



ReportSmith Web



**Strategic Reporting
ReportSmith®**

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Printed in the U.S.A.

Contents

Introduction5

ReportSmith® Web5

The Catalog7

About the Catalog7

Using the Report Catalog9

 Selecting a Catalog9

 Sorting the Right Pane10

 Running a Report10

 Entering Connection Information12

 Printing a Report from the Browser13

 Viewing Report Properties14

 Viewing Users and User Groups15

 Viewing User Properties15

The Report Scheduler17

About the Report Scheduler17

 Accessing the Report Scheduler18

 Scheduling a Report18

 Scheduling a Report to Run Once19

 Scheduling a Report to Run Daily20

 Scheduling a Report to Run Weekly22

 Scheduling a Report to Run Monthly24

 Scheduling with Report Variables26

About the Schedules Summary27

 Accessing the Schedules Summary27

 Editing a Report Schedule27

Index31

Introduction

ReportSmith® Web

ReportSmith Web is a Web-based version of ReportSmith. This version allows you to use a common web browser such as Microsoft® Internet Explore or Netscape® Communicator to perform some ReportSmith functions.

Using the Web, ReportSmith allows you to perform reporting tasks such as viewing, printing, and scheduling reports. In contrast to ReportSmith Enterprise (the client/server version) or ReportSmith Desktop (the stand alone version), ReportSmith Web and a browser interface provide you with the opportunity to perform these functions without having to load any software on your PC other than the browser.

Specifically, ReportSmith Web allows you to perform the following tasks:

- Select a Catalog
- Sort the Report List of the Report Catalog
- Run a Report
- Print a Report
- Schedule a Report
- Schedule a Report containing variables
- Edit a Report Schedule
- View Users and User Properties
- View Report Properties

ReportSmith Web is installed on a Web server. To connect to ReportSmith, you need the URL for the location of this Web server. Please see your System Administrator for this information..

■ To Connect to ReportSmith through the Web

1. **Open** your internet BROWSER.
2. **Type** the URL for the ReportSmith Web server in the Address bar and **press** <ENTER>. Your Web server displays the ReportSmith log-in page.
3. **Type** your USER NAME in the User Name text box.
4. **Type** your PASSWORD in the Password text box.
5. **Click** the LOGIN button. ReportSmith displays the Report Catalog, the ReportSmith Home Page. From this location, you can view, schedule, print reports, and view users.(if you have administrative privileges.)

The Catalog

About the Catalog

The Catalog, the first screen that ReportSmith displays in the browser after you log in, is a dialog box consisting of two panes: left and right. The left pane displays a tree view of folders; the right pane displays the documents contained within a selected folder. There are two basic trees, Reports and Users, which you can select by using the labeled tabs located at the bottom of the left pane. Note, however, that **the Users tab is visible only to those individuals with administrative privileges.**

Table 1 presents a description of the Catalog toolbar buttons, icons, and text boxes.

Table 1: The Catalog





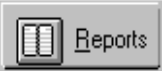


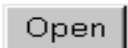


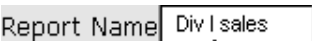
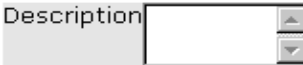
Name	Graphic	Function
Catalog list box		Displays a list of catalogs that are available to you.
Schedule icon		Creates a schedule for a report that you have selected.

Table 1: The Catalog

Name	Graphic	Function
Open icon		Displays and runs the contents of a report that you have selected.
Properties icon		Displays properties for a report or a user, depending on the tab you select at the bottom of the Catalog. Note: you need administrative privileges to view user properties.
Reports tab		Displays the reports located in the Report Catalog that are available to you.
Users tab		Displays the list of users stored in the Report Catalog. Note: you need administrative privileges to view users.
Logoff button		Exits the ReportSmith Catalog and displays the Logon screen.
Open button		Opens a selected report. Is an alternative to the Open icon on the toolbar.
'Save to PDF on Open'		Saves a report to the catalog as a PDF file.
Help button		Displays a new browser window containing the help files for ReportSmith Web.
Report Name text box		Displays in a text box, the name of the report you selected in the right pane of the catalog.
Description text box		Displays a description of the report you select — if the creator of the report entered a description.

Using the Report Catalog

The Report Catalog allows you to select any catalog to which you have access, and to view the documents contained within it through the browser. However, if you have administrative privileges, you can also see the Users tab located on the bottom left-hand corner of the Report Catalog. Through the browser, you can perform some of ReportSmith's most useful functions:

- Select a Catalog
- Sort the Report List
- Run a Report
- Print a Report
- View Report Properties
- View Users and User Properties

Note: The following topics are discussed in a separate chapter.

- Schedule a Report
- Schedule a Report that has Report Variables
- Edit a Report Schedule

Selecting a Catalog

Before you can open any report in the Report Catalog, you must first select the specific catalog that contains the report you want to use.

■ To select a catalog:

From the Report Catalog,

1. **Click** the DOWN ARROW next to the Report Catalog text box on the toolbar. ReportSmith displays a drop-down list of available catalogs.
2. **Click** the CATALOG you want. ReportSmith displays that catalog's report folders in the left pane.

