



Getting Started Guide
Scheduling And Delivery
Version 1.0

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Scheduling and Delivery Guide for Argos

*We encourage you to inform us of any errors you may find in this guide, and we ask that you please forward suggestions that will make this document more relevant/understandable to those that will follow. We listen to our users to always try to improve our literature and products. Welcome to **Argos!** Enjoy!*

Document Overview

This document should guide you through the Scheduling and Delivery features of **Argos**.

For the purposes of this guide, it is assumed that the software has been fully installed and configured – i.e. ADO connections and users have been added. It is also assumed that you have existing datablocks with reports.

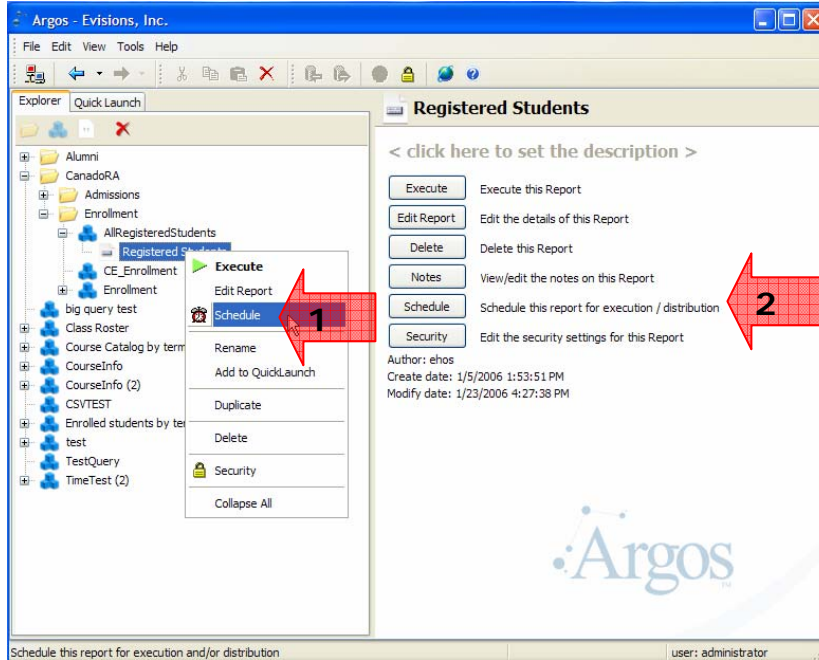
If any problems arise in following the examples in this guide, please contact our support staff for assistance. This can be done by submitting a support request to <http://helpdesk.evisions.com>, or you may choose to first visit our knowledgebase at <http://www.evisions.com/suport> .

In addition to this manual, there are additional manuals and multimedia tutorials for the Administrators and End Users.

Intended Audience

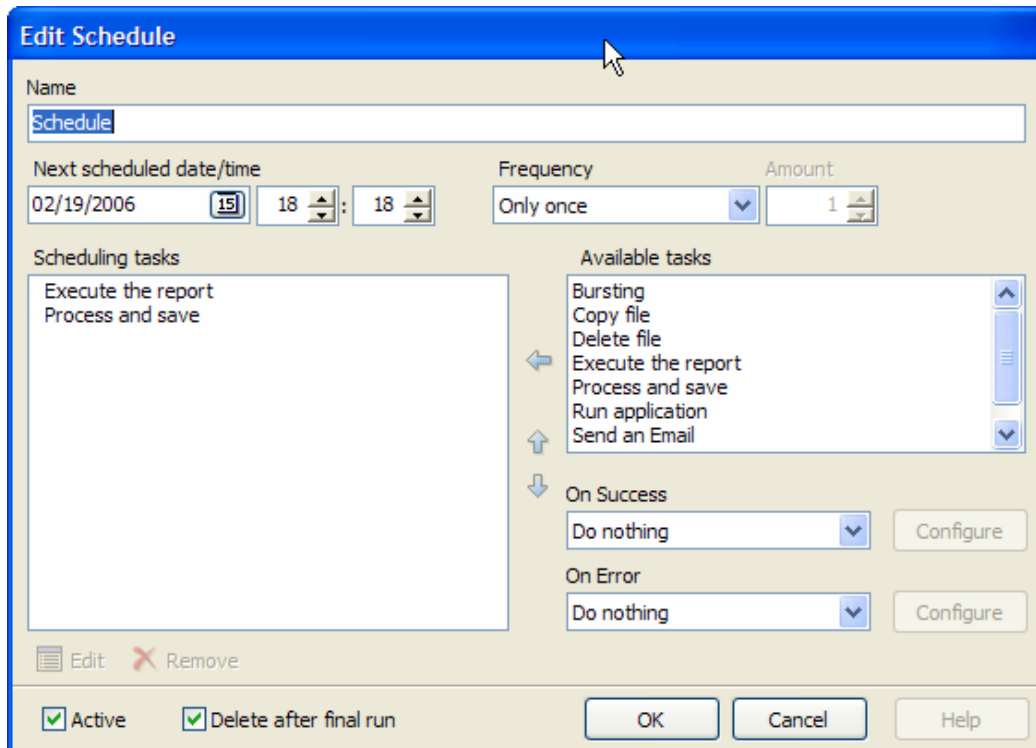
This guide is intended for the **Argos** developer and Normal User. I.e. any user who has the ability to create and/or execute reports. This is not a tutorial on how to create a report and will only discuss how to schedule reports to be executed and delivered.

1. Schedule a Job



To schedule a job, select the report and either right click and choose Schedule from the list of options (1), or select Schedule from the list of Menu options listed (2).

Note that only Banded Reports or CVS reports can be scheduled; Quick View reports cannot be scheduled.



The default Edit Schedule form will be displayed. This is the master form where the user will name the schedule; set the frequency; and establish the tasks.

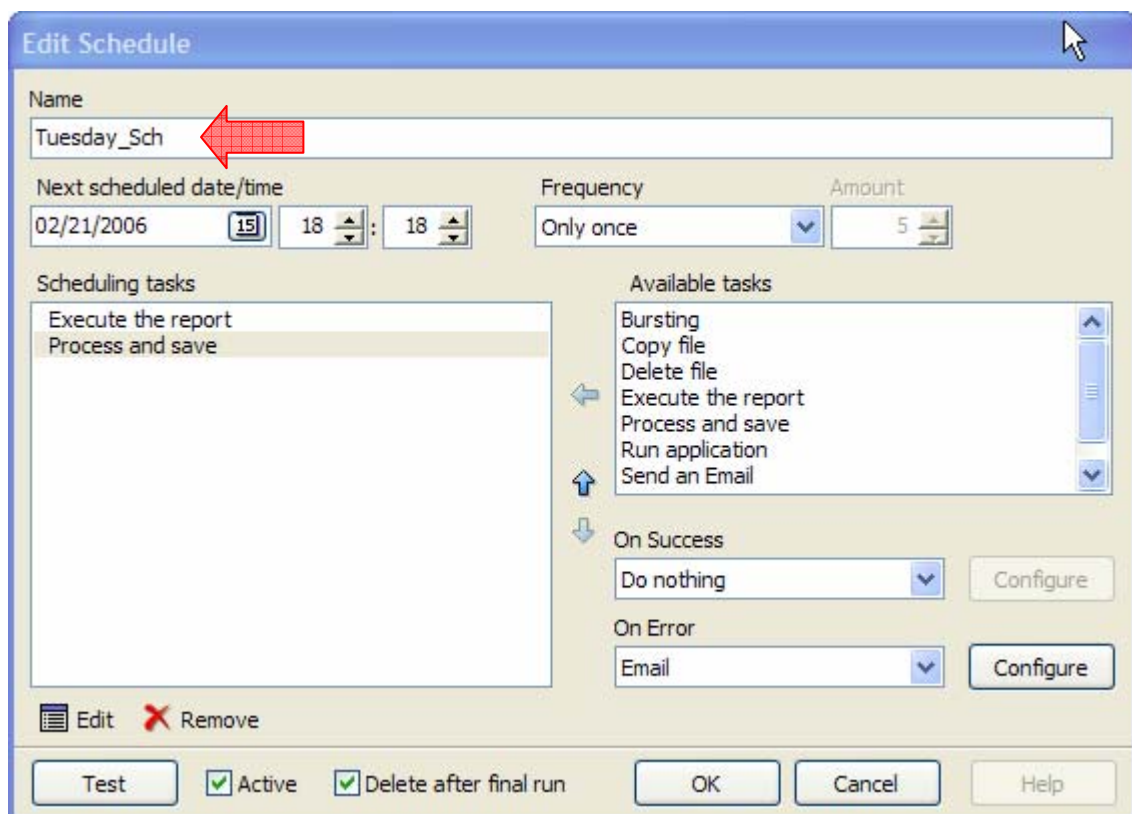
When scheduling a job the user should:

- Name the schedule job
- Set frequency
- Set the tasks
- Determine what to do if task succeeds or fails
- Test
- Activate and/or delete job after final execution
- Save settings

Name the schedule job

By default all jobs are assigned the name "Schedule". It is recommended that a more descriptive name be applied. By using a distinct name, the administrator can more easily manage jobs that are scheduled.

To assign a Name, highlight the current name and assign a new name. In this example, we want to execute the report every Tuesday and Thursday. The first one we create is the Tuesday schedule; therefore we will name it appropriately.

