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Generic Scheduled Reporting Setup

Enabling automated file generation

Customised for: Client Demo

Author: Philip Lacey

Version: 1-2

Date: 2012-02-07



Company Number: 400703 VAT Registered Number: IE 6420703G
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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.

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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.

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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.

Main Menu > System Access Management menu > User Administration

Add User - Security

System Details

Title: Mr | Firstname: Report | Surname: Generator

Password: [masked] If changed, the user will be asked to reset their password on next login.

Status: Live Live and Training users will be billed

Primary Contact Details

Work Contact Mobile: 353876533460 Used to SMS Staff

Work Contact Email: philip.lacey@allnone.ie Used to email Staff

Department: General The Department or Team the Staff works in

Primary Security Details

IP Range: 83.71.208.249 If set the account will only be able to log in from this IP. Separate multiples with commas.

External System Id: reportGenerator For use with the CHI API

External System Key: reptingKey For use with the CHI API

Force Inactive Logout: 0 After (selected) Minutes. For Data Protection usage

External Student Access: False When IP restricted can user still access courses and conferences.

Select All | Blank All | Reset

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=reptingKey&ID=1&reportId=3

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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;  
}
```

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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



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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;  
}
```



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6. Scheduled Task

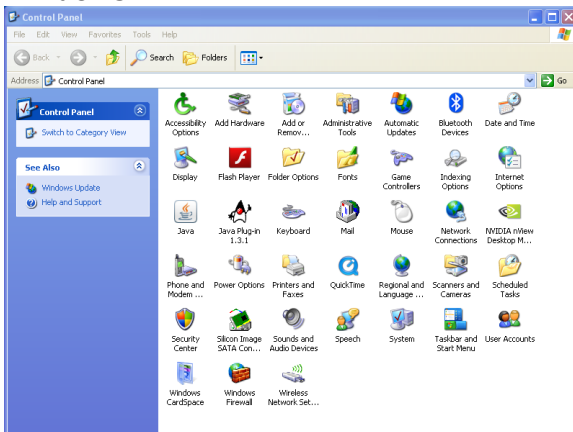
Business eXpress does not assume responsibility for timed requests. This requirement rests with the client, in this case Client Demo.

In order to enable timed requests the client must use Scheduled Tasks within windows to deliver the desired results.

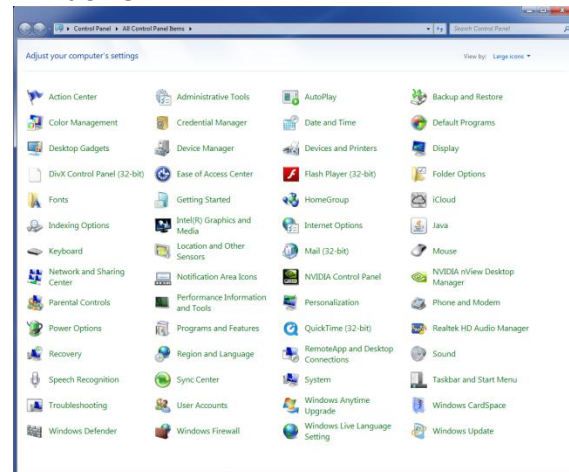
The following screen shots although taken in Windows 7, also apply to Windows XP.

6.1 Step 1. Open the Control Panel.

Windows XP



Windows 7



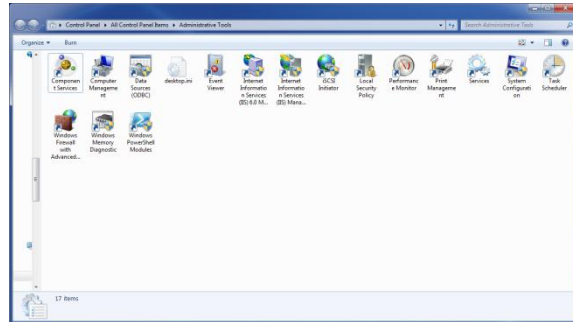
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6.2 Step 2. Windows 7 ONLY : Locate and open Administrative Tools