Note: Depending on the security level that has been established on your system, you may not have access to all catalogs. Note, however, that having administrative privileges grants you access to all catalogs.

Sorting the Right Pane

You can sort the right pane of the Report Catalog by clicking on the column heading you want to use as the report sort criteria.

■ To sort the right pane:

From the Report Catalog,

- **Click** the COLUMN HEADING in the right pane that you want to use as the sort criteria.

ReportSmith sorts the whole list based on that heading. For example, click the 'Name' column heading if you want to sort the reports in the right pane alphabetically. You can click any column heading repeatedly to toggle between an ascending sort order and a descending sort order

Note: Keep in mind that the browser sorts the entire list based on the column heading you select — not just that one particular column.

Running a Report

ReportSmith Web displays the Report Catalog dialog box in the browser after you log in. The catalog first displays a tree of report folders in the left pane. When you select one of those folders, ReportSmith displays a list of reports contained within that folder, in the right pane.

Note: If you are using ReportSmith for the first time, you may not have access to any catalogs. Please see your system administrator to obtain access to the necessary catalogs before attempting to run a report in ReportSmith.

Items listed in the Report Catalog as file type .pdf, .xls, or any type other than .rpt, are **static** documents. That is, when you open these documents, they are not generated by accessing a database; instead, they appear exactly as they did at the time the report was last run against the database.

To run a report:

From the Report Catalog,

1. **Select** the CATALOG from the drop-down list that contains the report you want to run. ReportSmith displays the folders available in the selected catalog.
2. **Click** the FOLDER in the left pane of the Catalog dialog box that contains the report you want to run. ReportSmith displays the contents of the selected folder in the right pane.
3. **Click** the REPORT ICON, in the right pane, which is located to the left of the report you want to run. ReportSmith places a dotted line around the icon and activates it, indicating that you selected the report.

Note: There is a check box labeled 'Save To PDF On Open' on the lower right-hand side of the screen. You can check this check box if you want ReportSmith to save the report to the catalog as a PDF document.

4. **Click** the OPEN button located on the lower right-hand side of the screen.

— or —

Click the OPEN icon on the toolbar located at the top of the screen.

If the file type is .pdf (a PDF document), ReportSmith displays the document in the Adobe Acrobat Reader window. However, if the file type is .rpt (a report file), ReportSmith displays the Connection Information dialog box.

Note: If you do not have the Adobe Acrobat Reader installed, Click the Adobe Acrobat Icon in the upper right-hand corner of the window. This is a direct link to the Adobe Web site, where you can download and install the Adobe Acrobat Reader.

Note: You **cannot double-click** the report to open it. You must use the Open button or the Open icon.

5. **Type** the proper CONNECTION INFORMATION in some or all of the following text boxes. For instructions on filling out the Connection Information dialog box, see "Entering Connection Information" on page 12.

6. **Click** the OK button when you finish entering your information. If the report includes no Report Variables, ReportSmith generates the report in an Adobe Acrobat Reader window in a .pdf format.

— or —

If the report contains Report Variables, ReportSmith displays the Report Variables dialog box in the browser. The Report Variables dialog box displays one or more prompts asking you to type or select a specific Report Variable value, for example, "Enter a last name." or "Select a date."

7. **Type** the ANSWER to each prompt in the Report Variables dialog box and **click** the OK button. The browser closes the Report Variables dialog box, runs the report, and displays it in an Adobe Acrobat Reader window.

If you don't have Adobe Acrobat Reader installed on your PC, the browser prompts you to save the report in the Report Catalog.

8. Click the OK button to save.

Entering Connection Information

ReportSmith displays the Connection Information dialog box whenever you run a report (.rpt file) and immediately after you create or edit the schedule of a report. The Connection Information dialog box receives the connection information needed to connect to the database that contains the report you want to run. You must enter the proper information in some or all of the boxes, depending on the database to which you are connecting.

The following list describes the information you should enter in each text box. The number of text boxes that require an entry depends on the database to which you want to connect.

- 'Login'— Enter your database login/user ID (not your ReportSmith user ID) in this text box.
- 'Database Name'— Enter the database name for the report in this text box.
- 'Server Name'— Enter the name of the server for the report in this text box.

If the database uses an ODBC driver, then enter the Data Source Name (DSN) in the text box labeled 'Server Name'.

- 'Password'— Enter the database password in this text box.

If necessary, please contact your system administrator to get the correct Database Login, Database Name, Server Name, and Database Password for the database you are trying to access.

■ To enter connection information:

In the Connection Information dialog box,

1. **Click** the corresponding CHECK box to select the row of connection information you want. If the proper connection information is listed in the table at the top of the box, ReportSmith immediately copies that row of information to the four boxes below the table.

— or —

Click the 'NEW' button located on the upper right-hand side of the Connection Information dialog box and **type** NEW CONNECTION INFORMATION in the four text boxes.

2. **Click** the OK button. ReportSmith closes the Connection Information dialog box.

