

flexera

Data Platform 5.5.x

Report Scheduler in User Console



Contents

Using the Report Scheduler in User Console..... 3
Legal Information..... 8



Using the Report Scheduler in User Console

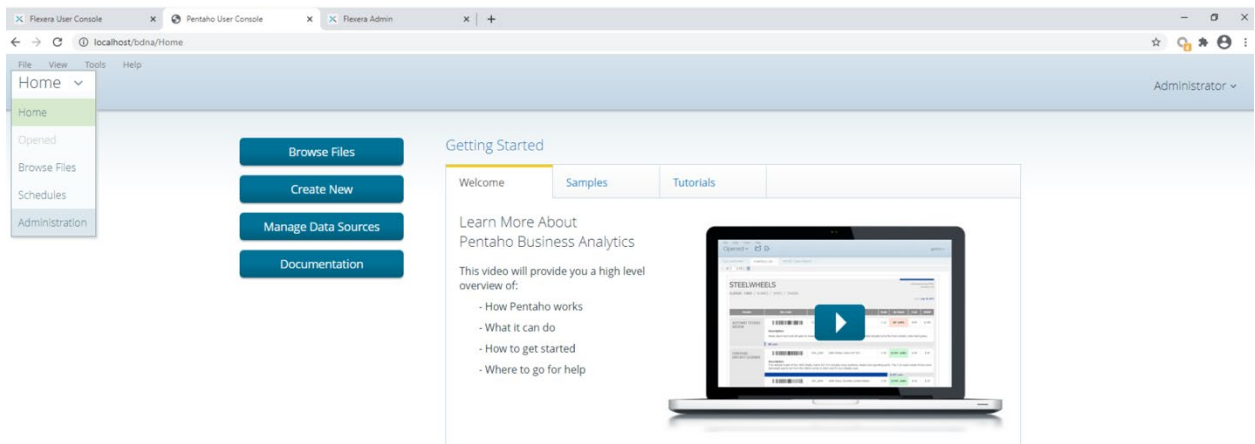
Data Platform's User Console is built upon Pentaho's Business Intelligence platform. It has a built-in capability to schedule reports generation along with the option to email them to users within the organization.

This document provides step-by-step instructions on how to do it in a User Console environment.

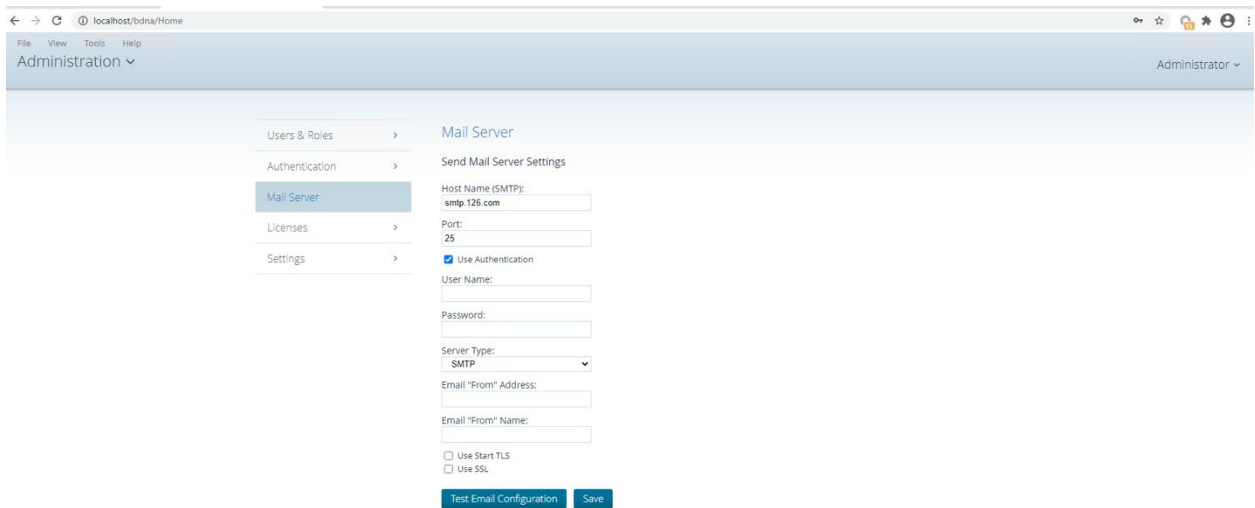
To use the Report Scheduler:

1. Log in with Management/Administrator Account to BDNA User Console
2. Navigate to Pentaho's User Console at this address:

