

Navarre Report Manager V6

Installation, configuration and operation manual





Preface

About PCS Programming IIc:

PCS programming llc started in 2003 when I, Patrick Schafer, created a very simple application to process reports. mainly because when Crystal 7 was released they removed the ability the compile reports. This application, version 1 was every basic only emailing PDF's and would only connect to a specific data source. I had told a few friends, and one thing lead to another, made a few changes, and started to sell "Report Scheduler V2". Now eight years later V6 is released. My main focus has always been to make it affordable for everyone to schedule reports. You don't need \$10,000 dollars worth of software to automate reports.

Version 6, Navarre Report Manager:

Navarre Report Manager is the latest Crystal Report automation software from PCS Programming IIc. Our focus has always been to deliver dependable software that our customers can depend on at a very reasonable price. Navarre Report Manager V6 has continued with this tradition.

New in Version 6 is the addition of a process group. This group adds the ability to group reports and job together in to one process greatly improving workflow. This totally new application uses the Microsoft Dot Net Framework and is UAC compliant for use in Vista, W2K8 and above.

My Promise:

Since I am a small company, my reaction time to correct issues with the software is days, not months. At the start of the development of this application I found a bug in CR2008 dealing with changing connections at runtime. After several days dealing with tech support they confirmed that the problem was there and that a fix, now here is the killer, would be out in a hot fix in six months! A hot fix in six months? This is my promise to you, I will not take months to fix a bug. In most cases I can correct an issue and have an updated set of executables created in 1 to 3 days. This is my promise to you, to make quality software that you can depend on.

Comments please:

Navarre is completely driven by customer's suggestions. It is you in the real world needing real solutions. It is my job to fill them. I can only do this if I hear from you. Please do not hesitate to talk to us about any problems or ideas on features you need. We need to hear from you. It is the only way that we will continue to improve.

Thanks, Patrick C. Schafer Owner, PCS Programming IIc



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Installation

Pre-Installation

When installing Navarre V6 you must first make a few decisions about how to install the software. Your first choice you need to make is where the database for Navarre will be setup. Navarre uses a SQL Server to store all of its data about what report goes where, when and how. This database is small and does not require a lot room. It most installation is less than 50 MB. You can choose any current SQL Server in your network or choose to download and install the free version (Express) from Microsoft (<u>www.microsoft.com/sql</u>). Please see your network administrator before installing. You can use SQL Server version 2000 and up, but, a minimum of 2005 is recommended. Once you have chosen your SQL Server you will need an account that will allow the creation of a database.

Your next decision is where to install the software. If this is the first installation this will be where all the reports will be processed. All other installation that connects to the same database will be considered clients. One thing to keep in mind is that Crystal is not a light weight application and can put a large strain on system resources especially when you select to process more than one report at a time. The strain on your reports data source should also be taken into consideration. PCS programming does NOT recommend installing Navarre Report Manager directly on a production SQL server

Requirements

Below is a list of the system requirements for Navarre Report Manager V6

- 1. Microsoft Windows XP or greater
- 2. Microsoft .Net Framework 3.5 or greater
- 3. SAP Crystal Reports 2008
- 4. Microsoft SQL Server 2000 or greater (2005 or greater recommended)
- 5. SQL Account with create database permission



Installation

Software

Now that you have selected your SQL Server and picked where you want to install the software, download and run the installation file (NavarreRMV6.msi). You will see the opening screen as shown below.

🖟 Navarre Report Manager	
Select Installation Folder	
The installer will install Navare Report Manager to the following folder. To install in this folder, click "Next". To install to a different folder, enter it be	low or click "Browse".
Eolder: [C:\Program Files\PCS ProgrammingWavarre V6\	Browse Disk Cost
Install Navarre Report Manager for yourself, or for anyone who uses this c Everyone O Just me	:omputer:
Cancel < <u>B</u> ack	<u>N</u> ext >

After you choose where to install Navarre or agree with the default directory, click "Next" to proceed.



To start the installation click "Next".





To finish the installation click the "Close" button.

Database



After the installation completes you first need to open the Database Utility to connect to your selected SQL server and then create a database.





Error
Connection to the server could not be made. Please correct by pressing the change button
OK

On the first opening of the Database Utility the software will need to create the systems public settings.

The same for the system user settings.

The connection error is normal on the first use, simply click the "OK" button.





With the Database Utility open click the "Change Settings" button in the lower left in the "Database Connection Information" group.



This will unlock the Server, User Name, Password and Database Name fields. Enter the correct information for your SQL Server. The standard database is "NavRMV6" and is recommended.

atabase Connection Information	Make a backup of the database before running any utility!
SQL Server Name	Backup & Restore Configuration Ubilities Settings SQL Script Import
(Local)	
User Name	Note: All locations are local to the SOL server
SA	Note. All locations are local to the OQE server.
Password	
	Partice Location
Connection Status	Backup Location
Connected	Error
	Restore File Location The database entered was not found. Do you wish to create it?
Database Name	
NavRMV6	
Failed	
Database Tables	Use original data file location
Scanning	Move orginal data file location (WITH MOVE)
Change Settings	

Clicking "Save Settings" will connect to the SQL Server and will test to see if the database is present. If the database is not present you will be prompted to create the database. Click "Yes" to create the database.

atabase Connection Information	Make a backup of the database before running any utility
SQL Server Name	Backup & Restore Configuration Utilities Settings SQL Script Import
(Locil)	
User Name	Note: All locations are local to the SQL server.
an	
Password	
	Backup Location
Connection Status	Error
Connected	
	Bestow File Locat Could not find the database information tables. Do you wish to create all the
Database Name	standard tables in the selected database?
Nev/RMV6	
Connected	🗆 Ov
Connocioa	
Database Tables	Meue eminal data lite location MITH MOVE)
Scanning	
Change Settings	

After creating the database you will be prompted to create the tables within the database. Click "Yes".



SQL Server Name	Beckup & Restore Configuration Utilities Settings SQL Script Import
(Local) User Name SA Password	Note: All locations are local to the SQL server.
	Packup Location
Connection Status	
Connected	CONTRACTOR IN THE REAL OF THE
	Restore File Location
Database Name	
Connected	Overwright Databos OK
Database Tables	Use original data file location
Connected	Move orginal data file location (WITH MOVE)
Change Settings	

With the successful creation of the database and tables the setup of the database connection is complete and you can now open Navarre Report Manager V6.



System Configuration

This section is a quick list of system configuration setting to get your installation running.

Email

One of the most popular report delivery methods is via email. Navarre has the ability to use any number of email accounts. These are configured in Options / Email.

General Setting		Control Pane
Default Email Account	On Error Email Account	🛉 Add
1	•	🖌
Email Accounts		💥 Delet
Description		S Cano
Server Name or IP		
Port No.		
Reply Address		
Anonymous Log	in	
User Name	Send Test File	
Password		

To add a new email account click on the "Add" button.

Default Email Account		On Erro	r Email Account	🛖 Save
	•			▼ Jà Edit
				20
Email Accounts				🐺 Delete
Description				S Cancel
Server Name or IP				
Port No.				
Reply Address				
	knonymous Login			
Liser Name				

Add the appropriate information to connect your email server. Be sure our executables, NavarreSM.exe and Navarre RMV6.exe are entered in your firewall and or anti-virus email allow list. If not, Navarre my not be able to send email. If the test file is rejected immediately your local system maybe blocking Navarre. Please see your network administrator for assistants.