Printing a Report from the Browser

ReportSmith 4.2 is able to convert reports to a .pdf format. You can view and print these reports using Adobe® Acrobat Reader. Note, however, that you need to install Adobe Acrobat Reader 4.0 on your PC to use the 'Print as Save' function.

Before printing a report to .pdf, you must first run it from the Report Catalog.

■ To print a report from the Browser:

From the Report Catalog,

1. **Run** the REPORT. (Refer to “Running a Report” on page 10.)
Note: The report must be either a .rpt or .pdf.
If the report is a .rpt, be sure you check the check box labeled 'Print to PDF on Open' in the Report Catalog.
2. **Click** the PRINT icon In the Adobe Acrobat Reader window. Adobe Acrobat Reader displays the Adobe Acrobat Print dialog box.
3. **Click** the DOWN arrow to the right of the Name field in the Print frame of the Print dialog box. Acrobat Reader displays a drop-down menu.
4. **Select** a PRINTER from the drop-down menu if you want to use a printer other than the default.
5. **Click** the CORRESPONDING check boxes to enable any of the following options:
 - Reverse pages—prints the document from back to front.
 - Print as image—prints from an image editing application such as Adobe® Photoshop
 - Fit to page—sizes the document to fit the page size you selected.
 - Print to file—prints to a file on your PC, not to a printer.
6. **Click** the PROPERTIES button and select the appropriate page setup options from the drop-down menu (i.e.: paper size, orientation, etc).
7. **Click** ONE of the following RADIO buttons in the Print Range section of the Print dialog box to choose a specific print range:
 - 'All' — Prints all pages of the report.
 - 'Current page' — Prints only the current page.
 - 'Pages: From...To' — Creates a print range when you type a beginning and ending page number in the text boxes on the right.
8. **Type** a NUMBER in the Copies text box or use the arrows on the right to scroll to the desired number of copies you want to print.
9. **Click** the DOWN arrow to the right of the Print text box and select one of the following print options from the drop-down menu:
 - Print odd pages
 - Print even pages
 - Print odd and even pages

10. **Click** the OK button at the bottom of the Print dialog box. Adobe Acrobat Reader prints the report at the printer that you specified in the Print frame of the dialog box.

Viewing Report Properties

Report properties are the characteristics of a specific report. You can view these properties using the Report Properties dialog box, which consists of three tabs: General, Security, and Schedule. You access the Report Properties dialog box from the Report Catalog.

■ To view report properties:

From the Report Catalog,

1. **Select** the CATALOG that contains the report you want.
2. **Navigate** to the FOLDER in the left pane that contains the report you want and **click** to open it. In the right pane, ReportSmith displays a list of reports contained inside the folder.
3. **Click** the REPORT icon located to the left of the report you want. ReportSmith places a dotted line around the icon and activates it, indicating that you selected the report.
4. **Click** the PROPERTIES icon located on the Report Catalog toolbar. ReportSmith displays the Properties dialog box with three labeled tabs at the top: General, Security, and Schedule.
 - General — displays the following information:
 - Report name
 - Description (of the report)
 - Creator of the report and the creation date
 - Who last modified the report and the date
 - Report type
 - Security — displays the following choices: 'private', 'print only', and 'read only'. Private is the default setting. It means that only the creator of the document or a user with administrative privileges can edit or delete it. A user without administrative privileges can only see those documents to which he/she has been granted access.

ReportSmith displays Report 'Security' properties for informational purposes only. They cannot be modified from within the browser.
 - Schedule — displays the Schedules Summary list box. The Schedules Summary list box displays all schedules that are created for this specific report, regardless of who created them.
5. **Click** the CLOSE button to exit the Properties box after viewing the properties for the report. ReportSmith closes the Properties dialog box and displays the Report Catalog.

Viewing Users and User Groups

If you have administrative privileges, ReportSmith displays a Users tab on the bottom left-hand corner of the Catalog. The Users tab displays two folders: User Groups and Users. A User Group refers to a number of individuals who are placed in a particular category. A User refers to each individual who currently has or previously has had privileges within ReportSmith.

Note: ReportSmith displays Users Groups solely for informational purposes.

When you select the Users folder in the left pane, ReportSmith displays, in the right pane, a list of all the individuals who have or ever have had privileges in ReportSmith. The table has three column headings:

- User Name —displays the names of all the users.
- Administrator — indicates whether a specific user has administrative privileges. 'Yes' means the user has administrative privileges. 'No' means the user does not have administrative privileges.
- Active — indicates whether a specific user is currently authorized to use ReportSmith. 'Yes' means the user is currently authorized. 'No' means the user was previously authorized, but currently is not.

Note: You can inactivate a user, but you may never delete a user from the list. This process allows even an inactive user to be included in all the audit trails of any reports he/she has either created or edited.

■ **To view users:**

From the Report Catalog,

1. **Click** the USERS tab on the bottom left-hand side of the screen. ReportSmith displays the User dialog box.
2. **Click** the USERS folder in the left pane. ReportSmith displays, in the right pane, a list of users contained within a specific user folder.