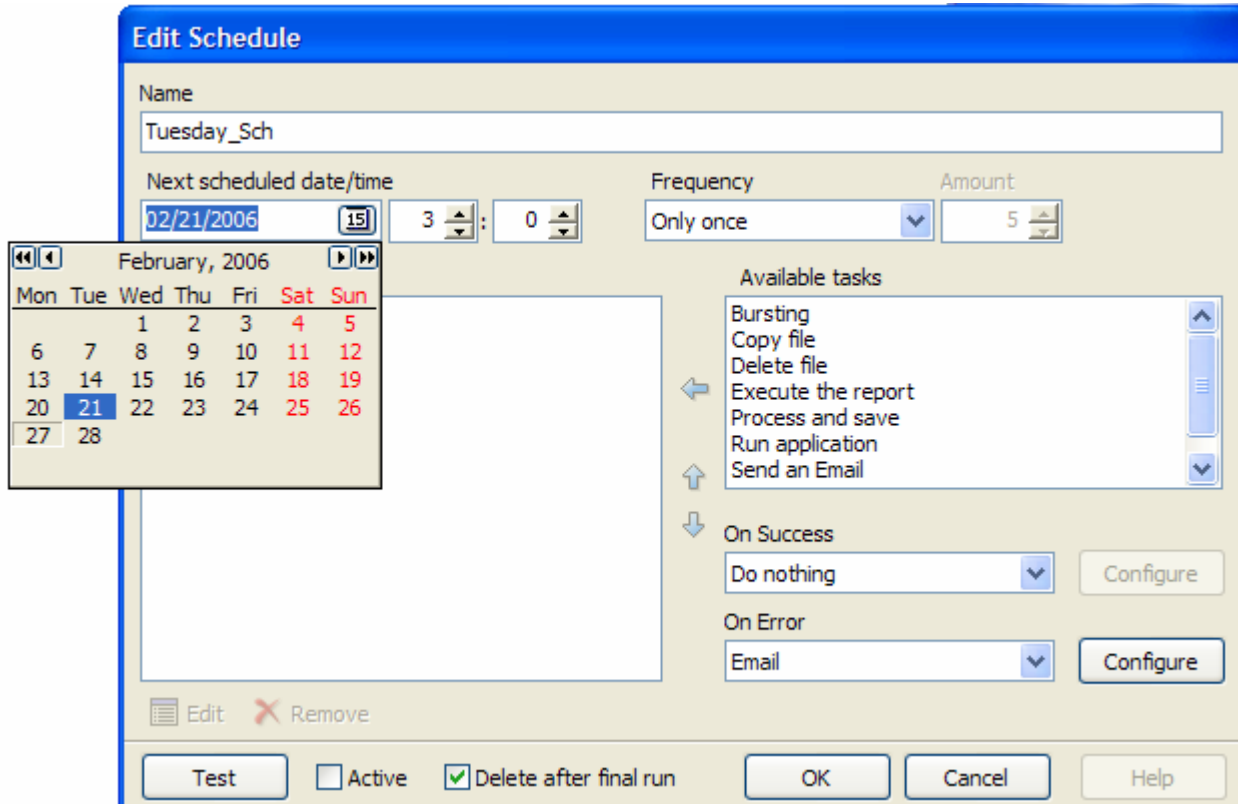


When the administrator reviews the scheduled jobs in MAPS, they will see the Name Tuesday_Sch.

Set the Frequency

By default the date and time is set the current date/time. If you keep this option, as soon as you click ok to save your settings, the job will execute.

To set the frequency, first decide the date and time that you want the first execution to occur. Click on the little Calendar Icon (📅) to have a full calendar display. The clock is set to use military or 24 hour. We want this job to run every Tuesday at 3:00am.



We next need to determine how frequently. Your options are:

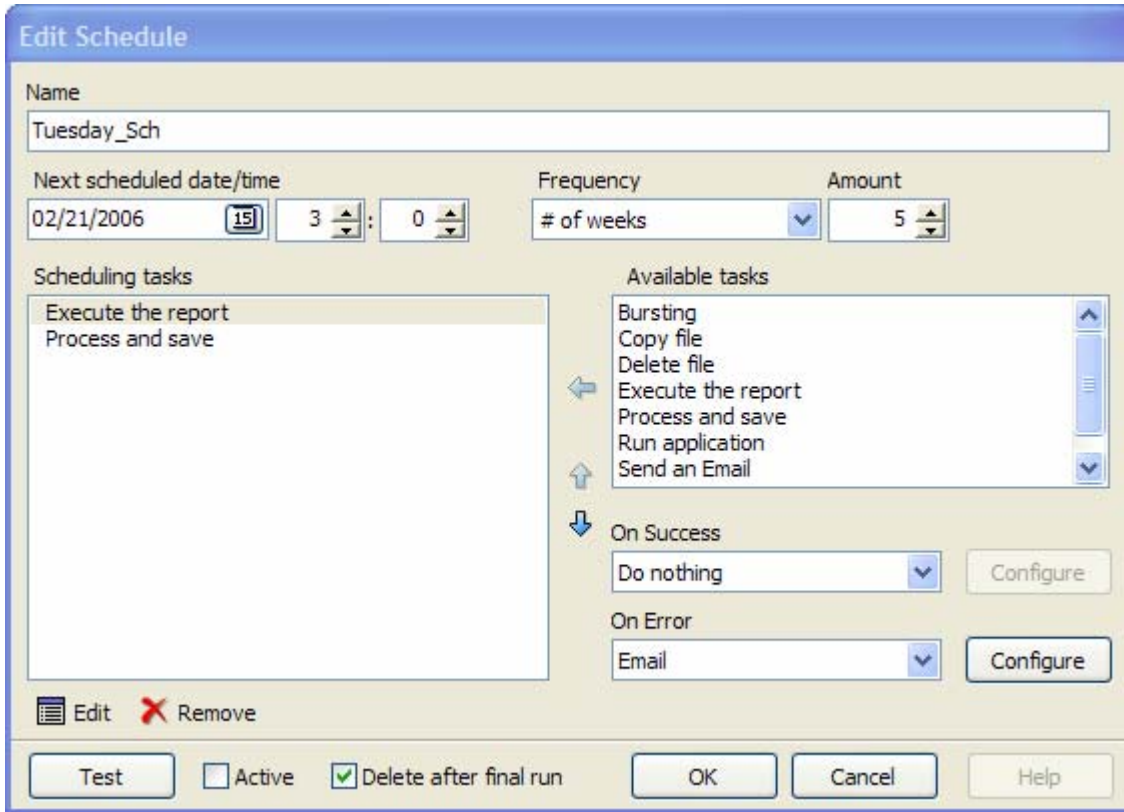
- Only once – will execute on the date scheduled just one time
- Starting on the date and hour selected, run
 - Every day
 - Every week
 - Twice per month
 - Every Month
 - Twice per year
 - Every year

The job will continue to execute on selected frequency until the administrator or user deactivates or deletes the schedule job.

- Starting on the date and hour selected, run x number of times
 - # of days
 - # of weeks
 - # of months

- o # of years

For the above example, we want to execute the report every Tuesday for the next 5 weeks. We will choose the option “# of weeks” and set the Amount to 5. When done, the updated form will appear as follows:




The amount field can only be populated when the Frequency is set to “# of ” some value. For other options, the amount field is not updateable.

Set the tasks

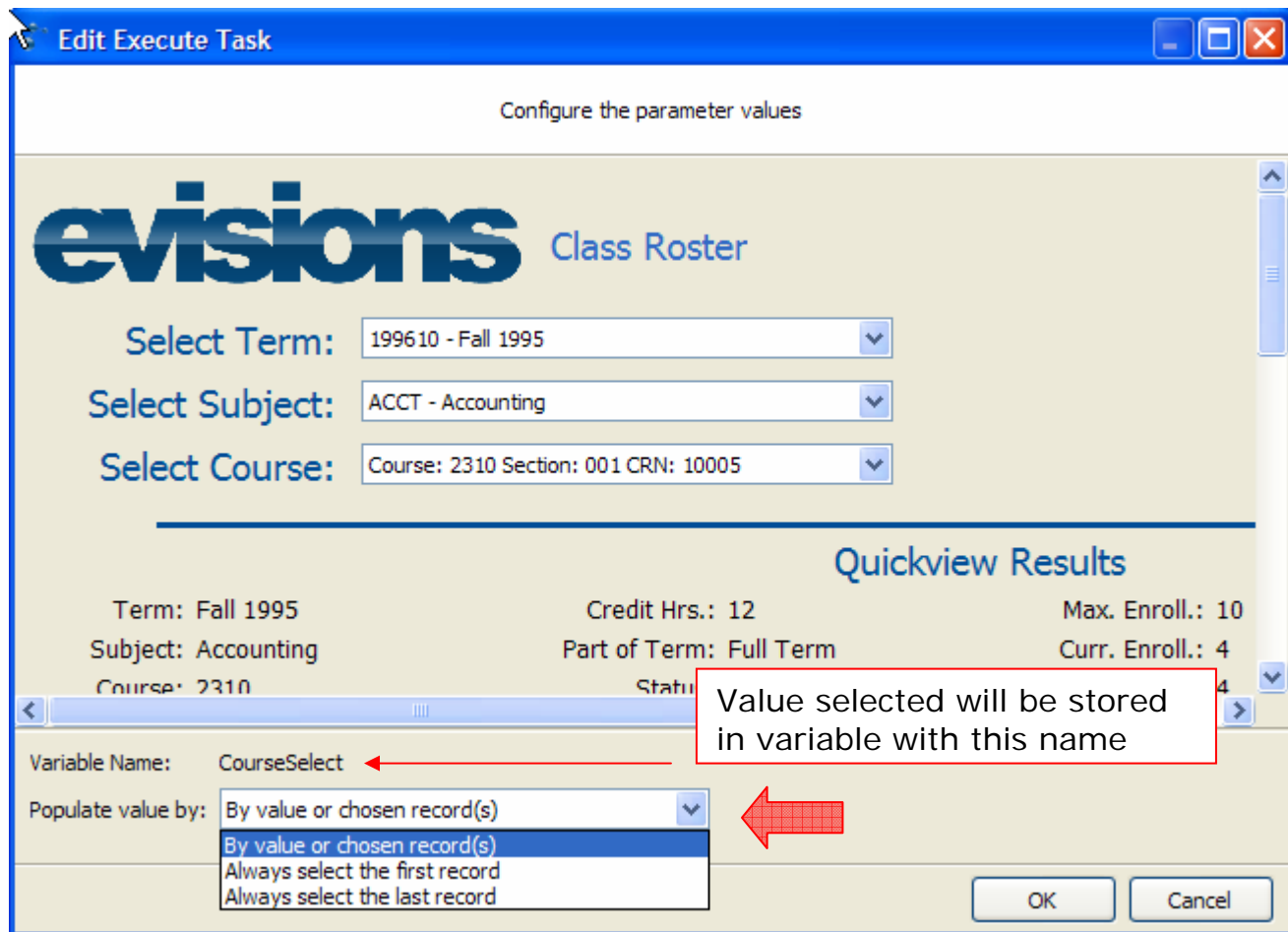
The majority of the set up is done in this step. Here the user establishes what parameters to use, when to execute, and when done, how to distribute the report.

