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I. Prerequisites for PBRS

All of the following prerequisites must be met in order to successfully install and use PBRS. If any of the following requirements are not met, some or all of PBRS’s functionalities will not work as designed.

**IMPORTANT:** You must be logged on to your server or PC as the LOCAL ADMINISTRATOR during installation. You can use the software as a normal user after installation is complete, but we highly recommend that you carry out the installation process as a LOCAL ADMINISTRATOR in order to ensure trouble-free use afterwards.

**Operating System - (New Installation)**

Please ensure at least ONE of the following 32 or 64 bit Operating Systems is in place with all the latest service packs and/or updates installed. Operating systems listed below is a prerequisite when installing PBRS on a new server.

- Windows 8
- Windows 8.1
- Windows 10
- Windows Server 2012
- Windows Server 2012R2
- Windows Server 2016

**Operating System - (Updating PBRS)**

Please ensure at least ONE of the following 32 or 64-bit Operating Systems are in place with all the latest service packs and/or updates installed. Operating systems listed below is a prerequisite when updating a currently installed PBRS instance.

- Windows 7
- Windows 8
- Windows 8.1
- Windows 10
- Windows Server 2008
- Windows Server 2008R2
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
Operating System - Additional

Please ensure ALL of the following are in place:

- .NET Framework 3.5
- .NET Framework 4.6.1

*You may have multiple versions of .NET Framework installed. However, 3.5 and 4.6.1 must be installed as it has components that other versions do not have.*

- UAC is switched off (Windows 10, Windows Server 2008)
- Primary Drive Disk Space
  - Minimum: 20 GB free
  - Recommended: 200 GB total
- Installed Memory/RAM
  - Minimum: 8 GB
  - Recommended: 8 GB

*Disk space and Memory/RAM requirements will vary based on report outputs.*

Microsoft Office

If you will use extended Output functions (e.g. Email, Excel Bursting, Document Properties, etc.), please ensure that ONE of the following is in place with all of the latest updates and fixes installed:

- Outlook/Excel/Office 2007 32 Bit Version Only
- Outlook/Excel/Office 2010 32 Bit Version Only
- Outlook/Excel/Office 2013 32 Bit Version Only
- Outlook/Excel/Office 2016 32 Bit Version Only
- Outlook/Excel/Office 365

*If you are using any other versions of Outlook or Office, ensure you have installed the latest service packs and updates.*

Microsoft Exchange

If you use Exchange to process email, please ensure that the following is in place:

- Any version of Exchange released after January 2006 (Exchange 2007, Exchange 2010, etc.)

*Integration with other versions of Exchange may work even if the latest service packs are not installed, but some functionality may error or be unavailable. For best results, please ensure you have applied the latest service pack and all updates.*
SMTP Server

If you use SMTP to process email, please ensure that ALL of the following are in place:

- You must know your mailbox security credentials.
- Your server must allow relaying.
- The IP address of the PBRS server is whitelisted on the mail server.

If you do not know your mailbox security credentials or are unsure if your server allows relaying, please contact your Email Administrator.

Windows NT Service Scheduler

PBRS installs a background application scheduler by default. However, if you wish to use the Windows (NT) Service scheduler, you can do so by going to Options > Scheduling and clicking the radio button next to Use NT Service.

Prior to using the NT Service Scheduler, you must ensure ALL of the following:

- The Windows Service user has full security rights to the mailbox to be used (if you will be emailing reports).
- The above user has full security rights to network files and folders (if you are reading reports across the network and if you are exporting to network folders).
- The above user has full security rights to any FTP location you may be exporting to.
- The above user has Log on as service rights on the local PC.
- The above user has Act as part of the operating system rights on the local PC.
- The above user is a local administrator (or a member of the local administrator group) of the PC.

If you need assistance with any of the prerequisites listed above, please contact your system administrator.

User Account Controls

At the time PBRS is installed on the server, it is imperative that the User Account Controls (UAC) on the server are turned off. Please ensure that you or your IT personnel are available to disable this feature until the installation is complete.

Once the installation is finished, these can be turned back on.
II. Before installing PBRS

*Download the latest version from: [https://go.christiansteven.com/download-pbrs-now-lpf](https://go.christiansteven.com/download-pbrs-now-lpf)*

Please ensure that **ALL** of the pre-requisites listed on the PBRS Pre-Requisites page have been met. This ensures that PBRS runs as expected. Failure to meet the listed pre-requisites may result in errors occurring.

Installation and Configuration of PBRS on a new server are **not** part of normal technical support. If assistance is needed or requested during the PBRS installation or configuration process, Professional Services can help for a nominal consultation fee.

