

## 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

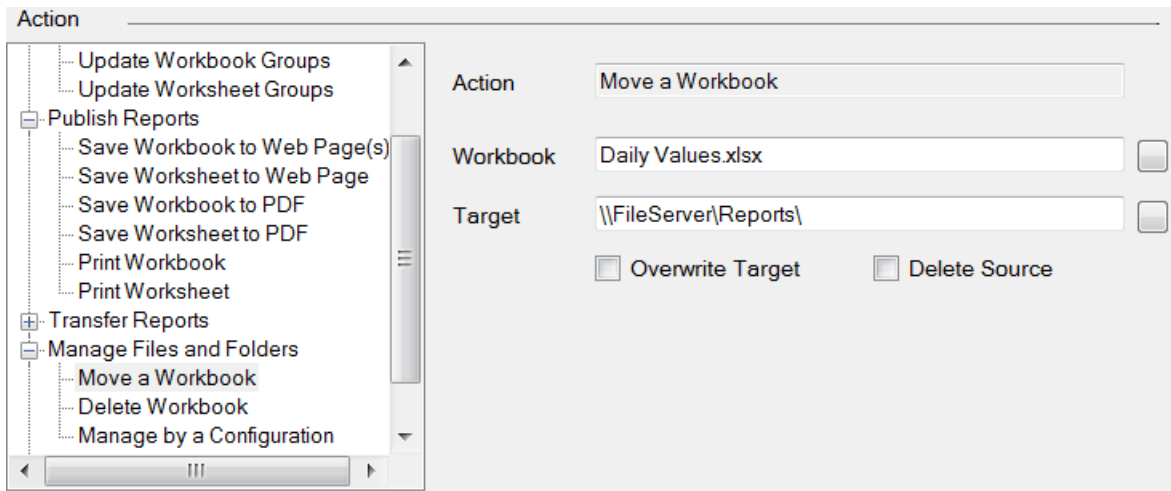
Actions can be scheduled at the same time so the action to distribute can happen at the same time as the action that produced the report. **XLReporter** buffers actions that occur at the same time so there is little chance that an action is lost.

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.



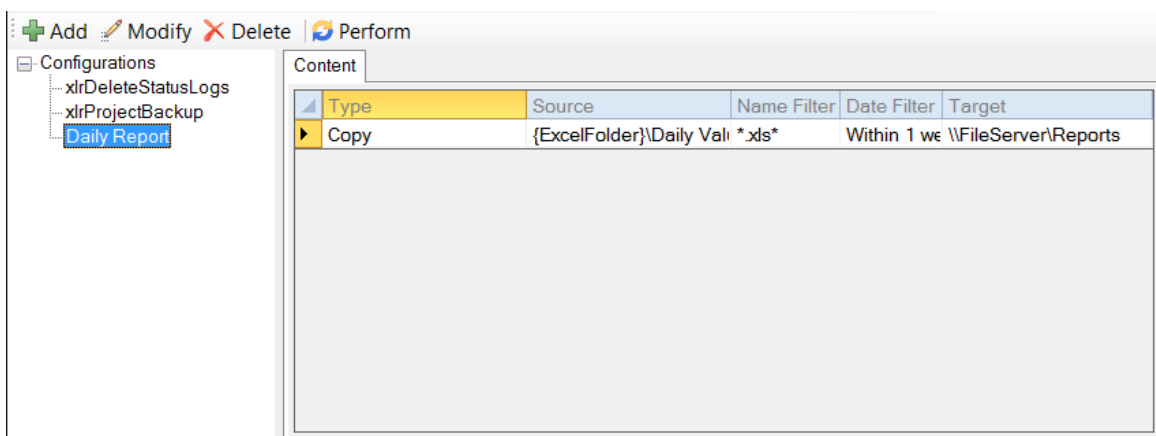
The **Workbook** setting for this action defines the workbook to move or copy. This should be set to the template name which will be translated to a report name (see above) when the action is processed.

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.

