Generic Scheduled Reporting Setup

Enabling automated file generation

Customised for: Client Demo

Author: Philip Lacey
Version: 1-2
Date: 2012-02-07

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

1. Overview

All n One's Business eXpress allows for the automated generation of data files through its CMI API. This document details the setup of this automated report generation and the setup required to enable it.

2. Table of Contents

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

3. Data capture

All the data entry is done using the Business eXpress interface. All data is live and available on demand.

4. Report setup

In order to retrieve the data a "Data Profiling" group must be set up to enable the report to be generated.

Training videos on generating Data Profiling groups are available from within the Business eXpress system.

The report generated to delivery your requirements is

Campaign Id = 1
Report Id   = 3

In order to generate a report automatically a user account with permission to generate the report must be allocated or created.

For security the users account will only be able to generate the report from pre-agreed IP addresses. From the server you wish to schedule this report on, access
http://www.allnone.ie/page_help_whatismyip.php

This will give you the IP address from which this machine will access BE and so give you the IP address to allocate to the account.

Armed with the IP address, you can update the Report Generation account.

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Below is a snap shot of adding a report generation account to BE, using the System Access management module. This is the same as adding any normal user. Training videos are available inside Business eXpress to explain how to create a user. The user does not need to be given any access to any module functionality.

The new user account will need to be granted security access to the campaign. Training videos are available inside Business eXpress to explain how to allocate security permissions to campaigns.

Most importantly is the Primary Security Details section.

IP Range   = The IP address just discovered.
External System Id   = a username to identify this account externally
External System Key   = a keyword to identify this account

With all these details set, it is possible to construct the URL. Using the same details entered above the URL would be.

https://ww3.allnone.ie/client/client_demo/cti/userCTI_DataProfiling.asp?user_id=reportGenerator&user_key=reprtingKey&ID=1&reportId=3

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

5. Maintenance File Setup

The most convenient way to execute the report is to create an executable JS
(JavaScript) file on the machine that can be scheduled to be run
automatically.

Here is the content for that file.

```
/*-----------------------------------------------------------------
=============================================
Business Express Generic Automated Routine
=============================================
Version        1-0
Date           2012-02-07
Author         Philip Lacey
Website http://www.allnone.ie


=============================================
Usage
=============================================
Simply enter the desired URL to execute in the strURL line below.
This script can be scheduled using Task Scheduler
Further support documentation can be found at
http://www.allnone.ie/page_whitepapers.php


------------------------------------------------------------------*/

var strURL =
"https://ww3.allnone.ie/client/client_demo/cti/userCTI_DataProfiling.asp?user_id=abc1
23&user_key=passkey&ID=123&reportId=123"


/*-----------------------------------------------------------------
=============================================
The following does not need to be modified.
The function creates a Microsoft XMLHTTP object and posts blank to the URL specified.
No feedback is returned via this mechanism.
=============================================
------------------------------------------------------------------*/
var strMaintenance;
strMaintenance = fn_BEX_PostOrder ( strURL ) ;

function fn_BEX_PostOrder ( strPassed_URL )
{
    var xmlhttp = new ActiveXObject ("Microsoft.XMLHTTP");
    xmlhttp.Open("POST", strPassed_URL, false);
    xmlhttp.Send("");
    return xmlhttp.responseXML;
}
```

Phone:

\+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Copy and paste the text block above into a text document and save it whatever name you like but add .js to the end of the filename.

You will need to modify the URL (the text highlighted in orange) to match the report you wish to generate. This URL for this is in the previous Report Setup section of this document.

