in ReportCaster).

Downloading WebFOCUS® ReportCaster Job Trace Files

After you run a schedule, or use the Purge Job Logs utility, you can select the corresponding job log stored in the WebFOCUS ReportCaster Console to download the trace files that were created by the job.

Download WebFOCUS® ReportCaster Job Trace Files

Procedure

1. Run a schedule, or use the Purge Job Logs utility.



Note: To receive trace files for a WebFOCUS ReportCaster job, traces must be enabled for the job.

2. Navigate to the WebFOCUS ReportCaster Console. On the ribbon, in the Show group,

click the **Job Log** button.

3. In the Job Logs panel, choose the folder that contains the job log you wish to select.
The job logs appear in the right panel.

4. Click a job log.

5. On the ribbon, in the Manage Job Logs group, click the down arrow on the **View Trace** button.

The Download Trace Files menu option appears.

6. Click the **Download Trace Files** option.

The Windows Save dialog box displays, from which you can save the trace files to your machine. The Job Id of the log becomes the name of the zip file to be opened or saved.

Distribution Server Initialization Tracing

The scheduler.log trace file is always created in the directory. This file traces Distribution Server initialization and indicates the options enabled in the . It also shows information that is written to the log file.

The following files are generated when the Distribution Server is installed and started as a Windows service:

- **service.log.** Created at service installation time.
- **commons-daemon.log.** Tracks the starting and stopping of the service.
- **wf80-stdout.log.** Indicates that the various Distribution Server services have started.
- **wf80-stderr.log.** Contains information about potential problems with the service.



Note: When multiple scheduler.log files are created on the same day, WebFOCUS ReportCaster creates a unique file for each instance, using a date and time stamp. The following format is used: scheduler_DD-MM-YY_HH-MM-SS.

Scheduler.log

The following is an excerpt from the Scheduler.log trace file.

```

scheduler.log - Notepad
File Edit Format View Help
[2012-07-31 16:11:59,730] main INFO - Starting Distribution Server with parameter(s): 'C:\install\8001\ibi\webrocus8001\reportcaster', 'GSOPLAP:8201', 'C:\install\8001\ibi\webrocus8001\client\wfc'
[2012-07-31 16:11:59,849] main INFO - gen info - [sequence]: gen=133
[2012-07-31 16:11:59,849] main INFO - gen info - [label]: label=branch8001
[2012-07-31 16:11:59,865] main INFO - gen info - [datetime]: date=sun Jul 29 19:04:21 EDT 2012
[2012-07-31 16:12:06,537] main INFO - start to read the config from the repository
[2012-07-31 16:12:06,107] main INFO - start to read the sendmode from the repository
[2012-07-31 16:12:06,154] main INFO - <repository>
<dbname>=<unittype>NO/<unittype>-targetdb/<data_server>
<server_name>=repository/<server_name>
<res_auth_type>=STATIC/<res_auth_type>
<user_id>=webfocus/<user_id>
<password>=[a]NCC1701a962845769227858287b636</password>
<jdbc_properties>
<url>=jdbc:derby://127.0.0.1:1527/webocus8001;create=true/<url>
<jdbc_driver>=org.apache.derby.jdbc.ClientDriver/<jdbc_driver>
<jdbc_locator_exit>
<jdbc_properties>
<data_source_properties>
<full_name>
<context_factory>
</data_source_properties>
</data_server>
</repository>
[2012-07-31 16:12:06,354] main INFO - <reportcaster operational_mode="STANDALONE" type="MASTER" failover="YES" multiple="no">
<console>
<console type="MASTER">
<host_name>=GSOPLAP/<host_name>
<port>=8201/<port>
<caster_name>
</console>
<console type="FAILOVER">
<host_name>=GSOPLAP/<host_name>
<port>=8202/<port>
<caster_name>
</console>
</console>
<max_thread>=3/<max_thread>
<max_message>=1000/<max_message>
<zip_method>=ZIP_METHOD_ZIP/<zip_method>
<excelserverurl>=http://GSOPLAP:8080/ibi_apps_8001/<excelserverurl>
<reader_interval>=1/<reader_interval>
<console_reader_interval>=1/<console_reader_interval>
<add_zip_file_extension>=YES/<add_zip_file_extension>
<default_zip_file_name>=NO/<default_zip_file_name>
<print_pdf>=YES/<print_pdf>
<recovery>=OFF/<recovery>
<log_purge_period>=100/<log_purge_period>
<log_purge_time>=0100/<log_purge_time>
<scan_back_type>=NO/<scan_back_type>
<scan_back>=15/<scan_back>
<mail_host>=ibmail/<mail_host>
<notify_mail_host>
<should_repository_connection>=YES/<hold_repository_connection>
<code_page>
<zip_encoding>=CP858/<zip_encoding>
<packet_mail>=YES/<packet_mail>
<packet_mail_byburst>=NO/<packet_mail_byburst>
<trace>=YES/<trace>
<report_trace>=NO/<report_trace>
<overflow_timeout_exit>
<email_domain>
<restrict_domain>=NO/<restrict_domain>
<email_retry>=3/<email_retry>
<email_retry_interval>=60/<email_retry_interval>
<process_report>=E8006/<process_report>
<foc_warning_codes>=99,90,201,737,837,36359/<foc_warning_codes>
<zip_condition_size>=K/<zip_condition_size>
<zip_condition_size_type>=K/<zip_condition_size_type>
<ftp_directory>
<ftp_index>=YES/<ftp_index>
<log_purge_start>=NO/<log_purge_start>
<zip_password_plugin_status>=0/<zip_password_plugin_status>
<zip_password_plugin>=ibi.broker.scheduler.plugin.scdonoreleased/<zip_password_plugin>
<job_listeners>
<save_on_demand_schedule>=NO/<save_on_demand_schedule>
<synchronize_server_status_with_db>=YES/<synchronize_server_status_with_db>
</reportcaster>
[2012-07-31 16:12:06,479] main INFO - Reportcaster repository release validation:Reportcaster Repository tables confirmed to be at the 8.0.0.1 release level.
[2012-07-31 16:12:06,479] main INFO - Distribution Server Initialization completed.
[2012-07-31 16:12:06,557] main INFO - Starting thread
[2012-07-31 16:12:06,557] main INFO - Console ready
[2012-07-31 16:12:06,557] main INFO - Reportcaster repositorymonitor INFO - Starting synchronizer thread
[2012-07-31 16:12:06,573] main INFO - Reportcaster server startup complete. (MODE: STANDALONE, TYPE: MASTER)
[2012-07-31 16:12:06,573] main INFO - Add shutdownhook to JVM Runtime
[2012-07-31 16:14:01,068] reportcaster.dstatusreader INFO - Synchronizer ready
[2012-07-31 16:14:01,068] reportcaster.dstatusreader INFO - Stop all the running processes
[2012-07-31 16:14:01,255] reportcaster.dstatusreader INFO - Stop the running processes on EDSERVE
[2012-07-31 16:14:01,255] reportcaster.dstatusreader INFO - Begin to stop Outserver EDSERVE
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - DISC code 32033
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - Starting reader thread
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - Reader ready
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - Starting dispatcher thread
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - Dispatcher ready
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - Switched to Full function mode from failover by the server status synchronization
[2012-07-31 16:14:01,271] reportcaster.dstatusreader INFO - The Server Status: 3646

```

ibi WebFOCUS Reporting Server Tracing

WebFOCUS Reporting Server tracing provides information about job execution and distribution. To enable server tracing, perform the following steps:

1. Access the WebFOCUS Reporting Server Console.
2. Select **Workspace** from the menu bar, then select **Diagnostics, Traces**.
3. Click **Enable Traces**.

Tips and Techniques for Coding a ReportCaster Report

This chapter provides tips and techniques that 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 graph output, and examples for using WebFOCUS commands, such as -HTMLFORM and GRAPH FILE.

Editing ibi WebFOCUS Procedures

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

Using an Ampersand or a Single Quotation Mark

In ReportCaster, you can use an ampersand (&) and single quotation mark (') in the following fields:

- Title
- Email Subject and From values
- FTP (scheduled from Managed Reporting) report name
- Managed Reporting folder name
- Notify subject

The technique for using an Ampersand (&) within an Amper Variable value. Place a concatenation sign after the ampersand (&) and before the next character in the string. For example:

```
-SET &COMPANY='AT&|T';  
-TYPE &COMPANY
```

The technique for using a Single quotation mark (') within an Amper Variable value. When a value contains a single quotation mark ('), use two single quotation marks (for example, O'Brien). Within a quoted string, two single quotation marks (") are interpreted as one single quotation mark.

i Note: Although we recommend using this technique, you can also use the CTRAN subroutine to change one character to another.

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 must 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.

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 that contains reference to content located on a web or application server, you must use the FOHTMLURL (this must be used for Managed Reporting procedures) or BASEURL command in the scheduled procedure to fully qualify the URL value. A fully qualified URL is needed so that the user viewing the report has access to the content on the web or application server where the WebFOCUS Client is installed or the referenced content is located. This enables the user to run the HTML or drill-down report, view images, resolve hyperlinks, and apply external cascading style sheets (CSS).

i 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 have access to 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 is displayed.

Do not use localhost as the host name when coding drill downs. When the report gets sent to the user 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 application server where the WebFOCUS Client is installed.

Coding Requirements for Pop-up Field Descriptions

Distributing an HTML report containing pop-up field descriptions with ReportCaster requires the use of JavaScript components located on the WebFOCUS Client. To access these components from a report distributed by ReportCaster, the scheduled procedure must contain the SET FOCHTMLURL command, which must be set to an absolute URL instead of the default value of /ibi_apps/ibi_html.

For example,

```
SET FOCHTMLURL = http://hostname[:port]/ibi_apps/ibi_html
```

where:

hostname[:port]

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

ibi_apps/ibi_html

Is the site-customized server alias pointing to the WebFOCUS82/ibi_html directory. ibi_apps/ibi_html is the default value.

Using -HTMLFORM

In the deployment environment, the -HTMLFORM command enhances the functionality of your webpage by enabling you to include HTML commands in your procedures. You can use all standard HTML elements in your webpage, including character styling, hyperlinks,

graph images, tables, forms, and frames. The content must be self-contained in a single answer set.