Click "Save" to store the settings.

Once you have all your email accounts entered you can select a default email and on error account. The default account is the one that will be shown automatically in the Job which you can always change to any other account if you choose. The on error account is where error notices are sent when a process group has issues processing reports.

Report Groups



Report groups are logical groupings of reports, like Sales, Production, Invoicing and etc. Reports can be but into groups so end users can more easily find the reports their looking for when creating jobs.

By default Navarre has a standard group called "Main". The group is not mandatory and can be deleted if you desire, but a group of some kind is needed.

To add a new group, go to Options / Report Groups....

👃 Navarre Report Manager V6	
Options	
Report Groups	
General Name Description Public	Display
Service Main Default Report Group 0	Start by rig
Email	Start by rig
Report Groups Add	
FTP Servers X Delete	
Event Log	
Nager VD	
Report Groups Name Description Public Display	
Main Default Report Group 0	After the D
Neport Groups	in the Nam
	currently is
Group Name	currently is
Description	determ
Public Group	
🗙 Delete 🗸 Apply	🖬 Save & Close
🛃 Report Groups	
0 H 0 H F	
Group Name Production	
Description Main Production Reports Group	
	CIICK "Sa

🚽 Save & Close

Start by right clicking in the grid area and select "Add" from the pop menu.

After the Report Groups dialog box appears. Fill in the Name and Description. The Public Group currently is not being used but in the future will determine which groups are hidden from remote admin clients.

Click "Save" to store the new Report Group.

Service Module

× Delete

The service module is the heart of the Enterprise Edition and is the key difference from the Standard Edition. This Windows service runs in the background allowing the user to log off and still have the Process Groups continue to run. It is also a benefit for when the host computer is restarted due to user initiated restart or power failure. It adds a higher level of scheduling power when a large number of Process Groups are scheduled to run at the same time.



The service module does have some restrictions that are forced onto it from Windows. These deal with system resources verses user resources. For example, a user may have a mapped drive point to a location on a file server where all his or hers reports are stored. The user will add a report to Navarre, create a Process Group and test all with complete success, but when the service module tries to process the group, it will fail. This is due to the fact that a mapped network drive is a user specific resource. If user "A" has "M" drive mapped to "FileServer\Dir1\Dir2", user "B" can have the same drive "M" mapped to "AppServer\Dir1" which is completely different location. The problem now is which one should the service use? For this reason Navarre RM V6 can not use mapped network drives. The same holds true for shared printers. Only local or networked printers are available. All ODBC setting should also be installed into the system section of the data sources administrator and not have any mapped drives used. There is no more notable difference to note when processing reports through the service module and that is security. Since most report processing deals with using some other resource from another computer like a file server where reports are stored or reports are exported to. The service module will need to have permissions on the external resource. This is often the cause of a report failing. This will be covered in more detail later in the chapter.

To recap, the three main differences in processing reports with the service module are...

- 1. No mapped network drives used in either the report location, export location or ODBC settings
- 2. Configure ODBC settings as a system resource
- 3. Apply the appropriate security for service

In most installations, the service module will need to have some security applied to it so it has permission to go and get reports that maybe stored on another computer on your network or need to export to a file server. The service module will need permission to do this. By default the service was installed with the installation of the software but with no permissions.

To give the service module permission, you must use the Windows computer management console or the services applet in the administrative tools.

First find Navarre V6 in the service list seen here....

😓 Computer Management					
<u>File Action View H</u> elp					
🗢 🄿 🙍 🗔 🗔 🖉	🛛 🖬 🕨 🖬 🕪				
Computer Management (Local System Tools D C Task Scheduler D C	Services Navarre V6 Start the service Description: PCS Programming Service Module scheduling engine	Name Name KtmRm for Distrib KtmRm for Distrib KtmRm for Distrib KtmRm for Distrib KtmRm for Distribution KtmRmm for Distribution KtmRm for Distribut	Description Coordinates Used by the Creates a N Allows Med Microsoft Microsoft Microsoft Manages Io Enables rela PCS Progra Maintains a The Networ Maintains a The Networ Manages o Identifies th	Status Started Started Started	Startup Type Manual Manual Disabled Disabled Disabled Automatic (D Manual Automatic Manual Disabled Manual Manual Manual Manual
		Network Location	Collects an	Started	Automatic

Right click on the service and choose "Properties" from the sub menu.



TAKING THE SCHEDULE OUT OF YOUR TIME

Navarre V6 Propertie	s (Local Computer)
General Log On F	Recovery Dependencies
Log on as:	
Local System ac	count
Allow service	to interact with desktop
This account:	.\superlogin Browse
Password:	•••••
Confirm passwor	d: •••••
Help me configure u	OK Cancel ópply
Vavarre V6 Properties	s (Local Computer)
	Leoren Beperlatinolog
Service name:	Navarre V6
Display name: N	Vavarre V6
Description:	2CS Programming Service Module scheduling
Path to executable: "C:\Users\Patrick\E	Desktop\Version 6\Service\bin\x86\Debug\NavarreSM
Startup type:	Manual
Help me configure s	ervice startup options.
Service status: S	Stopped
Start	Stop Pause Resume
You can specify the from here.	start parameters that apply when you start the service
Start parameters:	
-	OK Cancel Apply

Select "This account" and enter the domain name and user name into the account box and the password into the password box.

The Local system account can also be used if all the reports and export locations are local to the service module.

Now we have the service module configured you can start the service. This can be done in one of two ways. First is on the general tab of the properties for the service.

Click the "Start" to start the service.

The Second method is through Navarre Report Manager itself. If you are logged on as an administrator or started Navarre as an administrator then in the options / service the control panel is available to control the service.

	Current Status					
🕎 Home				0	×	
5 Schedule		Start Pa	use	Restart	Stop	
🖉 Report Storage						
鵗 User Maintenance						
4 Options						
» *						
Software Level: Trial (ENTER	PRISE) Expires: 6/6/2011	Version: 6 Patch: 1 Build: 5	Client Type: Master			

Optional Modules

Currently Navarre has three optional modules. The first of which was just covered, the Service Module, Bulk Distribution and Mass Distribution.



Service Module (Enterprise Edition)

This module processes the current schedule of process groups all in the background using a windows service. This service can run with out a user starting it or even being logged in. It can be configured to start automatically with the workstation. Once the service starts it can be configured to process all late jobs or reschedule them. This will keep all your jobs running in case of power outage or system maintenance. It also has the ability to run up to 20 process groups at one time. The service module has a more advanced schedule engine that will go back and run any missed group while it was busy running other groups when the queue was full.

Bulk Distribution Module

This module adds the ability to add multiple reports to a single job allowing you to attach as many exports to a single email as you like. With out this module you would have to create a job for each report and then the user would receive several emails each with a single attachment.