Windows 7



6.3 Step 3. Locate and Open Task Scheduler

Windows XP



Scheduled
Tasks

Windows 7



Task
Scheduler

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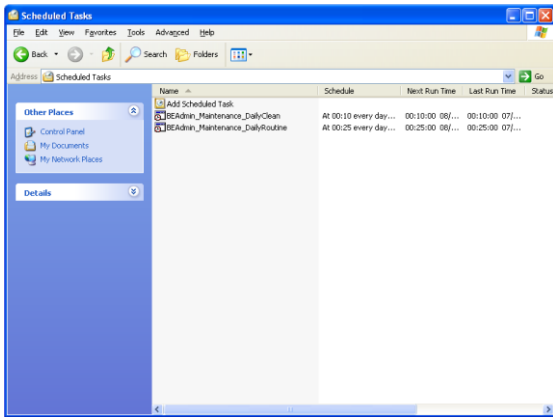
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6.4 Step 4. Create a new task

Windows XP

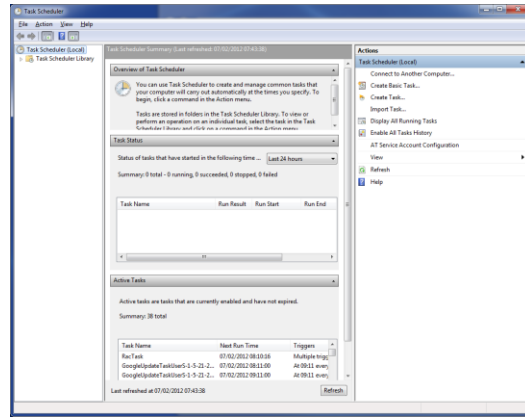
The option is entitled "Add Scheduled Task"

"



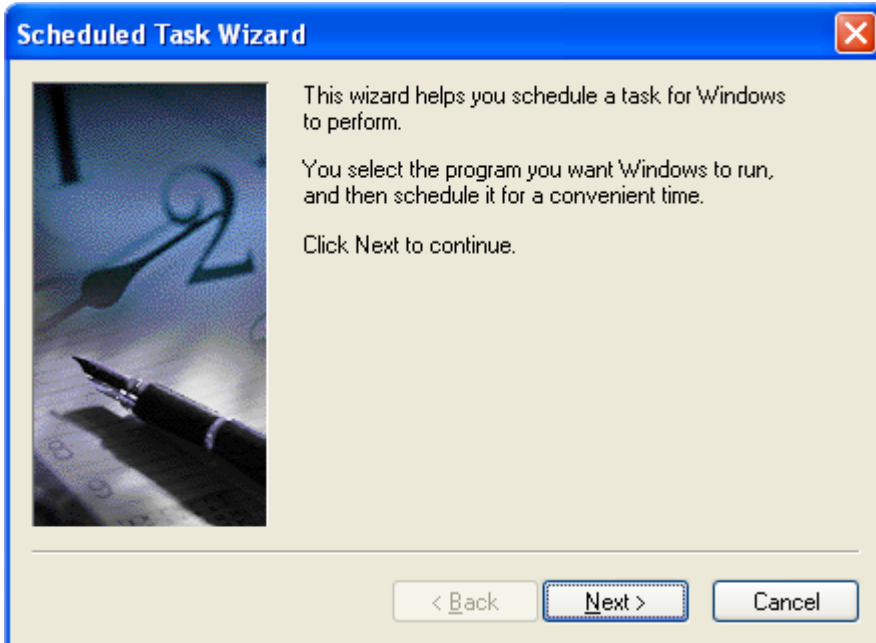
Windows 7

The option is on the right entitled "Create Basic Task..."



