

# Distributing Completed Reports

## Overview

**XLReporter** generates reports automatically through the built-in Scheduler.

This document explains the options **XLReporter** provides to distribute reports automatically.

## Before You Begin

Before discussing the distribution options available with **XLReporter**, let's first understand some concepts that are key to the product and are used throughout this document.

## Report Names

As part of the template design, **Report Names** are defined on both for the report at the *Workbook* and *Worksheet* level.

Template	Folder	Report	Over
<b>WORKBOOK</b>			
Daily Values		Daily Values_{MMM}{YYYY}	No
<b>WORKSHEET</b>			
*			
Template		{DD}	No

Under **WORKBOOK**, the **Report** column indicates the name of the workbook produced from the **Template** when it is processed. For example, the above image represents the naming convention in the template *Daily Values* which contains the worksheet *Template*. When the template is processed, a report will be produced called *Daily Values\_{MMM}{YYYY}* which will contain the worksheet *{DD}*. The naming convention can be a combination of text, variables, dates, times and values from the process e.g., Batch ID.

Whenever a template is referred to in a schedule action, the name under **WORKBOOK** is resolved and the resulting name is used for the report. For actions that also require a worksheet, the name under **WORKSHEET** is resolved and used.

In the example above, an action in the scheduler processed on January 1<sup>st</sup> 2020, would produce the workbook *Daily Values\_Jan2020* and produce/update the worksheet *01*.

## Schedule Order

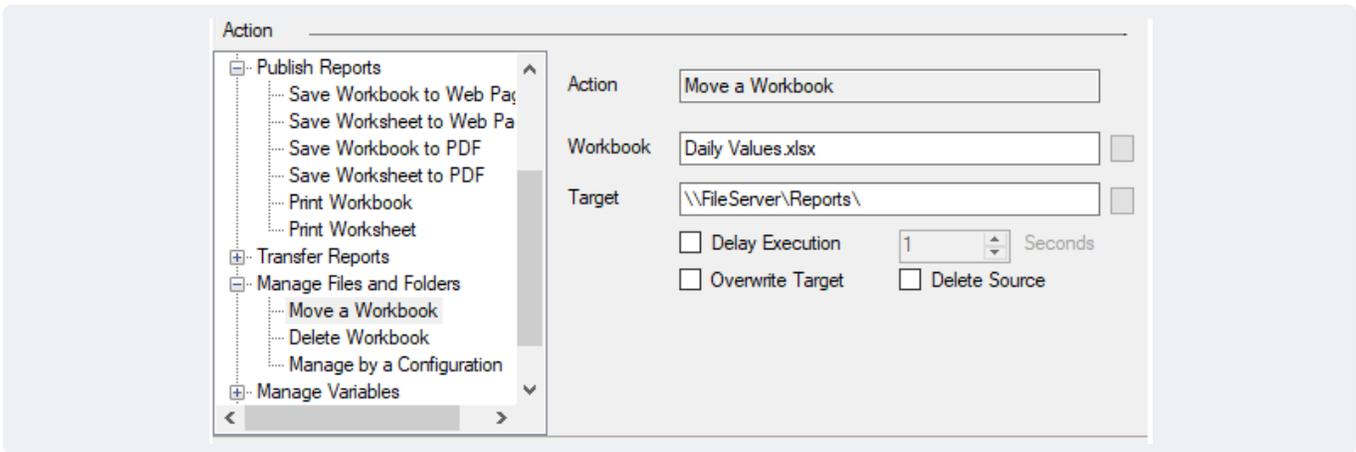
Actions can be scheduled at the same time so the action to distribute can happen at the same time as the action that produced the report. **XLReporter** buffers actions that occur at the same time so there is little chance that an action is lost.

When multiple actions are scheduled at the same time they are executed in the order they are listed in the **Schedule Designer** from top to bottom.

## Copy or Move a Report

One method of distribution is copy/move a report to a location that is more accessible to users. Since the format of the reports will be either Excel or PDF (see next section), it can be viewed by standard application such as Microsoft Excel, Open Office and Adobe Reader.

To schedule an automatic move/copy of a report, the *Move a Workbook* action is used.