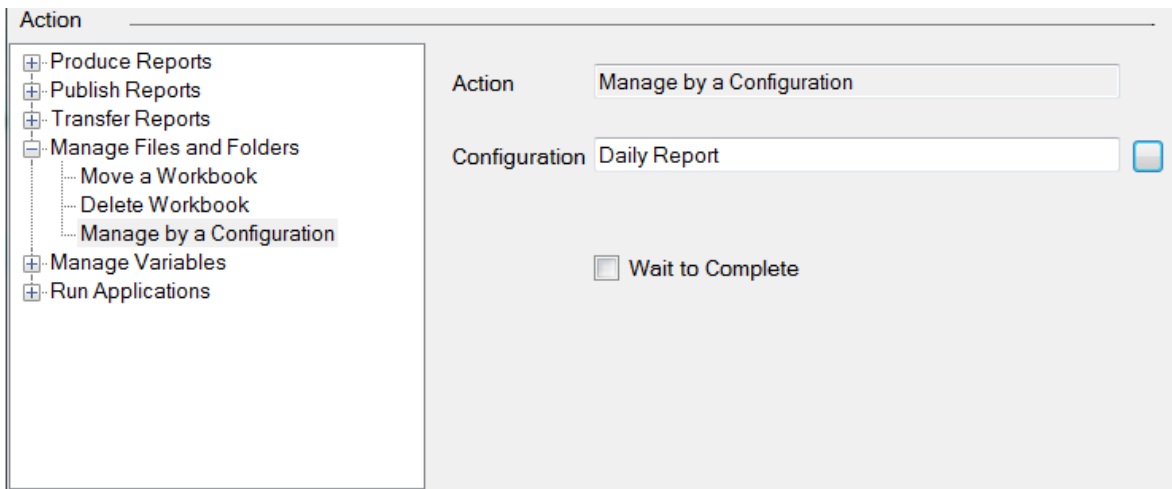
## File Management

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.

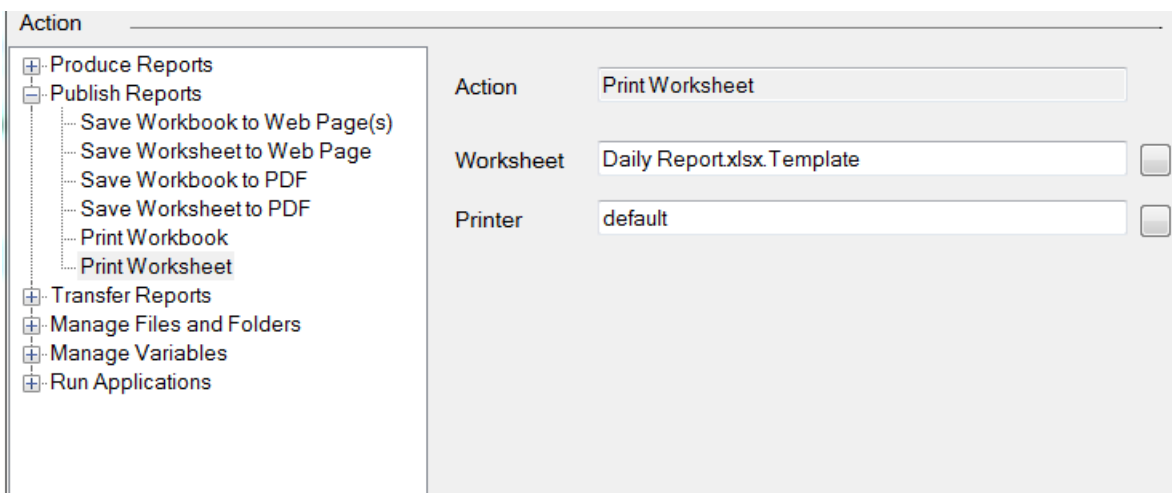
In the **Schedule Designer**, under **Manage Files and Folders**, the **Manage by a Configuration** action is used.



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).

Page Margins Header Footer Sheet

Orientation  
 Portrait  Landscape

Scaling  
Scale 100 %  
Width  Automatic 1 page(s)  
Height  Automatic 1 page(s)

First Page Number  
 Automatic  
 Specific 1

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

Action

- [-] Produce Reports
  - Update Workbook
  - Update Worksheet
  - Update Workbook Groups
  - Update Worksheet Groups
- [+] Publish Reports
- [-] Transfer Reports
  - FTP a Workbook
  - FTP by a Configuration
  - Email a Workbook
  - Email by a Configuration
- [+] Manage Files and Folders
- [+] Manage Variables
- [+] Run Applications

Action Email a Workbook

Workbook Daily Values.xlsx

Configuration Daily Values

Wait to Complete

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.

Server Content

Message  
Type: Email

Mail Server  
Friendly Name: Server (SMTP) Servers  
Server: smtp.thereportcompany.com

Details  
Logon Name: bshephard@sytech.com  
Sender Name: Bill Shepard  
Sender Email: bshephard@sytech.com

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**.

Server Content

To...: Fred,Wilma  
Cc...:   
Subject: Daily Report for {DATE}  
Importance: Normal Request receipt

Text: Attached is today's report  
 HTML:   
...