1 - Execute the report

Here you will assign values for any parameters that are required and will be used when the main query is executed. Most reports require parameters to be populated before executed. Even if the report requires no parameters, this task will still need to be executed.

For our sample, we do have required parameters. To populate these parameters, select “Set Variables values” and click on the Edit icon () on the bottom of the

form. The Parameter selection form for that report will be displayed. Set the values as if running the report and press OK to save the results.



Edit Execute Task

Configure the parameter values

evisions Class Roster

Select Term: 199610 - Fall 1995

Select Subject: ACCT - Accounting

Select Course: Course: 2310 Section: 001 CRN: 10005

Quickview Results

Term: Fall 1995 Credit Hrs.: 12 Max. Enroll.: 10
 Subject: Accounting Part of Term: Full Term Curr. Enroll.: 4
 Course: 2310 Status: 4

Variable Name: CourseSelect

Populate value by: By value or chosen record(s)

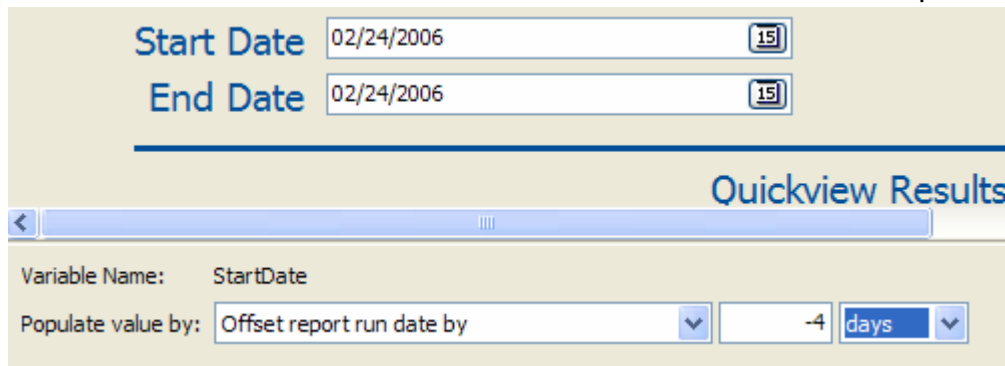
- By value or chosen record(s)
- Always select the first record
- Always select the last record

Value selected will be stored in variable with this name

OK Cancel

Optionally, instead of selecting a value, you can have Argos select a value for you. Near the bottom of the form, the variable selected will be listed. By default, the value selected will be the value to populate the variable. There are two other options. You can have the value populated by the first record or the last record. If the parameter allows multiple values to be selected, you will also see the value 'Select All Records' in the above list.

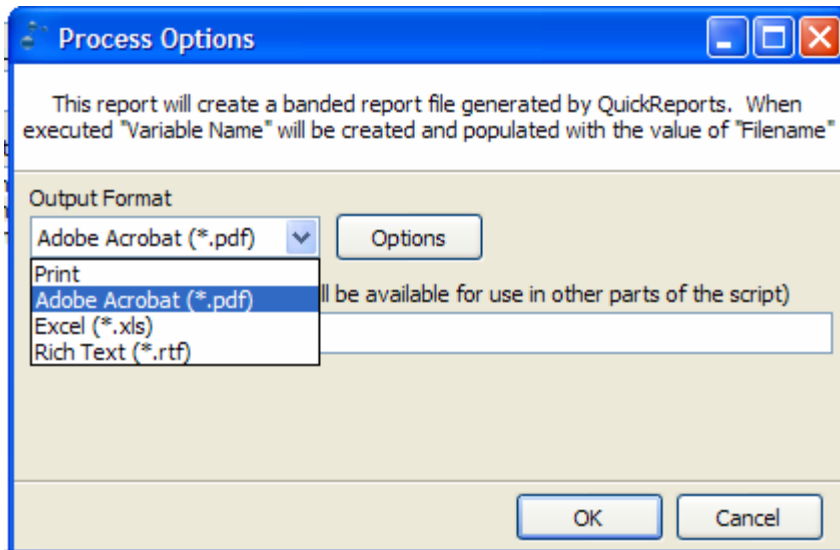
If one of the parameters is a date field, the options are slightly different. For a date, you can use the report run day and add or subtract x number of days by selecting the 'Offset Report Run date by' value. For example, if you are scheduling a job to list any students that have registered for courses for the current week (Monday through Friday), and you want the execute the report every Friday, you could set the Start Date to be 'Offset report run date by' -4 days. And the end date offset by 0 days.



You can offset dates by days, weeks, months, or years.

2 - Process and Save

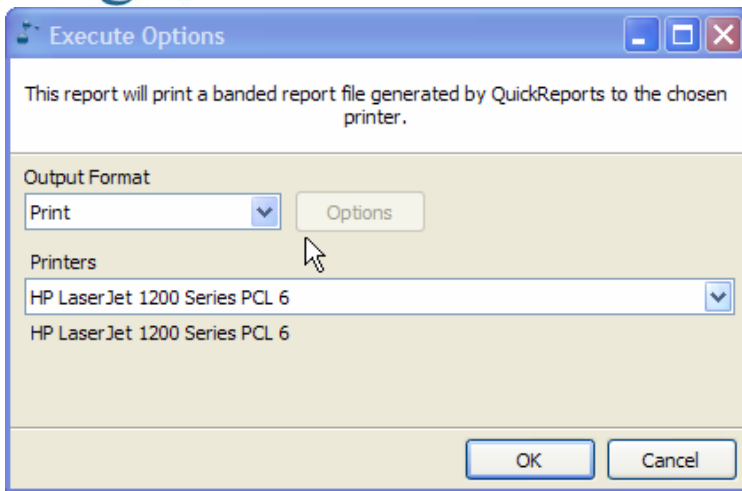
The next task is to actually process the data returned. Click on the EDIT button to see the options.



Note here you can select the Output Format. At this time we support Printed out, PDF, Excel or Rich Text, which can later be pulled into Microsoft Word. The output format will determine the other options available.

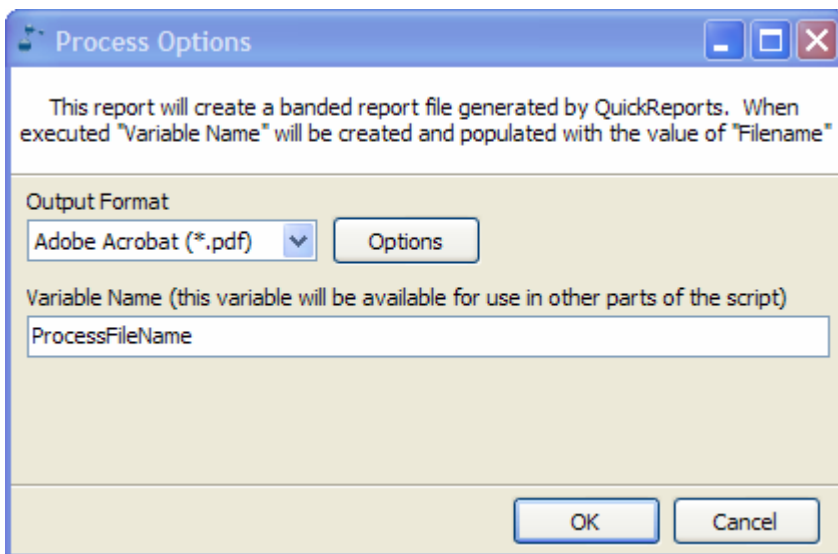
Output Format – Print

If the user selects the output format of Print, the screen changes. Here they will select the printer they want the output to be directed. The MAPS administrator must first have defined the printers listed here to MAPS. Use the drop down arrow in the printers box to list defined printers. Select the one where you wish the output to be directed.

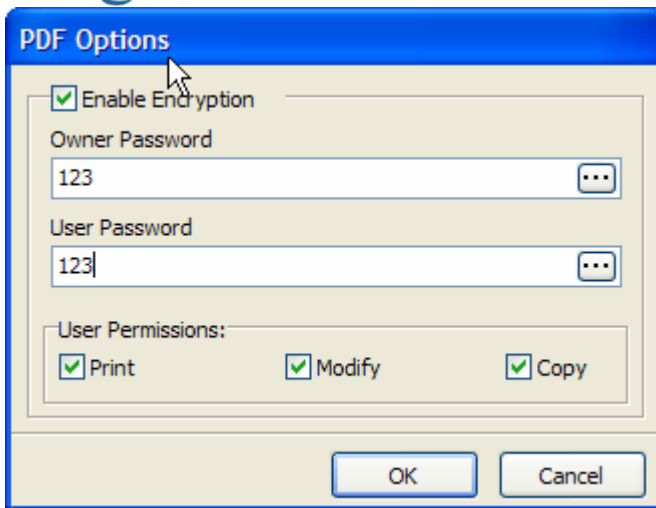


Output Format – Adobe Acrobat

Using this option, when the report is executed a PDF file will be created. A variable with the default name of "ProcessFileName."