Using -HTMLFORM to Display Two Tabular Reports in an HTML Page

```
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 -HTMLFORM command runs the specified .HTM file located on the WebFOCUS Reporting Server path. The following example displays the two tabular reports in an HTML page. The HTML page that will be distributed is shown in the following image.

<i>Century Corp Sales Analysis</i>				
Sales by Category		Sales By Category For Select Stores		
<u>Product Category</u>	<u>Line Total</u>	<u>Store</u>	<u>Category</u>	<u>Sales</u>
CD Players	\$85,034,454.74	1003CA	CD Players	\$555,790.98
Camcorders	\$739,819,546.58		Camcorders	\$8,755,177.98
Cameras	\$24,856,684.65		Cameras	\$361,298.05
DVD	\$112,057,864.09		DVD	\$2,821,530.46
Digital Tape Recorders	\$81,204,933.20		Digital Tape Recorders	\$1,854,704.60
PDA Devices	\$490,694,824.12		PDA Devices	\$11,502,951.64
VCRs	\$59,954,512.81		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 Table of Contents 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 order in which the sort fields are specified in the request determines the hierarchy. 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 TOC option is specified for. 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.
- The controlling multiple reports feature, documented in *Controlling Multiple Reports* in the *Creating Reporting Applications* manual, is not supported by ReportCaster.
- The size of a TOC-enabled report is limited to the memory available on the WebFOCUS Client.

Distribute a TOC Report Using ReportCaster

To distribute a TOC report using ReportCaster, add the following code in the procedure:

```
SET BASEURL=http://hostname[:port]
```

where:

hostname[:port]

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

ibi_apps/ibi_html

Is the site-customized web server alias pointing to the WebFOCUS82/*ibi_apps/ibi_html* directory (where *ibi_apps/ibi_html* is the default value).

For example:

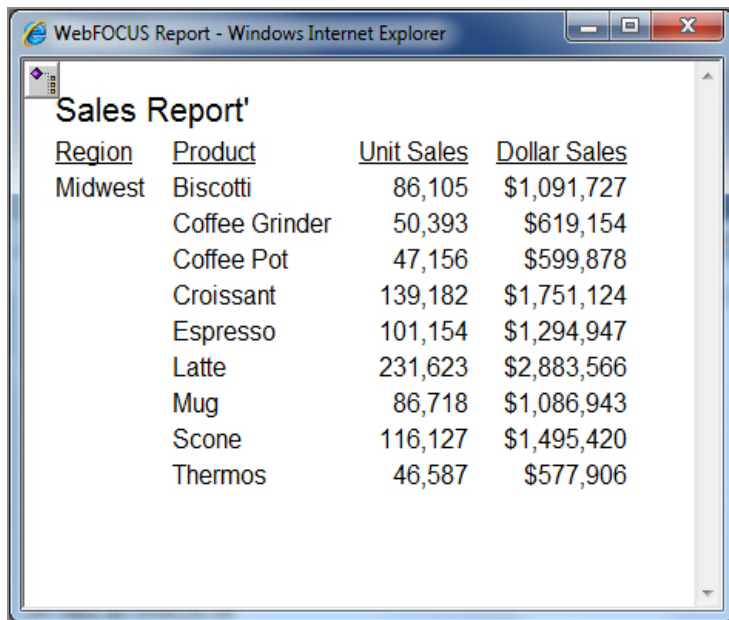
```
SET BASEURL=http://server1:8080/
TABLE FILE GGSales
HEADING
"Sales Report"
SUM GGSales.SALES01.UNITS/I08C
GGSales.SALES01.DOLLARS/I08M
BY GGSales.SALES01.REGION
BY GGSales.SALES01.PRODUCT
```

```

ON TABLE PCHOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE 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 image shows an HTML report containing a dynamic HTML-based TOC in the upper-left corner. After it is created, ReportCaster can distribute this report.



The screenshot shows a web browser window titled 'WebFOCUS Report - Windows Internet Explorer'. The report content is titled 'Sales Report' and includes a table with the following data:

Region	Product	Unit Sales	Dollar Sales
Midwest	Biscotti	86,105	\$1,091,727
	Coffee Grinder	50,393	\$619,154
	Coffee Pot	47,156	\$599,878
	Croissant	139,182	\$1,751,124
	Espresso	101,154	\$1,294,947
	Latte	231,623	\$2,883,566
	Mug	86,718	\$1,086,943
	Scone	116,127	\$1,495,420
	Thermos	46,587	\$577,906

Distributing an EXL2K Table of Contents Report

A report that generates an EXL2K TOC in Managed Reporting only generates the first sheet when distributed by ReportCaster. This is because ReportCaster is not processing the BYTOC request properly. As a workaround, add SET ONLINE-FMT=EXL2K to ensure that the BYTOC request is processed. For example:


```

SET BASEURL=http://server1:8080/
SET COMPOUND=BYTOC
SET ONLINE-FMT=EXL2K
TABLE FILE GGSales
SUM GGSales.SALES01.UNITS/I08C
GGSales.SALES01.DOLLARS/I08M
BY GGSales.SALES01.REGION
BY GGSales.SALES01.PRODUCT
ON TABLE SET PAGE-NUM OFF
ON TABLE SET BYDISPLAY ON
ON TABLE NOTOTAL
END

```

The following image shows an EXL2K report containing different tabs for different regions as a result of the SET ONLINE-FMT=EXL2K designation.

	A	B	C	D
1	Region	Product	Unit Sales	Dollar Sales
2	Midwest	Biscotti	86,105	\$1,091,727
3	Midwest	Coffee Grinder	50,393	\$619,154
4	Midwest	Coffee Pot	47,156	\$599,878
5	Midwest	Croissant	139,182	\$1,751,124
6	Midwest	Espresso	101,154	\$1,294,947
7	Midwest	Latte	231,623	\$2,883,566
8	Midwest	Mug	86,718	\$1,086,943
9	Midwest	Scone	116,127	\$1,495,420
10	Midwest	Thermos	46,587	\$577,906
11				
12				

Navigation: Midwest Northeast Southeast West

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 WebFOCUS Managed Reporting report or 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
```

where:

hostname[:port]

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

ibi_apps/ibi_html

Is the site-customized web server alias pointing to the WebFOCUS82/*ibi_apps/ibi_html* directory (where *ibi_apps/ibi_html* is the default value).

The resulting output, which can be distributed by ReportCaster, appears in graph format, as shown in the following image.

PAGE 1		
Plant Location	Employed Count	
BOS	18	
DAL	25	
LA	58	
ORL	30	
SEA	14	
STL	6	

Use Data Visualization on a Web Server Without ibi WebFOCUS

To use data visualization files on a web server without WebFOCUS installed on it, you must:

Procedure

1. Create a web server alias for `/ibi_html` or `ibi_apps/ibi_html`, based on your ReportCaster configuration, on the web server.
For more information about creating the WebFOCUS `/ibi_html` alias, see the ibi™ WebFOCUS® *Installation and Configuration* manual for your platform.
2. Create the `vis` subdirectory under the `/ibi_html` directory.
3. Copy the GIF files from the application server on which the WebFOCUS Client is installed onto `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.

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 graph 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 ReportCaster Distribution Server. This means that when the data for the GRAPH FILE request is sent back to the ReportCaster Distribution Server, it creates and distributes 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. When creating the ReportCaster schedule, you must specify one of the graph image formats (GIF, PNG, or SVG).

i Note: If the chart contains a header or footer and you want to distribute an image format (GIF, JPEG, PNG, or SVG), then you must select the WebFOCUS InfoAssist option to embed the header and footer in the image. If the embed option is not selected, then the header and footer are not included in the distributed image file. In this case, you must use HTML, HTML5, or PDF to distribute a chart that contains a header or footer.

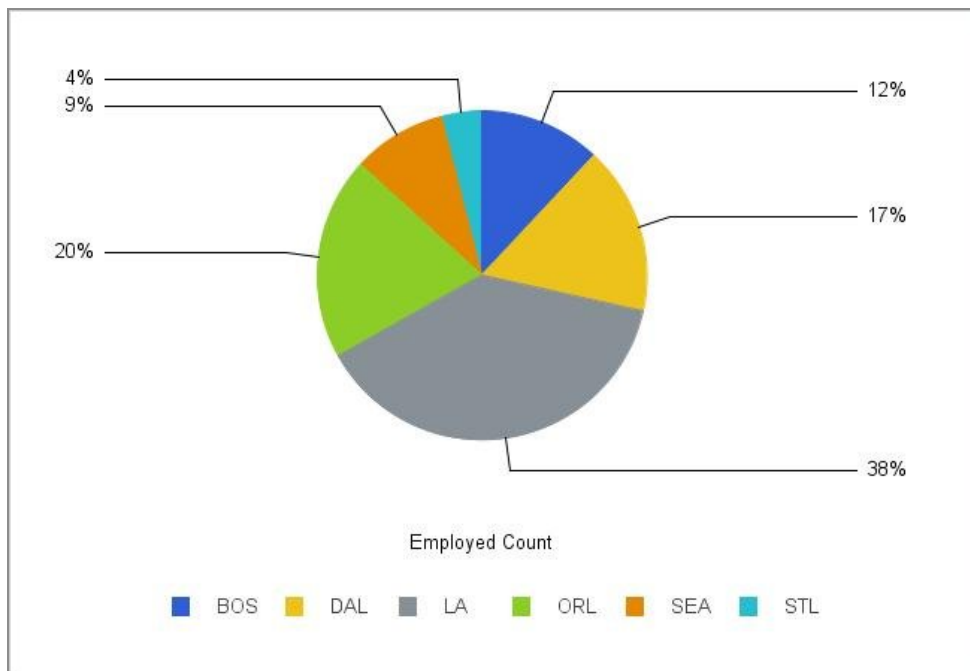
Creating a Report That Displays Output as a Pie Graph

You can use WebFOCUS InfoAssist to create a report that displays output as a pie graph:

```
-DEFAULTH &WF_STYLE_UNITS='PIXELS';
-DEFAULTH &WF_STYLE_HEIGHT='405.0';
-DEFAULTH &WF_STYLE_WIDTH='770.0';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
GRAPH FILE CENTHR
-* Created by Info Assist for Graph
SUM CENTHR.EMPSEG.EMP_COUNT
BY CENTHR.EMPSEG.PLANT
ON GRAPH PCHOLD FORMAT HTML
ON GRAPH SET HTMLENCODE ON
ON GRAPH SET GRAPHDEFAULT OFF
ON GRAPH SET ARGRAPHENGIN JSCHART
ON GRAPH SET VZERO OFF
ON GRAPH SET GRMERGE ADVANCED
ON GRAPH SET GRMULTIGRAPH 0
ON GRAPH SET GRLEGEND 0
ON GRAPH SET GRXAXIS 1
ON GRAPH SET UNITS &WF_STYLE_UNITS
ON GRAPH SET HAXIS &WF_STYLE_WIDTH
ON GRAPH SET VAXIS &WF_STYLE_HEIGHT
ON GRAPH SET GRMERGE ADVANCED
ON GRAPH SET GRMULTIGRAPH 0
ON GRAPH SET GRLEGEND 1
ON GRAPH SET GRXAXIS 0
ON GRAPH SET LOOKGRAPH PIEMULTI
ON GRAPH SET GRAPHSTYLE *
setReportParsingErrors(false);
setSelectionEnableMove(false);
setCurveFitEquationDisplay(false);
setPieDepth(0);
setPieTilt(0);
setDepthRadius(0);
setPieFeelerTextDisplay(1);
setPlace(true);
ENDSTYLE
ON GRAPH SET STYLE *
INCLUDE=IBFS:/FILE/IBI_HTML_DIR/javaassist/intl/EN/ENIADefault_
combine.sty,$
```