6.5 Step 5a. Task Configuration for Windows XP

Click "Next"



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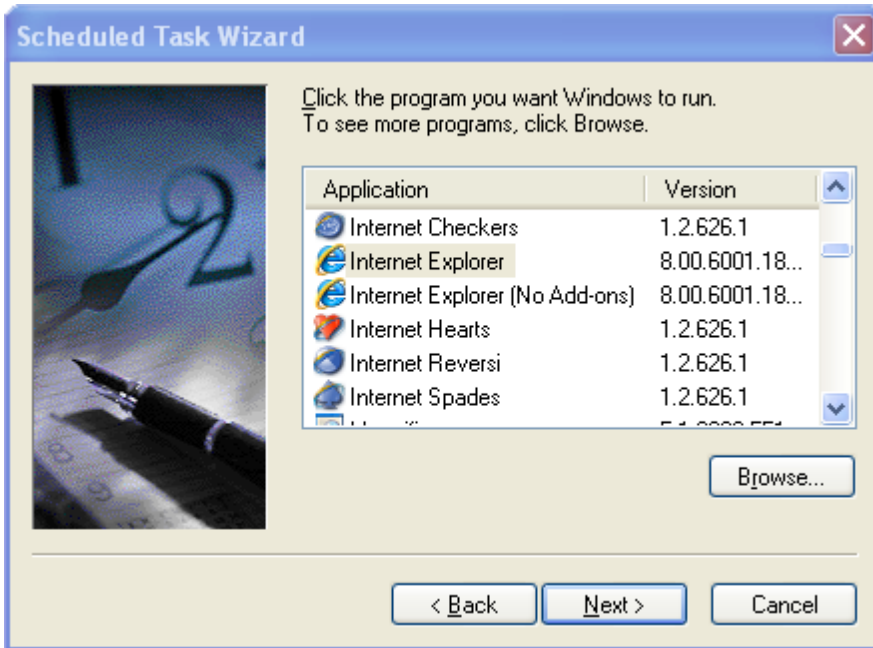
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Scroll down and click Browse. Navigate to the JS file you created in the previous section of this document.



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

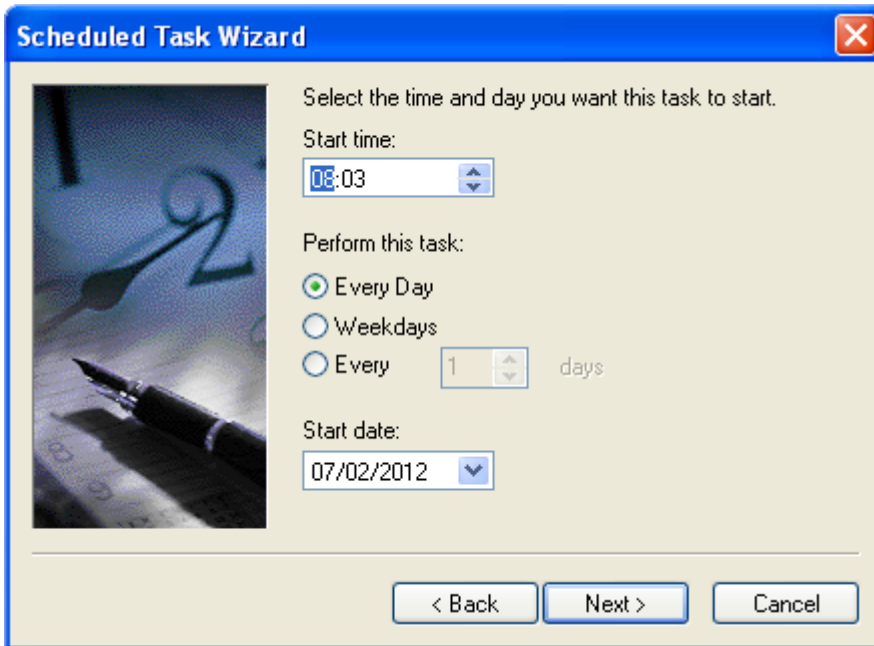


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Set the time to execute the report



Scheduled Task Wizard

Select the time and day you want this task to start.