If the user selects Adobe Acrobat as the output, they also have the option of password protecting the output. Select Adobe Acrobat and press the OPTIONS button. Then check the "Enable Encryption" and set the owner and user password and desired permissions. Passwords can be hard coded or based on a variable or calculated value.



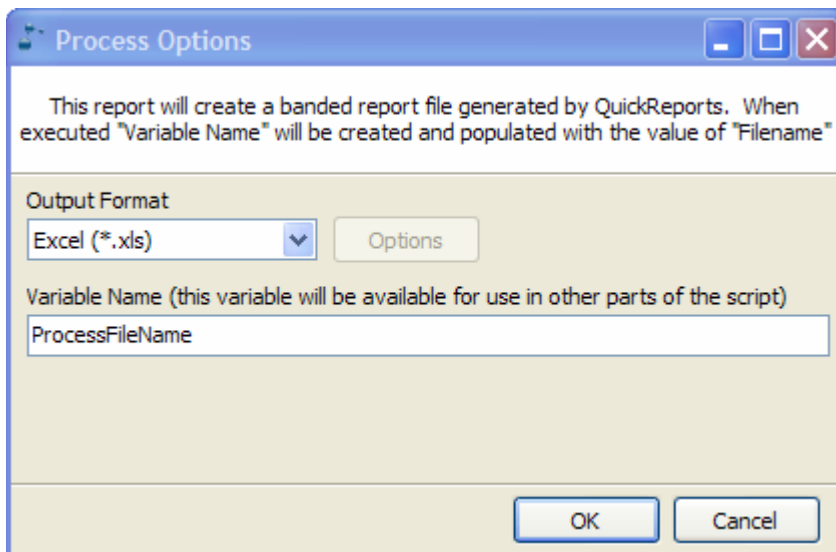
Note that you can also set user permissions; i.e. can the recipient print, modify or copy the attached document.

We will discuss using variables later. Any time there is an ellipsis (three dots) you can click on that to select from more options.

Output Format – Excel

When choosing this option, the output will be saved as an Excel spreadsheet.

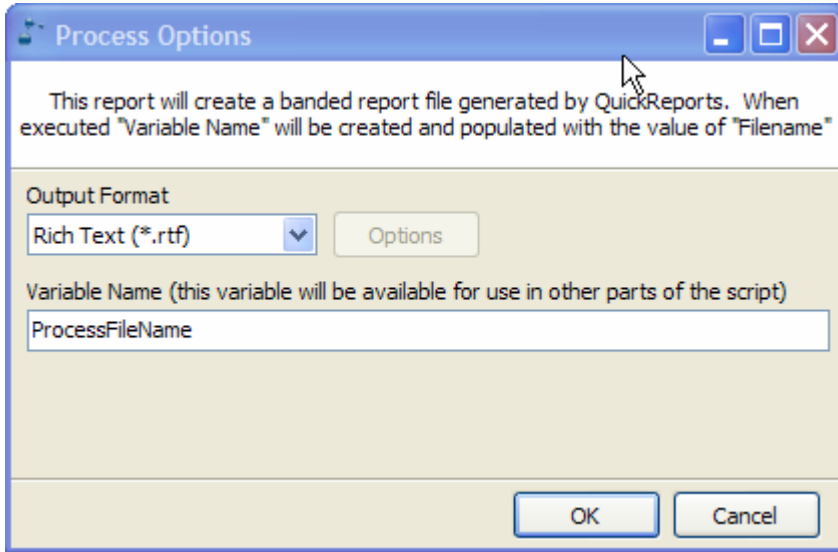
When the report is executed, a variable with the default name of “ProcessFileName” will be created.



Output Format – Rich Text

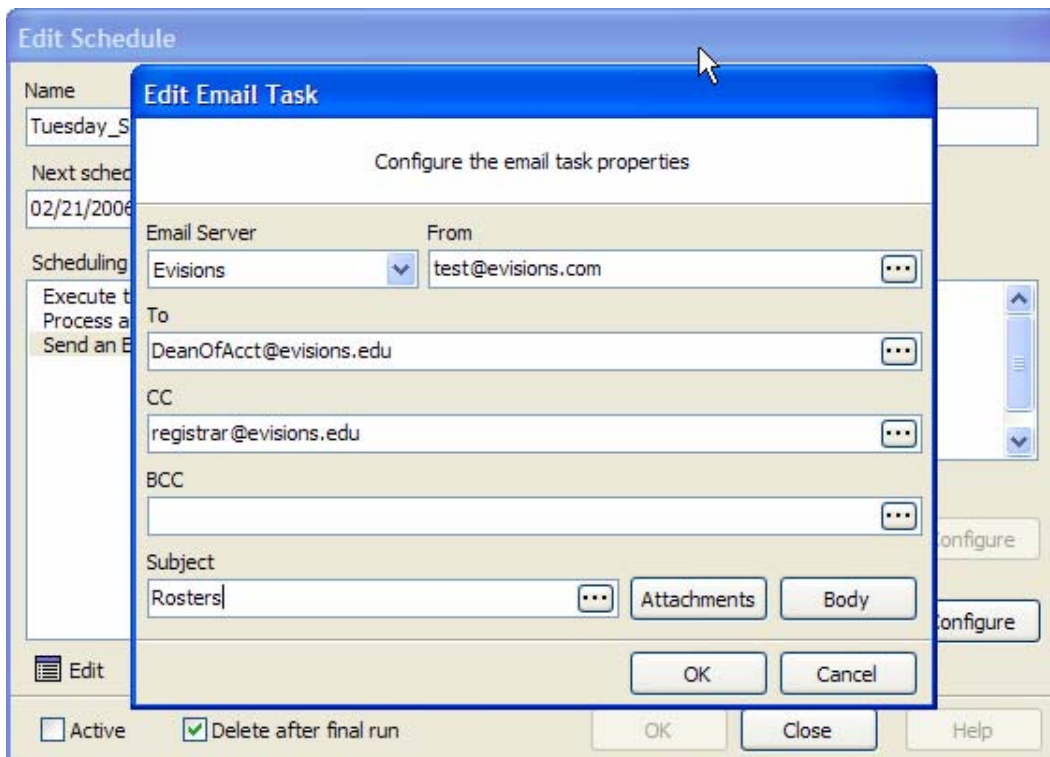
Using this option, output from the report will be in a Rich Text Format that can be pulled into Microsoft Word.

When the report is executed, a variable with the default name of "ProcessFileName" will be created.



3 - Send an Email

If you have selected the output format of print, the document will be printed. All other options will produce a file of the specified format. Typically you will want to email that document to the appropriate person(s). To do this, from the list of Available tasks, select "Send an Email." The following form will be displayed:



Note that to use the email feature, the MAPS administrator must add an Email Server. If only one has been added, the name of that server will be placed in the Email Server spot. If more than one, you will need to select from the list of available servers.

In each of the other edit box controls you are free to use other variables that might be coming from the report itself or a calculated field. If the administrator has provided email addresses for the Argos userids, that field is also available.

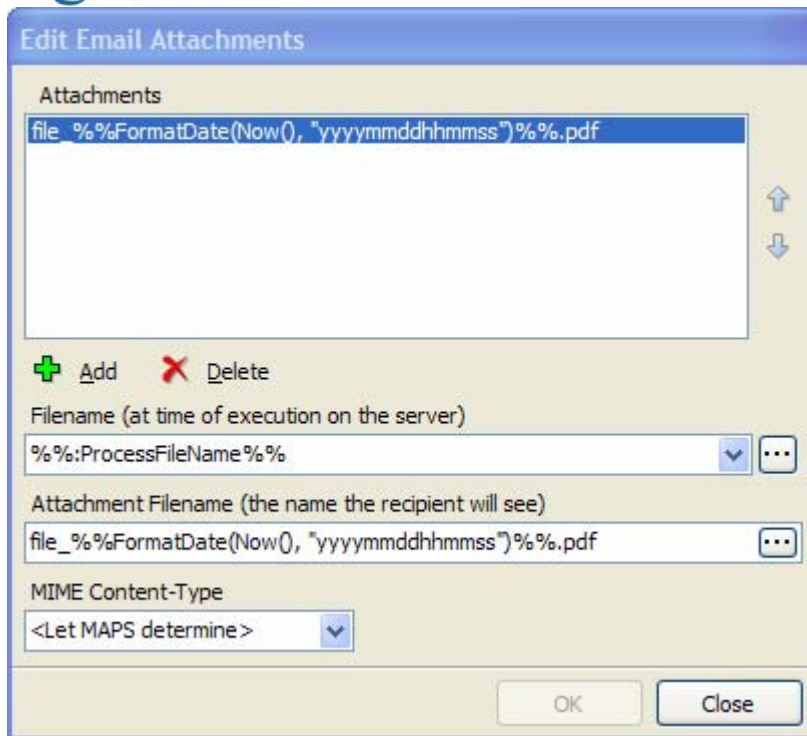
- **From** This controls the address that will be replied to if a recipient chooses to reply to the email. Also controls the name that is displayed as the originator of the email.
- **To** This controls the direct recipients of the email. Multiple recipients can be separated by commas.
- **CC** This controls recipients that should receive a copy of the email. Multiple recipients can be separated by commas.
- **BCC** This controls recipients that should receive a copy but should not be displayed as a recipient in the email. Multiple recipients can be separated by commas.