```
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING, $
ENDSTYLE
END
```

The following image shows an example of the type of multi-colored pie graph output that can be distributed by ReportCaster.



Distributing a Graph Image in a PDF Report

You can distribute a graph image in a PDF report using ReportCaster by performing the following steps:

1. Create the graph image (in a temporary directory on the WebFOCUS Reporting Server) and then insert the image file in the header or body of a PDF report.
2. After you create and embed the graph image into a PDF report, save the PDF procedure (FEX). You can then schedule the procedure (FEX) to distribute the PDF with ReportCaster. Be sure that you select the PDF report format when creating the schedule.

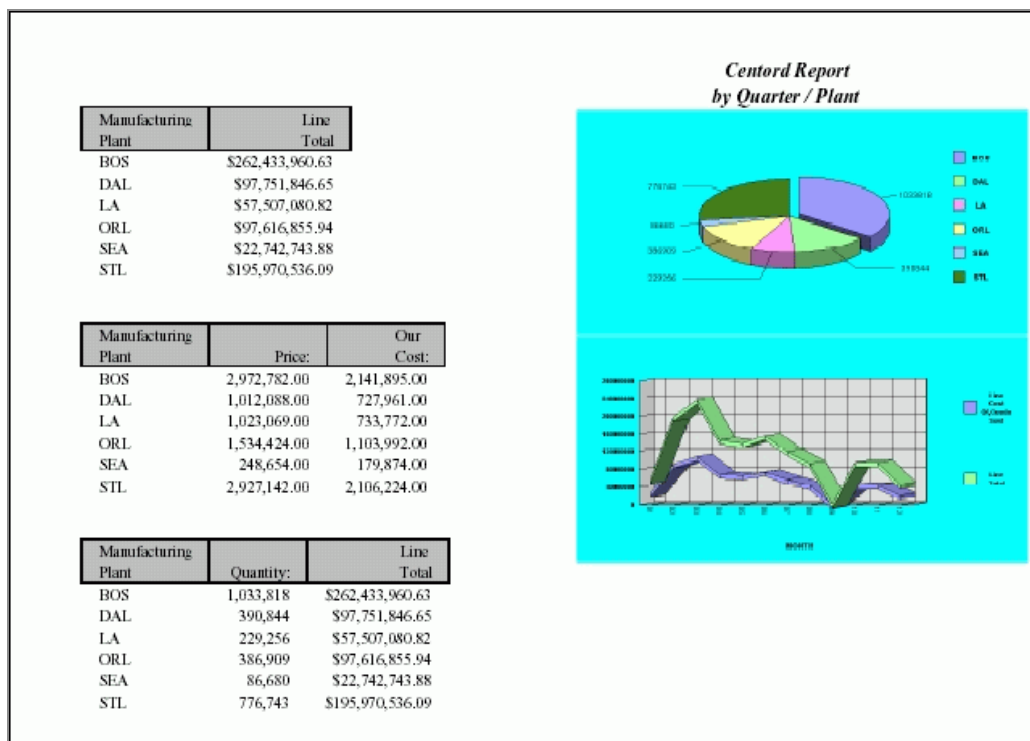
When you enable the JSCOM3 graph option on your WebFOCUS Reporting Server, you do not need to set GRAPHSEVURL, for example:

```
SET GRAPHSEVRURL=http://hostname:port/ibi_apps/IBIGraphServlet
```

For configurations that should not be used with GRAPHSEVRURL, see the ibi™ WebFOCUS® *Security and Administration* manual.

Creating Multiple Graph Images in a PDF Report

The following image shows a compound PDF document that contains three reports and includes two GIF images within one of the reports.



The following code creates the compound PDF document shown in the previous image. To retrieve this procedure, go to:

https://techsupport.informationbuilders.com/tech/wbf/wbf_tcn_088.html

```
SET GRAPHSEVRURL=http://hostname:port/ibi_apps/IBIGraphServlet
-* where hostname:port is the host name and port number of your
-* Application Server
GRAPH FILE CENTORD
SUM QUANTITY AS ''
ACROSS PLANT
```

```
ON GRAPH SET LOOKGRAPH PIESINGL
ON GRAPH SET GRAPHEDIT SERVER
ON GRAPH SET GRAPHSTYLE *
```

```
setPieDepth(99);
setPieTilt(57);
setAutofit(getLegendText(0),false);
setFontSize(getLegendText(0),14);
setAutofit(getLegendText(1),false);
setFontSize(getLegendText(1),14);
setAutofit(getLegendText(2),false);
setFontSize(getLegendText(2),14);
setAutofit(getLegendText(3),false);
setFontSize(getLegendText(3),14);
setAutofit(getLegendText(4),false);
setFontSize(getLegendText(4),14);
setAutofit(getLegendText(5),false);
setFontSize(getLegendText(5),14);
setFontSizeAbsolute(getPieSliceLabel(),true);
setAutofit(getPieSliceLabel(),false);
setFontSize(getPieSliceLabel(),14);
setFontStyle(getLegendText(0),2);
```

```
setBorderColor(getX1MinorGrid(),new Color(133,133,133));
setBorderColor(getY1MinorGrid(),new Color(133,133,133));
setAutofit(getLegendText(0),false);
setFillColor(getChartBackground(),new Color(0,255,255));
setPieSliceDetach(getSeries(0),52);
setFontSizeAbsolute(getO1Label(0),true);
setAutofit(getO1Label(0),false);
setFontSize(getO1Label(0),12);
setMarkerDisplay(true);
setConnectLineMarkers(false);
setConnectScatterMarkers(false);
setO1LabelDisplay(true);
setO1AxisSide(0);
setO1MajorGridDisplay(true);
setO1MajorGridStyle(0);
setO1MinorGridDisplay(false);
```

```
setSeriesType(0,0);
setY1LabelDisplay(true);
setY1AxisSide(0);
```

```

setY1MajorGridDisplay(true);
setY1MajorGridStyle(0);
setY1MinorGridDisplay(false);
setPieFeelerTextDisplay(1);
setPieLabelDisplay(0);
setTextFormatPreset(getPieSliceLabel(),1);
setTextFormatPreset(getY1Label(),1);
setLegendDisplay(true);
setFontSizeAbsolute(getLegendText(),true);
ENDSTYLE

```

```

ON GRAPH SET BARNUMB OFF
ON GRAPH SET 3D OFF
ON GRAPH SET VZERO ON
ON GRAPH SET GRID ON
ON GRAPH SAVE AS GRAPH1 FORMAT GIF
END

```

```

GRAPH FILE CENTORD
SUM LINE_COGS LINEPRICE
ACROSS MONTH
ON GRAPH SET LOOKGRAPH VLINSTK
ON GRAPH SET GRAPHEDIT SERVER
ON GRAPH SET GRAPHSTYLE *

```

```

setGridStep(getY1MajorGrid(),1.0E8);
setGridStep(getY2MajorGrid(),4.0E7);
setTextWrap(getLegendText(0),true);
setDisplayBarAsPictograph(true);
setAutofit(getLegendText(0),false);
setFontSize(getLegendText(0),11);
setAutofit(getLegendText(1),false);
setFontSize(getLegendText(1),11);
setAutofit(getY1Label(),false);
setFontStyle(getLegendText(0),2);
setBorderColor(getX1MinorGrid(),new Color(133,133,133));
setBorderColor(getY1MinorGrid(),new Color(133,133,133));
setRect(getLegendArea(),new Rectangle(10901,-9500,4698,20800));
setAutofit(getLegendText(0),false);
setDataLineThickness(39);
setDepthAngle(19);
setDepthRadius(18);

```



```

setFillColor(getChartBackground(),new Color(0,255,255));
setFillColor(getFrame(),new Color(223,223,223));
setFillColor(getFrameSide(),new Color(191,191,191));
setFillColor(getFrameBottom(),new Color(179,179,179));
setRiserBarGroupSpacing(52);
setRiserWidth(31);
setScaleMax(getY1Axis(),5.0E8);
setScaleMax(getY2Axis(),2.8E8);
setScaleMin(getY2Axis(),0.0);
setSeriesType(getSeries(0),2);
setSeriesType(getSeries(1),2);

```

```

setFontSizeAbsolute(getO1Label(0),true);
setAutofit(getO1Label(0),false);
setFontSize(getO1Label(0),12);
setFontSizeAbsolute(getO1Label(1),true);
setAutofit(getO1Label(1),false);
setFontSize(getO1Label(1),12);
setFontSizeAbsolute(getO1Label(2),true);
setAutofit(getO1Label(2),false);
setFontSize(getO1Label(2),12);
setFontSizeAbsolute(getO1Label(3),true);
setAutofit(getO1Label(3),false);
setFontSize(getO1Label(3),12);
setFontSizeAbsolute(getO1Label(4),true);
setAutofit(getO1Label(4),false);
setFontSize(getO1Label(4),12);
setFontSizeAbsolute(getO1Label(5),true);
setAutofit(getO1Label(5),false);
setFontSize(getO1Label(5),12);
setFontSizeAbsolute(getO1Label(6),true);
setAutofit(getO1Label(6),false);
setFontSize(getO1Label(6),12);
setFontSizeAbsolute(getO1Label(7),true);
setAutofit(getO1Label(7),false);
setFontSize(getO1Label(7),12);
setFontSizeAbsolute(getO1Label(8),true);
setAutofit(getO1Label(8),false);
setFontSize(getO1Label(8),12);
setFontSizeAbsolute(getO1Label(9),true);
setAutofit(getO1Label(9),false);
setFontSize(getO1Label(9),12);
setFontSizeAbsolute(getO1Label(10),true);
setAutofit(getO1Label(10),false);
setFontSize(getO1Label(10),12);
setFontSizeAbsolute(getO1Label(11),true);

```

```
setAutofit(getO1Label(11),false);
setFontSize(getO1Label(11),12);
```

```
setMarkerDisplay(false);
setConnectLineMarkers(true);
setConnectScatterMarkers(true);
setO1LabelDisplay(true);
setO1AxisSide(0);
setO1MajorGridDisplay(true);
setO1MajorGridStyle(0);
setO1MinorGridDisplay(false);
setSeriesType(0,2);
setSeriesType(1,2);
setY1LabelDisplay(true);
setY1AxisSide(0);
setY1MajorGridDisplay(true);
setY1MajorGridStyle(0);
setY1MinorGridDisplay(false);
setPieFeelerTextDisplay(0);
setTextFormatPreset(getPieSliceLabel(),1);
setTextFormatPreset(getY1Label(),1);
setLegendDisplay(true);
setFontSizeAbsolute(getLegendText(),true);
setFontSizeAbsolute(getY1Label(),true);
setFontSize(getY1Label(),11);
setFontStyle(getY1Label(),2);
ENDSTYLE
```