You should end up with a file icon like

Windows XP

Windows 7

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Here is the constructed file for Client Demo.

```
/*-----------------------------------------------------------------
=============================================
Business Express Generic Automated Routine
=============================================
Version        1-0
Date           2012-02-07
Author         Philip Lacey
Website http://www.allnone.ie

=============================================
Usage
=============================================
Simply enter the desired URL to execute in the strURL line below.
This script can be scheduled using Task Scheduler
Further support documentation can be found at
http://www.allnone.ie/page_whitepapers.php

-----------------------------------------------------------------*/

var strURL =
"https://ww3.allnone.ie/client/client_demo/cti/userCTI_DataProfiling.asp?user_id=repo
rtGenerator&user_key=reprtingKey&ID=5&reportId=1"

/*-----------------------------------------------------------------
=============================================
The following does not need to be modified.
The function creates a Microsoft XMLHTTP object and posts blank to the URL specified.
No feedback is returned via this mechanism.
=============================================
-----------------------------------------------------------------*/
var strMaintenance;
strMaintenance = fn_BEX_PostOrder ( strURL ) ;

function fn_BEX_PostOrder ( strPassed_URL )
{
    var xmlhttp = new ActiveXObject ("Microsoft.XMLHTTP");
    xmlhttp.Open("POST", strPassed_URL, false);
    xmlhttp.Send("");
    return xmlhttp.responseXML;
}
```

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
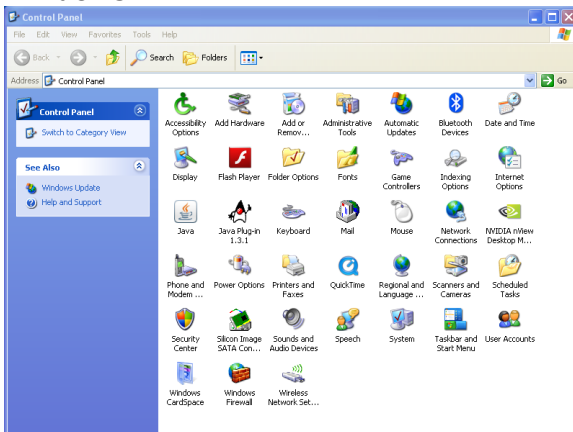Ireland

6. Scheduled Task

Business eXpress does not assume responsibility for timed requests. This requirement rests with the client, in this case Client Demo.

In order to enable timed requests the client must use Scheduled Tasks within windows to deliver the desired results.
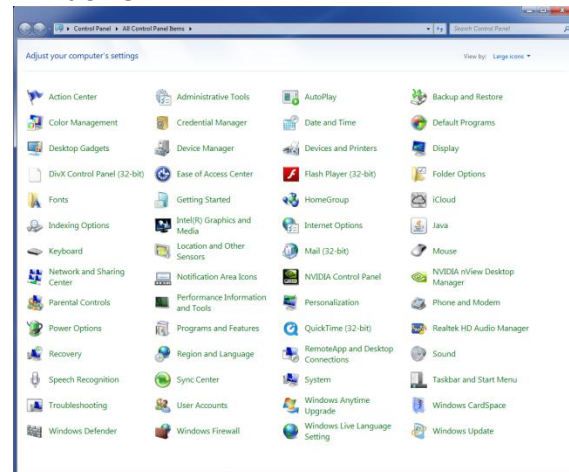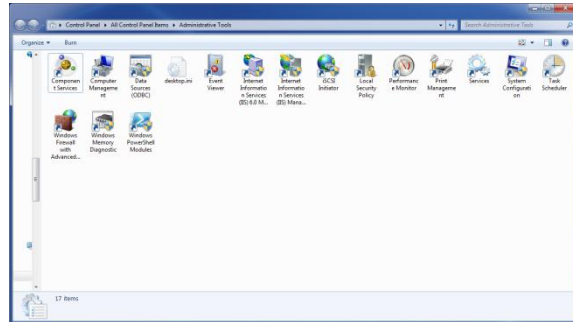
The following screen shots although taken in Windows 7, also apply to Windows XP.