On each of these, you can manually enter the email address. Alternatively, you can email to a defined Argos user account, as long as that user was added with a valid email, or use a variable being returned in the dataset. We will discuss this in more detail later.

- **Subject** The subject header of the email.
- **Body** Click this button to display a message editor in which you can type any additional text that should be emailed.

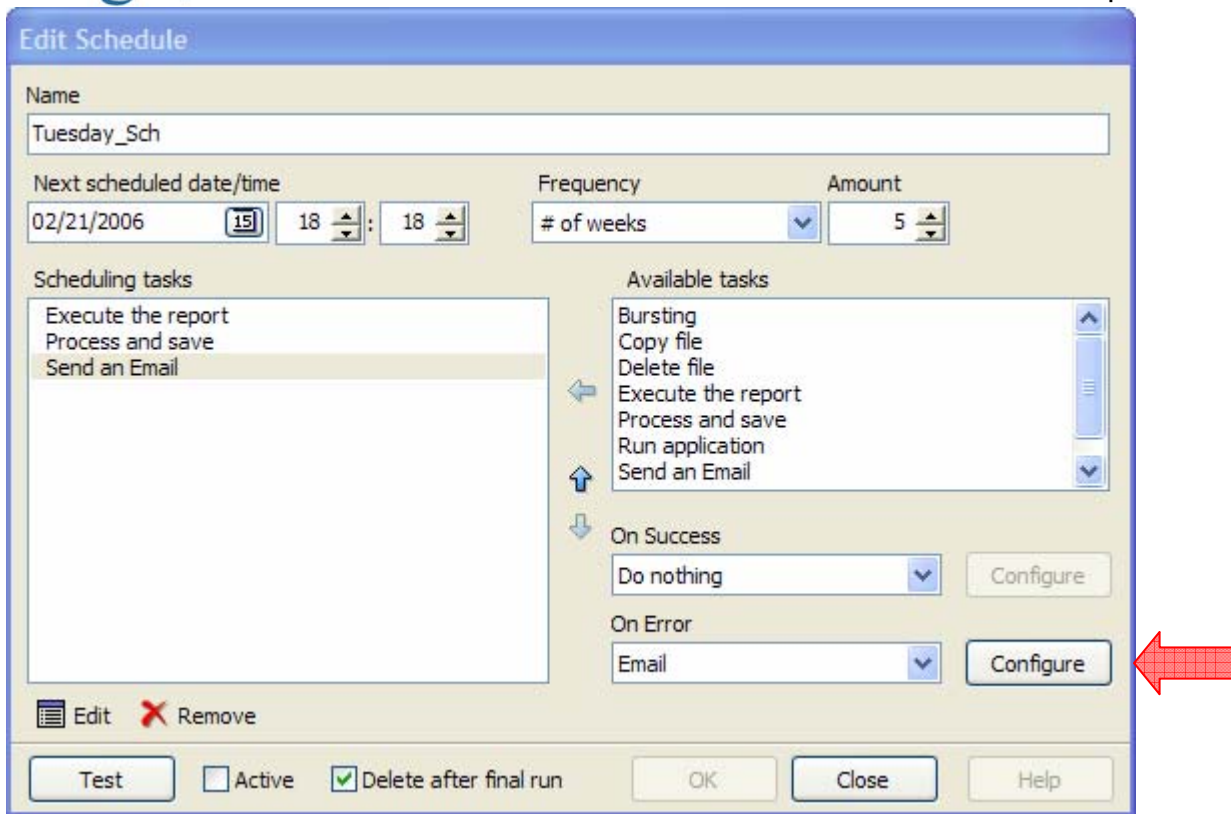
On the Subject and/or body you can use static text or include variable information. This will be discussed more completely later.

- **Attachments** This controls how the processed report output file will be attached to the email.



4 - Set On Success and/or On Error Option

For any schedule, you can also configure another option if that schedule was successful or failed. By default these are set to Do Nothing. The two other options are to either email or to send to My Argos (not currently available). In this sample, we have chosen to send an email if the schedule fails. There will be an error message in the body of the "On Error" email to explain why the schedule failed.



Press the Configure button and the same email task window is displayed. Fill out the information and click ok to continue.

5 – Test

Before saving your settings, you can perform a one-time test to make sure all parameters are properly set. Press the TEST button at the bottom of the form. The scheduled job will be immediately executed.

6 - Activate and delete

Finally, when you schedule a job, by default the job is set to Active and Delete after the final run.

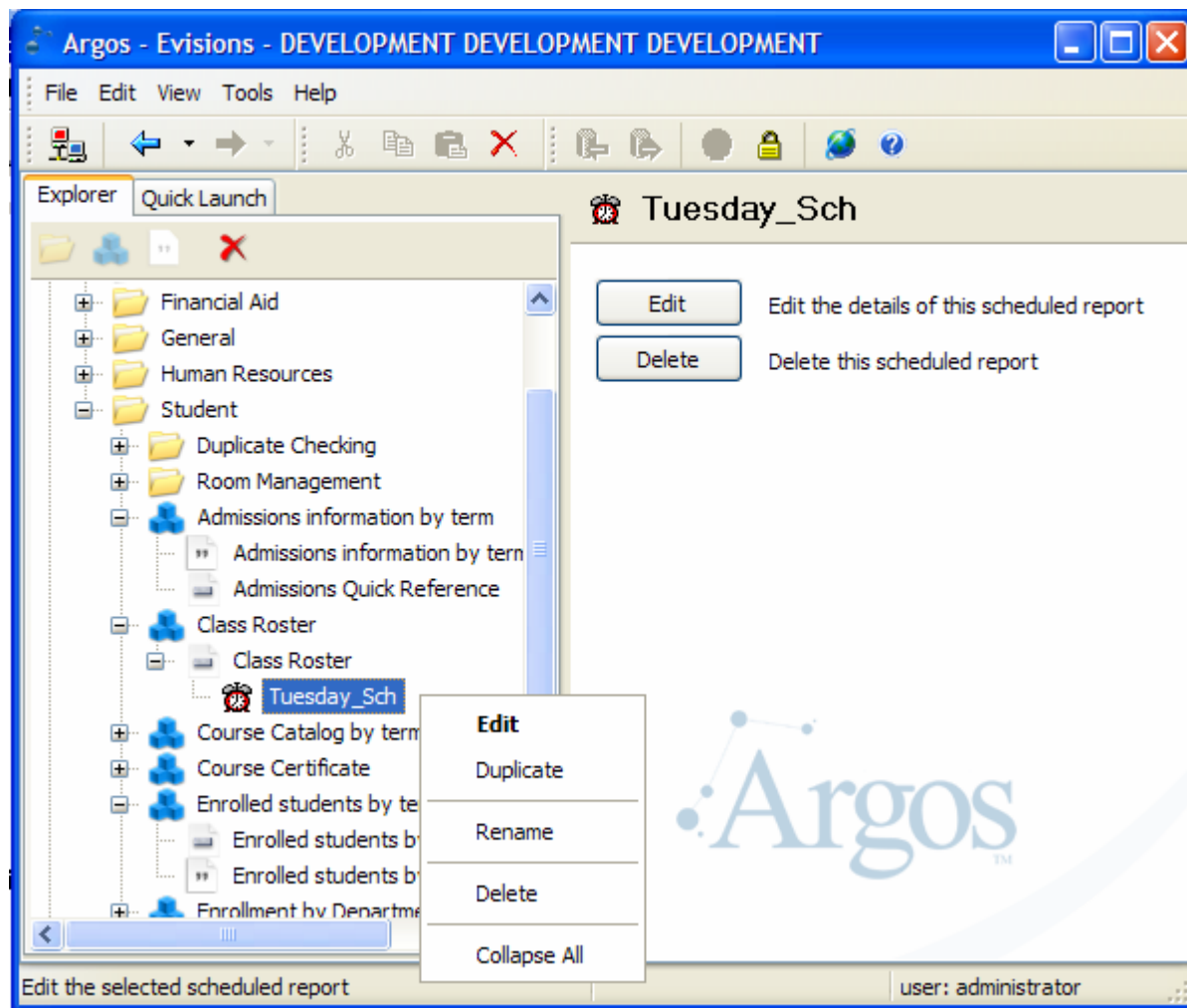
There are times you would like to set the tasks, but not activate. To do this, uncheck the Active box on the bottom of the form. This will save all the parameters that have been set, but the job will not execute until you edit and check the Active button. Or, if you have set the job to execute every Tuesday, but you know this week you do not want the job to run, you can in-activate by un-checking the Active button.

Also note that after the final execution of a job (i.e. the job was set to execute only once or x number of times) the job will be set to inactive. To run again, just check the box to activate.

If you have scheduled a job to execute only once, or for a set a job to execute x number of times, by default, once the job has executed its final run, the definition will be deleted. To keep the definition of this job, un-check the 'Delete after final run'. This will allow you to re-activate or edit the job.

7 - Save Settings

When complete, click the OK button. You should now see a small alarm clock under the report.