```
ON GRAPH SET BARNUMB OFF
ON GRAPH SET 3D ON
ON GRAPH SET VZERO ON
ON GRAPH SET GRID ON
ON GRAPH SAVE AS GRAPH2 FORMAT GIF
END
```

```
SET COMPOUND = OPEN NOBREAK
TABLE FILE CENTORD
SUM
    LINEPRICE
BY
    PLANT
HEADING
" <40 "
```

```
"Centord Report "
"by Quarter / Plant "
ON TABLE SET PAGE-NUM OFF
ON TABLE SET BYDISPLAY OFF
ON TABLE NOTOTAL
ON TABLE SET ONLINE-FMT PDF
```

```
ON TABLE SET STYLE *
    UNITS=IN,
    PAGESIZE='Letter',
    LEFTMARGIN=0.500000,
    RIGHTMARGIN=0.500000,
    TOPMARGIN=0.000000,
    BOTTOMMARGIN=0.000000,
    SQUEEZE=ON,
    ORIENTATION=LANDSCAPE,
$
```

```
TYPE=REPORT,
    FONT='TIMES NEW ROMAN',
    SIZE=8,
    COLOR=BLACK,
    BACKCOLOR=NONE,
    STYLE=NORMAL,
$
```

```
TYPE=TITLE,
    GRID=ON,
    BACKCOLOR=SILVER,
$
```

```
TYPE=REPORT,
    IMAGE=GRAPH1.gif,
    POSITION=(4.000000 0.700000),
    SIZE=(3.200000 1.600000),
$
```

```
TYPE=REPORT,
    IMAGE=GRAPH2.gif,
    POSITION=(4.000000 2.300000),
```

```

        SIZE=(3.200000 1.600000),
$

```

```

TYPE=HEADING, LINE=2, SIZE=10,STYLE=BOLD+ITALIC, JUSTIFY=CENTER, $
TYPE=HEADING, LINE=3, SIZE=10,STYLE=BOLD+ITALIC, JUSTIFY=CENTER, $
ENDSTYLE
END

```

```

SET COMPOUND = NOBREAK
TABLE FILE CENTORD
SUM PRICE COST
BY
    PLANT
ON TABLE SET PAGE-NUM OFF
ON TABLE SET BYDISPLAY OFF
ON TABLE NOTOTAL
ON TABLE SET ONLINE-FMT PDF
ON TABLE SET STYLE *
    UNITS=IN,
    PAGESIZE='Letter',
    LEFTMARGIN=0.500000,
    RIGHTMARGIN=0.500000,
    TOPMARGIN=0.000000,
    BOTTOMMARGIN=0.000000,
    SQUEEZE=ON,
    ORIENTATION=LANDSCAPE,
$

```

```

TYPE=REPORT,
    FONT='TIMES NEW ROMAN',
    SIZE=8,
    COLOR=BLACK,
    BACKCOLOR=NONE,
    STYLE=NORMAL,
$

```

```

TYPE=TITLE, BACKCOLOR=SILVER,
    GRID=ON,$
ENDSTYLE
END
SET COMPOUND = CLOSE
TABLE FILE CENTORD

```

```

SUM
    QUANTITY
    LINEPRICE
BY
    PLANT
ON TABLE SET PAGE-NUM OFF
ON TABLE SET BYDISPLAY OFF
ON TABLE NOTOTAL
ON TABLE SET ONLINE-FMT PDF
ON TABLE SET STYLE *
    UNITS=IN,
    PAGESIZE='Letter',
    LEFTMARGIN=0.500000,
    RIGHTMARGIN=0.500000,
    TOPMARGIN=0.000000,
    BOTTOMMARGIN=0.000000,
    SQUEEZE=ON,
    ORIENTATION=LANDSCAPE,
$

```

```

TYPE=REPORT,
    FONT='TIMES NEW ROMAN',
    SIZE=8,
    COLOR=BLACK,
    BACKCOLOR=NONE,
    STYLE=NORMAL,
$
TYPE=TITLE, BACKCOLOR=SILVER,
    GRID=ON,$
ENDSTYLE
END

```

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.

Use the following guidelines 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.

i Note: Bursting an FML report is not supported, since there is no BY field.

Using the POST Command in an FML Request

The following code creates an FML report and POSTs two tag rows to the LEDGEOUT work file. 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
```

Using the PICKUP Command in an FML Request

The following code retrieves the POSTed data from the LEDGEOUT work file and uses it in the RECAP calculation. ReportCaster distributes the output from this procedure.

```
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 commands and FOCUS commands supported by the WebFOCUS Reporting Server. The &&KILL_RPC amper variable must be set using Dialogue Manager.

The following sample code has been configured to run as a pre-processing procedure. It stops a request if the current date is in a list of holiday days.

```

- *
- * TEST CURRENT 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 baseapp/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';

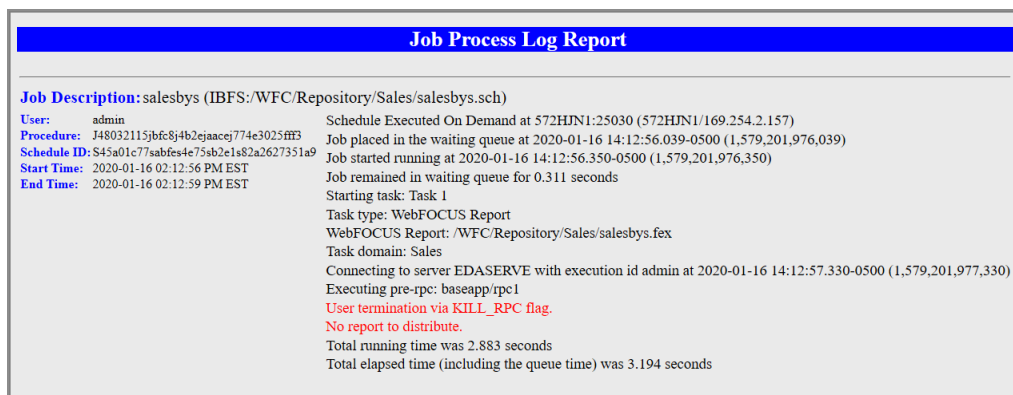
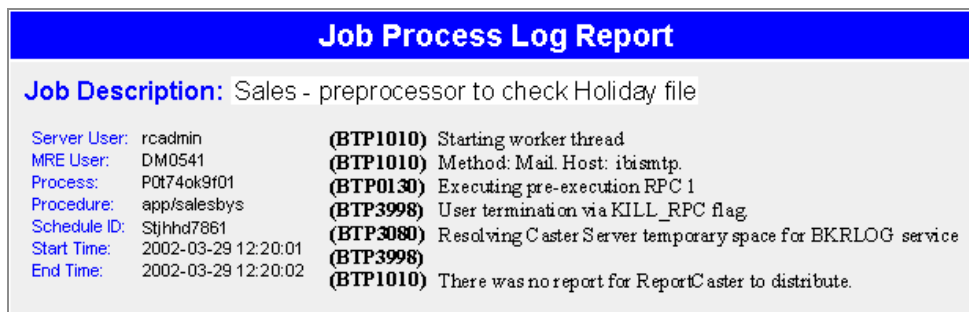
```

```

-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 image shows the information that appears in the log report, including **Executing pre-execution RPC 1** and **User termination via KILL_RPC flag** messages.



When **&&KILL_RPC** is set to **Y** to stop the execution of a scheduled job, the default behavior is to set the **NEXTRUNTIME** interval to the next run time value of the schedule stored in the WebFOCUS Repository and to trigger the Notification **On Error** condition when the schedule is stopped. You can control this behavior using the following global variables in the pre-execution procedure:

- **&&KILL_RPC_NRT** resets (Y) or does not reset (N) the **NEXTRUNTIME** interval when the scheduled job is stopped. The default value is **Y**.
- **&&KILL_RPC_ERR** triggers an On Error Notification (Y) or does not trigger an On Error Notification (N) when the scheduled job is stopped. The default value is **Y**. When this variable is set to **N**, messages about the **&&KILL_RPC** set to **Y** are written to the log as non-error messages.

The following sample code takes the previous example and adds the next run time and notification global variables for `&&KILL_RPC` so that the next run time of the schedule is not reset and the On Error notification is not sent if the schedule is stopped because the current date is in the list of holiday days.

```
-*
-* TEST CURRENT 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 baseapp/hdayrc1b.dat
-RUN
-*
-SET &TDAYX = &YYMD;
-SET &&KILL_RPC = 'N';
-SET &&KILL_RPC_NRT = 'N';
-SET &&KILL_RPC_ERR = '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
```

Manually Coded Excel Compound Reports

Excel Compound Reports enable you to generate multiple worksheet reports using the EXL2K output format.

The syntax of Excel Compound Reports is identical to that of PDF Compound Reports. By default, each of the component reports from the compound report is placed in a new Excel worksheet (analogous to a new page in PDF). If the NOBREAK keyword is used, the next report follows the current report on the same worksheet (analogous to starting the report on the same page in PDF).

Output, whether sent to the client using PCHOLD or saved in a file using HOLD, is generated in Microsoft Web Archive format. This format is labeled Single File Web Page in the Excel Save As dialog box. Excel provides the conventionally given file suffixes: .mht or

.mhtml. WebFOCUS uses the same .xht suffix that is used for EXL2K reports. Since the output is always a single file, ReportCaster can distribute it.

The components of an Excel compound report can be FORMULA or PIVOT reports. For more information about the Excel Compound Reports feature, see the *Creating Reports With ibi™ WebFOCUS® Language* manual.

i Note: When using the EXL2K format, Excel 2002 (Office XP) or higher must be installed. Excel Compound Reports will not work with earlier versions of Excel since they do not support the Web Archive file format.

Compound Reports and Coordinated Compound Reports

ReportCaster can distribute compound reports developed in AHTML, DHTML, EXL2K, XLSX, PDF, PPT, and PPTX formats.

ReportCaster can burst and distribute coordinated compound reports developed in XLSX, DHTML, PDF, PPT, and PPTX formats.

Controlling the Display of Sorted Data With Accordion Reports

Accordion Reports provide a way to control the amount of sorted data that appears on an HTML report page. You can produce reports with expandable views of data for each vertical sort field. When an Accordion Report first appears, only data values of the first (highest-level) vertical sort field are shown, and all other data is hidden. You can manually expand your view to expose data values of lower-level sort fields.

When you create an Accordion Report, a plus sign appears to the left of each data value in the column under the highest-level sort heading. For data associated with lower-level sort fields, a plus sign is to the left of each data value, but the data does not appear unless manually expanded. You cannot expand data values of the lowest-level sort field.