<https://localhost/bdna/Home>



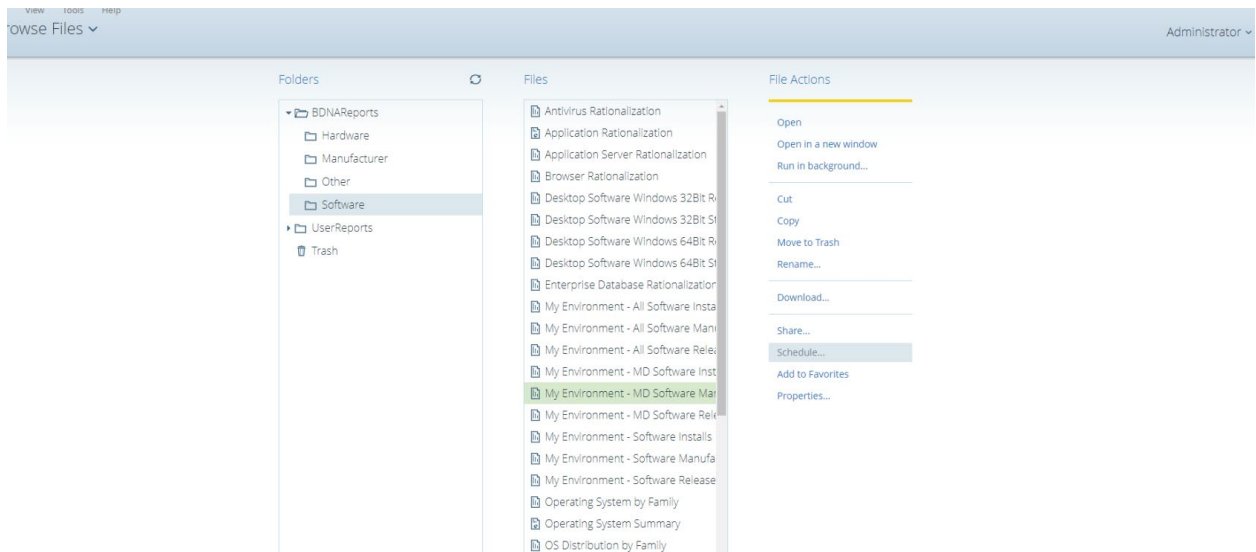
3. On the **Home** drop-down menu, go to **Administration** -> **Mail Server** to set up the outgoing email server and the account used to send reports through email.



The following table provides the description of the **Setting** menu items:

Settings	Description
Host Name (SMTP)	Address of your SMTP email server for sending email
Port	Port of your SMTP email server, usually 25. For Gmail, the value is 587.
Use Authentication	Enable to use authentication for email
User Name	User ID to connect to the email server for sending email
Password	Password used to connect to the email server
Server Type	Transport for accessing the email server, usually SMTP. For Gmail, SMTP is required.
Email "From" Name	Name that appears in the "From:" field in an email. If left blank, the default email name for this field is Pentaho Scheduler
Email "From" Address	Address that appears in the "From:" field in an email. If left blank, the default email address for this field is Pentaho Scheduler
Use Start TLS	Enable if the email server requires Start TLS connection
Use SSL	Enable if the email server requires an SSL connection. This value must be enabled for Gmail.

4. Click on **Test Email Configuration** to make sure the connection was successful. Then click **Save**.
5. To create a new schedule, on the drop-down menu go to **Administration -> Browse Files** and find the report that you want to schedule.
6. Select **Schedule** from the **File Actions** pane, then **New Schedule**.



7. Specify the values on the parameters (**Recurrence**, **Start Time**, **Frequency**, etc.)

New Schedule

Recurrence:

Weekly

Run Once
Seconds
Minutes
Hours
Daily
Weekly
Monthly
Yearly
Cron

00 AM Pacific Daylight

Tuesday Wednesday
 Thursday Friday Saturday

Range of recurrence

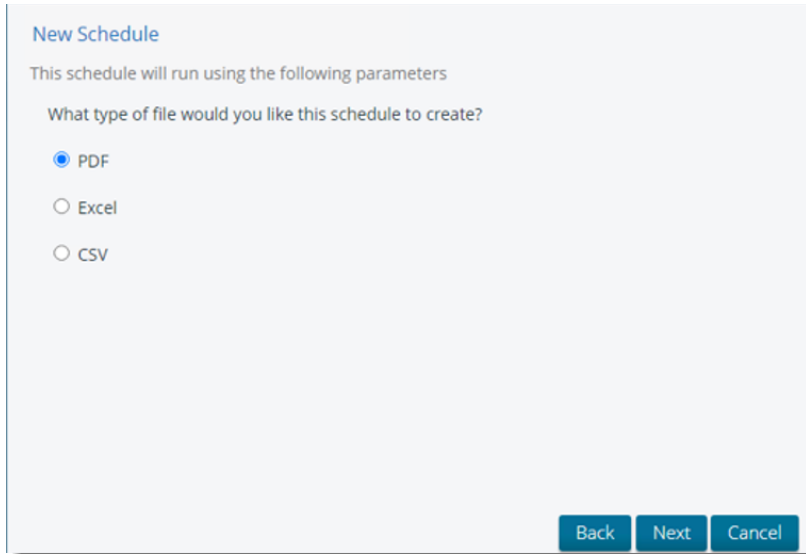
Start: 1/28/21 No end date
 End by: 1/29/21