Mass Distribution Module

This Job type is most powerful and allows for the connection to an ODBC data source to read and store up to ten pieces of information per record to be used throughout the job to custom format an email message and or apply to parameters. All reports that are attached to the job will then be run for each record returned. So if your connection returns 15 records and there is a single report item, the report will be processed 15 times. If there are 5 reports attached, each report will also be processed 15 times for a total of 75 exports, assuming each report only has one export. This comes in handy when creating a job to handle customer statements or late notices, anywhere you need to have the same report sent to a dynamic list of recipients. If you have stored a record ID such as a customer or salesman number you can link it to a parameter on the report to give a unique report to each recipient.

Note: This module only connects to a single table or view. No linking of tables is allowed in Navarre. It was indented to be used with a SQL view where you can use the power of the SQL server to return the data to a single table.



Database Utility

Overview

The database utility's main function is to manage the connection to the SQL Server where the database for ALL the Navarre applications is stored. It also manages all the configuration settings.

The utility is separated into 7 main sections.

- 1. The SQL connection (on the left side of the application)
- 2. Backup and Restore tab
- 3. Configuration tab
- 4. Utilities tab
- 5. Settings tab
 - a. User settings
 - b. Computer settings
 - c. Global settings
- 6. SQL Script tap
- 7. Import tap

The SQL connection was covered earlier () and will not be covered here, so let's look at each one of the remaining sections.

Backup and Restore

Backup

Backing up the database in VERY important and should be done routinely. The database utility makes it very easy to do. Start by selecting a location for the backup.

Note: that any backup and restore operations are commands sent to the SQL Server so paths are local to the server and may be different than those of the database utility.

After selecting a path and filename (an extension of .bak is recommended) click on the "Start Backup" button.



Restore

Restoring a database should be done with caution as it is destructive to the current database. Please see your database administrator before attempting any restore!



You start by selecting your SQL backup file.

Restore File Location	

If the backup file was created on a different server or used a different database name you will need to select the "With Move" option.

	O Use original	data file location		
	Move orgina	al data file location (WIT	TH MOVE)	
With I	Move" Options			
Data	File Location			
Log F	File Location			

You will need to specify the current data file name (.mdf) and the current log file name (.ldf). If the database you are restoring used a different database name other than the current one that is use, you will need to select the "With Replace".

Overwright Database (WITH REPLACE)

Configuration

Modules Status

This tab displays the current options that are enabled.

Current Configuration			
Authorization Status	Trial Mode	Software Mode	
Serial Number		Service Module	
Maintenance Date		Mass Distribution	
Company Name		Bulk Distribution	
Trial Expration Date	6/6/2011	Encryption Module	

The left section shows the trial status and registration information. The right side displays the optional modules that are enabled. A brief description of each module:

- 1. Software mode: Basic / Standard / Enterprise are the three levels of options within the software that are available. The Enterprise is the same as the Standard with the service module enables. There is no difference in features between the two.
- 2. Service Module: Provides the Standard edition with the ability to process jobs via a Windows service.



- 3. Mass Distribution Module: Dynamically processes reports based of an ODBC data source.
- 4. Bulk Distribution Module: Allows multiple reports to be attached to a give email.
- 5. High Encryption Module: Allows for the encryption of files or attachments up to AES 256 bit.

Update / Import Update Request

The update request section is used to generate update requests and import authorization files. Update requests are primarily used to extend trials. When a request is generated, it voids all previously generated authorization files which where created using any update request. Equally, once an authorization file is imported it is also rendered useless. Authorization file created for the original purchase are not subject t this rule and always can be imported.

Import authorization file is used for importing temporary update request, original purchase and maintenance authorization files.

Update Request	
Generate File Update Request	Import Authorization File

Utilities

The Utilities tab has a few special utilities that are not available through the application.

The Configuration Reset utility will remove all you configuration settings and restore your installation to the trial version, which will be expired. You will need to then generate an update request and contact technical support to extend your trial or reinstall your original authorization file.

Configuration Reset	
Configuration neset	
	This utility will destroy all configuration data and reset
Reset to trial version	the installation back to an expired trial.

All passwords are stored using a private encryption key in the database. Each database has its own unique key. This is to keep your passwords secure. If at any time you generate a new key you will need to reenter each report that is stored, SMTP email accounts and FTP server settings.



Private Encryption Key	
Create new private key	A private key is a global encryption key used to safe guard your reports passwords. If reset, all stored password will be need to be reentered.

The clear events utility will destroy all the stored log events in the database.

Clear Events	
Clear ALL logged events	This utilityt will remove all the events looged in the Navarre Report Manager's database.

Settings

The Settings tab controls all the settings for Navarre Report Manager V6 and its related modules.

User Settings

These settings control the user interface for the user. Each user will have their own settings.

User Setting Computer Settings Global Settin	gs
	Save Settings
Client Mode	
⊙ On	

Client Mode: This setting controls the way the user joins the database. Currently there is 4 types of user accounts: Master, Administrator, Remote Client and Viewer Client.

With the client mode off the user will try to join as the master. The master is the main administrator of the system and is the first user to join.

With the client mode on the user will join as either an administrator or a remote client. An administrator has the same options available as the master and must be promoted from a remote client by the master. The remote client does not have the option available.

The Viewer client is reserved for future use.

Computer Settings

These settings affect any Navarre application that is used on the physical computer.



Service Module Queue Depth Service Module Hang Time (min) 1 60 Root Archive Folder C:\Users\Patrick\Desktop\test	User Setting Computer Settings Global Settings Service Startup Mode (Late Jobs) Nothing Reschedule Run & Reschedule	Save Settings
Root Archive Folder C:\Users\Patrick\Desktop\test	Service Module Queue Depth Service Module Hang Time (min)	
	Root Archive Folder C:\Users\Patrick\Desktop\test	

The service startup options has three options that effect how the service module acts when starting up. If it is set to nothing, the service will start normally and only process on time groups. If it is set to reschedule, the service will reschedule all late groups and then start processing on time groups. If it is set to run and reschedule all late process groups will be processed and then rescheduled.

The queue depth setting is the number of process groups that Navarre will process at one time. Use extreme caution when adjusting this setting as it is like opening the number of Crystal Reports and then refreshing each report all at one time. This can put a very large load onto the host computer and or the reports data source. In most application the default of one (1) is recommended.

The hang time setting is the number of minute each process group is allowed to run before the process thread is terminated. This is done to keep the list of scheduled process groups running.

The archive root folder is the location where process groups will be archived if it is enabled.

Global Settings

User Setting Computer Settings Global Settings	
Debug Level 💿 Low 🔿 Medium 💿 High 🔿 OMG	Save Settings

These settings control any Navarre application that is connected to the database.

The debug level setting controls how much data is transferred into the event log from the processing of groups

SQL Script

Running any SQL script should be with caution as they can not be undone. For this reason you should make a full backup first. A script and be type in manually in the window or be loaded using the Load Script button. In either case pressing the Execute Script button will start the processing.



Again, any changes can **not** be undone unless you have a backup!

Import

The import tab is used to import data from version 5 patch 15 databases. Importing data does not change the version 5 database but converts the data and inserts into the currently connected version 6 database.

The first step is to connect to the version 5 data source...

Source Database		
SQL Server Name	User Name	
	Password	Connect
	1 dosword	

Enter the SQL server name and the SQL logon information and click on the Connect button.

Once connected to the version 5 data source you will be able to enter the database name.