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

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

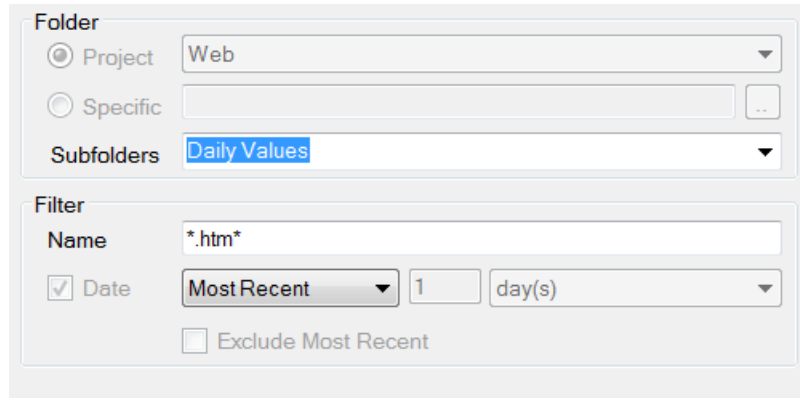
### Email by a Configuration

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 ([...]).

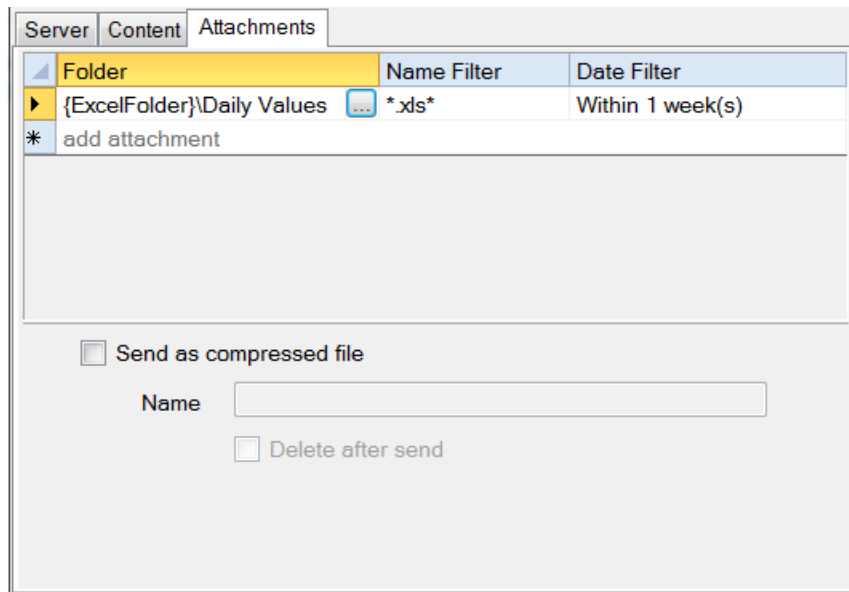


The screenshot shows the 'Content' tab configuration. Under the 'Folder' section, 'Project' is set to 'Web', 'Specific' is empty, and 'Subfolders' is set to 'Daily Values'. Under the 'Filter' section, 'Name' is set to '\*.htm\*', 'Date' is checked, 'Most Recent' is selected from the dropdown, '1' is entered in the quantity field, and 'day(s)' is selected from the unit dropdown. 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 'Attachments' tab configuration. It features a table with columns for 'Folder', 'Name Filter', and 'Date Filter'. The first row is expanded to show '{ExcelFolder}\Daily Values' for the folder, '\*.xls\*' for the name filter, and 'Within 1 week(s)' for the date filter. Below the table, there is a checkbox for 'Send as compressed file', a text input field for 'Name', and another checkbox for 'Delete after send'.

Folder	Name Filter	Date Filter
{ExcelFolder}\Daily Values	*.xls*	Within 1 week(s)
* add attachment		

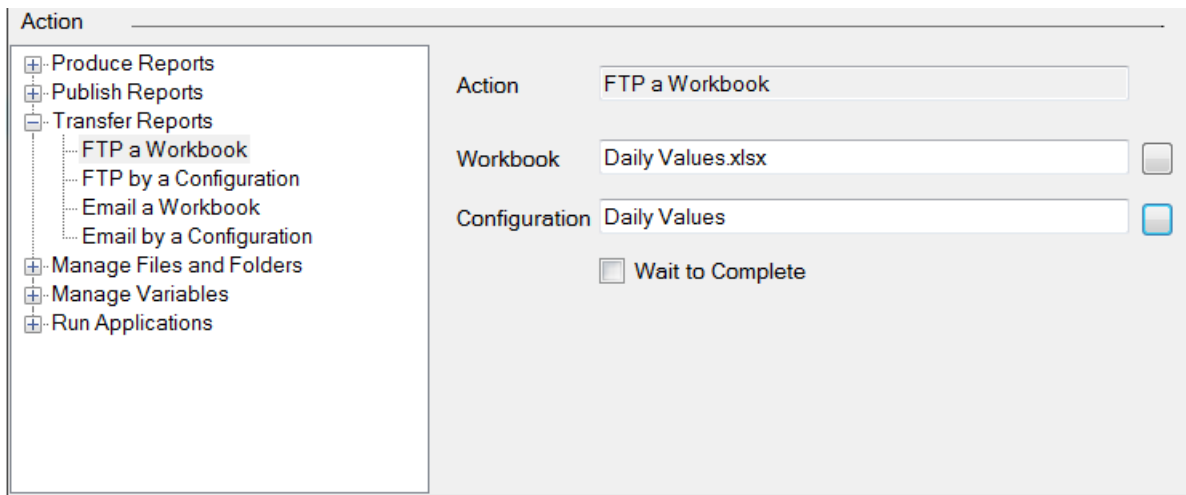
In the settings above, all the *Daily Values* reports generated within the last week will be attached to the email. If the reports are produced in PDF format, then these settings can be changed to reflect this.