A reboot of the PBRS server will be required after installation is complete.
IIII. Installing PBRS

Preparing for the Installation

*These steps must be completed prior to running the PBRS installer.*

After downloading and extracting the latest build/version of PBRS, perform the following steps:

1. **User Account Control**
   
   If you are installing PBRS for the first time on this server, turn off the User Account Control (UAC). You can turn it back on once the installation of PBRS has completed.

2. **Unblock the PBRS installer**
   
   a. Open the appropriate **PBRS version/build folder**.  
   *This is most likely located in your Downloads folder.*
   
   b. Highlight and then right-click the **PBRSSetup** file.
c. Click **Properties**.

![Properties dialog box with 'Run as administrator', 'Import to Grammarly', 'Troubleshoot compatibility', 'Pin to Start', 'Scan with Windows Defender', 'Give access to', 'Share', 'Send to', 'Cut', 'Copy', 'Create shortcut', 'Delete', 'Rename', and 'Properties' options highlighted.]

d. On the **General** tab, click **Unblock** in the lower right corner.

![Security properties dialog box with 'Read-only', 'Hidden', 'Advanced', 'This file came from another computer and might be blocked to help protect this computer', ' Unblock' options highlighted.]

*If Unblock is not present, the PBRS installer is already unblocked.*
Some security features, such as Windows SmartScreen, can block certain files or flag them as potentially unwanted. If the PBRS installer is run without being unblocked, PBRS will not run properly.

e. Click **Apply**.
f. Click **OK**.

3. **Change the Compatibility Settings**
   a. On the Properties window for the PBRSSetupX that you opened in the previous step, click the **Compatibility tab**.

   ![Compatibility tab](image)

   b. In the **Settings** section at the bottom of the window, ensure that **Run this program as an administrator** has a check next to it. If it does not, check it.
c. Click the **Apply** and **OK**.

*You must perform this step even if you are logged in as an Administrator or have Administrative rights on this computer.*

**Beginning the Installation**

To install the latest build/version of PBRS, perform the following steps:

1. Right-click the **PBRSSetupX** and select **Run as Administrator**.

2. Click on the **Yes** on the ‘**Install Core PreRequisite?**’ pop-up window.

3. Click **Next** on the Welcome message.
4. Carefully read the License Agreement.

- Once you have fully read and understand the License Agreement, click the radio button next to **I accept the terms in the license agreement**. Then, click **Next**.

  *If you do not accept the terms of the license agreement, you will not be able to proceed with the installation.*
5. Now, you will see the Select Destination Folder screen. You can choose to leave the default destination folder that is currently listed or select your own. Click Next.

_Leaving the default destination as the destination folder is recommended._
6. You should now see a *Ready to Install* window detailing the current settings for the PBRS installation. These details include the destination folder you chose in Step 10, as well as the Disk Space Requirements for the PBRS installation.

- Click **Next**.

*The Disk Space Requirements will vary from build to build. This is only the amount of disk space that is required for the installation/components of PBRS.*
7. Allow the PBRS installation to complete. You do not need to click anything during this process.
8. When the *Setup Wizard Complete screen* appears, click **Finish**.

![Setup Wizard Complete Screen]

9. At this time, you may see a pop-up stating that you will need to restart your computer in order to complete the PBRS installation. Click **OK**.

*Should you not receive this message (below) you will need to manually reboot the server at this time.*

![PBRS Pop-up]

PBRS is now successfully installed on this server.
Database Installation
The first time you open PBRS, you will need to configure the PBRS database. This is where PBRS will store the information regarding the schedules you set up within the software.

Select how you want to install the PBRS database to proceed with the database installation steps.

- Option 1: Default PBRS Database Installation.
- Option 2: Use my existing database server.

Option 1: Default PBRS Database Installation
1. Open PBRS

2. You should now see a Database Configuration Wizard pop up. Click Next.
3. Select **Install and configure a new database installation** and click on the **Next**.

4. The database will now be created. This process can take up 20 minutes.
If the configuration fails, PBRS will offer to install a local Access database. PBRS will operate in this instance. However, advanced users will likely prefer to run PBRS using the SQL Server install. If the configuration fails and you would like to use the SQL Server install, verify that you have met all the PBRS prerequisites.

5. If successful, pop-up will appear: *Operation completed successfully*. Click **OK**.
6. Click **Finish** to complete the database configuration.

The PBRS installation and database configuration is now complete.
Option 2: Use my existing database server.
You will need to have your SQL Server name and a SQL Server account (username and password) which have read/write/create permissions.