Start time:
08:03

Perform this task:

Every Day
 Weekdays
 Every 1 days

Start date:
07/02/2012

< Back Next > Cancel

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



Scheduled Task Wizard

Enter the name and password of a user. The task will run as if it were started by that user.

Enter the user name: ALLNONE\Administrator

Enter the password: []

Confirm password: []

If a password is not entered, scheduled tasks might not run.

< Back Next > Cancel

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



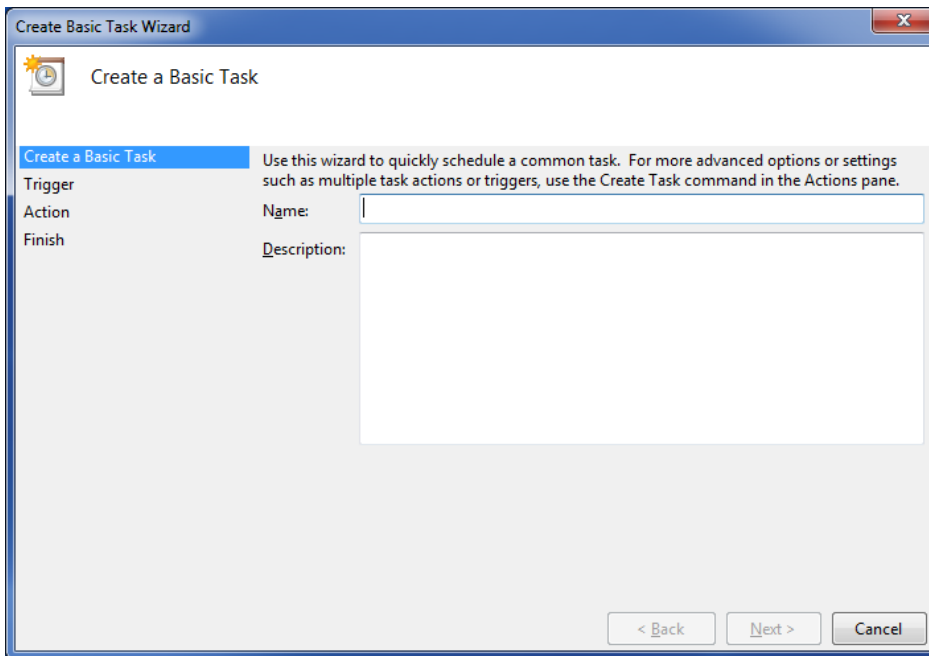
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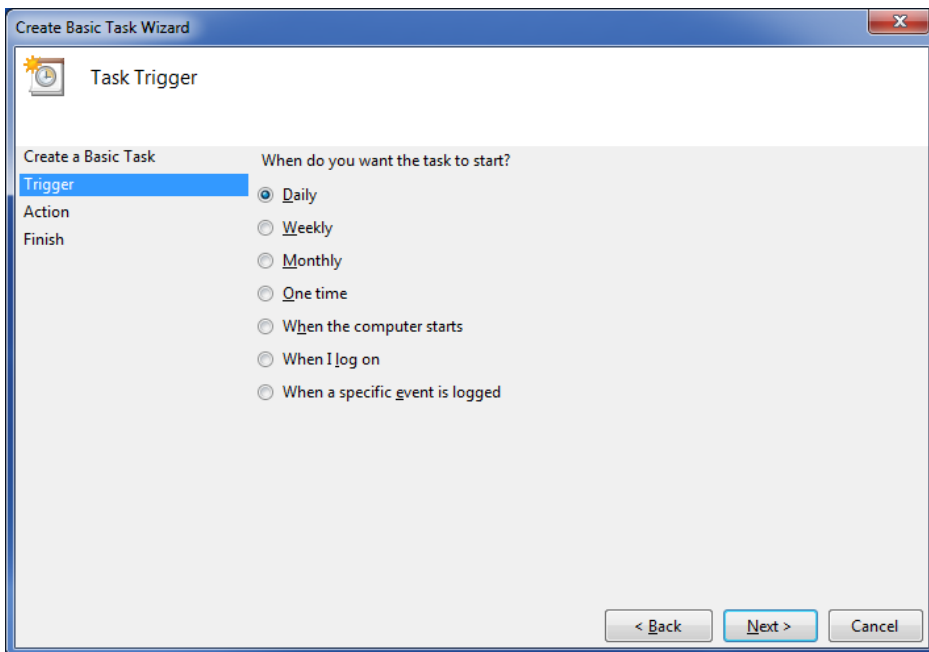
6.6 Step 5b. Task Configuration for Windows 7