To expand your view of data for any expandable sort field, click a plus sign and all data associated with the next lower-level sort field appears. When you expand a data value

under the next to lowest sort heading, all of the remaining associated data values in the report appear.

When using Accordion Reports, you must include two vertical sort fields coded with BY phrases. If the command syntax does not contain at least two BY phrases, the EXPANDABLE command is ignored, no message is generated, and a standard HTML report is created.

You can use horizontal sort fields coded with ACROSS phrases with Accordion Reports. The ACROSS sort headings that appear above vertical sort headings in a standard HTML report do not display in an Accordion Report until at least one sorted data value expands manually in each expandable sort column.

PDF and Excel formats are not supported with Accordion Reports.

Requirements for Accordion Reports

When you create Accordion Reports, consider the following requirements:

- When you add a drill-down link to an Accordion Report, you must set the TARGET parameter to a value that specifies a new HTML frame.
- Once an Accordion Report is created and delivered to the user, there are no subsequent calls to the WebFOCUS Reporting Server required when the user is interacting with the report. However, the collapsible folder controls on the sort fields require JavaScript that resides on the WebFOCUS Client. The user must be connected to the WebFOCUS Web tier components in order to use this feature. For online, connected users of WebFOCUS, no change is required to the report. However, for distribution of reports using ReportCaster, see [Controlling the Display of Sorted Data With Accordion Reports](#) to ensure that the report is delivered correctly as an email attachment or as an archived report in the Report Library.

Distributing Accordion Reports With ReportCaster

Distributing Accordion Reports with ReportCaster requires the use of JavaScript components and images located on the WebFOCUS Client.

To access the JavaScript components and images from a report distributed by ReportCaster, the scheduled procedure must contain the SET FOCHTMLURL command, which must be set to an absolute URL instead of the default value. For example,

```
SET FOCHTMLURL = http://hostname[:port]/ibi_apps/ibi_html
```

where:

hostname[:port]

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

ibi_apps/ibi_html

Is the site-customized web server alias pointing to the WebFOCUS82/*ibi_apps/ibi_html* directory (where *ibi_apps/ibi_html* is the default value).

Support for Accordion Reports

The following commands are not supported in Accordion Reports:

```
BORDER, COLUMN, FOR, IN, OVER, PAGE-NUM, ROW-TOTAL, TOTAL
```

Data Visualization, OLAP, On Demand Paging, and the ReportCaster burst feature are also not supported with Accordion Reports.

Create Accordion Reports

To enable Accordion Reports, specify the following

```
ON TABLE SET EXPANDABLE = {ON|OFF}
TABLE FILE GGSales
SUM UNITS DOLLARS
BY REGION BY ST BY CITY BY CATEGORY
ON TABLE SET EXPANDABLE ON
END
```

where:

ON

Enables Accordion Reports.

OFF

Disables Accordion Reports. OFF is the default value.

Creating an Accordion Report

This example shows how to use an EXPANDABLE command to create an Accordion Report.

```
TABLE FILE GGSales
SUM UNITS DOLLARS
BY REGION BY ST BY CITY BY CATEGORY
ON TABLE SET EXPANDABLE ON
END
```

The following image shows an Accordion Report which displays all data associated with the first-level sort field, Region, by default. The expanded data values you see are the result of a report user clicking plus signs to the left of specific first-level, second-level, and third-level sort fields after the report is generated.

Region	State	City	Category	Unit Sales	Dollar Sales
⊞ Midwest					
⊞ Northeast	⊞ CT				
	⊞ MA				
	⊞ NY	⊞ New York	Coffee	116659	1459160
			Food	125473	1555165
			Gifts	70194	887940
⊞ Southeast					
⊞ West	⊞ CA	⊞ Los Angeles	Coffee	109082	1383924
			Food	110417	1381698
			Gifts	78571	1006381
		⊞ San Francisco			
	⊞ WA				

Limitations for Using ibi WebFOCUS Features

Due to the complex internal processing of ReportCaster, scheduled procedures do not support the following features.

- **PCSEND.** WebFOCUS reporting feature to store report sections in different files.
- **Multiple TABLE or GRAPH requests with HTML format.** Internally, these are multiple HTML documents. Only the result of the first TABLE or GRAPH request (without a HOLD or SAVE command) is distributed.
- To distribute a graph, you must use the GIF, HTML, JPG, PDF, PNG, or SVG format.

The following WebFOCUS features are not available with ReportCaster distribution by email and FTP because they require distributing multiple files, or integrating with web or application server components.

- **OLAP.** Only entire reports or burst report sections are distributed. OLAP capability requires authentication and connection to the WebFOCUS components on the web or application server.
- **On-demand Paging.** Only entire reports or burst report sections are distributed. The report output is cached, and the first page of the report is sent to the browser along with the WebFOCUS viewer. Do not use the ON TABLE SET WEBVIEWTARG command in a report scheduled for distribution to the Library in the HTML-ODP format.
- **Graph Drill Down.** When a GRAPH request is run, ReportCaster creates the graph as an image. When GRAPH requests are run through the WebFOCUS Client, there is an HTML form and the graph image. The HTML form has a reference to display the graph image and any corresponding drill downs.

Using SET Commands to Access Live Links or Drill Downs

When distributing reports that contain live links or links to WebFOCUS reports (drill downs), the URL context must be fully qualified and the user must have connectivity to the web or application server in order to run the report or access the content of the link. You can fully qualify the live link using the SET FOCHTMLURL or SET BASEURL commands. Use SET FOCHTMLURL to access resources that reside under the ibi_apps/ibi_html alias. For non-Managed Reporting procedures, use SET BASEURL to specify a default location for a

relative URL that references documents (HTML files and images) created by WebFOCUS. You can fully qualify the drill down using the SET FOCEXURL command. If using SSL security, specify https in the URL. By default, the Distribution Server automatically configures the FOCHTML and FOCEXURL commands using the settings found in the Data Servers folder in the ReportCaster Configuration tool.

Known Issues When Using ibi WebFOCUS Commands

The following table lists, describes, and provides solutions for known issues that occur when using certain commands in procedures scheduled using ReportCaster.

Command	Known Issue	Solution
&DATE	The following message appears in the log file when you have a pre-execution procedure that attempts to set the EDAPATH and perform a computation on a field that originated from &DATE: No report for ReportCaster to distribute	Use the &YYMD amper variable instead of &DATE.
ON TABLE SUMMARIZE	Is ignored when used with ACROSS and COMPUTE in a TABLE request with multiple verbs.	Do not use this syntax with multiple verbs.
TABLE MAINTAIN	In SQL Server, do not use a field named USER. USER is a reserved word. TABLE and MAINTAIN commands fail if a field name of USER is	Change the database field name to USERID.

Command	Known Issue	Solution
	referenced.	
FORMAT YYM and FORMAT YM	Do not display values on MVS.	Set DATEDISPLAY=ON.
-INCLUDE	Cannot create report output that would result in more than one report to distribute, as ReportCaster can only accept a single answer set.	Use with procedures that HOLD or SAVE output. You can use StyleSheet (.sty), cascading style sheet (.css), or GIF (.gif) files with -INCLUDE. Use the compound report feature.
-EXIT -QUIT	Do not use these commands within a procedure you schedule because they terminate the internal session that is executing the scheduled job. When the internal session is terminated during the execution of a scheduled job, the report output may be successfully distributed. However, the log information for the execution of the schedule cannot be processed.	Use Dialogue Manager commands to branch to a label located at the end of your procedure. This enables you to implement your application logic, and permit ReportCaster to both run any post-processing procedures specified and process the log information.
FOC_NONE	ReportCaster does not support Server Procedures that use the FOC_NONE syntax.	Use FOC_NONE only in Managed Reporting procedures that will be scheduled with ReportCaster and the WebFOCUS Client. IBIF_describe_null is set to

Command	Known Issue	Solution
		FOC_NONE. The value is set by clicking WebFOCUS Administration Console Configuration , and then Parameter Prompting , which is located in the Application Settings folder.



Note: For more information about these commands, see the *Developing Reporting Applications* manual.

Using ibi WebFOCUS Commands With Burst Reports

This section provides considerations when using WebFOCUS commands with burst reports.

Grand Totals Automatically Suppressed for Burst Reports

When the SUBTOTAL, SUB-TOTAL, SUMMARIZE, or RECOMPUTE commands are used with burst reports, the WebFOCUS Reporting Server automatically suppresses the grand total. For example, the following code might produce the Excel report, shown below, for a burst value of PRODCAT (Product Category) shown in the image below.

```
TABLE FILE CENTINV
SUM QTY_IN_STOCK
BY PRODCAT SUBTOTAL
BY PRODTYPE BY PRODNAME
```

```
ON TABLE PCHOLD FORMAT EXL2K FORMULA
END
```

The grand total for each product type is suppressed, and the quantity in stock values are totaled only by product category.

Product Category:	Product Type:	Product Name:	Quantity In Stock:
CD Players	Digital	QX Portable CD Player	22000
*TOTAL PRODCAT CD Players			22000
Camcorders	Analog	110 VHS-C Camcorder 20 X	4000
		120 VHS-C Camcorder 40 X	2300
		150 8MM Camcorder 20 X	5961
		250 8MM Camcorder 40 X	60073
	Digital	650DL Digital Camcorder 150 X	2972
		750SL Digital Camcorder 300 X	10758
*TOTAL PRODCAT Camcorders			86064

Showing Column Totals for Burst Reports

When a report with ON TABLE COLUMN-TOTAL is burst, a column total is created for each burst value. For example, the following code might produce the Excel report, shown below, for a burst value of PRODCAT (Product Category) shown in the image below.

```
TABLE FILE CENTINV
SUM QTY_IN_STOCK
BY PRODCAT
BY PRODTYPE SUBTOTAL BY PRODNAME
ON TABLE PCHOLD FORMAT EXL2K FORMULA
ON TABLE COLUMN-TOTAL
END
```

A column total is created for each product type (for example, Analog), and the quantity in stock values are totaled by product category.

Product Category:	Product Type:	Product Name:	Quantity In Stock:
CD Players	Digital	QX Portable CD Player	22000
*TOTAL PRODTYPE Digital			22000
Camcorders	Analog	110 VHS-C Camcorder 20 X	4000
		120 VHS-C Camcorder 40 X	2300
		150 8MM Camcorder 20 X	5961
		250 8MM Camcorder 40 X	60073
*TOTAL PRODTYPE Analog			72334
	Digital	650DL Digital Camcorder 150 X	2972
		750SL Digital Camcorder 300 X	10758
*TOTAL PRODTYPE Digital			13730

Specifying the Language for Scheduled Output

You can specify the language in which ReportCaster displays scheduled output by including the SET LANG parameter in the procedure you are scheduling (for example, SET LANG=ja will display the report in Japanese).