1. Open PBRS
2. You should now see a Database Configuration Wizard pop up. Click **Next**.

   ![Database Configuration Wizard](image1)

   **Database Configuration Wizard**

   Welcome to the Database Configuration Wizard for PBRS.

   The Wizard will guide you through the process of configuring the database used by PBRS.

   All your existing schedules and settings (if any) will remain unchanged during this process.

   Please make sure that you are logged on as a member of the Local Administrators group before proceeding.

   Click “Start” to proceed

   ![Next button](image2)

3. Select *Use my existing database server* and click on the **Next**.

   ![Database Configuration Wizard](image3)

   ![Next button](image4)
4. Enter the details of your SQL Server, check the option *Create Database (existing database will be dropped)* and enter the credentials of your SQL Server account. Click **Test**. Once PBRS can successfully connect to your SQL Server, click **Next**.

5. Click **OK**.

*The SQL Server credentials must have permissions to read/write/create.*
6. The database is now being created within your own database server.

7. Click **Finish** when the process is complete.
PBRS is now configured to store the scheduling information in a database on your server.
IV. Welcome to PBRS

Each time you use PBRS, you will be required to login. Your security credentials determine what you can and cannot do and what schedules you can see.

The first time you log in to PBRS, you must create an Administrator account.

Once you are logged on as an Administrator, you can use the User Manager to:

- Set up additional Administrators and Users.
- Set PBRS to log on automatically using a specified user.
- Assign specific folders and schedules to specific users.
- And so much more!

To create an Administrator account, simply fill in the required information in the fields listed on the Create Admin User portion of the Welcome screen (shown below).

IMPORTANT: Make note of the username and password you set up as the Administrator. You will need these again to use PBRS. If you forget the administrator credentials, you will have to log a support ticket with our Technical Support Help Desk in order to have the password reset.
Options

The Options module allows you to change and customize configuration settings that are used by PBRS. Example: Messaging, Scheduling, Power BI accounts and more.

- Go to Options.
In PBRS, you have the option to configure many different aspects of how the software performs. You can access the configuration options by clicking the Options button at the top of PBRS. This will bring up an Options window. The first tab, the General tab, is broken down into four sections: User Experience, Error Handling, Misc. & Reports. Below, we will take a closer look at each of these sections.
User Experience

- **Customer #**: The value that should be listed here is your individual customer number, which is provided by Christian Steven when you purchase PBRS. It identifies you in our billing and tech support system and allows you to log support tickets through PBRS itself. Once you receive your customer number from Christian Steven, you should input it here (if it is not already listed).

  *If you are using the free trial version of PBRS, no value will be listed here and this field will be left blank until you purchase PBRS. If you are experiencing issues with PBRS during your free trial, contact your Sales Manager. You will be unable to log a support ticket through PBRS.*

- **Automatically Refresh Desktop**: When viewing the PBRS desktop (especially when using Detail option), this option will refresh the screen at the interval of seconds you specify. This will allow you to see an up to date status of your schedules at a glance without having to refresh the system manually.

- **Only convert remote paths to UNC**: This setting instructs PBRS only to convert remote paths to UNC. This option helps prevent any path resolution problems you may otherwise have. Local paths are not affected if you are a system administrator. (network or shared paths)

- **Use Relative time**: This setting lets you select whether timings should be displayed and saved in the time zone of the scheduler or the time zone of the user (if they are different).

Error Handling

The Error Handling section tells PBRS what to do when PBRS encounters a problem. You can choose between the following options:

- **Send an Email**: Choose to be notified by email if a report fails to run successfully. You can specify any email address in this field as long as it is valid.

- **Send an SMS**: Choose to receive an SMS text message on your cellphone if a report fails to run successfully. This can be any phone number as long as it is valid.

- **Close Oops Messages after X Seconds**: Automatically close any error messages after a specified amount of time.

  *An error log file is stored in the installation folder (typically, Program Files\Christiansteven\PBRS). You can also view the log file from the System Monitor.*

Misc.

- **Sync User Defaults across all clients**: If you have multiple installations of PBRS and all of them are connected to the same database, you can select this checkbox to sync the User Defaults on this installation of PBRS with the other installations.

- **Automatically check for updates**: Checking this option will ensure that PBRS automatically checks for and alerts you when an update is available. If you do not have this option checked in PBRS, you will need to manually check for updates to PBRS by following our Product Info & Updates blog.