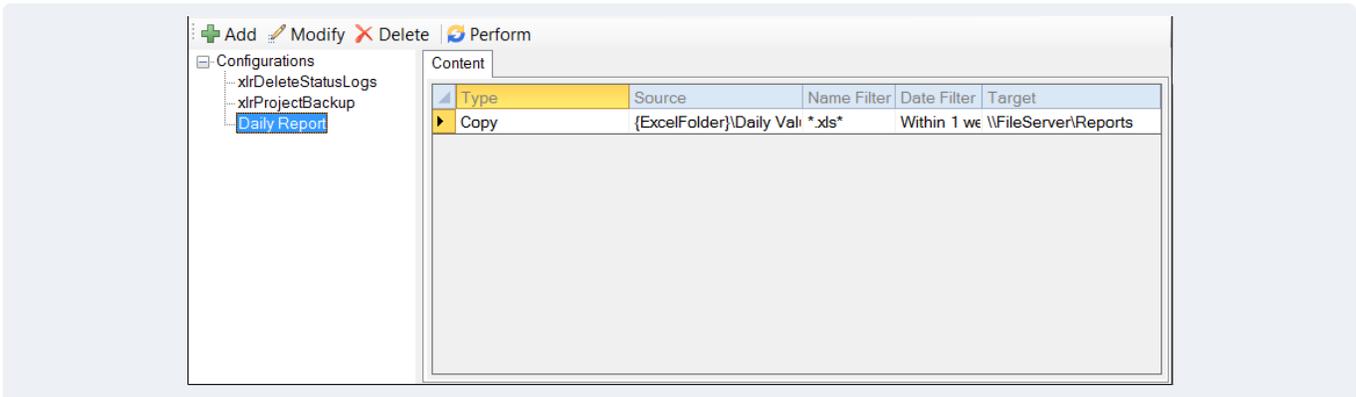
The **Workbook** setting for this action defines the workbook to move or copy. This should be set to the template name which will be translated to a report name (see above) when the action is processed.

The **Target** setting defines where the workbook is moved or copied. It can also redefine the name of the workbook in the **Target** folder. If the **Target** setting ends with “\”, this indicates the setting is just a folder and the name of the report is the same as the source. Otherwise, **Target** is considered both a folder and file name.

If **Delete Source** is checked, this action would move the report, deleting it from the source folder. If unchecked this action would copy the file.

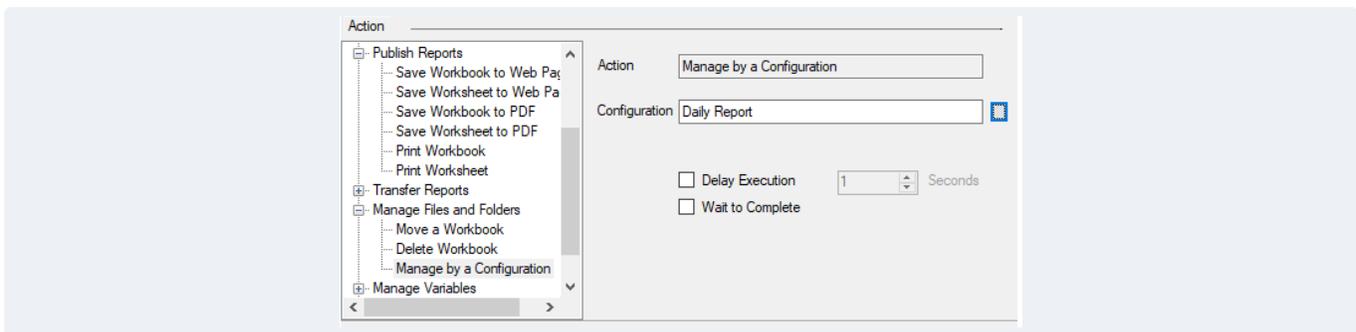
## File Management

Advancing the concept of copying and moving one step further, a comprehensive **File Management** application is available. This is configured from the **Project Explorer** under the **Tools** menu by clicking **File Manager**.



File Management can be used to move, copy and/or archive reports in bulk for reports in Excel and PDF format. The configuration name is used in the scheduler for initiate the file management.