6.1 Step 1. Open the Control Panel.

Windows XP

Windows 7

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

6.2 Step 2. Windows 7 ONLY : Locate and open Administrative Tools

Windows 7

6.3 Step 3. Locate and Open Task Scheduler

Windows XP

Windows 7

6.4 Step 4. Create a new task

Windows XP
The option is entitled "Add
Scheduled Task
"
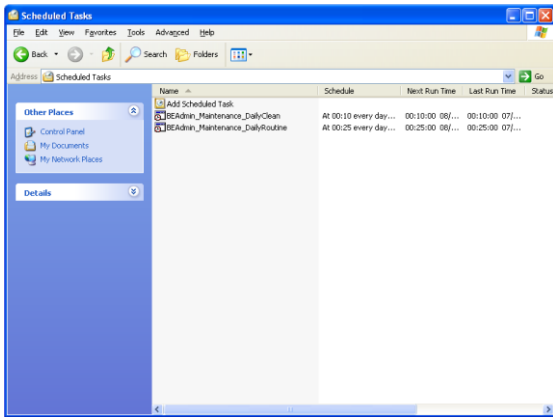
Windows 7
The option is on the right
entitled "Create Basic
Task…"
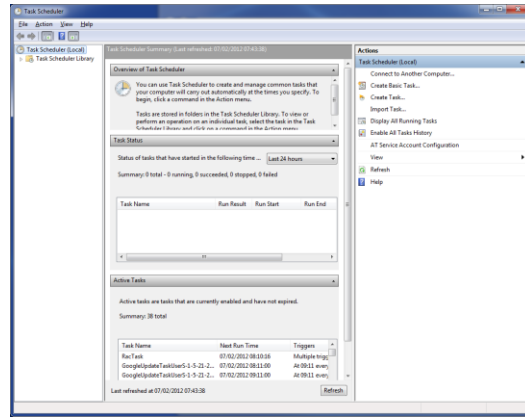
6.5 Step 5a. Task Configuration for Windows XP

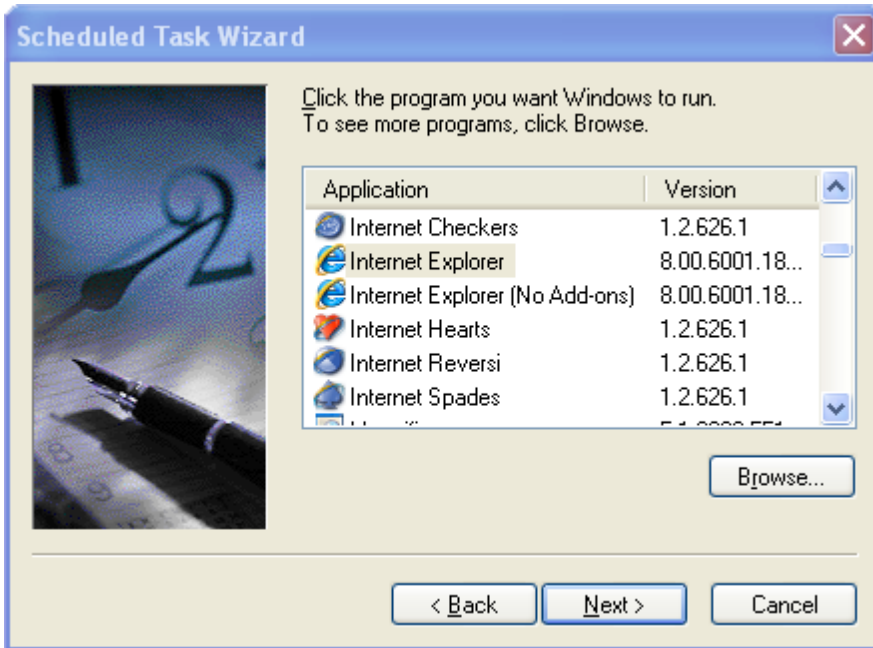Click "Next"
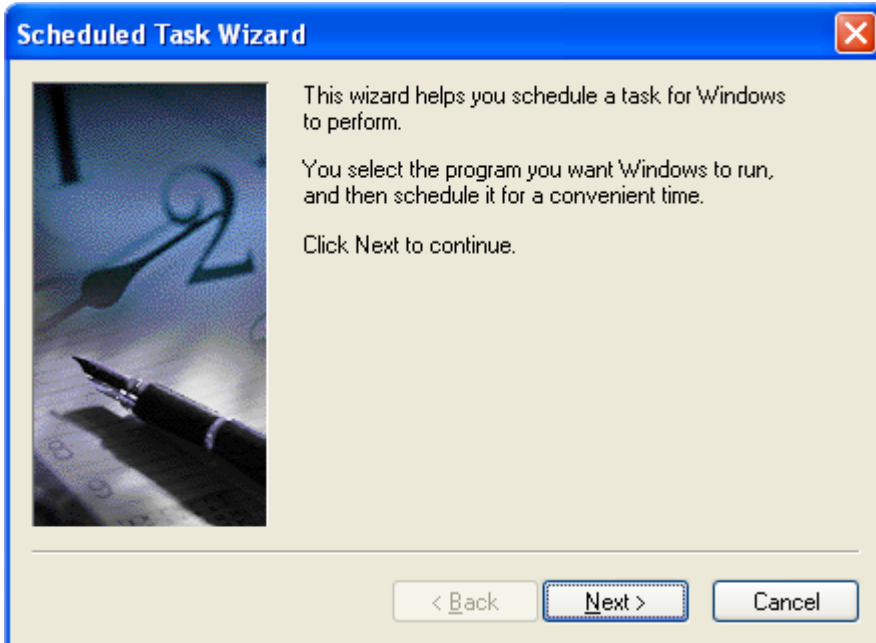
Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Scroll down and click Browse. Navigate to the JS file you created in the previous section of this document.