When scheduling a procedure, you can also be prompted to select a language value instead of hard coding the value in the procedure. This can be done using an amper variable within the procedure that provides a drop-down list from which you can select values.

At schedule time, there is no validation of the value the user selected and the set of languages for the ReportCaster Distribution Server code page. If you select a language that is not one of the title language options available in the Master File, then the plain 'title=' values appear instead. If TITLE does not exist, the FIELDNAME value is used.

i Note: The Dynamic Language Switch setting in the WebFOCUS Administration Console, which specifies the language of the ReportCaster user interfaces, works independently from this setting. The SET LANG command affects all report output, including log reports. For more information about the SET LANG command, see *Customizing Your Environment* in the *Developing Reporting Applications* manual.

WebFOCUS® ReportCaster Formats for Scheduled Output

When you create a schedule, WebFOCUS ReportCaster outputs the report in the format coded in the procedure, or the default format, if no format is specified in the procedure. You can optionally override the format coded in the procedure and specify a particular format in the schedule. This section describes each format available to WebFOCUS ReportCaster, and includes suggestions for using the format, as well as considerations that you should be aware of when distributing that format. Some formats cannot be produced by overriding the format in the procedure. The scheduled report must be coded to produce these formats. Formats that cannot be produced through an override are not available for selection in the scheduling tools. For more information, refer to the considerations of each format.

AHTML

Format: AHTML (.htm, .html)

Description: Provides customizable options for creating HTML formatted reports that enable users to experience features normally found in Excel workbooks.

Suggested Uses: .

Considerations:

- Bursting is supported, except for .
- Can only be distributed as an email attachment. Inline email messages are not supported.

ALPHA

Format: ALPHA (.ftm, .txt)

Description: Saves scheduled output as fixed-format character data.

Suggested Uses: For display in a text document, for further reporting in WebFOCUS, and as a transaction file for modifying a data source.

Considerations:

- When created as a HOLD file, a corresponding Master File is created.
- Bursting is supported.

COM

Format: Com (.cvs)

Description: Saves scheduled output as a variable-length text file in comma-delimited format with character values enclosed in double quotation marks (" "). Blanks within fields are not retained.

This format is required by certain software packages, such as Microsoft Access.

Suggested Uses: For further processing in a database application. This format type can be imported into applications, such as Excel or Lotus.

Considerations:

- This format type does not create a Master File.
- Bursting is supported.
- Can be opened in the Report Library with Excel.
- 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.

COMMA

Format: COMMA (.csv)

Description: 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.

Suggested Uses: For further processing in a database application. This format type can be imported into applications, such as Excel or Lotus.

Considerations:

- This format type does not create a Master File.
- Bursting is supported.
- Can be opened in the Report Library with Excel, or you can open COMMA reports in Lotus 1-2-3 by right-clicking the report and saving it as a COMMA file outside of the Library.
- 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.

COMT

Format: COMT (.csv)

Description: Adds titles to a COMMA file. 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.

Suggested Uses: For further processing in a database application. This format type can be imported into applications, such as Excel or Lotus.

Considerations:

- This format type does not create a Master File.

- Bursting is supported.
- Cannot be opened in the Report Library with Excel.
- 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.
- When creating a ReportCaster schedule using the COMT format, you must check the **Override the Format Specified in the Procedure** check box and select the COMT format. Otherwise, the output may lose the CR/LF (Carriage Return / Line Feed) when producing the .csv file.

DFIX

Format: DFIX (.ftm, .txt)

Description: Enables you to define any character to act as the delimiter (DELIMITER = your choice of character), include quotation marks around alpha fields (ENCLOSURE = “”), and include column titles (HEADER = YES/NO).

The following is an example of a PCHOLD statement that specifies the pipe character (|) as the delimiter, adds quotation marks around alpha fields, and does not include column titles or headings.

```
ON TABLE PCHOLD AS OUT1 FORMAT DFIX DELIMITER | ENCLOSURE " HEADER NO
```

Suggested Uses: Use in files that require custom (non-standard) delimiters.

Considerations:

- Missing data is indicated by showing no data. If you specified an enclosure, then missing alpha fields are indicated by “”. Missing numeric fields are indicated by two delimiters.
- Bursting is supported.

DHTML

Format: DHTML (.htm, .mht)

Description: Supports hyperlinks and other World Wide Web features. Retains StyleSheet formatting.

Along with the features of the HTML format, DHTML supports the web archive format (.mht). An .mht file can contain multiple reports and graphs and is utilized for Coordinated Compound Reports.

Suggested Uses: .

Considerations:

- The default file type for the DHTML format is .mht. If the output returned from your procedure is HTML, you must manually change the file type to .htm in order for the output file to open correctly.
- Bursting is supported.
- DHTML can be distributed inline, provided the WebFOCUS Reporting Server is not returning a web archive file (.mht). It cannot be used to distribute inline if the returned file is a web archive file.
- DHTML can be distributed as an email attachment and be sent as an inline email message when the output is .htm, but not when the output is .mht.
- DHTML will return two possible formats:
 - The scheduled procedure (FOCEXEC) outputs an HTML file when the request does not contain the SET HTMLARCHIVE=ON command. When distributing by email or FTP, the file type should be .htm.
 - The scheduled procedure (FOCEXEC) outputs a web archive file (.mht) when the SET HTMLARCHIVE=ON command is specified. When distributing by email or FTP, the file type should be .mht.

DOC

Format: DOC (.txt)

Description: 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 display page output.

Suggested Uses: Word Processing applications, printing unformatted reports, email.

Considerations:

- Does not retain most formatting. Does not support hyperlinks or alerts.
- Can be distributed as an email attachment or as an inline email message.
- Bursting is supported.

EXCEL

Format: EXCEL (.xls)

Description: Scheduled output opens as a Microsoft Excel 2000 or 2003 spreadsheet file.

Suggested Uses: Email, Report Library.

Considerations:

- Microsoft Excel 2000 or 2003 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.
- Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.
- When ReportCaster distributes EXCEL reports created with a TABLE request containing BY HIGHEST *primarysortfield* syntax, the report contains page breaks on each primary sort field value.

EXL07

Format: EXL07 (.xlsx)

Description: Scheduled output opens within Excel 2007 or 2010.

Suggested Uses: Email.

Considerations:

- When scheduling a report to be distributed in this format, ensure that either the FEX or the WebFOCUS ReportCaster configuration setting, **Excel server URL**, specifies the application server that will zip the Excel 2007 file components for distribution. The Excel server URL in the FEX will override the value specified in the WebFOCUS ReportCaster Configuration.
- Bursting is supported, except compound reports.

EXL07 FORMULA

Format: EXL07 FORMULA (.xlsx)

Description: Scheduled output opens within Excel 2007 or 2010.

Contains Excel formulas that calculate and display the results of any type of summed information, such as column totals, row totals, and subtotals.

Suggested Uses: Email, Report Library.

Considerations:

- When scheduling a report to be distributed in this format, ensure that either the FEX or the ReportCaster configuration setting, **Excel server URL**, specifies the application server that will zip the Excel 2007 file components for distribution. The Excel server URL in the FEX will override the value specified in the ReportCaster Configuration.
- Bursting is supported, except compound reports.

EXL07 TEMPLATE

Format: EXL07 TEMPLATE (.xlsx)

Description: Scheduled output opens within Excel 2007 or 2010.

Suggested Uses: Email, Report Library.

Considerations:

- The default file extension for the EXL07 TEMPLATE format is .xlsx. If the template used in the procedure is a macro-enabled template, you must manually change the extension to .xlsm, in order for the output file to open correctly.
- The scheduled procedure must contain a PCHOLD statement, such as the following:

```
ON TABLE PCHOLD FORMAT EXL07 TEMPLATE templatenam SHEETNUMBER
sheetnumber
```

- Must be using Windows XP or Windows 2003 or higher.
- Microsoft Excel 2002 or higher must be installed.
- The format is ASCII.
- Bursting is supported.

EXL2K

Format: EXL2K (.xls)

Description: Scheduled output opens within Excel 2000 or higher.

Supports most StyleSheet attributes, allowing for full report formatting.

Suggested Uses: Email.

Considerations:

- 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 email or FTP distribution. You must edit your web server MIME table so that the .xls extension is ASCII application data, instead of binary.
- Bursting is supported, except compound reports.

EXL2K FORMULA

Format: EXL2K FORMULA (.xls)

Description: Scheduled output opens within Excel 2000 or higher.

Contains Excel formulas that calculate and display the results of any type of summed information, such as column totals, row totals, and subtotals.

Suggested Uses: Email.

Considerations:

- 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 email or FTP distribution. You must edit your web server MIME table so that the .xls extension is ASCII application data, instead of binary.
- Bursting is supported, except compound reports.

EXL2K PIVOT

Format: EXL2K PIVOT (.xls)

Description: Scheduled output opens within Excel 2000 or higher.

Used to analyze complex data much like the OLAP tool in WebFOCUS. It enables you to drag data fields within a PivotTable, providing different views of the data, such as sorting across rows or columns.

Suggested Uses: Email, Report Library.

Considerations:

- When the format of an EXL2K PIVOT report is not overridden in the schedule, the Report Library will display EXL2K as the format.
- Microsoft Excel 2000 or higher must be installed.
- Must be using Microsoft Office 2000 at a minimum release level of 9.0.3821 SR-1 in order to open in the Report Library.
- The format is ASCII.
- Requires the WEBARCHIVE=ON command so that the WebFOCUS Reporting Server creates a single output file, rather than a main file and a cache file. The default WebFOCUS Reporting Server configuration is WEBARCHIVE=ON.

- All EXL2K output with an .xht extension is dynamically changed to .xls for email or FTP distribution. You must edit your web server MIME table so that the .xls extension is ASCII application data, instead of binary.
- Cannot be used to schedule a compound report.
- The scheduled procedure must contain a PCHOLD statement, such as the following:

```
ON TABLE PCHOLD FORMAT EXL2K PIVOT
```

- Bursting is not supported.

EXL2K TEMPLATE

Format: EXL2K TEMPLATE (.xls)

Description: Scheduled output opens within Excel 2002 or higher.

Excel templates that are populated with data from scheduled output.

Suggested Uses: Email, Report Library.

Considerations:

- When the format of an EXL2K TEMPLATE report is not overridden in the schedule, the Report Library will display EXL2K as the format.
- The scheduled procedure must contain a PCHOLD statement, such as the following:

```
ON TABLE PCHOLD FORMAT EXL2K TEMPLATE templatenam SHEETNUMBER  
sheetnumber
```

- Must be using Windows XP or Windows 2003 or higher.
- Microsoft Excel 2002 or higher must be installed.
- The format is ASCII.
- All EXL2K output with an .mht extension is dynamically changed to .xls for email or FTP distribution. You must edit your web server MIME table so that the .xls extension is ASCII application data, instead of binary.
- Bursting is supported.