Viewing User Properties

If you have administrative privileges, ReportSmith displays a Users tab on the lower left-hand side of the Report Catalog dialog box. ReportSmith displays User properties for informational purposes only. You can modify the User properties from ReportSmith Enterprise and not through the browser.

Note: You can inactivate a user, but you may never delete a user from the list. This process allows even an inactive user to be included in all the audit trails of any reports he/she has either created or edited.

■ **To view user properties:**

From the Report Catalog,

1. **Click** the USER tab. ReportSmith displays the User dialog box.
2. **Click**, in the right pane, the ICON located immediately to the left of a specific user name. The ReportSmith activates the icon, indicating that you have selected it.
3. **Click** the PROPERTIES icon on the Report Catalog toolbar. ReportSmith displays the User Properties dialog box with two tabs: General and Security.
 - The General tab displays the following information.
 - The user name.
 - A check box that indicates whether the user has administrative privileges. An 'x' in the check box means the user has administrative privileges.
 - A check box that indicates whether the user is 'active'. An 'x' in the check box means the user is active; that is, he/she is currently authorized to use ReportSmith.
 - The Security tab displays a list of catalogs that you are authorized to access.
4. **Select** the TAB that contains the information you want to view.

The Report Scheduler

About the Report Scheduler

ReportSmith Web allows you to use the Report Scheduler through the browser to schedule reports to run at specific times and intervals. The Report Scheduler accepts your scheduling data and saves it on the Report Server once you click the OK button. You can view the schedules by viewing the Schedules Summary within the properties of the report.

The newest feature of the Report Scheduler is its ability to schedule reports that contain Report Variables. With Report Variables, you can customize a report to obtain different results, depending on the data entered into a dialog box.

Using the Report Scheduler, you can schedule reports:

- **Once:** meaning one entire day — one time on one day, or many times on one day.
- **Daily:** meaning each day or several days during the week, as well as several times each day.
- **Weekly:** meaning every number of weeks (for example: every first week, every third week) on one, all, or multiple days of the week.
- **Monthly:** meaning once each month, every day of the month, or several days of each week during the month.
- **Specify a date on which to stop running the report** for all types of schedules, except schedules set to run just 'Once', for example, 'end date: 9/30/00'.

- **Specify the frequency for running the report**, for example, run 'every 15 minutes'.
- **Specify the end of x repetitions** as a defined time, or specify the duration to run the report, for example, run the report 'every 15 minutes', 'Until time 05:17:30'.

Accessing the Report Scheduler

You can access the Report Scheduler by selecting a report from the Report Catalog, then clicking the Schedule icon on the browser toolbar.

■ To access the Report Scheduler:

From the Report Catalog,

1. **Click** the REPORT ICON to the left of the report that you want to schedule. ReportSmith places a dotted line around the icon and activates it, indicating that you selected the report.
2. **Click** the SCHEDULE ICON on the toolbar. ReportSmith displays the Scheduler dialog box in a new window in the browser. In the Scheduler dialog box, you have the option to schedule a report to run Once, Daily, Weekly, or Monthly, then set the date and time, set the frequency, choose to print to .pdf, or suspend the schedule.

Scheduling a Report

Using ReportSmith you can schedule a report by following this process:

1. Locate the Report Scheduler. See “Accessing the Report Scheduler” on page 18.
2. Select whether you want to run the report ONCE, DAILY, WEEKLY, OR MONTHLY.
3. Fill in the text boxes with the appropriate information.
4. Click OK.

For a more detailed explanation on completing each specific type of schedule, refer to the procedures that follow.

Scheduling a Report to Run Once

Scheduling a report to run 'Once' means scheduling it to run only on one specific day. The Report Scheduler gives you the option to run the report only one time on that day, or many times on that day.

■ To schedule a report to run 'Once':

From the Report Catalog,

1. **Select** the CATALOG that contains the report you want to schedule.
2. **Navigate** to the FOLDER that contains the report and **click** to open it. ReportSmith displays, in the right pane, a list of reports that the folder contains.
3. **Click** the REPORT icon to the left of the report you want to schedule. ReportSmith activates the icon, indicating that you selected it.
4. **Click** the SCHEDULE icon on the toolbar. ReportSmith displays the Report Scheduler dialog box in a new browser window.
5. **Click** the RADIO button labeled 'Once', in the top frame of the Report Scheduler dialog box. ReportSmith places a black dot in the radio button, indicating that you selected it.
6. **Type** a START DATE in the 'Start Date' text box, using the format shown in the box, i.e.: MM/DD/YYYY.
7. **Type** a START TIME (hour and minutes) in the 'Start Time' text box, using the format shown in the box, i.e.: HH:MM, and **Click** the DOWN arrow on the right to select AM or PM.
8. **Click** the CHECK BOX labeled 'Repeat' if you want to run the report on a recurring basis on that day. ReportSmith places a check mark in the box, indicating that you selected it. You can toggle a check box on and off by clicking it repeatedly with your mouse.
 - (1) **Type** a NUMBER in the text box labeled 'Every.'
 - (2) **Click** the DOWN ARROW on the right to select 'hours' or 'minutes' as the frequency of recurrence.
 - (3) **Type** the TIME (hour and minutes) in the 'Until time' text box that you want the report schedule to end and **Click** the DOWN arrow on the right to select AM or PM.