Name the task and select how frequently to execute the report. In most cases this will be daily.
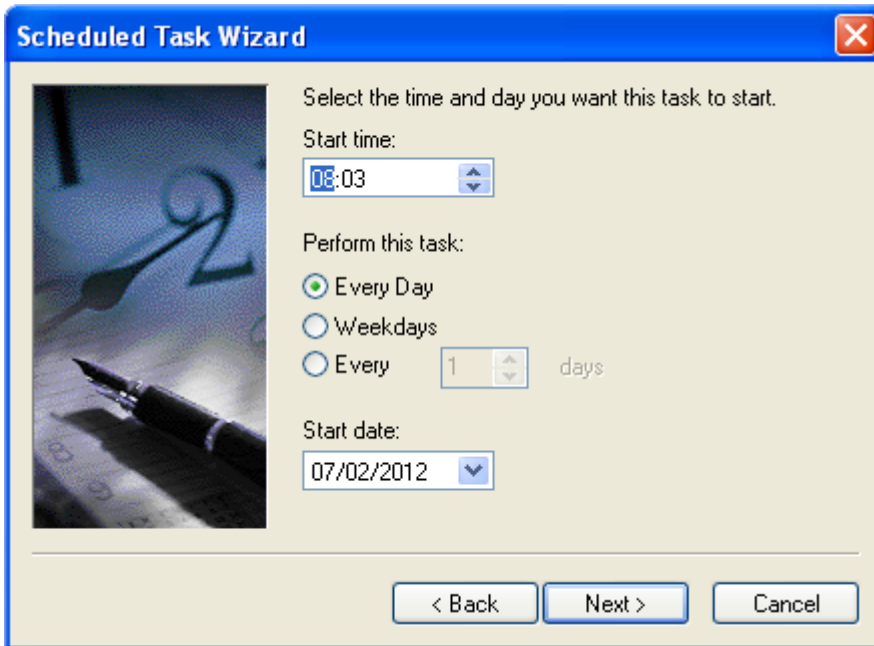
Phone:

\+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Set the time to execute the report

In Windows XP, you will need to set the username and password of the Windows XP account that can be automated