Database Information		
Database Name	Find	Start Conversion

If the selected database qualifies for upgrading the Start Conversion button will be enabled. Clicking it will start the importing of data into the current V6 database.

All reports will be imported into a special group call "V5 Imported Reports". Please note that due to the difference in the way passwords are applied in version 5 to version 6 you must edit each report and re-enter the logon information.



User Interface

Navarre Report Manager's new user interface uses an outlook style tool bar with 5 main groups.

- Home
- Schedule
- Report Storage
- User Maintenance
- Options

These groups are lock or unlocked depending on the client level of the user.

Schedule	urrent A	lotivity			
		COVEY			
				en e	
Start Schedule	S Re	fresh Grid	Auto	Refresh	On Ti
		Status	Name	Descript	tion
	•	Normal	Dymanic In	port(3)	
÷		Normal	13 test(5)		
New Process Group		Normal	cust by dat	e(2)	
		Normal	customer in	fo(1)	
thome	ate	Proces	s Groun	2	
Schedule	Late	Outer	News	Deservation	NextD
Scheudie	_	status	rvame	Description	NextH
Report Storage	•	Normal	test parm(4		
User Maintenance					
Options					
»					
Software Level: Trial (ENTERPRIS	E) Evo	ires: 6/6/201	1 Versio	n:6 Patch:1 B	uild: 5

Client Type	Home	Schedule	Report Storage	User Maintenance	Options
Master	Х	Х	Х	Х	Х
Remote Admin	Х	Х	Х	Х	Х
Client	Х	Х	Х		
Viewer	Х				

Home

The Home screen is the opening screen for the application. It shows the current web content from our website. It will display information about updates, tips, and other relevant information.

Schedule (Process Group)

A process group is the top level of grouping of jobs, reports and exports. Each process group has any number of schedules attached to the group. It contains any number of jobs, which is a container for an export destination, like emailing or file transfer. A job also contains any number or reports with each report having any number of exports.

The below diagram shows the association of the process group to its objects...





In the above sample process group, the group contains two jobs, a normal file transfer job and a bulk email job. Both of these job types will be covered later. What is import at this point is that you see that a process group can hold as many jobs as you need to run at the same time. Which you do by setting a schedule or schedules. Once one of the scheduled times arrives all the jobs will be processed, one at a time by default. What you can also see is that a job can hold several reports (optional bulk module) and that each report can also have several exports.

Let's look at this in greater detail. To start a new process group go to "Schedule" on the main menu and then

click the "New Process Group" button . This will open the process group object window.



General

The process group window has three tabs general, schedules and jobs. The general tab shown here displays some general information along with the statistics.

A priority can also be set which dictates which process group will run first if more than one is schedule for the same time.

💗 Process Group	
General Schedules Jobs	
General	
Name	
Description	
Priority Low	
Statictics Last Processing Time 0 Total Processing Time 0	Total Number of Runs
Reset All	
Show Record ID	Apply Save & Close

Schedule

	👳 Process Group
The Schedule tab displays all the schedules for the process group. Any number of schedules can be applied. To add a new schedule click on the "Add" button Add . This will display the schedule object window.	Process Group General Schedules Jobs Schedules Name Next Flun Status Type Frequency Add Double click to load selected record, right click for options.
	Show Record ID
	Appy Bave & Close





There are two main types of schedules "One Time" and "Recurring". A one time schedule is processed once and the is disabled so it will not run again. A recurring schedule runs on a repeating schedule.

Select a date and time which you what the process group to run and click the "Save & Close" button.

seneral 📝 Enabl	ed N	ame				Schedul	е Туре	One Time	Recurring
One Time Occurrence									
	Date	Thursday .	May 12	. 2011 👻	Time	01:02 PM	÷		
1000 T-0 (
ummany Next nun clate and tir			Осси	rs once on Thursda	y, May 12, 2011	at 1:02 PM			
ummary Next run date and tir 5/12/2011 1:02:00	ne: PM		Осси	rs once on Thursda	y, May 12, 2011	at 1:02 PM			
ummary Next run date and tir 5/12/2011 1:02:00	ne: PM		Осси	rs once on Thursda	y, May 12, 2011	at 1:02 PM			

To create a recurring schedule, click the "Recurring" radio button on the top right.

Each frequency type allows for a daily frequency, which is once the date is reached a process group run at the specified time or will repeat from the starting time to the ending.

Each frequency type also has a starting and an ending date. This make this specific schedule valid for the dates selected.

There are three different types of recurring schedules, daily, weekly and monthly.

Daily

Besides the daily frequency, the only other option for the daily schedule type is the "Recurs Every" X number of days. With the value set at one the process group the run every day of the week. If you change the value 3 the process group will run every three days.

			Schedule Type	One Time	Recurring		
Dail	ly Frequency	 Occurs once 	e at 01:02 PM 🚖				
		Occurs even	y 1 A Hour(s)		ng 01:02 PM	Ending 12:48 PM	
	-						

-

,	Occurs once at	01:02 PM	<u>+</u>				
	 Occurs every 	1	Hour(s)	Starting 01:02 PM	÷ Ending	12:48 PM 🚔	
							_

Duration										
Start Date	Thursday .	May	12, 2011	•	No End Date	End Date	Friday	May	13, 2011	Y



Daily				
bany	Recurs Every	1	Day(s)	



Day

Weekly

When selecting the weekly schedule type you can individually check the days of the week you want the process group to run. With a "Recurs Every" set to one the group is run every week. If you change the value to two the process group will run every other week on the selected days.

Monthly

When selecting the monthly schedule type there is two options, on the "Day" and on "The" types. Selecting day will allow you to set the specific day of the month you wish to have the process group run. If you select the 31st and the current month only has 28 days, the process group will run on the last day of the month.

Selecting "The" monthly schedule type will allow you to select a certain day of the month like, the first weekday or the third Thursday of the month.

And again as with the other schedule types you can select an increment of X number of months to skip months.



of every 1 🚔 Month(s

Monthly		
	💿 Day 31 🗼	
	● The First ▼ Sunday	-
Daily Frequency	Second Monday Third Tuesday Occurs onc Last Thursday	
	Occurs every I Hour(s) Friday Saturday Weekday Weekday	S
Duration	Veekend Day Day	

	-		Martico	
of every	1	-	Month(s)	

Error Handling

Before we start talking about jobs, lets look at the error handling first because this can change the way in which you design your jobs. Below is the section that deals with error handling when a job is being processed.



There four main ways to deal with errors. Continue, Fail, Pause or Reschedule. Continue will let all the other jobs be processed. When complete, the process group will be rescheduled as normal. Fail will stop all the other jobs from being processed. It also does not reschedule the process group, requiring a user to intervene to correct the issue and reschedule the process group. Pause will make the export engine sleep for the specified time. During this time no other process group or job will be processed. Reschedule will reschedule the process group for the specified time, allowing other process groups to be run. When the new time is reached the entire group will be rerun.

Jobs



General

Your first decision when creating a new job is what kind of a job. A job can be one of four types, Alternate Application, Normal, Bulk Distribution and Mass distribution. This selection determines how the reports are processed.