'Save as file' is checked as the default. You can either 'Save as PDF' or 'Save as RPT'.
9. **Check** the CHECK box labeled 'Suspended' if you want to indefinitely suspend the running of an existing schedule. Note, however, you must clear this box to resume running the schedule.
10. **Click** the OK button. ReportSmith closes the Report Scheduler dialog box and displays the Connection Information dialog box.

11. **Type** the proper CONNECTION INFORMATION in some or all of the following boxes in the Connection Information dialog box: Login, Database Name, Server Name, and Password.(Refer to “Entering Connection Information” on page 12 for information on completing this dialog box.)

The number of text boxes that require an entry depends on the database to which you are connecting. If necessary, please contact your system administrator to get the proper connection information.

12. **Click** the OK button when you finish entering your connection information. If the report includes no Report Variables, ReportSmith closes the Connection Information dialog box, stores the schedule on the Report Server, and displays the Report Catalog.

— or —

If the report contains Report Variables, ReportSmith displays the Report Variables dialog box. The Report Variables dialog box displays one or more prompts asking you to type or select a specific Report Variable value; for example, "Enter a last name." or "Select a date."

13. **Type** the ANSWER to each prompt in the Report Variables dialog box, then **click** the OK button. ReportSmith closes the dialog box, stores the schedule on the Report Server and displays the Report Catalog.

Scheduling a Report to Run Daily

Scheduling a report to run 'Daily' means scheduling it to run each day, several days during the week, and/or several times each day.

■ To schedule a report to run 'Daily':

From the Report Catalog,

1. **Select** the CATALOG that contains the report you want to schedule.
2. **Navigate** to the FOLDER that contains the report and **click** to open it. ReportSmith displays, in the right pane, a list of reports that are contained in the folder.
3. **Click** the REPORT icon located to the left of the report you want to schedule. ReportSmith activates the icon, indicating that you have selected it.
4. **Click** the SCHEDULE icon on the toolbar. ReportSmith displays the Report Scheduler dialog box in a new window in the browser.
5. **Click** the RADIO button labeled 'Daily', in the top frame of the dialog box. ReportSmith places a black dot in the button, indicating that you selected it and opens an 'Every...Day(s)' text box.
6. **Type** a NUMBER in the text box labeled 'Every..Day(s)' to indicate the frequency of days you want the report to run.

7. **Type** a START DATE in the 'Start Date' text box, using the format shown in the box, i.e.: MM/DD/YYYY.
8. **Type** a START TIME (hour and minutes) in the 'Start Time' text box, using the format shown in the box, i.e.: HH:MM, and **click** the DOWN arrow on the right to select AM or PM.
9. **Click** the RADIO button labeled 'No end date' if you want the report schedule to run indefinitely.

— or —

Click the RADIO button labeled 'End Date' if you want the report schedule to end on a particular date. ReportSmith places a black dot in the button, indicating that you selected it.

10. **Type** the END DATE in the text box located on the right of the End Date radio button. Use the format shown in the box, i.e.: MM/DD/YYYY.
11. **Click** the CHECK box labeled 'Repeat' if you want to run the report on a recurring basis during that time frame. ReportSmith places a check mark in the box, indicating that you selected it. You can toggle a check box on and off by clicking on it repeatedly.
 - (1) **Type** a NUMBER in the text box labeled 'Every'.
 - (2) **Click** the DOWN arrow on the right to select 'hours' or 'minutes' as the frequency of recurrence.
 - (3) **Type** the TIME (hour and minutes) in the 'Until time' text box that you want the report schedule to end and **click** the DOWN arrow on the right to select AM or PM.

'Save as file' is checked as the default. You can either 'Save as PDF' or 'Save as RPT'.

12. **Check** the check box labeled 'Suspended' if you want to indefinitely suspend the running of an existing schedule. Note, however, you must clear this box to resume running the schedule.
13. **Click** OK. ReportSmith closes the Report Scheduler dialog box and displays the Connection Information dialog box.
14. **Type** the proper CONNECTION INFORMATION in some or all of the following boxes in the Connection Information dialog box : Login, Database Name, Server Name, and Password.

The number of text boxes that require an entry depends on the database to which you are connecting. If necessary, please contact your system administrator to get the proper connection information. (Refer to "Entering Connection Information" on page 12 for help in completing this dialog box.)

15. **Click** the OK button once you have entered all your connection information. If the report includes no Report Variables, ReportSmith closes the Connection Information dialog box, stores the schedule on the Report Server, and displays the Report Catalog.

— or —

If the report has Report Variables, ReportSmith displays the Report Variables dialog box. The Report Variables dialog box displays one or more prompts asking you to type or select a specific Report Variable value, for example, "Enter a last name." or "Select a date."