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Ensure the "Open advanced properties for this task when I click Finish" is NOT ticked. Then
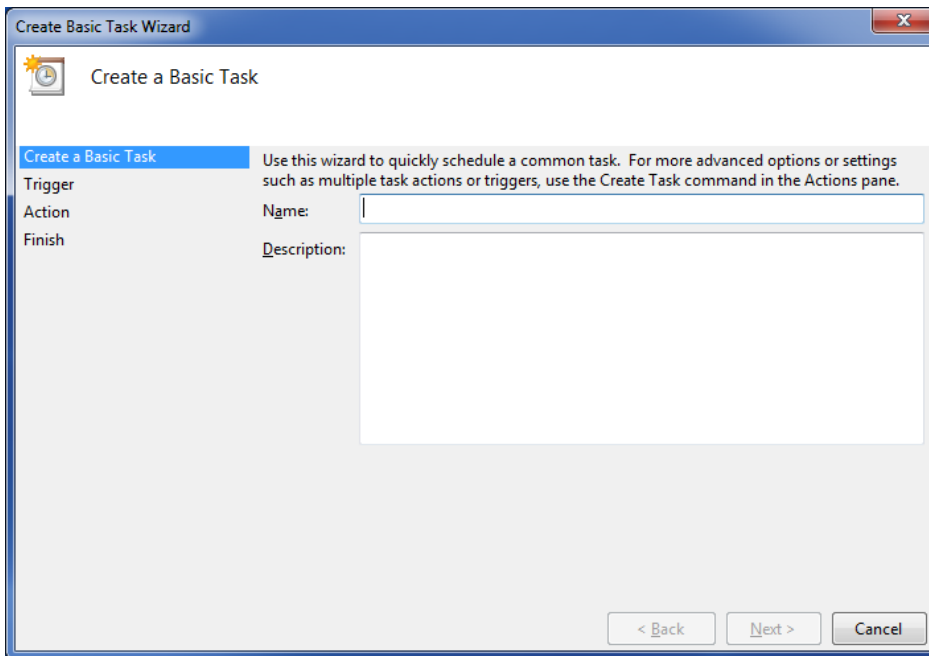click Finish

Phone:
+ 353 1 4294000

Web
www. allnone.ie

Address
48/49 Western Parkway Business Park
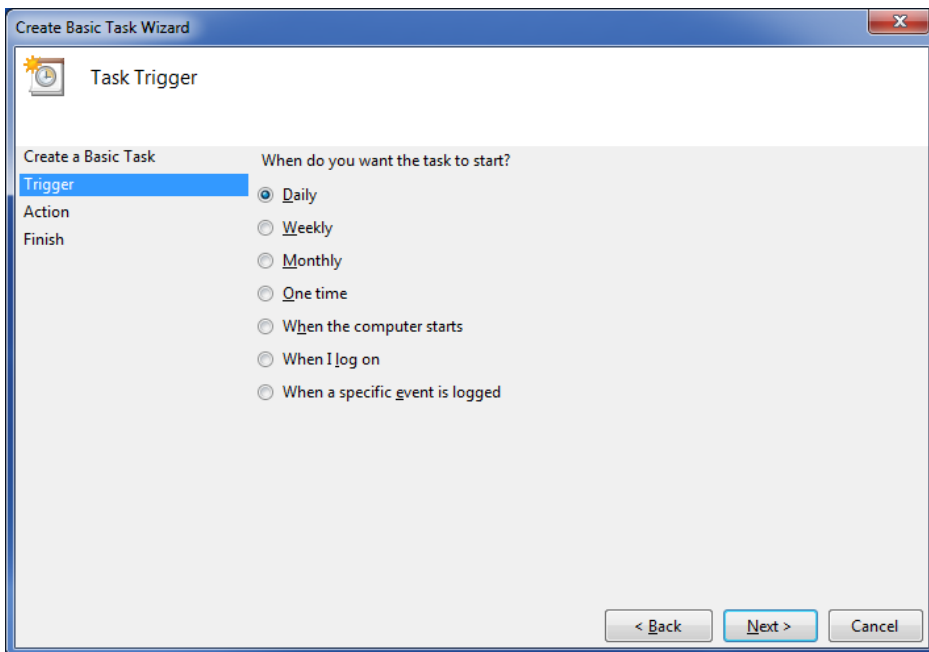Lower Ballymount Road
Dublin 12
Ireland

6.6 Step 5b. Task Configuration for Windows 7

Name the task

Set the timing period required to run the reports

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Set the time the report will run and then click Next

Choose "Start a program" and click next

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Click the browse button and navigate to the JS file you created in the previous section of this document.

Click Finish.