Back Next Cancel

The following table provides the description the parameters:

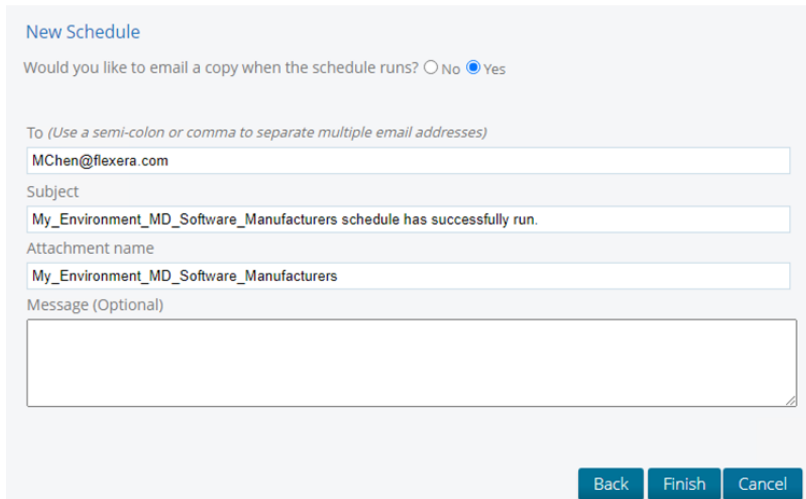
Field	Description
Recurrence	<p>Choose a time interval for the report from the Recurrence list. Options include:</p> <ul style="list-style-type: none"> • Run Once: Runs the file one time • Seconds: Runs the file repeatedly at the time interval (in seconds) specified in the Recurrence pattern • Minutes: Runs the file repeatedly at the time interval (in minutes) specified in the Recurrence pattern • Hours: Runs the file repeatedly at the time interval (in hours) specified in the Recurrence pattern • Daily: Runs the file repeatedly either every weekday or at the time interval (in days) specified in the Recurrence pattern • Weekly: Runs the file repeatedly on the day(s) specified in the Recurrence pattern • Monthly: Runs the file repeatedly on the day of the month specified in the Recurrence pattern • Yearly: Runs the file repeatedly on the date specified in the Recurrence pattern • Cron: Runs the file according to the Quartz cron attributes in the Cron String field. If you want to enter a custom time interval, choose the Cron option. <p>If blockout times have been scheduled by your administrator, a View Blockout Times button appears on the bottom of the New Schedule window. Click View Blockout Times to view the list of blockout times.</p>
Start Time	Specify start time to run the file
Recurrence pattern	Depending your selected time interval in the Recurrence field, specify the recurrence pattern
Range of recurrence	Specify the start and end dates for running this report. The report will begin running according to the specified recurrence pattern on the start date specified and complete its run cycle on the end date specified in this section.
Start Date (Run Once)	If you select Run Once for Recurrence, then specify the Cron syntax. Consult the Quartz cron attributes reference to learn the Quartz Cron syntax.
Cron String (Cron)	If you select Con for Recurrence, then specify the date to run the report

8. Choose whether the report will be attached as a **PDF**, **Excel**, or **CSV** file



The screenshot shows a dialog box titled "New Schedule". Below the title, it says "This schedule will run using the following parameters". The main question is "What type of file would you like this schedule to create?". There are three radio button options: "PDF" (which is selected), "Excel", and "CSV". At the bottom right, there are three buttons: "Back", "Next", and "Cancel".

9. Choose the **Yes** radio button on the question, "Would you like to email a copy when the schedule runs?" Specify the email address(es) and any other optional fields.



The screenshot shows the "New Schedule" dialog box with the "Would you like to email a copy when the schedule runs?" question. The "Yes" radio button is selected. Below this, there are several input fields: "To" (with a note to use semi-colon or comma for multiple addresses) containing "MChen@flexera.com", "Subject" containing "My_Environment_MD_Software_Manufacturers schedule has successfully run.", and "Attachment name" containing "My_Environment_MD_Software_Manufacturers". There is also a "Message (Optional)" text area which is currently empty. At the bottom right, there are three buttons: "Back", "Finish", and "Cancel".

10. To manage the schedule on the drop-down menu, go to **Administration -> Schedules -> Manage Schedules**. You can pause/edit/delete the schedules on this interface.

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