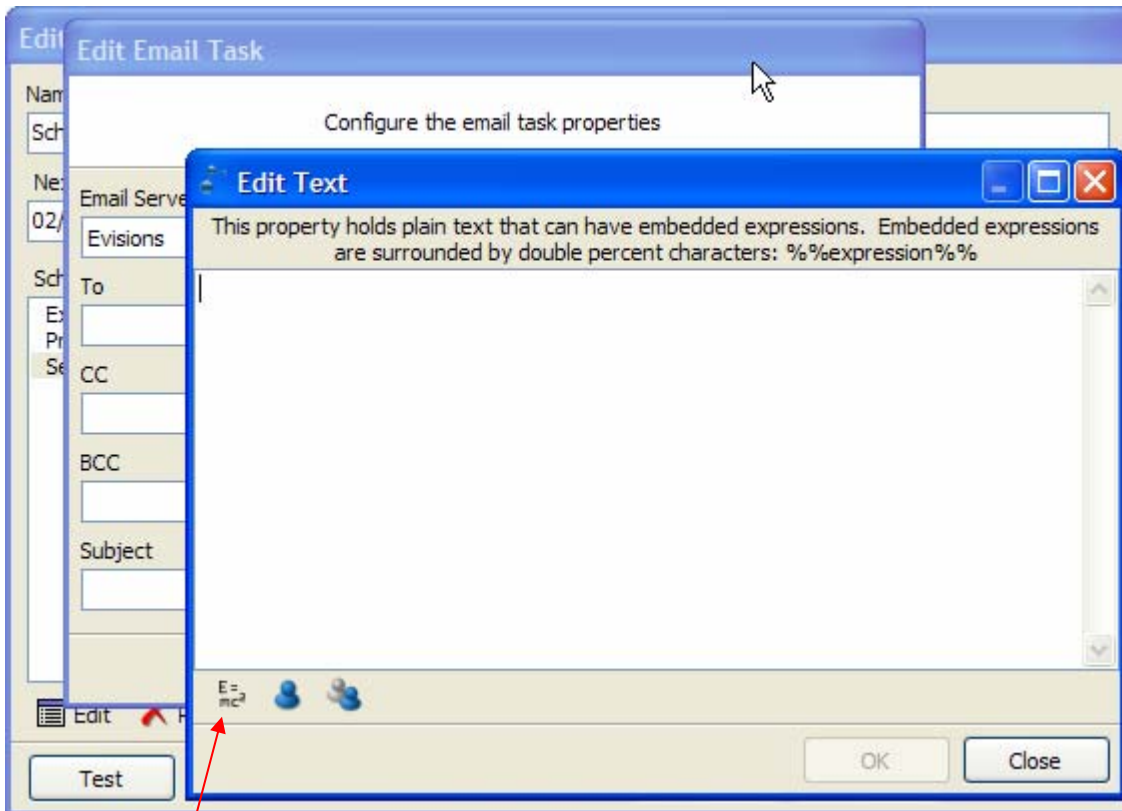


Once the job has been created, you can modify, duplicate, rename or delete the job by right clicking on the scheduled job and selecting the option from the displayed menu.

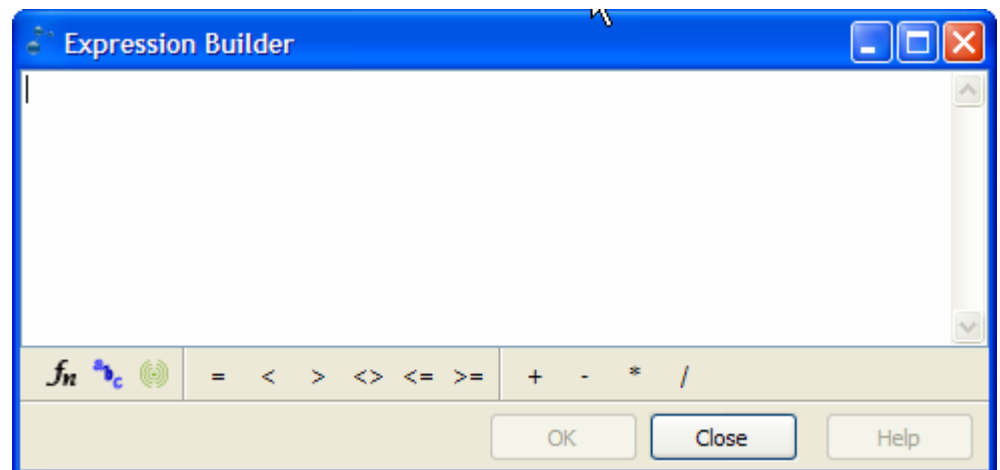
II. Advanced Options

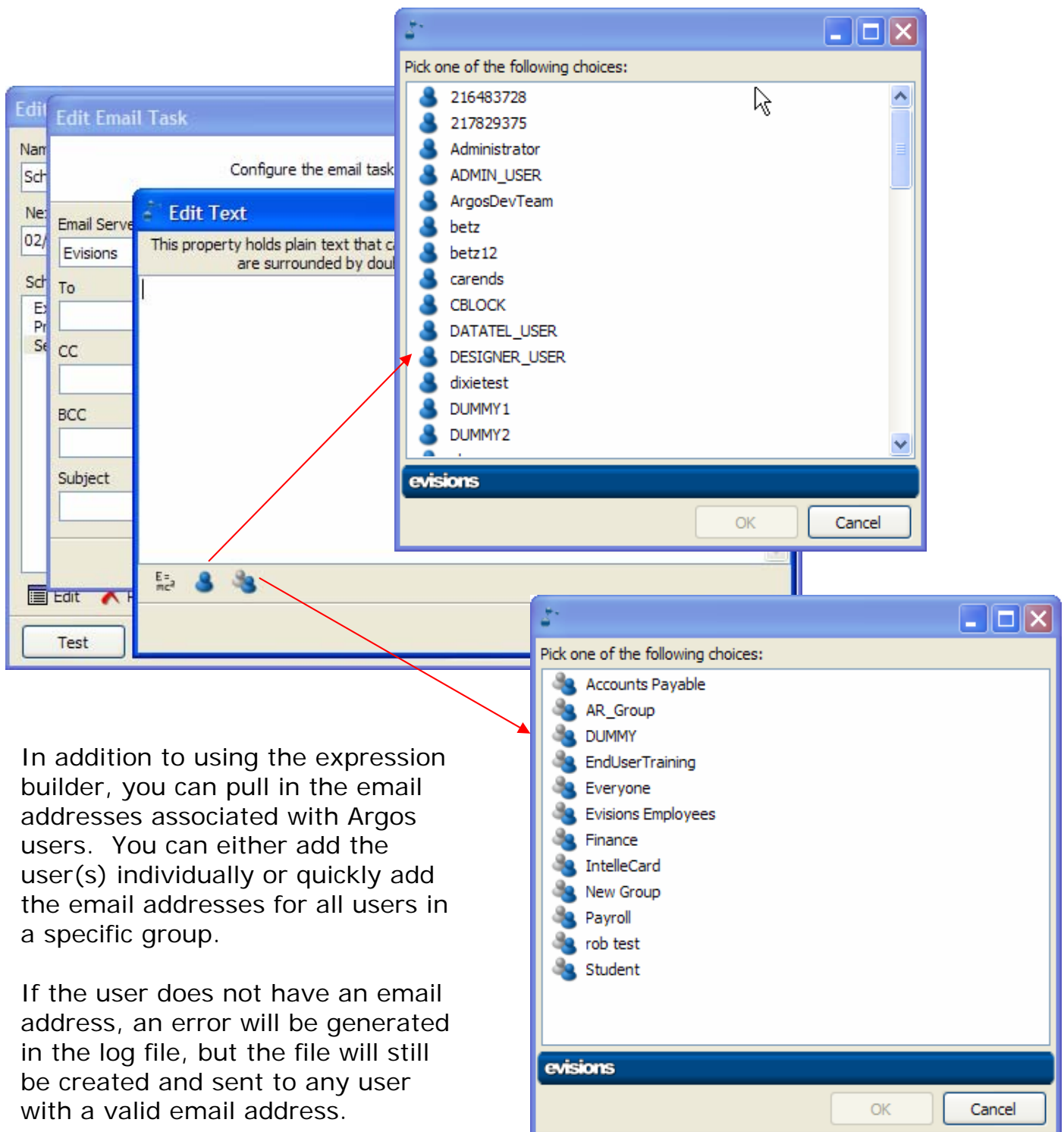
1 – Email Addresses

When sending an email you can manually enter the email address, use a variable from the report, or use an address associated with an existing Argos user. On the Edit Email Task form, when you click on any of the ellipses (⋮) next to a field where you would enter an email address (FROM, TO, CC, BCC) you will see the following form:



Click on the Expression builder Icon (E=mc²) to display the Expression Builder form.






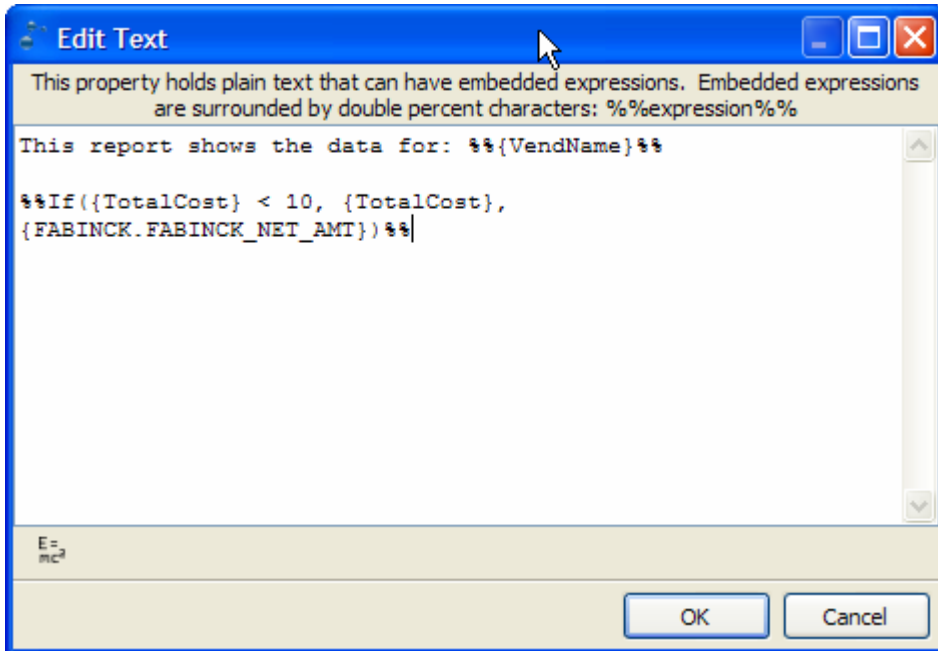
In addition to using the expression builder, you can pull in the email addresses associated with Argos users. You can either add the user(s) individually or quickly add the email addresses for all users in a specific group.