Name the task



The screenshot shows the 'Create Basic Task Wizard' dialog box. The title bar reads 'Create Basic Task Wizard'. The main area is titled 'Create a Basic Task'. On the left, there is a vertical list of steps: 'Create a Basic Task' (highlighted), 'Trigger', 'Action', and 'Finish'. The main content area contains the text: 'Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.' Below this text are two input fields: 'Name:' with an empty text box, and 'Description:' with a larger empty text area. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Set the timing period required to run the reports



The screenshot shows the 'Create Basic Task Wizard' dialog box at the 'Task Trigger' step. The title bar reads 'Create Basic Task Wizard'. The main area is titled 'Task Trigger'. On the left, the steps are: 'Create a Basic Task', 'Trigger' (highlighted), 'Action', and 'Finish'. The main content area contains the text: 'When do you want the task to start?'. Below this text are seven radio button options: 'Daily' (selected), 'Weekly', 'Monthly', 'One time', 'When the computer starts', 'When I log on', and 'When a specific event is logged'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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Set the time the report will run and then click Next

Create Basic Task Wizard

Daily

Create a Basic Task

Trigger Start: 07/02/2012 07:50:38 Synchronize across time zones

Daily Recur every: 1 days

Action

Finish

< Back Next > Cancel

Choose "Start a program" and click next

Create Basic Task Wizard

Action

Create a Basic Task

Trigger

Daily

Action What action do you want the task to perform?

Start a program

Send an e-mail

Display a message

Finish

< Back Next > Cancel

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

The screenshot shows the 'Create Basic Task Wizard' dialog box with the 'Start a Program' step selected. The 'Trigger' is set to 'Daily'. The 'Action' is 'Start a Program'. The 'Program/script' field is empty, and the 'Browse...' button is visible. The 'Add arguments (optional)' and 'Start in (optional)' fields are also empty. The 'Finish' button is highlighted.

Click Finish.

The screenshot shows the 'Create Basic Task Wizard' dialog box with the 'Summary' step selected. The 'Name' field contains 'Oxygen Demo'. The 'Description' field contains 'Auto generation of reports'. The 'Trigger' is 'Daily; At 07:50 every day'. The 'Action' is 'Start a program; iexplore "https://ww3.allnone.ie/client/client_oxygen/cti/use"'. The 'Finish' button is highlighted.