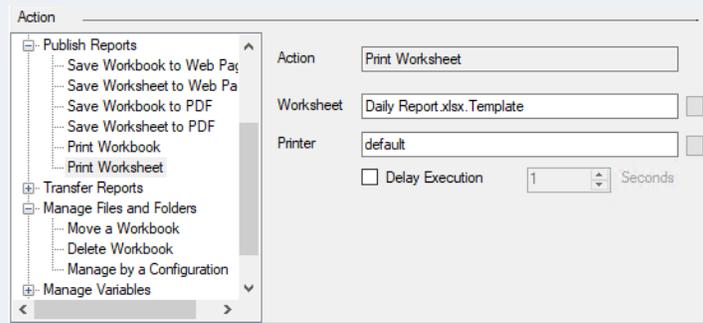
In the **Schedule Designer**, under **Manage Files and Folders**, the **Manage by a Configuration** action is used.



A single configuration can contain multiple file management tasks.

## Print Reports

The scheduler provides actions to automatically print to any connected local or networked printer using the two actions: **Print Workbook** and **Print Worksheet**.

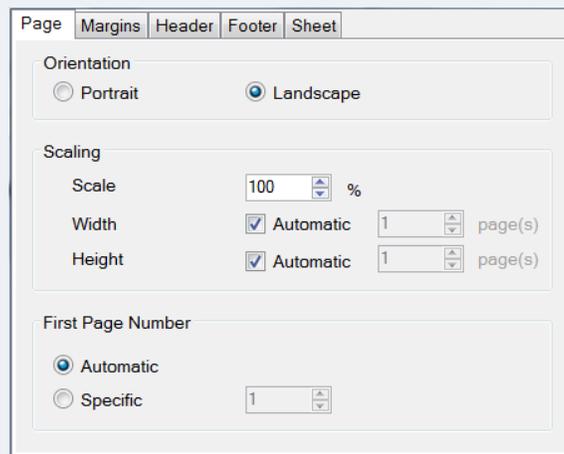


**Print Worksheet** prints a specific worksheet in the workbook whereas **Print Workbook** prints every worksheet in the workbook.

The **Printer** setting for either action can be set to a specific printer or can be set to the text *default*. When *default* is specified, the workbook or worksheet is printed to the default printer as defined in the **Windows Control Panel**.

## Page Setup Settings

When a worksheet is printed, it adheres to the settings defined in the **Page Setup** settings in the **Template Design Studio**. These are accessible under the **Worksheet** tab by clicking **Page Setup** (in Excel these are available under the **Page Setup** tab).

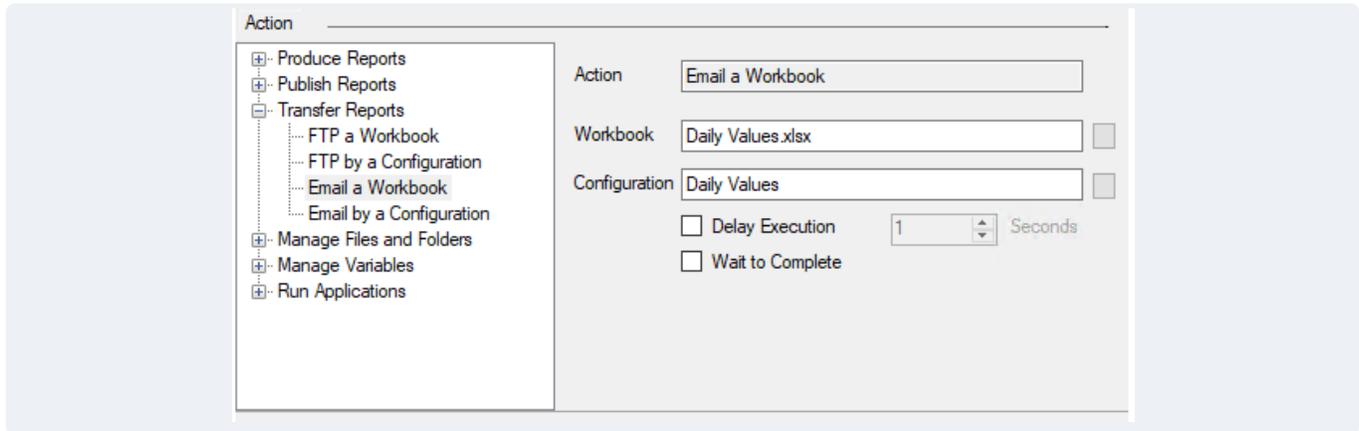


Here you can specify custom **Headers** and **Footers**, as well as **Rows** and **Columns** to repeat on every printed page.