EXL97

Format: EXL97 (.xls)

Description: Scheduled output opens as an Excel97 spreadsheet file, an HTML-based display format that supports report formatting and drill downs.

Suggested Uses: Email.

Considerations:

- Microsoft Excel 97 or higher must be installed.
- Bursting is supported.

GIF

Format: GIF (.gif)

Description: Scheduled output opens as a graph image in GIF format.

Suggested Uses: Email.

Considerations:

- 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.
- Drilldowns are not supported since the GIF format creates a static image.
- You cannot distribute multiple images within a single report when using the GIF format. Instead, use the PDF format to distribute multiple images within a single report.
- If the chart contains a header or footer and you want to distribute an image format (GIF, JPEG, PNG or SVG), then you must select the WebFOCUS InfoAssist option to embed the header and footer in the image. If the embed option is not selected, then the header and footer are not included in the distributed GIF file. In this case, you must use HTML, HTML5, or PDF to distribute a chart that contains a header or footer.
- Inline email messaging is supported.

HTML

Format: HTML (.htm, .html)

Description: Supports hyperlinks and other web-based features. Retains StyleSheet formatting.

Suggested Uses: Report Library, .

Considerations:

- The default file type for the HTML format is .htm. If the output returned from your procedure is an .mht file, you must manually change the file type to .mht, in order for the output file to open correctly.
- A chart that is scheduled to be distributed in HTML format cannot be burst. To successfully burst a chart, the following formats can be selected:
 - **The following image formats can be burst:**
 - PNG
 - SVG
 - JPEG
 - GIF
 - **The following file formats can be burst:**
 - PDF
 - PPTX
 - EXL07
 - In order to output HTML pages with images, normally you would select DHTML as the format and the output is distributed with the extension .mht. You can select HTML as the distribution format. If you select HTML, WebFOCUS ReportCaster creates the output with the extension .htm by default.

i Note: In order for an HTML report to display an image, the procedure must specify the command SET BASEURL=''.

If the scheduled procedure contains the SET WEBARCHIVE = ON command, outputs pages with images, and you select HTML as the format, be sure to

change the extension in the Save Report As field from .htm to .mht.

- When distributing HTML reports by email or FTP, the scheduled report (.fex) must set a fully qualified FOCEXURL and FOCHTMLURL for the report styling options defined below. These reference the JavaScript components located on the web or application server where the Client is configured. For example:

Styling options include:

- Accordion reports
- Table of Contents (TOC) reports
- Peer Graphics/Data Visualization graphical reporting
- Multi-drill reports
- HFREEZE options

If using SSL security, edit the URL to specify https.

- Bursting is supported.
- Can be distributed as an email attachment or as an inline email message.
- Works with procedures that contain GRAPH FILE syntax. When used with GRAPH FILE, WebFOCUS ReportCaster automatically generates the graph on the reporting server (using JSCOM3) and embeds it into the HTML output using HTMLMBEDIMG=ON. If the scheduled procedure specifies HTMLARCHIVE=ON, this will override HTMLMBEDIMG=ON and generate output that can be displayed in older versions of Internet Explorer.

HTML5

Format: HTML5 (.htm)

Description: Scheduled output opens as a graph image. These graph images are bit-mapped and can support 16 million colors. In addition, HTML5 graphics have lossless compression (data is decompressed 100% back to the original). Therefore, saving, altering, and resaving an HTML5 image does not degrade its overall quality.

Suggested Uses: .

Considerations:

- A report distributed in HTML5 may not open correctly in Internet Explorer 8. Internet

Explorer 8 does not support HTML5 and will first attempt to render a chart distributed in HTML5 format (JSCHART) using the Adobe Flash Platform. If it is unable to render, the Microsoft VML standard will be used.

- Only works with procedures that contain GRAPH FILE syntax.
- Bursting is not supported.
- Drill downs are not supported, as this format creates a static image.
- A fully qualified FOCEXURL is required for email and FTP distribution. If using SSL security, specify https in the URL.

JPEG

Format: JPEG (.jpg, .jpeg, .jpe, .jfif)

Description: Scheduled output opens as a graph image in JPEG format.

Suggested Uses: Email.

Considerations:

- 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.
- Drilldowns are not supported since the JPEG format creates a static image.
- If the chart contains a header or footer and you want to distribute an image format (JPEG, PNG or SVG), then you must select the WebFOCUS InfoAssist option to embed the header and footer in the image. If the embed option is not selected, then the header and footer are not included in the distributed JPEG file. In this case, you must use HTML, HTML5, or PDF to distribute a chart that contains a header or footer.
- Inline email messaging is supported.

PDF

Format: PDF (.pdf)

Description: Appearance of the scheduled output is preserved in an electronic document when printed using Adobe Acrobat or distributed to a printer that has an appropriate driver. Retains all relevant StyleSheet formatting.

Suggested Uses: Email, printing.

Considerations:

- Does not support hyperlinks in email attachments. Recipient must have an Adobe Acrobat application to view.
- Printing is supported when WebFOCUS ReportCaster is configured for PDF printing and the printer has the appropriate driver.
- Bursting is supported.
- When WebFOCUS ReportCaster distributes PDF reports created with a TABLE request containing BY HIGHEST *primarysortfield* syntax, the report contains page breaks on each primary sort field value.
- The PDF Drill-Through feature is supported.

PNG

Format: PNG (.png)

Description: Scheduled output opens as a graph image. These graph images are bit-mapped and can support 16 million colors. In addition, PNG graphs have lossless compression (data is decompressed 100% back to the original). Therefore, saving, altering, and resaving a PNG does not degrade its overall quality.

Suggested Uses: Email.

Considerations:

- 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.
- Drilldowns are not supported, as this format creates a static image.
- If the chart contains a header or footer and you want to distribute an image format (JPEG, PNG or SVG), then you must select the WebFOCUS InfoAssist option to embed the header and footer in the image. If the embed option is not selected, then the

header and footer are not included in the distributed PNG file. In this case, you must use HTML, HTML5, or PDF to distribute a chart that contains a header or footer.

- Inline email messaging is supported.

PPT

Format: PPT (.ppt)

Description: Generates a new PowerPoint file in the web archive format (.mht).

Suggested Uses: Email.

Considerations:

- Bursting is supported.
- PPT can output as a single report and can also include as many graphs as desired embedded in the StyleSheet of the report (TABLE).

PPT Template

Format: PPT (.ppt)

Description: Generates a new PowerPoint file in the web archive format (.mht).

Suggested Uses: Email.

Considerations:

- Bursting is supported.
- The scheduled procedure must contain a PCHOLD statement, such as the following:

```
ON TABLE PCHOLD [AS name] FORMAT PPT TEMPLATE templatename  
SLIDENUMBER n
```

- PPT can output as a single report and can also include as many graphs as desired embedded in the StyleSheet of the report (TABLE).

PPTX

Format: PPTX (.pptx)

Description: Generates a new PowerPoint file, created using the Open XML format, in the web archive format (.mht).

Suggested Uses: Email.

Considerations:

- Bursting is supported with the Release 8.1 Version 05 Reporting Server and a procedure that is scheduled 'as is', which means that the ON TABLE PCHOLD FORMAT PPTX must be specified in the procedure and the user must create the schedule without checking the Override option.
- If PPTX is selected, then at schedule execution time, add SET DISTRIBUTE=PPTX to the .fex that is run by the Distribution Server.
- PPTX can output as a single report and can also include as many graphs as desired embedded in the style sheet of the report (TABLE).

PPTX Template

Format: PPTX (.pptx)

Description: Generates a new PowerPoint file, created using the Open XML format, in the web archive format (.mht).

Suggested Uses: Email.

Considerations:

- Bursting is not supported.
- The scheduled procedure must contain a PCHOLD statement, such as the following:

```
ON TABLE PCHOLD [AS name] FORMAT PPTX TEMPLATE templatename  
SLIDENUMBER n
```

- If PPTX is selected, then at schedule execution time, add SET DISTRIBUTE=PPTX to the .fex that is run by the Distribution Server.

PS

Format: PS (.ps)

Description: Appearance of the scheduled output is preserved in an electronic document when printed using PostScript. Retains all relevant StyleSheet formatting.

Suggested Uses: Printing.

Considerations:

- Does not support hyperlinks.
- Printers must support PostScript. Recipient must have an application (for example, GhostView) that supports PostScript.
- Bursting is supported.

SVG

Format: SVG (.svg)

Description: Scheduled output opens as a graph image. This file format, based on Extensible Markup Language (XML), presents powerful, interactive images.

Suggested Uses: Email.

Considerations:

- 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.
- If the chart contains a header or footer and you want to distribute an image format (JPEG, PNG or SVG), then you must select the WebFOCUS InfoAssist option to embed the header and footer in the image. If the embed option is not selected, then the header and footer are not included in the distributed SVG file. In this case, you must use HTML, HTML5, or PDF to distribute a chart that contains a header or footer.
- Drilldowns are not supported, as this format creates a static image.
- Inline email messaging is supported.

TAB and TABT

Format: TAB (.tab, .tsv, .txt)

Description: Scheduled output opens in tab-delimited format. For TABT, the format includes column headings in the first row.

This format is required by certain software packages, such as Microsoft Access.

Suggested Uses: Email.

Considerations: Bursting is supported.

WK1

Format: WK1 (.wk1)

Description: Scheduled output opens within Lotus 1-2-3, Excel.

Suggested Uses: Email.

Considerations:

- Lotus 1-2-3 or Excel must be installed.
- In the Redirection Settings of the WebFOCUS Client Administration Console, specifically the mime.wfs configuration file:
 - Specify **No** in the Redirect column to launch Lotus 1-2-3.
 - Specify **Yes** in the Redirect column to launch Excel.
 - Note that 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.
- You can open WK1 reports in Lotus 1-2-3 by right-clicking the report and saving it as a WK1 file outside of the library.
- Cannot be opened in the Report Library. However, you can open WK1 reports in Lotus 1-2-3 by right-clicking the report and saving it as a WK1 file outside of the library.

WP

Format: WP (.txt, .wp)

Description: Scheduled output opens as a plain-text word processing document in the web browser. Text can be opened by any word processing application.

Suggested Uses: Word processing applications, printing unformatted reports, email.

Considerations:

- Does not retain page breaks or most formatting.
- Does not support hyperlinks or alerts.
- Can be distributed as an email attachment or as an inline email message.
- Bursting is supported.

XML

Format: XML (.xml)

Description: Scheduled output opens in XML format, a markup language that is derived from the Standard Generalized Markup Language (SGML).

Suggested Uses: Describing and exchanging data for applications on different systems.

Considerations: Bursting is not supported.

ibi WebFOCUS Repository Tables for ReportCaster

The following sections describe the contents and primary keys of each WebFOCUS Repository that stores ReportCaster information. You can then use this information to create reports that provide information on how ReportCaster is being used within your organization.

ibi WebFOCUS Repository Tables

ReportCaster stores distribution and scheduling information in WebFOCUS Repository tables. At installation, an SQL-based repository is created in a selected location.