- **Load SSRS cascading parameters automatically**: If you are using Microsoft SQL Server Reporting Services, click on this option to display cascading parameters.
Reports

- **Show hidden report parameters (SSRS):** Click on this option to display any hidden parameters contained in SSRS reports.
- **Enable system verbose logging:** Verbose logging allows PBRS to record more details regarding schedules, outputs, files, errors, etc. It is especially helpful should PBRS experience issues where technical support or Development would need to troubleshoot. Having this enabled does not impact user functionality in any way. Unless otherwise advised, please leave this option checked.
- **Use "ReportExecution" Endpoint for Report Execution:** When scheduling reports for SSRS, it will tell PBRS to use a different API endpoint for rendering the reports.
Power BI Accounts

You can also manage **Integrations Library** here.
Select **PowerBI Accounts**.
• Click **Add** to add an account.
Adding Office 365 accounts

- Select **Office 365** as the **Authentication Type**.
- Follow the instructions in the blue section of the *Add a Power BI Account* screen.

When you have completed the instructions, click **Verify**.
If successful, a pop-up will appear: *Power BI account verified successfully*. Click **OK**.
- The Power BI account is now added to PBRS.
Adding Azure Active Directory accounts

- Select **Azure Active Directory** as the Authentication Type.
- Follow the instructions in the blue section of the *Add a Power BI Account* screen.

You will need to be an Azure Global Administrator to be able to successfully give PBRS the required permissions. If you are not an Azure Global Administrator, your Azure Global Administrator must first register an Azure AD app to embed Power BI content for use with PBRS, and then provide you with the Client ID and the Azure Tenant ID. *Here’s how.*

- When you have completed the instructions, click **Verify**.
If successful, a pop-up will appear: Power BI account verified successfully. Click **OK**.
The Power BI account is now added to PBRS.
a. Email Settings

When you click on the Messaging tab in PBRS’s Options window, you will see that you have two separate messaging options (shown on the tabs): Email Settings and SMS Settings. On this page, we will discuss the various email options available to you when using PBRS and how to set them up.

No separate server is required in order for PBRS to send e-mail. However, if you are unfamiliar with your organization’s e-mail settings, you may want to have a system administrator set these for you.

MAPI

You should choose MAPI from the Mail Type drop down if your organization uses a MAPI compliant system (such as Outlook or Exchange). In order to utilize the MAPI mail type, you will need to install the Collaboration Data Objects component from your Outlook or Office installation disk.

Once the CDO component is installed, you may need to register them again.

To verify whether or not you already have the Collaboration Data Objects installed, click the Housekeeping tab on the far left. Then, under the Components tab, verify that Collaboration Data Objects is listed. If it is not, you will need to install them.

To use the MAPI mail type, use the following credentials:

- **MAPI Profile**: Enter the name of your MAPI Profile.
- **Password**: Enter your password.
The MAPI Profile is how PBRS will communicate with your email system, global address book, and other email functions. Depending on the version of Windows you are running, it may also communicate with your security rights and the service packs you have installed. The drop-down may not show the list of profiles which exist on your PC.

If you are unsure of your MAPI Profile name, you can find it by going to Windows Control Panel > Mail and taking a look to see what your default profile is set to be. Then, simply type this profile's name into the field. More often than not, the profile name will be Outlook or MS Exchange Settings, but this is not always the case.

In the MAPI Section, click on the More... The More button allows you to specify additional settings for the MAPI messaging. You can choose to set PBRS to use the Exchange Server, to email reports using Exchange or Office 365, or to use Stand-Alone Outlook.

Setting PBRS to use Exchange Server

If you would like to set PBRS to run from just the Exchange Server, perform the following:

1. From the drop-down menu, select Exchange Server.

2. Once you select the Exchange Server option, enter in the MAPI Alias and your Exchange Server Name in the applicable fields.

3. Click Verify.

You must verify the MAPI Alias and Exchange Server Name or you will be unable to save the settings.

4. Click OK to return the main messaging settings page.
5. Skip to the Test Settings section at the bottom of this page to complete the Email Settings configuration.
Setting PBRS to use the Exchange Web Service

If you would like to set PBRS to use the Exchange Web Service, perform the following:

1. From the drop-down menu, select **Exchange Web Service (2007 or later)**.

2. Enter the following credentials:
   - **Domain\UserID**: Domain and User ID.
     
     *Office 365 users should enter their full email address in this field instead.*
   - **Password**: Enter your password.
   - **Use Exchange Auto-Discovery**: This will enable you to automatically gather your exchange server settings. Enter your **Email Address**, click **Go**, and PBRS should return the following settings:
     - **Server Name/Service URL**: The name of your exchange server.
     - **Sender Name**: Your sender name.
     - **Sender Address**: Your sender address.