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 a 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



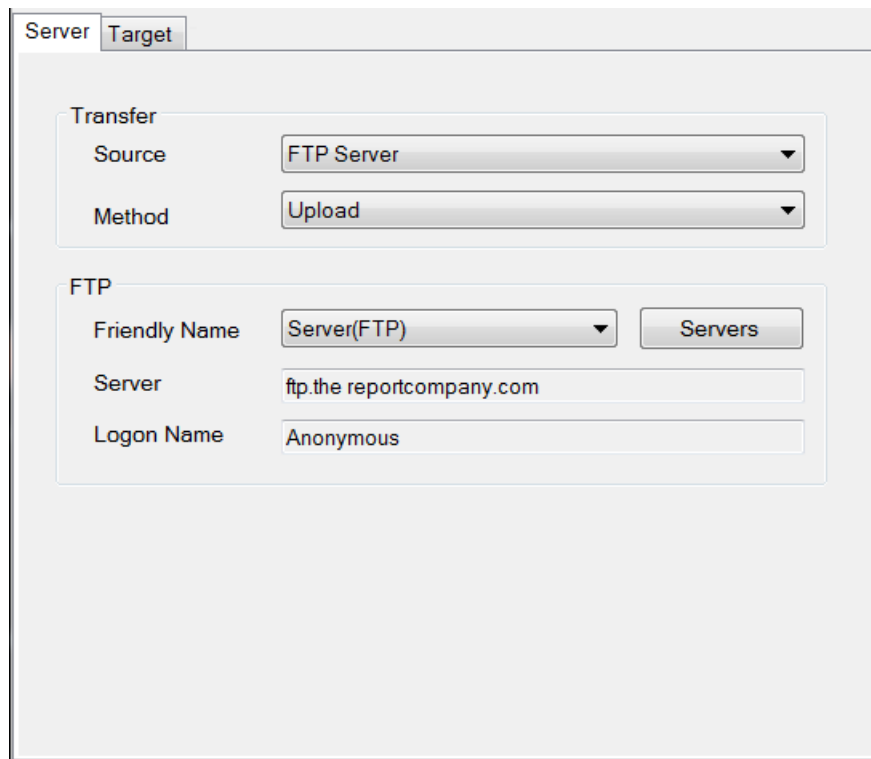
The screenshot shows the 'Action' configuration dialog. On the left, a tree view shows the following structure:

- Produce Reports
- Publish Reports
- Transfer Reports
  - FTP a Workbook
  - FTP by a Configuration
  - Email a Workbook
  - Email by a Configuration
- Manage Files and Folders
- Manage Variables
- Run Applications

On the right, the configuration for the selected 'FTP a Workbook' action is shown:

- Action: FTP a Workbook
- Workbook: Daily Values.xlsx
- Configuration: Daily Values
- Wait to Complete

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



The screenshot shows the 'FTP Configuration' dialog with the 'Server' tab selected. The configuration is as follows:

- Transfer**
  - Source: FTP Server
  - Method: Upload
- FTP**
  - Friendly Name: Server(FTP)
  - Server: ftp.the.reportcompany.com
  - Logon Name: Anonymous

A 'Servers' button is located next to the 'Friendly Name' field.

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.

The screenshot shows a configuration window with two tabs: 'Server' and 'Target'. The 'Target' tab is active. It contains the following settings:

- Folder:** A text input field containing 'Server(FTP)/Reports' and a browse button (two dots).
- Clear Folder before transfer:** An unchecked checkbox.
- Overwrite:** A dropdown menu set to '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

The screenshot shows a configuration window with three tabs: 'Server', 'Source', and 'Target'. The 'Source' tab is active. It contains the following settings:

- Folder:**
  - Project:** Selected radio button, with a dropdown menu showing 'Excel'.
  - Specific:** Unselected radio button, with an empty text field and a browse button.
  - Subfolders:** A dropdown menu set to 'Daily Values'.
- Filter:**
  - Name:** A text input field containing '\*.xls\*'.
  - Date:** Checked checkbox, with a dropdown menu set to 'Within', a text input field containing '1', and another dropdown menu set to 'week(s)'.
  - Exclude Most Recent:** Unchecked checkbox.

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.