The following is a list of WebFOCUS Repository tables that store ReportCaster information, their contents, and primary keys.

Table	Contains	Primary Keys
BOTACCES	Access List names. One record per Access List and 1:m with BOTLIST.	Access ID.
BOTADDR	Properties of each Distribution List. For example, its name and whether it is a public or private list. One record per list and 1:m with BOTDEST.	AddressBook ID.
BOTCAT	Library catalog table. Includes one record for each report in the Report Library. If the schedule is burst, each bursted report is a record.	Report group ID.
BOTCDATE	Information about the custom run intervals of schedules.	CDate ID.
BOTDEST	Recipients and destinations within a Distribution List. One	Distribution List

Table	Contains	Primary Keys
	record per destination.	name and a counter from 1 to n for each member of a particular Distribution List.
BOTDIST	Distribution information.	Distribution ID.
BOTSIT	Recurrence information.	Interval ID.
BOTLDATA	Report stored in the Report Library, in BLOB format.	Report ID and a counter from 1 to n for each report stored in the Library.
BOTLIB	Version and expiration information. One record for each report in the Report Library.	Report group ID, and version.
BOTLIST	User IDs and burst values within each Access List. One record per destination.	Access List name and a counter from 1 to n for each member of a particular Access List.
BOTLOG	General log information, such as the start time and end time for each executed job. One record per job run and a 1:m with BOTLOG2.	Process number that is generated when a job is run.
BOTLOG2	Detailed log records for all jobs that have run. One record per job message.	Process number and a

Table	Contains	Primary Keys
		counter that runs from 1 to n for each detail log record for a particular process number.
BOTPACK	Packet ID that uniquely identifies each schedule.	Packet ID.
BOTPARMS	Parameter names and values for each Task. One record per parameter per Task.	Schedule ID, Task ID, parameter name, and a counter from 1 to n for each parameter in a Task.
BOTSBDS	Schedule Blackout Dates table. Contains global and group schedule blackout dates and descriptions.	ID.
BOTSCHEID	Timing, frequency, and connection information about a particular schedule. Distribution methods (for example, email or FTP), along with supporting information, such as Reply Address and location of recipient. Distribution List (if any). One record per schedule.	Schedule ID.
BOTSCIT	Information about the custom run intervals of schedules.	
BOTSTATE	Failover and Workload Distribution information.	
BOTTASK	Individual Task information. Includes the name of the Task, the Execution ID for the Task, and the WebFOCUS	Task ID, Packet ID.

Table	Contains	Primary Keys
	Reporting Server name. For WebFOCUS reports, BOTTASK also lists the full path in the WebFOCUS Repository. There is a BOTTASK record for each Task in a schedule. Since there can be multiple Tasks in a schedule, there is a 1:m relationship with BOTSCHED.	
BOTTSKEX	ReportCaster user ID. Execution ID and password. Contains execution type (for example, WebFOCUS Server Procedure). Depending on execution type, contains server name (for WebFOCUS Server Procedures and Managed Reporting reports), application name (for files), or server name and port (for URLs, FTP files, and mainframe output). One record per Task.	ReportCaster User ID, Execution ID, server name, server type.
BOTWATCH	Library Watch List information.	

About WebFOCUS® ReportCasterReports

You can create and run reports against the WebFOCUS Repository by first creating a Synonym for each table in the repository. You must have the WebFOCUS adapter for your database in order to create a Synonym and run the reports.

WebFOCUS® ReportCaster Variables

The ReportCaster Distribution Server creates and adds variables, beginning with &DST, to each schedule job FEX. These are reserved variable names for use by ReportCaster and can be referenced in scheduled procedures (FEX), as well as ReportCaster pre-processing and post-processing procedures for custom application logic. Customers should not create variables with the same &DST name, as this can impact the internal processing of ReportCaster.

WebFOCUS® ReportCaster Internal Variables

The following internal variables are created by the ReportCaster Distribution Server:

Variable	Description
DSTJOBID	An ID that identifies a specific execution of a schedule job.
DSTJOBNAME	The name of the schedule job procedure (FEX) created by the Distribution Server that is submitted to the WebFOCUS Reporting Server.
DSTSCHEDID	An ID that uniquely identifies the schedule.
DSTSCHEDDESC	The title (description) of the schedule.
DSTOWNER	The User ID that is the owner of the schedule.
DSTPACKETID	An ID that uniquely identifies the task group in a multi-task schedule. For a single task schedule, it is an ID that uniquely identifies the task in each schedule.
DSTTASKID	An ID that identifies a specific task within the schedule. Task information includes the Execution ID for the Task

Variable	Description
	and the WebFOCUS Reporting Server name. For reports stored in the WebFOCUS Repository, the task information also includes the full IBFS path.
DSTPRERPC1	The procedure (FEX) name of the first pre-processing procedure.
DSTPRERPC2	The procedure (FEX) name of the second pre-processing procedure.
DSTPOSTRPC1	The procedure (FEX) name of the first post-processing procedure.
DSTPOSTRPC2	The procedure (FEX) name of the second-post processing procedure.
DSTDMAIN	The domain folder name when a scheduled task is a procedure (FEX) stored in the WebFOCUS repository.
DSTFEXNAME	The name of the procedure (FEX).
DSTBURST	The burst the report output (Y/N).
DSTEDAUSER	The User ID used to connect to the Reporting Server.
DSTRPTSERVER	The WebFOCUS Reporting Server to which the scheduled procedure (FEX) is submitted.
DSTHOST	The Distribution Server hostname.
DSTPORT	The Distribution Server port number.

Glossary

This is a glossary of key terms and concepts related to WebFOCUS ReportCaster that are found in this manual.

blackout dates

Dates on which schedules cannot be run or set to run.

bursting a report

Used to split the report into sections to be distributed separately to the same or different destinations.

Distribution List

A Distribution List is an easy way to distribute content to multiple recipients or destinations. The list, which is stored in the WebFOCUS repository, contains a previously specified group of individual recipients. The Distribution List automates distribution to this stored list, rather than requiring the entry of each recipient individually into a schedule.

Distribution Server

The WebFOCUS component responsible for submitting scheduled and on-demand jobs for execution, and distributing the output of these jobs.

Distribution Server Failover

Enables you to configure a backup Distribution Server that can assume ReportCaster operations when there is an interruption (planned or unplanned) in the primary Distribution Server.

Distribution Servers folder of the Configuration Tool

The WebFOCUS component that executes jobs and distributes output and log results.

Dynamic Distribution List

Allows 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).

Email Settings folder of the Configuration Tool

Configures email settings, such as the default email host, the notification email host, number of attempts to distribute to an email host, and security information.

Execution ID

A valid user ID that is used to run a report on a specified WebFOCUS Reporting Server.

External Distribution File

A file consisting of multiple recipients, which can be assigned to any schedule. This distribution file is created outside of ReportCaster.

FEX

A WebFOCUS report procedure.

FTP

File Transfer Protocol. ReportCaster can schedule the retrieval of a file from any FTP server.

FTP Settings

Allows you to specify the default FTP host and user ID, and SFTP security plug-in. You can also indicate whether the server requires a secure SFTP connection and specify the authentication method.

General Preferences folder of the Configuration Tool

Specifies which Address Book access types, schedule tasks, distribution formats, and methods will be available to a user that is creating a schedule.

Global Updates interface

Authorized users can make global updates in the Global Updates interface for the Mail Server, FTP Server, Printer, Email Address, Email from, Library URL, Data Server, Notification Type, Notification Reply Address, Notification Subject, Notification Brief Message To, and Notification Full Message To fields from values stored in schedules and Distribution Lists.

job log

Provides information about a scheduled job that has executed, such as the job ID, start time, execution status, and recipients.

job status

The status of jobs that are executing or that are in the ReportCaster Distribution Server queue.

LDAP Settings folder

Allows you to configure ReportCaster to retrieve email information from an LDAP directory.

Library Access List

A Library Access List defines the groups and users that are authorized to view report output distributed by a schedule to the Report Library. A Library Access List can be used with single or multiple schedules.

Log Settings folder of the Configuration Tool

Allows you to specify log settings, including the number of days after which ReportCaster automatically purges individual log reports, and the time at which purging will occur.

mode

The state and function of the Distribution Server. Options include: Manager, Worker, Full Function, Failover, and Down.

Quick Access Toolbar

A navigation tool, which is always visible, located at the top of the Basic Scheduling tool.

Recovery

A setting that controls whether upon startup, the Distribution Server should re-run jobs that did not complete when the Distribution Server was interrupted.

ReportCaster Console

The user interface that provides access to the tools that administer the Distribution Server and manage schedule job logs, blackout dates, and Execution IDs.

ReportCaster Explorer

The ReportCaster Explorer interface provides users with the ability to obtain a list of ReportCaster items, by type, displayed with columns of detailed information specific to the item type selected.

ReportCaster Configuration Tool

An administration tool that allows authorized users the ability to navigate through and change the various settings that define the ReportCaster configuration.

Scanback

In certain instances, the ReportCaster Distribution Server may be unavailable for a period of time. During this time, no scheduled jobs can run. By default, when the ReportCaster Distribution Server becomes available again, it searches for and runs all jobs with a next run time less than the current time, and resets the next run time according to the next scheduled run time of the job. If the Distribution Server is unavailable for an extended time period, you may want to adjust this behavior. Using the Scanback parameter, you can run only those jobs found in a specified time period of the outage, or just reset the next run time of all unexecuted jobs without running them.

schedule

A ReportCaster schedule allows you to specify when to run a report, the format in which to create the output, and how it will be distributed. ReportCaster schedules are created with the Basic Scheduling tool or the Advanced Scheduling tool.

scheduled jobs

Jobs that are scheduled to run at a specific time.

Server Status

Allows WebFOCUS administrators to select a Distribution Server to restart, suspend, stop distribution, switch servers, or refresh data.

SSL Certificate

A data file that connects a domain name, server name, or host name to the name and location of a company. ReportCaster uses an SSL Certificate to secure the communication between the ReportCaster application and the Distribution Server.

Status

The status of each service currently running on the Distribution Server. Types of status include: Ready, Standing By, Suspend, Listening, Polling, and Monitoring.

Workload Distribution

The Workload Distribution feature enables ReportCaster to distribute the scheduled jobs across multiple Distribution Servers, providing an efficient and fast way to process large

numbers of ReportCaster schedules.

Zip Settings

Provides settings to configure how .zip archive files will be created and named.

ibi Documentation and Support Services

For information about this product, you can read the documentation, contact Support, and join Community.

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Documentation for ibi products is available on the [Product Documentation website](#), mainly in HTML and PDF formats.

The [Product Documentation website](#) is updated frequently and is more current than any other documentation included with the product.

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