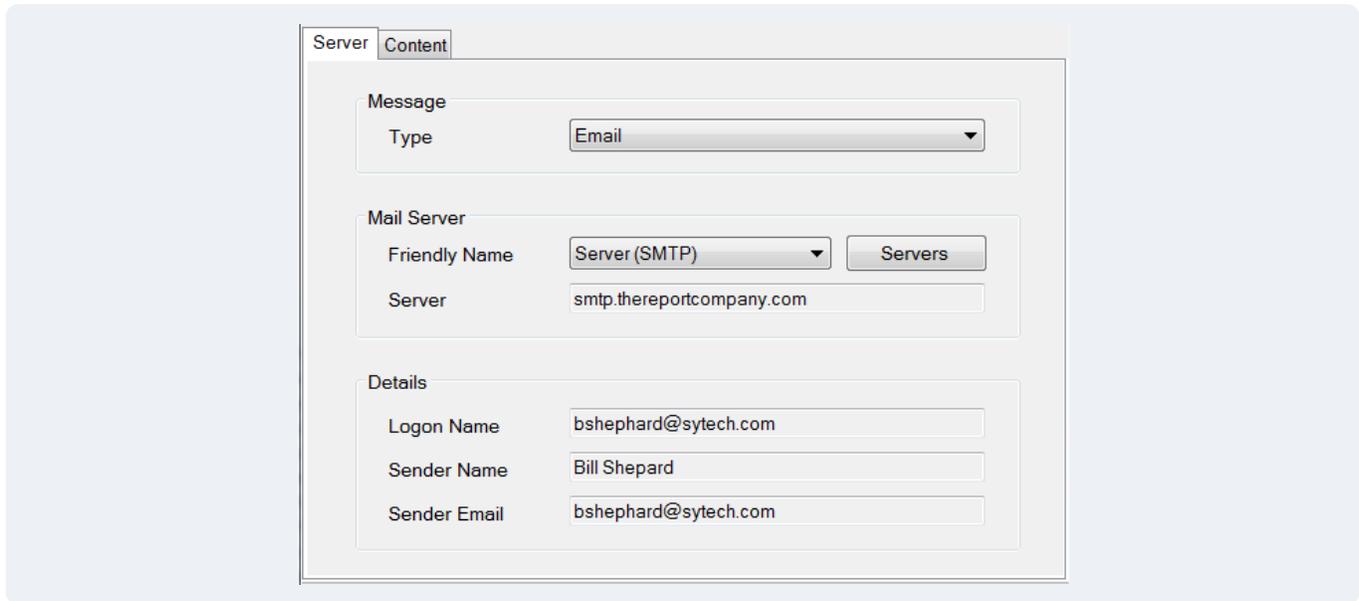
# Email Reports

The scheduler provides actions to automatically email one or more reports to a list for specified recipients using the two actions: **Email a Workbook** and **Email by a Configuration**.