If the user does not have an email address, an error will be generated in the log file, but the file will still be created and sent to any user with a valid email address.

2 – Expression Builder

Using the expression builder, you can assign a different name to the attached file; or add variable information to the Subject of an email; or add variable information to the Body of an email. Any time you see the expression builder icon () you will be taken to the Expression Builder Form. Using this form, you have access to functions as well as all the variables returned from the executed query. This allows you to personalize e-mails and/or rename the attached files.

The screenshot displays the Expression Builder interface with two dialog boxes open. The 'Choose Variable' dialog lists variables such as \$User, CourseInfoVar, and CourseInfoVar.CRN. The 'Choose Field' dialog lists fields returned from a query, including AreaCode, AttemptedHrs, Bldg, and Course. Callouts identify these lists as 'List of variables from parameter form' and 'List of fields returned from query'. The 'Choose a Function' dialog is also visible, showing categories like Date & Time, Logical, Math, and String, with a callout identifying it as 'List of available functions'.

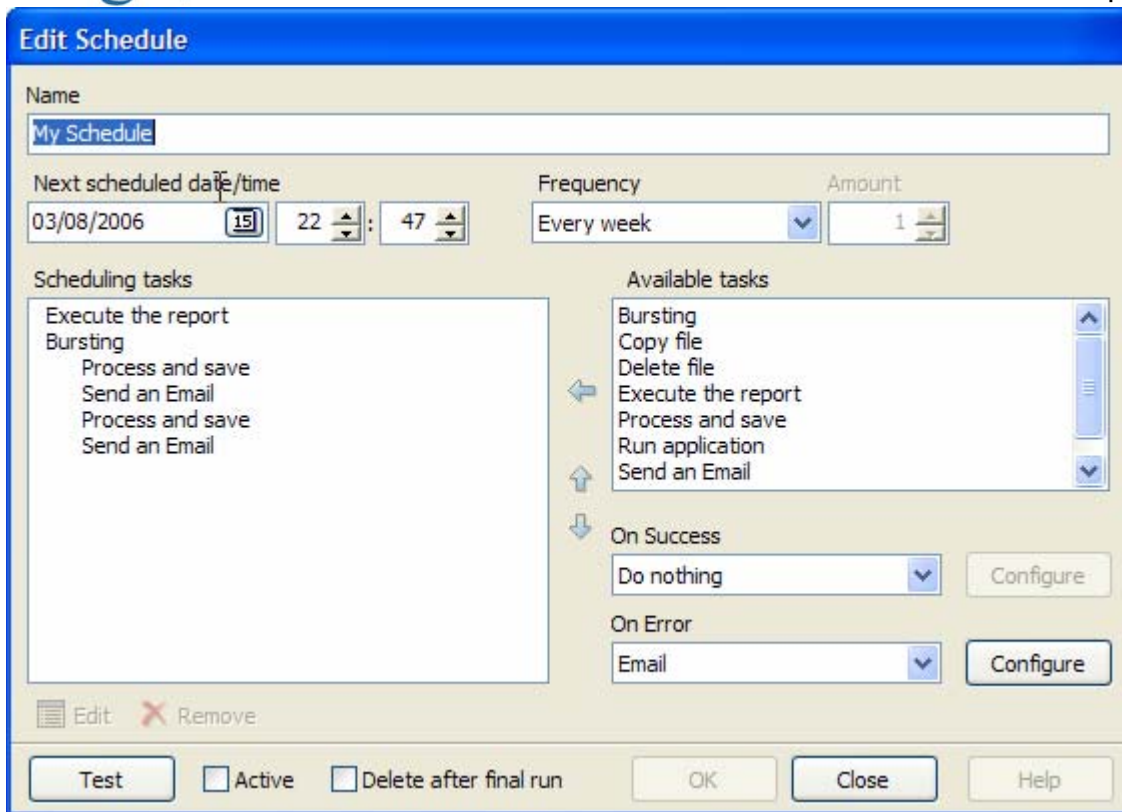


When adding any variables and/or functions, the value will be surrounded by double per-cent signs (%%). Any variable from either the parameter form or the query will be surrounded by curly brackets ({}).

3 – Bursting

With the Scheduling and Delivery tool it is possible to take a report and break it apart or burst on selected value. For example, if you have a budget report, you could burst on the ORGN code and distribute the proper pages to the proper ORGN directors.

To use the bursting feature, bursting must be selected as a task BEFORE the Process and Save task.



Edit Schedule

Name: My Schedule

Next scheduled date/time: 03/08/2006 15:22:47

Frequency: Every week

Amount: 1

Scheduling tasks

- Execute the report
- Bursting
 - Process and save
 - Send an Email
 - Process and save
 - Send an Email

Available tasks

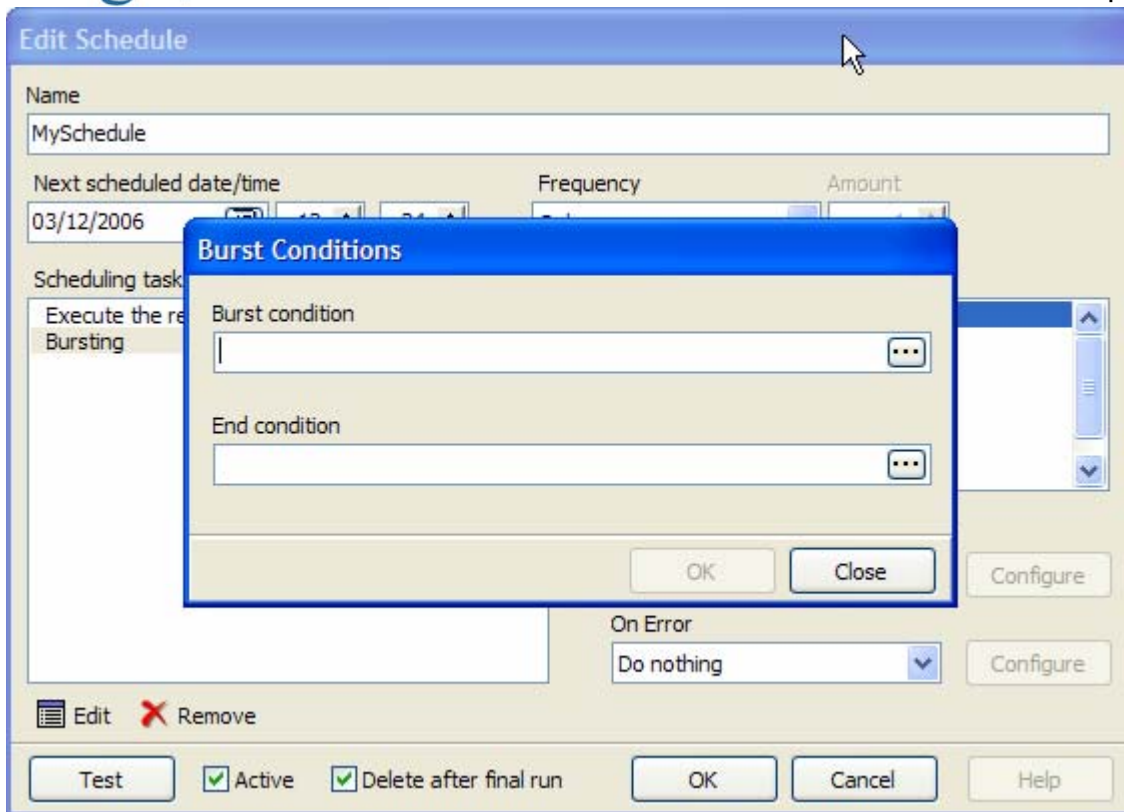
- Bursting
- Copy file
- Delete file
- Execute the report
- Process and save
- Run application
- Send an Email

On Success: Do nothing [Configure]

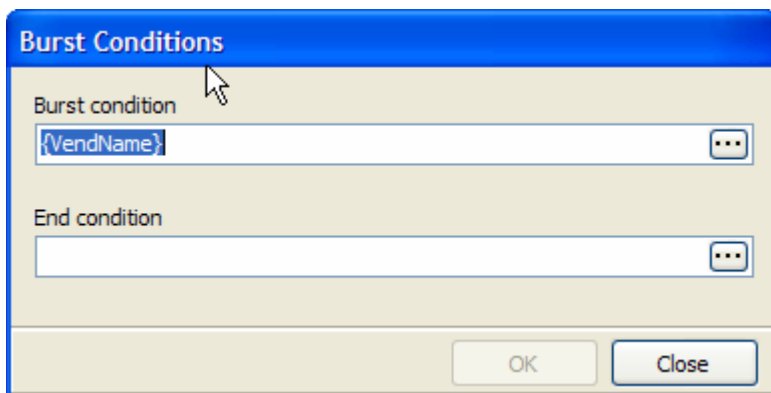
On Error: Email [Configure]