16. **Type** the ANSWER to each prompt in the Report Variables dialog box, then **click** the OK button. ReportSmith closes the dialog box, stores the schedule on the Report Server and displays the Report Catalog. (Refer to ReportSmith's user guide, *Creating Reports*, for more information about creating report variables.)

Scheduling a Report to Run Weekly

Scheduling a report to run 'Weekly' means it runs every number of weeks on one, all, or multiple days of the week.

■ To schedule a report to run 'Weekly':

From the Report Catalog,

1. **Select** the CATALOG that contains the report you want to schedule.
2. **Navigate** to the FOLDER that contains the report and **click** to open it. ReportSmith displays, in the right pane, a list of reports that are contained in the folder.
3. **Click** the REPORT icon located to the left of the report you want to schedule. ReportSmith places a dotted line around the icon, indicating that you selected it.
4. **Click** the SCHEDULE icon on the toolbar. ReportSmith displays the Report Scheduler dialog box in a new browser window.
5. **Click** the RADIO button labeled 'Weekly', in the top frame of the dialog box. The browser places a black dot in the button, indicating that you selected it, and displays a row of check boxes to the far right of the radio button.
 - (1) **Type** a NUMBER in the check box labeled 'Every...Week(s)' to indicate the frequency of weeks you want the report to run. For example, 'Every 3 week(s)'.
 - (2) **Click** the corresponding CHECK BOX for each day of the week you want the report to run. For example, you can schedule the report to run 'Every 3 week(s) on Monday, Wednesday, and Friday.' ReportSmith displays a check mark in each box you select.

6. **Type** a START DATE in the 'Start Date' text box, using the format shown in the box, i.e.: MM/DD/YYYY.
7. **Type** a START TIME (hour and minutes) in the 'Start Time' text box, using the format shown in the box, i.e.: HH:MM, and **click** the DOWN arrow on the right to select AM or PM.
8. **Click** the RADIO button labeled 'No end date' if you want the report schedule to run indefinitely.

— or —

Click the RADIO button labeled 'End Date' if you want the report schedule to end on a particular date.

ReportSmith places a black dot in the button, indicating that you selected it.

9. **Type** the END DATE in the text box on the right of the End Date radio button. Use the format shown in the box, i.e.: MM/DD/YYYY.
10. **Click** the CHECK box labeled 'Repeat' if you want to run the report on a recurring basis during that time frame. ReportSmith places a check mark in the box, indicating that you selected it. You can toggle a check box on and off by clicking on it repeatedly.
 - (1) **Type** a NUMBER in the text box labeled 'Every'.
 - (2) **Click** the DOWN arrow on the right to select 'hours' or 'minutes' as the frequency of recurrence.
 - (3) **Type** the TIME (hour and minutes) in the 'Until time' text box that you want the report schedule to end and **click** the DOWN arrow on the right to select AM or PM.

'Save as file' is checked as the default. You can either 'Save as PDF' or 'Save as RPT'.

11. **Check** the check box labeled 'Suspended' if you want to indefinitely suspend the running of an existing schedule. Note, however, you must clear this box to resume running the schedule.
12. **Click** the OK button. ReportSmith closes the Report Scheduler dialog box and displays the Connection Information dialog box.
13. **Type** the proper CONNECTION INFORMATION in some or all of the following boxes in the Connection Information dialog box: Login, Database Name, Server Name, and Password.

The number of text boxes that require an entry depends on the database to which you are connecting. If necessary, please contact your system administrator for the proper connection information. (Refer to "Entering Connection Information" on page 12 for help in completing this dialog box.)

14. **Click** the OK button once you have entered all your connection information. If the report includes no Report Variables, ReportSmith closes the Connection Information dialog box, stores the schedule on the Report Server, and displays the Report Catalog.

— or —

If the report has Report Variables, ReportSmith displays the Report Variables dialog box. The Report Variables dialog box displays one or more prompts asking you to type or select a specific Report Variable value, for example, "Enter a last name." or "Select a date."

15. **Type** the ANSWER to each prompt in the Report Variables dialog box, then **click** the OK button. ReportSmith closes the dialog box, stores the schedule on the Report Server and displays the Report Catalog. (Refer to ReportSmith's user guide, *Creating Reports*, for more information on creating report variables.)

Scheduling a Report to Run Monthly

Scheduling a report to run 'Monthly' means the report runs once each month, every day of the month, or several days of each week during the month.

■ To schedule a report to run 'Monthly':

From the Report Catalog,

1. **Select** the CATALOG that contains the report you want to schedule.
2. **Navigate** to the FOLDER that contains the report and **click** to open it. ReportSmith displays, in the right pane, a list of reports that the folder contains.
3. **Click** the REPORT icon located to the left of the report you want to schedule. ReportSmith places a dotted line around the icon, indicating that you have selected it.
4. **Click** the SCHEDULE icon on the toolbar. ReportSmith displays the Report Scheduler dialog box in a new browser window.
5. **Click** the RADIO button labeled 'Monthly' in the top frame of the dialog box. ReportSmith places a black dot in the button, indicating that you have selected it, and displays a row of radio buttons and text boxes on the right.
6. **Click** the RADIO button to the left of the word 'Day', and **type** a NUMBER in the text box to the right, indicating which day you want the report to run. ReportSmith places a black dot in the radio button, indicating that you have selected it.