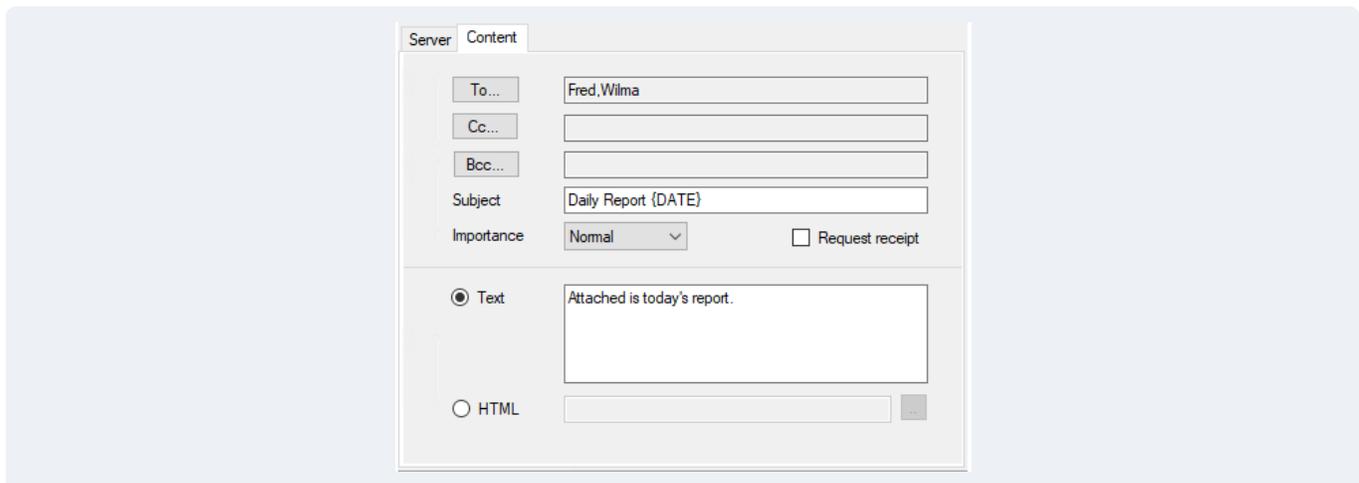
## Email a Workbook



The **Email a Workbook** action emails **Workbook** based on the **Configuration** specified. The browse pushbutton ([...]) for **Configuration** opens the **Mail Configuration** dialog where the information on the mail server and the recipients is specified.



The **Server** tab defines the SMTP mail server used to send the email. This is defined by clicking the **Servers** button. Once a server is defined, it can be selected the list in the **Friendly Name**.



The **Content** tab defines email recipients along with the **Subject** and **Content** of the message. The **To**, **Cc**, and **Bcc** buttons open the **Contacts** list.

The **Subject** and **Text** can be a combination of text, Variables, Date and Time keywords.

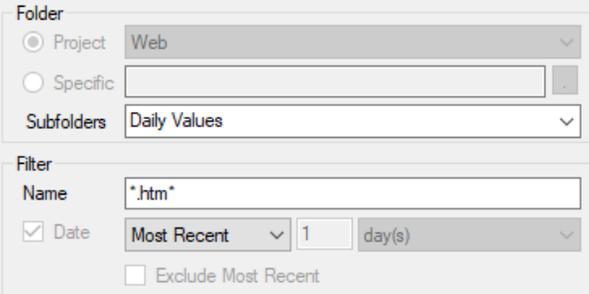
## Email by a Configuration

The **Email by a Configuration** action requires just a **Configuration** name. With this action some additional options are available that were not with the **Email Workbook** action.

## Embed a Web Report

If a report is published as a web page using the **Save Worksheet to Web Page** action, then it can be embedded as the body of the email.

On the **Content** tab select **HTML** and then the browse pushbutton ([...]).

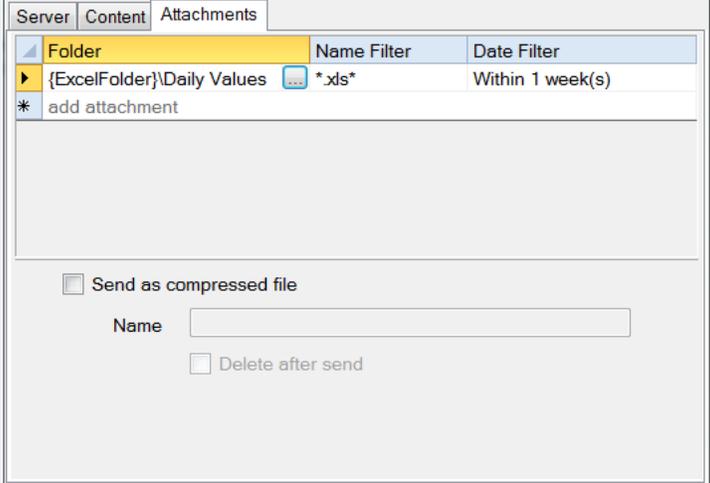


The screenshot shows the configuration for embedding a web report. It is divided into two sections: 'Folder' and 'Filter'.  
In the 'Folder' section, the 'Project' radio button is selected, and the folder path is set to 'Web' with 'Daily Values' as the subfolder.  
In the 'Filter' section, the 'Name' filter is set to '\*.htm\*', the 'Date' filter is set to 'Most Recent' with a value of '1' day(s), and the 'Exclude Most Recent' checkbox is unchecked.