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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

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7.3 Show the successful connection

```
OxygenData - 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
```

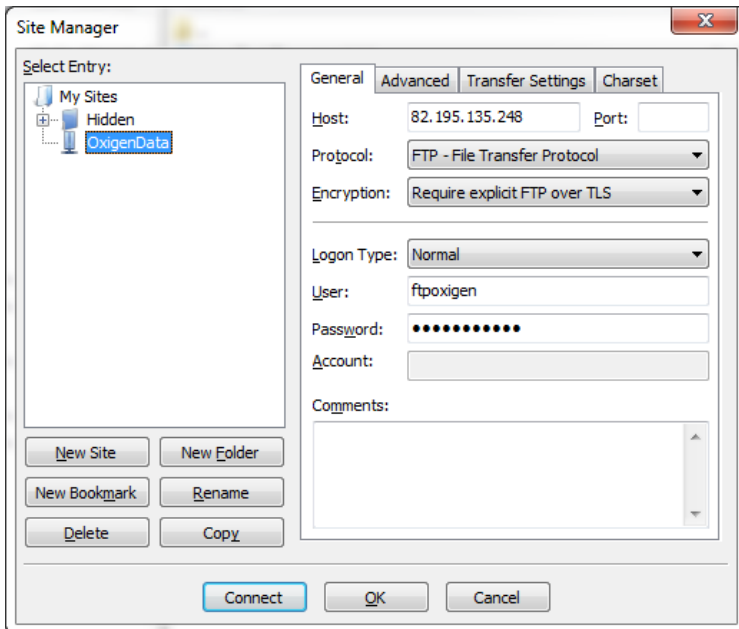


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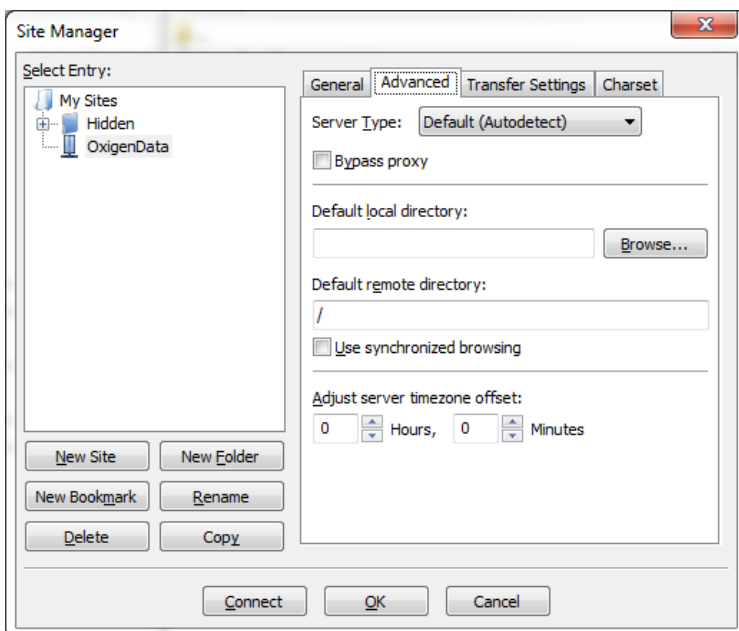
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7.4 Settings for the site manager



The screenshot shows the 'Site Manager' dialog box with the 'General' tab selected. The 'Select Entry' pane on the left shows a tree view with 'My Sites', 'Hidden', and 'OxygenData'. Below this are buttons for 'New Site', 'New Folder', 'New Bookmark', 'Rename', 'Delete', and 'Copy'. The main settings area includes: Host: 82.195.135.248, Port: (empty), Protocol: FTP - File Transfer Protocol, Encryption: Require explicit FTP over TLS, Logon Type: Normal, User: ftpoxygen, Password: (masked with dots), Account: (empty), and a Comments text area. At the bottom are 'Connect', 'OK', and 'Cancel' buttons.



The screenshot shows the 'Site Manager' dialog box with the 'Advanced' tab selected. The 'Select Entry' pane and buttons are the same as in the previous screenshot. The main settings area includes: Server Type: Default (Autodetect), Bypass proxy: (unchecked), Default local directory: (empty) with a 'Browse...' button, Default remote directory: /, Use synchronized browsing: (unchecked), and Adjust server timezone offset: 0 Hours, 0 Minutes. At the bottom are 'Connect', 'OK', and 'Cancel' buttons.

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