Job Type					
0	Alternate Application	Normal	Bulk Distribution	Mass Distribution	
Name					
Description					
Statictics					
La	t Processing Time	Total Processing Time	Total Number of Runs	Reset	



Alternate Application

This job type is nothing more than a way to lunch custom export engines or some other application. When this type of job is executed it only calls the selected application and then proceeds to the next job in the process group. It does not wait for the program to complete or return information as to what happened.

Job Type Alternate Application 	Normal	Bulk Distribution	Mass Distribution	
Alternate Application				
Enter command to execute.				

Normal

This job type is the default for a new job. This type processes a single report to the selected destination with any number exports.

Bulk Distribution

This job type allows for more than one report to be added to a destination type. The primary use for this job type is to attach multiple reports exports to a single email.

Mass Distribution

This Job type is most powerful and allows for the connection to an ODBC data source to read and store up to ten pieces of information per record to be used throughout the job to custom format an email message and or apply to parameters. All reports that are attached to the job will then be run for each record returned. So if your connection returns 15 records and there is a single report item, the report will be processed 15 times. If there are 5 reports attached, each report will also be processed 15 times for a total of 75 exports, assuming each report only has one export. This comes in handy when creating a job to handle customer statements or late notices, anywhere you need to have the same report sent to a dynamic list of recipients. If you have stored a record ID such as a customer or salesman number you can link it to a parameter on the report to give a unique report to each recipient.

Note: This module only connects to a single table or view. No linking of tables is allowed in Navarre. It was indented to be used with a SQL view where you can use the power of the SQL server to return the data to a single table.

General Mass Distribution Options Expo

. This tab allow for

Once selected the mass distribution tab is shown the user to store the special data required for the ODBC connection.



The first section is the ODBC Connection tab.
This is where you make the connection to the
data source.

NOTE: Any DSN name should be configured as a system DSN so the service module will be able to connect as well.

Job Description								×
General Mass Distrib	ution Options Exp	ort Via Reports	Archiving					
ODBC Connection	Auto SQL Mode	Manual SQL Mode						
	User Nar	ne	u wish to retrieve ti	e list of ID to process	•			
	Passwo	rd		Connect				
Show Record ID								
						Apply	and Save & Close	

Once connected to the data source you have two options.

ODBC Connection	Auto SQL Mode	Manual SQL Mode

The first is the "Auto SQL Mode". In this mode you select the table and fields from a list and apply filters to the results. The second option is the "Manual SQL Mode". Here you manually enter the SQL statement directly into the user interface.

Auto SQL Mode

lot 🦪	b Description	1 4	×
Gene	eral Mass Distribu	tion Options Eq	ort Via Reports Archiving
0	DBC Connection	Auto SQL Mode	Manual SQL Mode
[Table Selection	Record Selection	Variable Linking Logging Preview
		Table Name	Please select the table you wish to connect to.
		rabic Name	Show Column Details
I Sh	low Record ID		Apply

In the auto SQL mode the first selection you make is the table.



Job Description

Show Record ID

Job Description

General Mass Distribution Options Export Via Reports Archiving ODBC Connection Auto SQL Mode Manual SQL Mode Table Selection Record Selection Variable Linking Logging Preview

Field Name ble 1 ID

Variable 2 Name

ble 3 Email

le 4 State

General Mass Distribution Options Export Via Reports Archiving ODBC Connection Auto SQL Mode Manual SQL Mode Table Selection Record Selection Variable Linking Logging Preview

Condition Filter

•

•

•

Variable 7

Variable 8

Variable 9

ble 10

•

Apply Apply Save & Close

.

•

•

-

• Clear Selection

Field Name

State (None)



Once the table is selected you can apply up to	
four filters using the record selection tab. This	
allows you to filter the records from the table.	

The Variable Linking tab allows you to store up
to ten fields, which then can be used later in the
job. The most common use is to apply to a
parameter to create a unique report for the
given record or to customize an email message.

Show Record ID	Apply ave & Close
Job Description General Mass Detribution Options Esport Via Reports Archiverg ODEC Connection Auto SQL Mode Manual SQL Mode Table Selection Record Selection Variable Linking Logging Preview	×
This optional step logs the progress in the Narvane database to help in the analysis in tre Exable Detail Logging Select the Field name, type of event and the value to log. Start of Processing	Clear All Events Set To 1
Field Name	Set To
	·•
Show Record ID	Apply Save & Close

This next section, Logging, if enabled allows the tacking of which records were processed, which were completed and which records failed. This information is stored in a special table in Navarre's database (Nav_ProGrp_Job_MassLog).

You can then create another job to report on this outcome.

28



The preview tab shows the SQL statement as generated by the previous tabs. It also displays the records that currently are returned by the SQL script.

If the job was to run right now, all attached report items would then be processed for each record shown.

		our more [Manual SQL	Mode					
Table Select	ion Reco	rd Selection	Variable Link	ing Logging	review	1			
Curren	t SQL								
Curren	t Preview								
	ID	Name	Email	State	- 1				
•	1275	AERO	patrick@	OH	- 1				
	1278	SHOR	mhuffman	OH	-11				
	1235	PESO	tedettica	Oh	- 1				
	1493	FRAN	BrianBarr	он	-				

Manual SQL Mode

While auto mode walks you through the process of building the SQL query, when using manual mode, you the user enters the query.

Again, we need to stress this interface is not designed for a complex select statement, no nested queries can be used. You are still only able to have one table entered.

Here we have a simple query entered. Once the

Execute SQL button is pressed to execute the command you can switch tabs to select which fields to store for later use.

SQL Quer	Y Variable Linking Logging Preview		
SE ID, FR Cu Wi	11827 Gmil Name, Rote KMR HERE HERE KE = °CH	Execute SQL.	



The Variable Linking tab allows you to store up to ten fields, which then can be used later in the job. The most common use is to apply to a parameter to create a unique report for the given record or to customize an email message.

Job Description		Conception in the local division of the loca		-			×
General Mass Distri	foution Opt	ions Export Via Reports A	rchiving				
ODBC Connection	Auto SG	L Mode Manual SQL Mode	L				_
SQL Query Va	riable Linki	ng Logging Preview					
	Fie	eld Name		Ð	eld Name		
Vari	iable 1 🕕)	•	Variable 6		•	
Vari	table 2 🚺	ame	•	Variable 7		•	
Vari	table 3 E	mal	•	Variable 8		•	
Vari	iable 4 S	tate	•	Variable 9		•	
Vari	iable 5		•	Variable 10		•	
						<u></u>	
					Ue	ar selection	
Show Record ID					🖌 Apply	Save & Close	

SQL Query Variable Linking Logging Preview				
This optional step logs the progress in the Navarre database to	help in the analysis in	tracking records p	rocessed	
Select the Field name, type of event and the value to	log.		Clear All Eve	nts
	Start of Processing	Set To 1		
Field Name	uccessful Completion	Set To 2		
	Failed Completion	Set To		

This next section, Logging, if enabled allows the tacking of which records were processed, which were completed and which records failed. This information is stored in a special table in Navarre's database (Nav_ProGrp_Job_MassLog). You can then create another job to report on this outcome.

ement as	Current	Preview	and g to	33"3			
o displays 🛛		ID	Email	Name	State		
ad by the	•	1275	patrick	AEROLI	ОН		
eu by the		1278	mhuffm	SHORE	ОН		
		1295	ted@ttl	TOOL T	ОН		
		1379	susan	RESOU	Oh		
		1493	BrianBa	FRANKLI	ОН		
ittached I for each							

Show Record ID

Mass Distribution Options Export Via Reports Archiving

The preview tab shows the SQL statement as generated by the previous tabs. It also displays the records that currently are returned by the SQL script.