These settings embed the **Most Recent** web report produced from the *Daily Values* template.

## Attach One or More Reports

Under the **Attachments** tab, one or more attachments can be configured to send with the email. The configuration for the attachments is flexible enough to send multiple reports based on when the reports were generated.



The screenshot shows the configuration for attaching reports. It is divided into two sections: a table for attachment filters and a section for sending as a compressed file.  
The table has three columns: 'Folder', 'Name Filter', and 'Date Filter'. The first row shows a folder path '{ExcelFolder}\Daily Values', a name filter '\*.xls\*', and a date filter 'Within 1 week(s)'. There is also an 'add attachment' button.  
Below the table, there is a checkbox for 'Send as compressed file', a 'Name' input field, and a checkbox for 'Delete after send'.

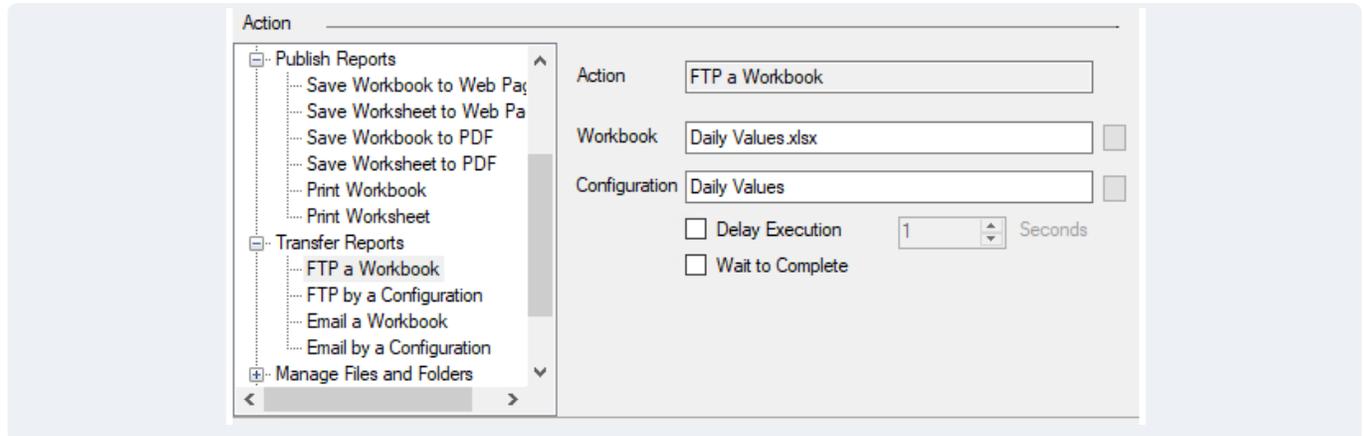
In the settings above, all the *Daily Values* reports generated within the last week will be attached to the email. If the reports are produced in PDF format, then these settings can be changed to reflect this.

If several reports are attached to the email, the **Send as compressed file** option is useful since it compresses all the reports to a single zip file before sending.