— or —

Click the RADIO button to the left of the word 'The'.

Some months have only 28 or 30 days. If you select day 31 of the month, ReportSmith defaults to the last day of the month to run reports.

- (1) **Click** the FIRST down arrow on the right to select the frequency for the day, i.e.: 'first', 'second', etc.
- (2) **Click** the SECOND down arrow on the right to select the day of the week, i.e.: the 'last Friday of the month'.
7. **Type** a START DATE in the 'Start Date' text box, using the format shown in the box, i.e.: MM/DD/YYYY.
8. **Type** a START TIME (hour and minutes) in the 'Start Time' text box, using the format shown in the box, i.e.: HH:MM, and **click** the DOWN arrow on the right to select AM or PM.
9. **Click** the RADIO button labeled 'No end date' if you want the report schedule to run indefinitely.

— or —

Click the RADIO button labeled 'End Date' if you want the report schedule to end on a particular date.

ReportSmith places a black dot in the button, indicating that you selected it.

10. **Type** the END DATE in the text box on the right of the End Date radio button. Use the format shown in the box, i.e.: MM/DD/YYYY.
11. **Click** the CHECK box labeled 'Repeat' if you want to run the report on a recurring basis during that time frame. ReportSmith places a check mark in the box, indicating that you selected it. You can toggle a check box on and off by clicking on it repeatedly.
 - (1) **Type** a NUMBER in the text box labeled 'Every'.
 - (2) **Click** the DOWN arrow on the right to select 'hours' or 'minutes' as the frequency of recurrence.
 - (3) **Type** the TIME (hour and minutes) in the 'Until time' text box that you want the report schedule to end and **click** the DOWN arrow on the right to select AM or PM.

'Save as file' is checked as the default. You can either 'Save as PDF' or 'Save as RPT'.

12. **Check** the check box labeled 'Suspended' if you want to suspend the running of an existing schedule indefinitely. Note, however, you must clear this box to resume running the schedule.
13. **Click** the OK button. ReportSmith closes the Report Scheduler dialog box and displays the Connection Information dialog box.
14. **Type** the proper CONNECTION INFORMATION in some or all of the following boxes in the Connection Information dialog box: Login, Database Name, Server Name, and Password.

The number of text boxes that require an entry depends on the database to which you are connecting. If necessary, please contact your system administrator for the proper connection information. (Refer to "Entering Connection Information" on page 12 for help in completing this dialog box.)

15. **Click** the OK button when you finish entering your connection information. If the report includes no Report Variables, ReportSmith closes the Connection Information dialog box, stores the schedule on the Report Server, and displays the Report Catalog.

— or —

If the report has Report Variables, ReportSmith displays the Report Variables dialog box. The Report Variables dialog box displays one or more prompts asking you to type or select a specific Report Variable value, for example, "Enter a last name." or "Select a date."

16. **Type** the ANSWER to each prompt in the Report Variables dialog box, then **click** the OK button. ReportSmith closes the dialog box, stores the schedule on the Report Server and displays the Report Catalog. Refer to ReportSmith's user guide, *Creating Reports*, for more information on creating report variables.

Scheduling with Report Variables

Report Variables are the criteria you enter to customize a report. With Report Variables, you can obtain specific results that depend on the data you enter in the dialog box. For example, you can schedule a report to run at 3:00 PM for the state of California or at 6:00 PM for the state of Massachusetts.

When a report includes Report Variables, ReportSmith displays the Report Variables dialog box whenever you open or schedule the report.

■ To Schedule a Report that contains Report Variables:

1. **Schedule** the REPORT and **click** the OK button at the bottom of the Report Scheduler dialog box. ReportSmith displays the Connection Information dialog box. (Refer to "Scheduling a Report to Run Once" on page 19 for help in scheduling a report and "Entering Connection Information" on page 12 for help in completing the Connection Information dialog box.)
2. **Type** the INFORMATION in the Connection Information dialog box and **click** the OK button. ReportSmith displays the Report Variables dialog box with the variable listed in the title bar, and opens a text box.
3. **Type** the specific VALUE for the report variable in the text box and **click** the OK button. For example, if the report value in the report is 'state', then ReportSmith displays 'state' in the title bar. Type the abbreviation for a state in the text box, for example, CA. ReportSmith closes the Report Variables dialog box and schedules your report to run with the report variable you selected. (Refer to ReportSmith's user guide, *Creating Reports*, for more information on creating report variables.)

About the Schedules Summary

The Schedules Summary is a list box that displays all the report schedules created for one particular report using the Report Scheduler. Each line in the summary represents an existing schedule for a report. You can access the Schedules Summary list box from the Report Properties dialog box.

From the Schedules Summary list box, you can:

- View all reports that are scheduled to run for a particular report.
- Determine whether any report has been suspended.
- Note when a report was last run or when the next run is scheduled to occur.
- Identify who scheduled the report.
- Edit the run schedule for a report if you originally created the schedule or if you have administrative privileges.