If the job was to run right now, all attached report items would then be processed for each record shown.

Apply Save & Close



Export Via

In this section you select how all the attached reports exports will be sent.

Export To			
Printer	Email	File Transfer	FTP Transfer
	Email with Embedded HTML	File Transfer with Email Notice	FTP Transfer with Email Notice

Printer

When you choosing to export to a printer you must select which printer and the number of copies you would like. *Note: in most cases the service module will only be able to print to a network or locally attached printer.*



Email

When choosing to export by email, the normal email To, CC, BCC, subject and body can be used. You also need to select the email account. Each job can use a different account but only one account can be used.

Dynamic variables can be used by dragging and dropping them into any of the fields.

If the job type is a mass distribution job, then you can customize the email by using any of the stored variables as shown here.

Job Description neral Mass Distribution Options Export Via Reports Archiving Export To File Transfer FTP Transfer Printe Email C FTP Transfer а нтмі C File Tran BCC Subject %md21 Body HTM Show Record ID Save & Close Apply

File Transfer



This export type allows for the transferring of export from the processing computer to any other computer as long as the service or workstation has the appropriate permissions.

Note: NEVER use a mapped network drive to specify a location. If used, a test using the currently logged on user may run just fine and the service will fail. This is because a mapped drive is a user resource and NOT a system resource.

You only need to select the final directory, the names of the files will be assigned in the exports.

eneral Mass Distributi	ion Options Export Via Reports An	chiving	
Export To			
Printer	Email	e File Transfer	FTP Transfer
	Email with Embedded HTML	Rile Transfer with Email Notice	FTP Transfer with Email Notice
File Transfer			
Export directory lo	cation		
\\server34\Mast	erDIR\Sub1\		Ovenwrite Existing File
Note: Always u	ise a UNC path to specify an export loc	ation.	
			Augulable dupagio fielde
			Group ID Group Name Group Description Job ID Job Name Job Description
			Drag and drop fields where needed

FTP

After choosing FTP File transfer you must next select the FTP server you with to use, which are configured in the options off the main menu. You also have the ability to specify an addition path you add on to the preconfigured path for the FTP server. So if the configuration for the server has a path of "/www/home/reports/" you may want to put "production/monthly/" in the addition path to place all of the reports in this job into the final directory. You also can use the dynamic variables in the path as well. Show Record ID

Note a constrained and constrained and a constrained and constrained and a constrained and a constraine

Email with Embedded HTML



This export type takes the report and embeds the HTML output directly into the body of the email. The only restriction is that only one report can be attached to the job. This be because of the way in which Crystal formats the HYML code.

You can also select the version of HTML you wish to use.

You then can populate the email fields in the same way in which you would normally do.

O Printer	 Email Email with Embedded HTML 	 File Transfer File Transfer with Email Notice 	 FTP Transfer FTP Transfer with Email Notice
mbedded HTML Op	tions		
HTML 3.2 HTML 4.0	l L	Attach Images	
mail			
To:		Email Account	Main Email Account
CC:			
BCC:			
Subject:			
Body			Available dynamic fields
HTML			Group ID Group Description Job ID Job Name Job Description *
			Drag and drop fields where needed

File Transfer with Email Notice

This export type in a combination of email and file transfers. First all the exports are sent to the file destination and then an email is sent to notify a user of the export.

Using dynamic variables you can show the recipient what field where exported and where to find them. This will be covered later in detail.

O De		C End	Cla Tanada		ETP Terrades	
U Pa	NCI	 Email with Embedded HTML 	 File Transfer 	with Email Notice	 FTP Transfer with Email Notice 	
ile Transfe	r					
Export	directory loca	tion				
\\serv	er34\Master[DIR\Sub1\			🔜 📄 Overwrite Existin	g File
Note	: Always use	a UNC path to specify an export loca	tion.			
mail						
To:	patrick			Email Account	Main Email Account	•
						_
BCC:						
Subject:	Monthly pro	oduction reports				
Podu					Available dupamic fields	
booly					Group ID	
HTML					Group Name	
V					Group Description	
					Job Name	
					Drag and drop fields where need	ed

FTP Transfer with Email Notice

This export type also combines the email but is add FTP transfer. First files are transferred to the FTP server and an email is sent to notify a user of the export.

Again, you can use dynamic variables to inform the recipients of the transfer.

O Prir				
	ter 🕐 Email	⑦ File Transfe	r	FTP Transfer
	Email with Embedded	HTML File Transfe	r with Email Notice	FTP Transfer with Email Notice]
FTP				
	FTP Server	Additiona	l Path	
	MainFTPServer	 /Export/ 		
Email				
To:	patrick		Email Account	Main Email Account
CC:				
BCC:				
Subject:	Monthly production reports			
Body				Available dynamic fields
				Group Name
HTML				Job ID
HTML				Job Name
HTML				Job Description *
HTML				Job Description * Drag and drop fields where needed



Dynamic Variables

Dynamic variables (DV) are special codes that get reevaluated each time a job is processed. By dragging and dropping them into an email you can easily customize the message.

Most of the ones listed in blue are self explanatory but others need to be explained. The hardest ones to explain are the ones in red dealing with links to flies generated. This is because a web or FTP server by be local to the software but no to the end user receiving. To account for this you must start by using the link start DV and then specify the location of the file and the name. then close the link using the link end DV. An example would be:

> Link Start | Path to File | File Name | Link End %linkstart% \\server1\dir1\dir2\ %filepos%1* %linkend% Note: spaces are added for clarity and must be removed in production.

> > This would generate to: (CLICK HERE FOR FILE)

You can also add the file name using the DV in front of the link to tell the end user what the link is: File Attachment101.pdf : (CLICK HERE FOR FILE)

If the files are local to the end user you can use the 'Export Location(s) at Pos X' DV.

> Link Start | Path to File and File Name | Link End %linkstart% %exportpos%1* %linkend% Note: spaces are added for clarity and must be removed in production.

The green Mass Distribution variables will display the stored data from the current retrieved record when using the Mass Distribution Module. These can be used to store names, address, ID fields, parameter data, email address and more. Group ID Group Name Group Description Job ID Job Name Job Description Item ID Item Name Item Description Export ID ShortDate ShortTime Month Day Year

Report Name(s) Report Names(s) at Pos X Export Location(s) Export Location(s) at Pos X File Name(s) File Name(s) at Pos X Link Start Link End

> Mass Distribution V1 Mass Distribution V2 Mass Distribution V3 Mass Distribution V4 Mass Distribution V5 Mass Distribution V7 Mass Distribution V8 Mass Distribution V9 Mass Distribution V10

Reports

The reports tab of the jobs object is where you add report objects that you have already added to the report storage shown below. More detail about this later in the chapter.