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

7. SFTP setup

7.1 Remote Access

Retrieving of files can be done a number of ways. SFTP is one of these ways.

This is usually done using a secure FTP client such as FileZilla.

http://filezilla-project.org/

7.2 Basic Settings

Host: 82.195.135.248

Username: ftpdemo

Password: --will be communicated separately—

Encryption: Require explicit FTP over TLS

Transfer Model: Passive

Phone:

\+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

7.3 Show the successful connection

```
OxigenData - ftpes://ftpoxigen@82.195.135.248 - FileZilla

File   Edit   View   Transfer   Server   Bookmarks   Help

Host:              Username:            Password:

Status:      Connecting to 82.195.135.248:21...
Status:      Connection established, waiting for welcome message...
Response:    220 Welcome to the SFTP access of ww3.allnone.ie
Command:     AUTH TLS
Response:    234 Using authentication type TLS
Status:      Initializing TLS...
Status:      Verifying certificate...
Command:     USER ftpoxigen
Status:      TLS/SSL connection established.
Response:    331 Password required for ftpoxigen
Command:     PASS ***********
Response:    230 Logged on
Command:     SYST
Response:    215 UNIX emulated by FileZilla
Command:     FEAT
Response:    211-Features:
Response:     MDTM
Response:     REST STREAM
Response:     SIZE
Response:     MLST type*;size*;modify*;
Response:     MLSD
Response:     AUTH SSL
Response:     AUTH TLS
Response:     PROT
Response:     PBSZ
Response:     UTF8
Response:     CLNT
Response:     MFMT
Response:    211 End
Command:     PBSZ 0
Response:    200 PBSZ=0
Command:     PROT P
Response:    200 Protection level set to P
Status:      Connected
Status:      Retrieving directory listing...
Command:     CWD /

Response:     215 UNIX emulated by FileZilla
Command:     FEAT
Response:     211-Features:
Response:      MDTM
Response:      REST STREAM
Response:      SIZE
Response:      MLST type*;size*;modify*;
Response:      MLSD
Response:      AUTH SSL
Response:      AUTH TLS
Response:      PROT
Response:      PBSZ
Response:      UTF8
Response:      CLNT
Response:      MFMT
Response:     211 End
Command:     PBSZ 0
Response:     200 PBSZ=0
Command:     PROT P
Response:     200 Protection level set to P
Status:      Connected
Status:      Retrieving directory listing...
Command:     CWD /
Response:     250 CWD successful. "/" is current directory.
Command:     PWD
Response:     257 "/" is current directory.
Command:     TYPE I
Response:     200 Type set to I
Command:     PASV
Response:     227 Entering Passive Mode (82,195,135,248,23,113)
Command:     MLSD
Response:     150 Connection accepted
Response:     226 Transfer OK
Status:      Directory listing successful
Response:     421 Connection timed out.
Error:       Connection closed by server
```
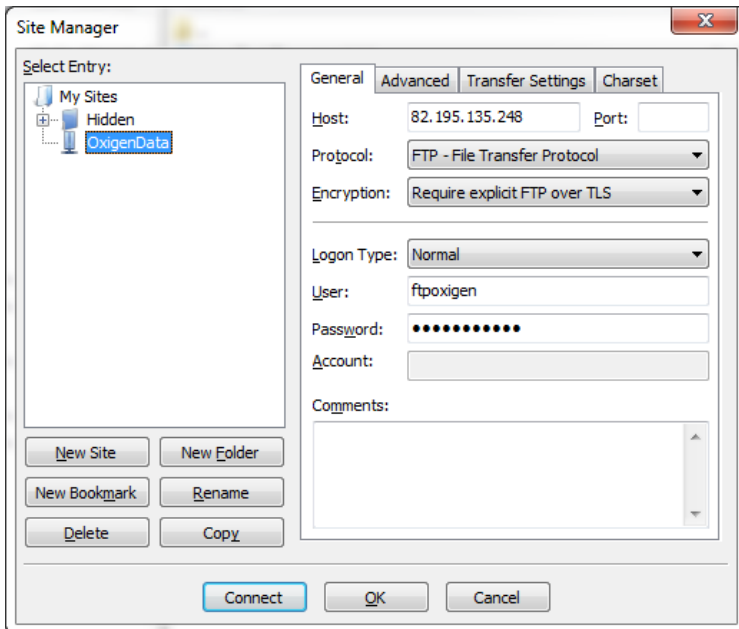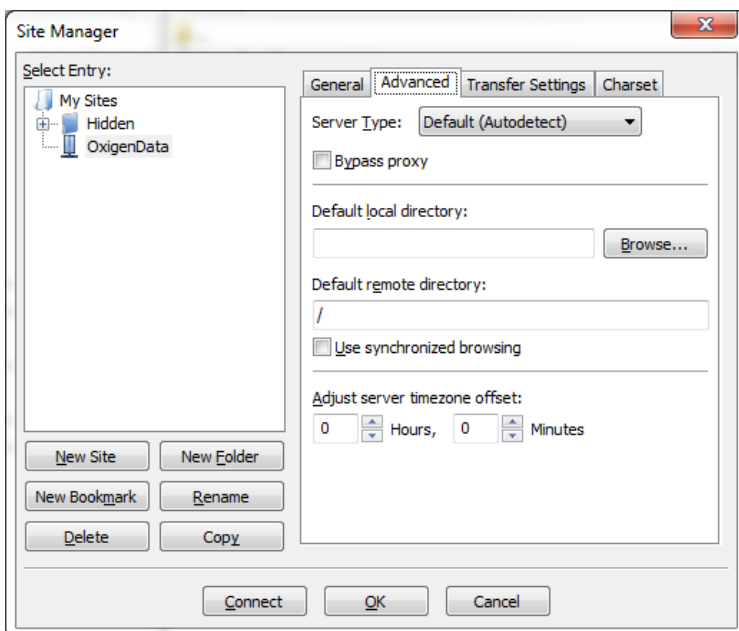
Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