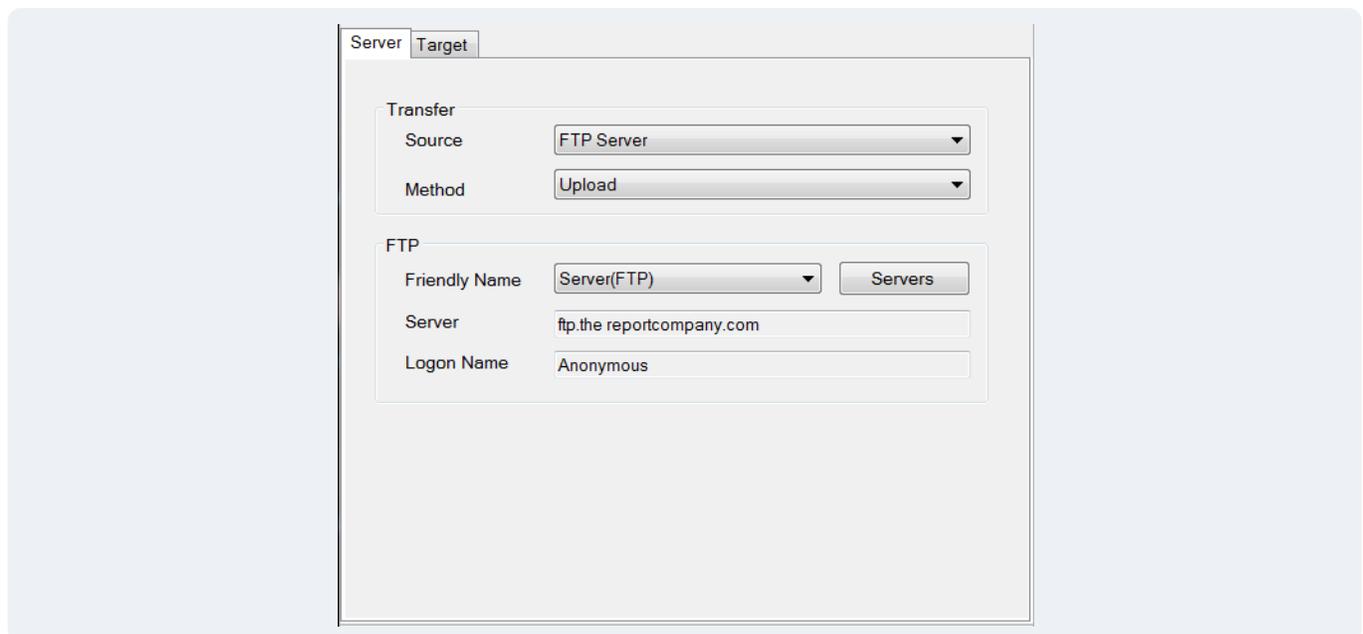
## Upload Reports to an FTP Server

The scheduler provides actions to automatically upload one or more reports to an FTP or SFTP server, providing users access to view or download them. If web reports are uploaded to a web server using FTP then **XLReporter** automatically uploads all the associated files e.g., image files.

### FTP a Workbook



The **FTP a Workbook** action uploads the report based on the **Configuration** specified. The browse pushbutton ([...]) for **Configuration** opens the **FTP Configuration** dialog.



The **Server** tab defines the FTP or SFTP server used to upload the reports to. This can be defined by clicking the **Servers** button. Once a server is defined, it can be selected for **Friendly Name** with any other configuration.

Server Target

Folder Server(FTP)/Reports ...

Clear Folder before transfer

Overwrite Never

The **Target** tab defines where the reports are uploaded to on the server.

## FTP by a Configuration

The **FTP by a Configuration** action requires just the **Configuration** setting. However, the **Configuration** for this action has an additional option to distribute reports that are not available with the **FTP Workbook** action.

## Define the Source

Server Source Target

Folder

Project Excel

Specific ...

Subfolders Daily Values

Filter

Name \*.xls\*

Date Within 1 week(s)

Exclude Most Recent

Under the **Source** tab one or more reports can be configured to upload to the server. The configuration is flexible enough to upload multiple reports based on when the reports were generated.

In the settings above, all the *Daily Values* reports generated within the last week will be uploaded to the server when executed.

Not only can report workbooks be uploaded, but also reports published in both HTML and PDF formats.

## View Reports through the Web Portal

In a distributed installation of **XLReporter**, reports produced in workbook, HTML or PDF formats can be viewed using a Team Client. Two types of Team clients are provided:

### Web Clients

Using a web client, anyone can view reports, of any format, from a web browser on any device from a PC to a tablet to a mobile phone.

### Windows Clients

Using the windows client, anyone can view reports, of any format, from a windows client which is configured from a web browser.