Reports Items	
	🛉 Add
Double click to load selected record, right click for options	

You can also add other files to the job using the additional file section shown below.



You can either select a specific file to add or select entire directory.

Error Handling

Error handling is done using the below section.

On Error				
If any report fails 🔘 Continue	🔘 Fail Job	Pause for	5 minute(s) and retry 3	times.

These setting pertain to any report object that is attached to the job. You can select to Continue, which will let the next report object process if a report fails. You can select Fail, which will not let any other report be processed if an error occurs and will not process the export type. Last, you can choose Pause, this will make the export engine sleep for the time specified and then retry until the retry amount has been reached. During this time no other report object will be processed. Other process groups may continue being processed if the queue depth is set high enough to allow another process in.

Archive

This tab allows all exports to be saved in a predetermined directory which is set using the database utility. Any export created in this job will be saved to this directory.

Report Object

A report object is the container for a report and all exports. Here you can attach as many reports to a job as is required. Remember, all report exports are sent the same way per the job description.



To add a report item to a job simply click the

Add

button from the job description.

General E	xport Via	Reports	Archiving		
Reports It	ems				
					Add 🚔
					1.00
					Ŀ

C	(D. () D . () D		0				
Group	Default Report Group		Report	Scanning			- Add
Show	Record ID				 Apply 		Save & Close
Report	Items		_				
Report	ltems	1122					
Report Report Group	Items Default Report Group		Report	Maintenance Not	ice		T Add
Report Report Group	Items Default Report Group		Report	Maintenance Not Scanning	ice		- Add
Report Report Group General	Items Default Report Group Personneters Ferrorts		Report	Maintenance Not Scanning	kce		• 🛖 Add
Report Report Group General	Default Report Group		Report	Maintenance Not Scanning	ice		- Add
Report Report Group General	Default Report Group Parameters Exports Name		Report	Maintenance Not Scanning	ice		- Add
Report Report Group General	Items Default Report Group Parametes Exports Name		Report	Maintenance Not Scanning	ice		- Add
Report Report Group General Der	Items Default Report Group Parameters Exports Name scripton		- Report	Maintenance Not Scanning	ice		• Add
Report Report Group General Der	Items Default Report Group Parameters Exports Name scription		Report	Maintenance Not Scanning	ice		• (* A3
Report Report Group General Der	Rems Default Report Group Parameters Equats Name Secretion		Report	Maintenance Not	ice		- Add
Report Report Group General Der	Dens Default Report Group Parameters Equation Reports Name constant	Tel Deuro	Report	Maintenance Not Scanning	ice		- Add
Report Report Group General Der	Rems Default Report Group Permeters Escots Name Asticid Last Peccesarg Time	Total Processi 0	Report	Martenance Not Scarring	ice d Runs	Ret	- Add
Report Report Group General Der	Items Datust Report Group Datust Report Group Parameters Deports Name exception Validics Last Processing Time	Total Processi 0	Report	Mattenance Not Scanning Total Number c 0	ice difference of Runs	Ret	• Add
Report Report Group General Der	Items Default Report Group Persmeters Deports Name orption Last Processing Time	Tetal Process 0	• Report	Martenance Not Scarning Total Number o 0	ke d Fars	Ret	• • Add
Report Report Group Der S	Dens Default Report Group Parameters Deports Name constrom Last Processing Time 0	Total Process	Report	Martenance Not Scarning	ice d Runs	Ret	• • • • • • • • • • • • • • • • • • •
Report Report Group General Der	Rems Default Report Group Parameters Deports Parameters Deports Parameters Last Processing Time	Teld Process	Report	Maritenance Not Scanning	ice d Pans	Res	т <u>т</u> Аб
Report Report Group Der	Items Dafad Report Group Parentes Doots Remetes Doots Anne Lat Poccesar Tree	Total Process 0	• Report	Maritenance Not Scanning Total Number o O	ice	Ret	• • A3
Report Group General Der	Remo Default Report Group Paremeters Deports Name ecotion Last Processing Time 0	Teld Process 0	• Report	Mastenance hot Scanning	ice / Puns	Ret	₹ A4
Report Report Group Der	Default Resort Group Default Resort Parentes Execute Name conten tatificat Last Poccesing Time	Total Process 0	Report	Martenance Not Scarring Total Number c	toe	Ree	. 1 ∧ A3
Report Report Group Der	Items Dafauk Report Group Parametes Denote Parametes Denote Name control on Name Later Processing Time 0	Total Process	Report	Mestenance Not Scanning Total Number	of Runs	Ree	· · · · · · · · · · · · · · · · · · ·
Report Report Group Der	Items Default Report Group Permeters Equation Name Excession Addition Last Processing Time 0	Total Process	Report	Martenance Not Scarring	ke d Ruse	Rec	× A3
Report Report Group Der	Items Dafad Report Group Parentes Doots Parentes Doots Anne Anne Antica Lat Poccessor Tree O	Total Process 0	• Report	Martenne Nat Scarring	d Pars	Re	

on the fly using the Add button. Once a report is selected it is scanned for parameters.

To add a report you must first have configured it in the report storage. You need to you can add it

After selecting a report you can give report a name and description. The stats are also displayed but will be blank when adding a new report item.

Parameters



If the selected report has any parameters imbedded, they will be displayed in the parameters tab in the left pane.

Note: all parameters MUST have some value attached. Just because your report may accept no value or a default value does not mean that they can be skipped. The Crystal engine will not accept the non answer and will cause the Navarre Export engine to hang while it waits for an answer. Please enter a value or use one of the dynamic variables.

Once you click on a parameter name the screen will adjust to the type of parameter. Here a discrete parameter is being used.

The top portion of the standard values screen displays some general information about the parameter. At this point you have two basic options. First you can add a static value into the value box or secondly, select a dynamic variable from the dropdown box. In some cases you can add an amount to the variable. This is used to adjust the calculation. For instance, if you select current date with a -2 in the amount, it would adjust the dated generated by -2 days. But if you used a Mass distribution variable with a 5 in the amount, it would have no effect and is just ignored.

Once you have entered or selected your value, click the "Add" button to store the value. To edit a stored value double click on the value in grid, this will repopulate the upper portion allowing the user to make changes and then save or delete the stored value.

You might also notice that a value is calculated when using most dynamic variables. This is normal and is not static. This value reevaluated each time the report is processed.

When a range parameter is selected the screen changes to allow the range start and range end values. Any combination of static or dynamic values can be added.



Field Prompt Enter CustID:				
Enter CustID:				
Multiple Malues				
multiple values	Prompt Type	Data Type		
False	Discrete	CRNumber		
Discrete Value				
Dynamic Variab	ao	Amount		
Nees	-	Anount		
Informe		•		
Enter Value				
		•		
		•		



Range Start		Range End	
Dynamic Variables None Enter Value	Amount	Dynamic Variables None Enter Value	Amount
No Lower Amount		No Upper Amount	



TAKING THE SCHEDULE OUT OF YOUR TIME

Report Ite

If you have selected parameter that allows for multiple values to be added, the import tab will allow the importing of static or dynamic list of values from an ODBC data source.

To start, select "ODBC Import" from the dynamic variable list and then click on the import values tab.