7.4 Settings for the site manager

Site Manager

Select Entry:

- My Sites
  - Hidden
  - OxigenData

Tabs: General | Advanced | Transfer Settings | Charset

Host: 82.195.135.248   Port:

Protocol: FTP - File Transfer Protocol

Encryption: Require explicit FTP over TLS

Logon Type: Normal

User: ftpoxigen

Password: ••••••••••••

Account:

Comments:

Buttons: New Site | New Folder | New Bookmark | Rename | Delete | Copy

Connect | OK | Cancel

Site Manager

Select Entry:

- My Sites
  - Hidden
  - OxigenData

Tabs: General | Advanced | Transfer Settings | Charset

Server Type: Default (Autodetect)

☐ Bypass proxy

Default local directory:

[   ] Browse...

Default remote directory:

/

☐ Use synchronized browsing

Adjust server timezone offset:

0 Hours, 0 Minutes

Buttons: New Site | New Folder | New Bookmark | Rename | Delete | Copy

Connect | OK | Cancel

Phone:

+ 353 1 4294000

Web

www. allnone.ie

Address

48/49 Western Parkway Business Park
Lower Ballymount Road
Dublin 12
Ireland

Site Manager

Select Entry:

- My Sites
  - Hidden
  - OxigenData

| General | Advanced | Transfer Settings | Charset |

Transfer mode:

( ) Default   ( ) Active   (●) Passive

[✓] Limit number of simultaneous connections

Maximum number of connections: 1

[New Site]   [New Folder]
[New Bookmark]   [Rename]
[Delete]   [Copy]

[Connect]   [OK]   [Cancel]

Site Manager

Select Entry:

- My Sites
  - Hidden
  - OxigenData

| General | Advanced | Transfer Settings | Charset |

The server uses following charset encoding for filenames:

(●) Autodetect

Use UTF-8 if the server supports it, else use local charset.

( ) Force UTF-8

( ) Use custom charset

Encoding:

Using the wrong charset can result in filenames not displaying properly.

[New Site]   [New Folder]
[New Bookmark]   [Rename]
[Delete]   [Copy]

[Connect]   [OK]   [Cancel]