Accessing the Schedules Summary

The Schedules Summary list box displays all the report schedules created for a specific report regardless of who scheduled them. To access the Schedules Summary list box, you must first select a report from the Report Catalog.

■ To view the Schedules Summary list box:

From the Report Catalog,

1. **Click** the REPORT icon to the left of the specific report whose schedule you want to view. ReportSmith places a dotted line around the icon and activates it, indicating that you selected the report.
2. **Click** the PROPERTIES icon on the browser toolbar. ReportSmith displays the Report Properties dialog box with three tabs: General, Security, and Schedule.
3. **Click** the SCHEDULE tab. ReportSmith displays the Schedules Summary list box, containing all the schedules created for the selected report.

Editing a Report Schedule

You can edit the schedule for a particular report after creating it. However, you access the Report Scheduler through the Schedule tab on the Report Properties dialog box rather than using the Schedule button on the browser toolbar. The Schedule button on the browser toolbar does not allow you to edit a pre-existing schedule. It only allows you to create new schedules.

Note: You can only edit the schedule of a report if:

- You created the original schedule.
- or—
- You have administrative privileges.

■ To edit a report schedule:

From the Report Catalog,

1. **Select** the CATALOG that contains the report you want. (Refer to “Selecting a Catalog” on page 9.)
2. **Navigate** to the FOLDER in the left pane that contains the report and **click** to open it. In the right pane, ReportSmith displays a list of reports contained in that particular folder.
3. **Click** the REPORT ICON located to the left of the specific report you want to edit. ReportSmith places a dotted line around the icon and activates it, indicating that you selected the report.
4. **Click** the PROPERTIES ICON on the toolbar at the top of the Report Catalog window. ReportSmith displays the Properties dialog box with three tabs: General, Security, and Schedule.
5. **Click** the SCHEDULE TAB to select it. ReportSmith displays a Schedules Summary list for that specific report.
6. **Click** the SCHEDULE in the Report Name section of the Schedules Summary list that you want to edit. ReportSmith displays the Scheduler dialog box.
7. **Edit** the SCHEDULING CRITERIA for the report in the Scheduler dialog box, and **click** the OK button. ReportSmith displays the Connection Information dialog box.
8. **Type** the proper CONNECTION INFORMATION in some or all of the following text boxes in the Connection Information dialog box.
 - 'Login' - Enter your database login/user ID (not your ReportSmith user ID) in this text box.
 - 'Database Name'- Enter the name of the proper database in this text box.
 - 'Server Name' - Enter the name of the proper server in this text box.

If the database uses an ODBC driver, then enter the Data Source Name in this text box.

- 'Password'- Enter the database password in this box.

The number of text boxes that require an entry depends on the database to which you are connecting. (Refer to “Entering Connection Information” on page 12 for detailed instructions on entering connection information.)

9. **Click** the OK button once you have entered the connection information. If the report has no Report Variables, ReportSmith closes the Connection Information dialog box and saves the revised schedule to the Scheduler.

—or—

If the report contains Report Variables, ReportSmith displays the Report Variables dialog box. The Report Variables dialog box displays one or more prompts asking you to type or select a specific Report Variable value. For example, "Enter a last name." or "Select a date."

10. **Type** the ANSWER to each prompt in the proper text box or select the proper button, then **click** the OK button. ReportSmith closes the dialog box and saves the revised schedule to the Scheduler. (Refer to ReportSmith's user guide, *Creating Reports*, for more information on creating report variables.)

Index

A

Adobe Acrobat Reader 11

B

browser 5

connecting to ReportSmith 6

C

catalog

functions 7

selecting 9

sorting 10

connecting to ReportSmith 6

connection information 12

D

delete user 15

description text box 8

E

editing a report schedule 27

F

function

catalog 7

description text box 8

help button 8

logoff button 8

open button 8

open icon 8

report name text box 8

reports tab 8

save to pdf on open 8

schedule icon 7

through the browser 9

users tab 8

G

general properties 14

H

help button 8

L

logoff button 8

O

open button 8

open icon 8

P

Printing a pdf report 13

properties tab

general 14

schedule 14

R

report name text box 8

report properties 14

viewing 14

report schedule, edit 27

report scheduler, accessing 18

reports tab 8

running a report 10

S

Save to PDF 8

schedule icon 7

schedule properties 14

- schedule reports 17, 18
 - containing report variables 26
 - daily 17, 20
 - end date 17
 - for months with less than 31 days 24
 - frequency 18
 - monthly 17, 24
 - once 17, 19
 - specify end of repetitions 18
 - suspend 19
 - weekly 17, 22
- schedule summary
 - accessing 27
 - view 27
- security properties 14
- selecting a catalog 9
- Sorting the report list 10
- suspend a schedule 19

T

- tasks through a browser 5

U

- user 15
- user group 15
- user properties 15
- users tab 8

V

- view schedule summary 27
- view user properties 15
- view users 15
- view users groups 15
- viewing report properties 14

W

- Web environment 5