Discrete Value	
Dynamic Variables	Amount
ODBC Import -	0
Enter Value	
	•

Expon	15				
neters Star	ndard Values Import Values				
e in	mport Type © Disabled	۲	Static Import	Opnamic Import	
P	DBC		User Name	Password	
	navarre2 (SQL Server)	•	88		D
T	able and Field Table Name			Field Name	
	Nav_ProGrp		•	ProGrpIDNum	
R	Record Selection				
R	ield Name		Condition	n Fiter	
	ProGipIDNum		,		
	▶ 101				
	103				
	105				
	De F	neter	neer Sander Values Import Values To Disabled OBC OBC OBC OBC OBC Table and Field Table and Field Table and Field New Ports Field Name Process Proce	Inter Standard Values Import Values To Dashed OCCC OCC OCC OCC OCC OCC OCC OCC OCC O	Inter Sanded Values Inpot Values Inpot Type Inpot T



	Value	Variable Name	Adjustment	 🖌 Add
Þ		ODBC Import		X Delete
				Cancel

First select either Static or Dynamic import. A static import will import value once only. A dynamic import will import values every time the report is processed.

After you have entered all the required information, switch back to the stored values tab and click the "Add" button.

If you are using the static import the values will be imported as if you typed them in.

If you are using the dynamic import the value will be saved as just like a normal dynamic variable as shown here.

Error Handling

Error handling is done using the below section for all exports that are added to the report item.



These setting pertain to any export object that is attached to the report item. You can select to Continue, which will let the next export object process if an export fails. You can select Fail, which will not let any other export be processed if an error occurs. Last, you can choose Pause, this will make the export engine sleep for the time specified and then retry until the retry amount has been reached. during this time no other export objects will be processed.

Exports

An export is the definition of the file that will be generated by Crystal. You can add as many as you wish and all will be processed by the job when completed to its final destination.

roup	Default Report Group	-	Report Maintena Scanning	ance Notice	← Add
ieneral Exp	Parameters Exports				
					Add
Doui	ble click to load selected record, r	ght click for options.			
Doul Or H	ble click to load selected record, r n Error any export fails O Continue	ght click for options.	Pause for	5 minute(s) and retry 3 t	imes.
Dou Or H	ble click to load selected record, r 1 Error any export falls Continue gh Encryption Module Features	ght click for options.	Pause for	5 minute(p) and retry 3 t	imee.
Doul Or H	ble click to load selected record, r Error any export fails © Continue gh Encryption Module Features 2p & Encrypt all exports in to	ght click for options.	Pause for	5 minute(s) and retry 3 t	imee.
Dou Or H	ble click to load selected record, r t Error any expot falls © Continue gh Encryption Module Features 2p & Encrypt all exports in to Password @ Dec Send Decime Decem	ght click for options.	Pause for	5 minute(s) and retry 3 t Attachment Type	ines.
Doul Or H	ble click to load selected record, r n Error any export fals © Continue © Fic-Sprit on Module Features © 20 & Encrypt al exports in to Password © Pre-Seried Password	ght click for options. Fail Report Item a single export rord Password	Pause for	5 minute(s) and retry 3 t Atsochment Type @ Zp File	ines.
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To add an export to a report item click on the exports tab. This screen will show all the currently saved exports. Click on the "Add" to launch the export object window.

The main focus of this screen is to define what types of files to generate when processing the report. Currently Navarre supports creating PDF, XLS, XLS (Data only) CVS, TXT, DOC, RPT, HTML 3.2 & 4.0. Several export types have optional settings, which will be displayed when selected.

You can also adjust the export name by dragging and dropping items from the dynamic fields list into the file name box.



Here we have selected XLS as the export type and can see the optional settings being displayed.

Export type		
Arobat Reader (PDF)	 Microsoft Excel (XLS) 	HTML 4.0
 Comma Separated Values (CSV) 	 Microsoft Excel data only (XLS) 	HTML 3.2
Text (TXT)	 Microsoft Word (DOC) 	Crystal Reports (RPT)
Common Excel options	Microsoft Excel data only option	8
	Export object formatting	Maintain column alignment
Use constant column width 36.	Export images	Export header and footer
Whole Report v Number	0 🛆 📃 Use worksheet function	s Simplify page headers
	Maintain relative object	position Show group outlines
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Report Storage

The report storage is where all reports are configured. This is done so you will only need to enter the connection data once. You then can use the report repeatedly throughout Navarre.

To add a new report to Navarre click on the — This will open the report maintenance window.

To start, click the browse button to select the report you wish to store.

button once you have selected the Report Staorage.

Z Report Maintenance	— X —
General	
Select Report	
Report Location	
Scanning Progress	
Report Options	
Report Name	
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•	104	cust by date(2)	103	Main Job	103	Main Report	

Navarre will scan the report looking for connections. Once completed you can give the report a name and description. You also need to assign the report to a group.

The connections properties tab contains all the connection information for each connection. If your report contains more than one connection the next connection button will be available.

It is highly recommended to preview the report after all the connection information is stored. As long as the report can display data at this point without Crystal requesting logon information, Navarre will be able to process the report.

The currently attached tab displays the all the process groups that use the report. The report can not be deleted until all the process groups are deleted or the jobs are changed to use a different report.



User Maintenance

Ever user that connects to the Navarre database is assigned a client ID number. Every Client can have a level of Master, Administrator, Remote Client or Viewer. Every client can be locked or unlocked. The most common reason for a client to be locked is due to license violation.

Navarre Report Manager V	6	100					
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		104	Normal	cust by date(2)	5/15/2	2011 12:52 PM 5	_
		105	Normal	test parm(4)	5/15/2	2011 10:45 PM 5 2011 11:39 AM 5	_
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Software Level: Trial (ENTER	RISE) Exp	ires: 6/6/2	011 Ven	sion: 6 Patch: 1 Buil	d: 5 Client Type: M	aster	

Client Types:

Master: Is the first client to join the database and has all the option available.

Administrator: Is the same as the master. Is promoted by the master to administrate the system.

Remote Client: Can manage there own list of process groups which is processed by the service.

Viewer: Reserved for future use.

You can change a client from one type to another by selecting the client in the tree view then by clicking the change button. Select the desired type and click the save button.



Options

General

This sections displays the current software configuration and the location of the temporary directory where all exports are created be for the destination is processed.

Service

This section displays the status of the service module. This is only available is the current user is an administrator and if UAC is enabled, the application must be launched using `run as administrator'. It will also allow an administrator to set the service modules settings.

Email

The email sections stores all the email accounts that are used throughout Navarre. You also have the ability to select a default account. The account will be selected by default when creating a new job. The user can change it at any time if needed. The error account will be used to notify someone that an error has occurred.

Report groups

Report groups are used to group alike reports together. During the installation a standard group of "Main" was created. To edit a group, double click or right click and select edit. You can add as many groups as you need. To add a new group right click in the grid and select add.

FTP Servers

The FTP server section allows you to configure any needed FTP servers for export destinations. You can store as many as needed.

Event Log

The event log tracks all the activity through the software. The amount of detail is determined by the debug level in the global setting which can be found in the database utility. All the events are displayed in a standard Crystal viewer which can be printed, refreshed and exported as needed. In the top left, you can clear all events by pressing the "Clear All Logged Events" button.