Buttons: Test, Active, Delete after final run, OK, Close, Help

After setting the parameters in the 'Execute the report task' you will need to add the Bursting task from the list of available tasks. When added, the following form will be opened:



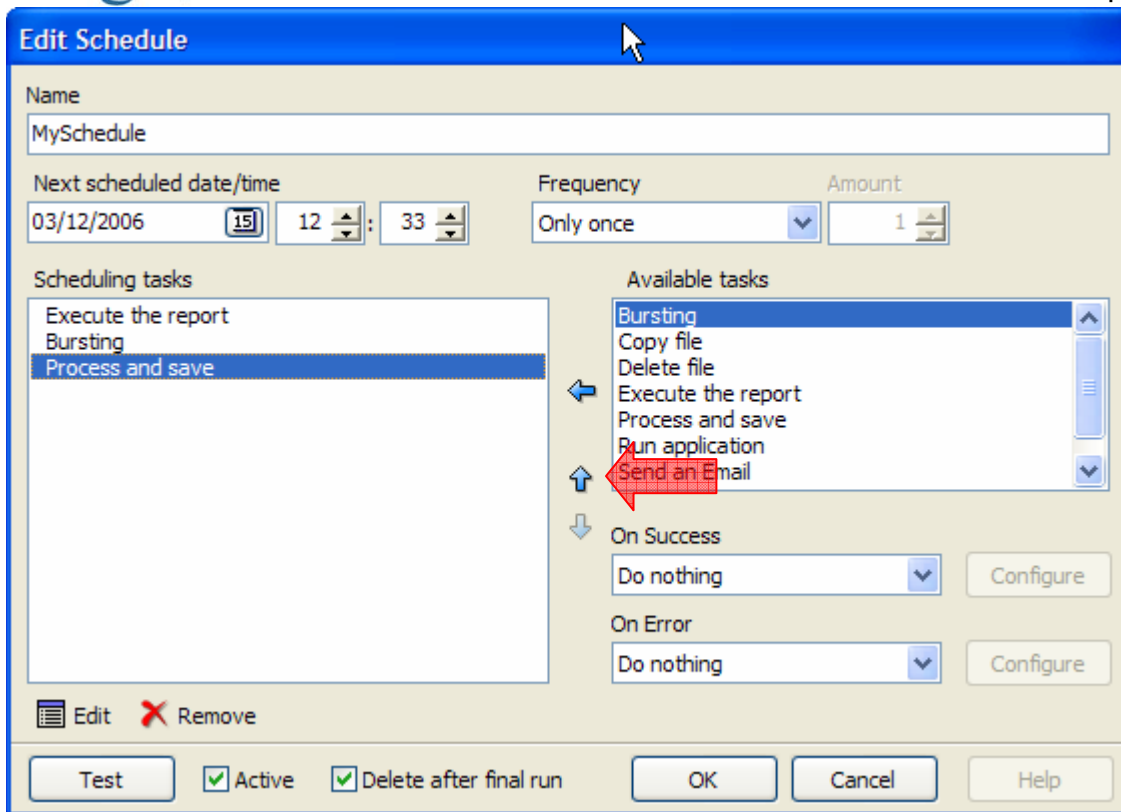
Click on the ellipse next to the Burst Condition to enter the expression builder. We want to break on the VendorName.



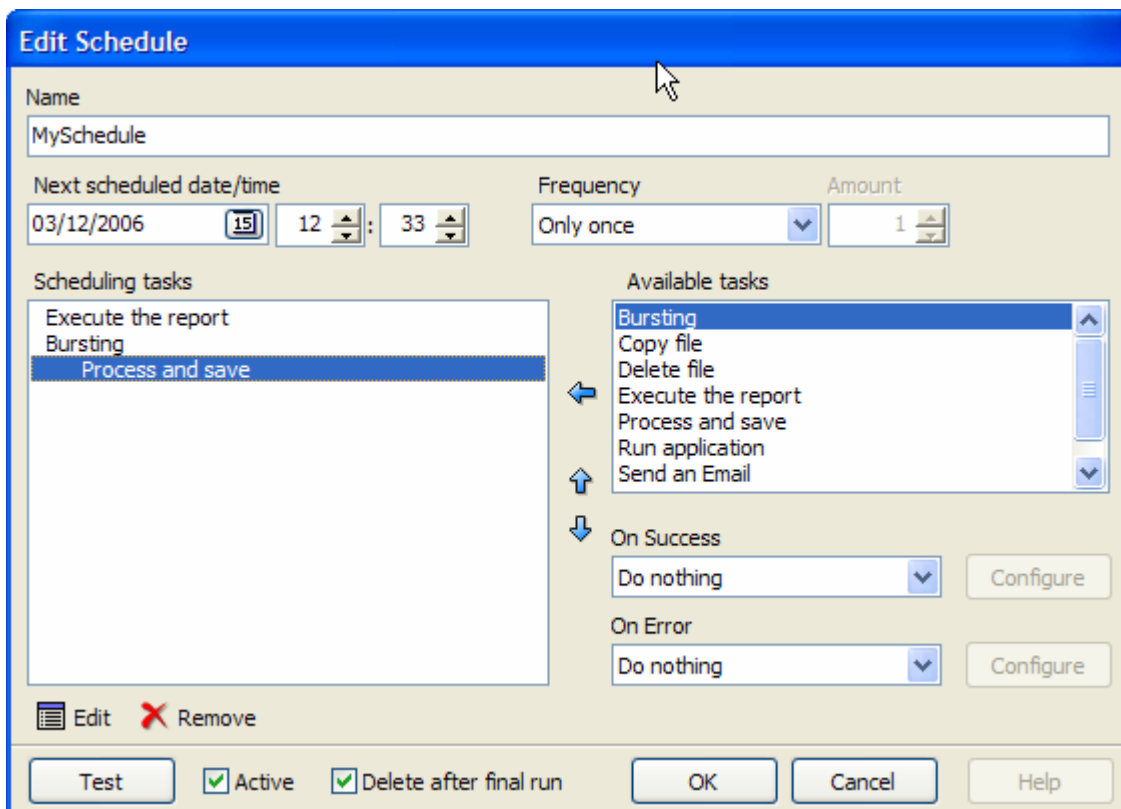
The end condition allows a range of values to be entered.

Click OK to continue.

At this point, the list of tasks should look like the following:

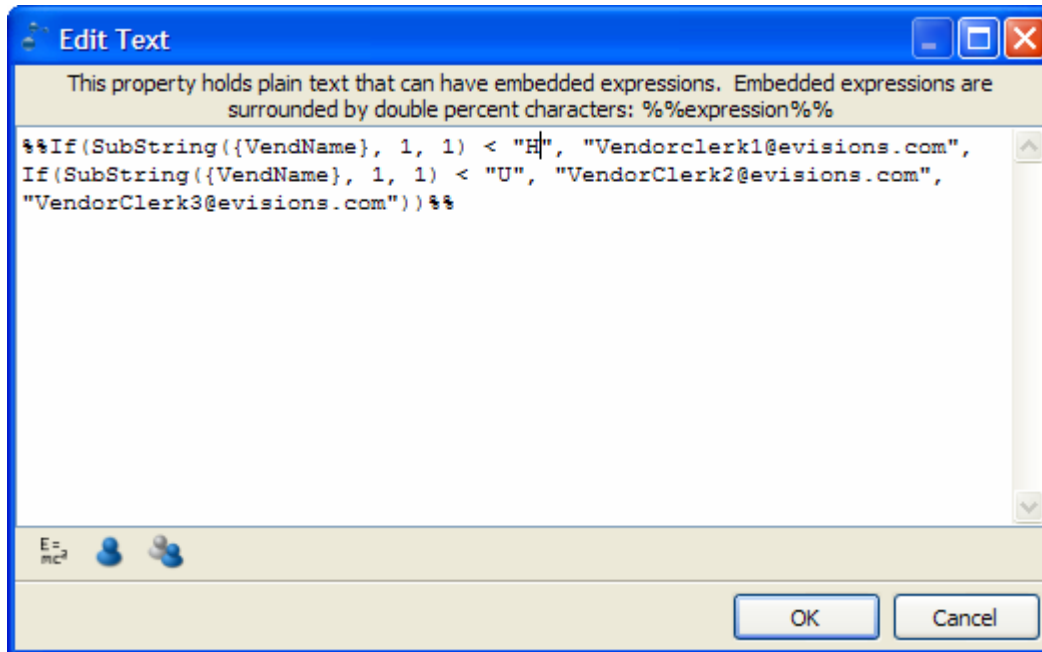


To place the Process and Save in the proper flow, click the up arrow icon. Now the list should look like the following:



Set the rest of the tasks as normal.

Following is a sample email task that shows how you could use the expression builder to distribute the bursted report to different users. Here if the VendorName begins with a letter 'A – G' it will be sent to VendorClerk1. 'H – T' will be sent to VendorClerk2, all others will be sent to VendorClerk3.



Conclusion

The Scheduling and Delivery feature of Argos allows the designer to schedule jobs to execute at non-peak hours and have the output distributed or printed. This document outlines major features of this add on feature to Argos. There are some features that were not described in this document due to complexity. Please make sure to review other white papers and on-line tutorials.

Getting Help

If you are having problems, please search our knowledge base at <http://helpdesk.evisions.com>. If you are unable to find the solution, please submit a HelpDesk request including a detailed explanation of the problem.

Please do not hesitate to contact the Evisions HelpDesk if any questions or problems arise. We are here to help you and have performed this installation at numerous sites.



Also, if you find that areas of this documentation require additional detail or clarification, please let us know. We are constantly trying to improve the installation process to make it as easy as possible.

Important Links

<http://www.evisions.com/support>

<http://helpdesk.evisions.com>

<http://evisions.com/support/argos>