3. If the settings are correct, click **OK** to save. You can test these settings on the main setup screen.

4. Check the box next to **Use currently logged in user to send emails during manual execution** if you would like PBRS to use the currently logged in Windows account (rather than the MAPI profile you are currently inputting) for emails that are sent when a schedule is manually executed.

5. Skip to the **Test Settings** section at the bottom of this page to complete the Email Settings configuration.
Setting PBRS to use Stand-Alone Outlook

1. If you want PBRS to interface directly with your Outlook profile, select Stand-Alone Outlook from the drop-down menu.

2. Click OK. There is no need to enter in any additional credentials. *Using this option, PBRS will not send emails if you are not logged into the server with Outlook open. This is the case even if you are running PBRS as an NT service.*

3. Skip to the Test Settings section at the bottom of this page to complete the Email Settings configuration.

SMTP

If you wish to connect to an SMTP mail server, perform the following:

[Image of SMTP settings configuration]
1. Then enter the following credentials:
   - **User ID**: Enter the User ID provided by your email administrator.
   - **Password**: Enter the password provided by your email administrator.
   - **Server name**: Enter your SMTP server details. You can use the mail server name or the IP address.
   - **Sender Address**: When the email is received, this will be the From address displayed.
   - **Sender Name**: When the email is received, this will be the displayed Sender Name.
   - **SMTP Timeout**: Use this to determine how long PBRS will wait for a connection from your SMTP server before declaring a failure. The default is 30 seconds, but you may need to adjust this depending on your preference.

2. If you would like to set up options such as *POP before SMTP* (if they are required by your SMTP server) or to set your server settings for Read Receipts, click **Advanced**. Then, select the appropriate option from the drop down and enter the requested credentials.
You must select **Verify** or **Test** after entering the relevant credentials in the Advanced pop-up window. **If you do not verify or test the settings, you will not be able to save them.**

3. If you would like PBRS to notify you when an invalid email address is entered, check the box next to **Throw an error if an invalid email is detected.**
4. Skip to the **Test Settings** section at the bottom of this page to complete the Email Settings configuration.
If you will not be using PBRS to send emails, perform the following:

_This does not affect other aspects of PBRS. You will still be able to use PBRS to print, export to folder, or export to an FTP destination, etc._

![Email Settings](image)

**Test Settings**

In this section, we will test your Mail Type settings to verify they work as expected. Testing the settings ensures that PBRS will not encounter errors when trying to send out emails while running schedules. To test the settings, perform the following:

**Verify the settings work**

1. Click **Test Settings**

![Test Settings](image)

2. Enter an email address to send the test email to.
   Click **OK**.
3. You should receive a pop-up stating _"Email sent successfully!"_.
   Click **OK**.

   _If you receive an error message, verify that your server information is listed correctly._
Check the appropriate options

- If you wish to clear the currently entered mail settings and start over, click **Clear Settings**.
- If you would like PBRS to keep trying to send emails after they’ve failed to send once, click the checkbox next to **Try re-sending failed emails**.
- If you would like PBRS to **Automatically embed related images into HTML emails**, verify the checkbox next to this option is checked. *By default, PBRS will automatically embed an image if the link is placed in the body of an HTML email. Keep this box checked if you wish for this to occur. If you would rather the image link be placed in the HTML email body (rather than the image itself), then uncheck this box.*
- If you would like to change the **Text Character Encoding**, select the appropriate choice from the drop-down. *Encoding is used by Operating Systems to determine how to display emails on the recipient’s PC. US-ASCII is standard for most languages. However, if you are using Japanese characters, then you should select ISO-2022-JP.*
- If you would like to set or change the **Default Email Font** use this option to set the font family and font size.

1. Click **Apply** at the bottom of the **Options** window.
b. **SMS Settings**

### How SMS Works

PBRS sends SMS messages using three different methods: A direct connection to a cell phone or GSM modem, a modem connected to a phone line, or the Red Oxygen Web Service.

### Direct Connection to a Cell Phone or GSM Modem

If you have a cell phone connected to a COM port on your PC, PBRS can interface directly with the cell phone and send messages.
Information located on this page may indicate that SMS could be received by PBRS. However, this function has not been enabled in our software. The SMS component within PBRS can only send SMS. It cannot receive and process SMS messages.

You can use a GSM Modem or GSM Phone for sending SMS messages. However, we recommend a dedicated GSM modem instead of a GSM phone; a GSM modem is more reliable and faster.

PBRS supports the majority of the GSM modems available on the market (although we strongly recommend WaveCom Fastrack GSM Modems) and supports most ‘business’ GSM phones (i.e. GSM phones that support the AT+C command set).

As mentioned previously, there are many GSM modems and GSM phones available today, and we do support most of these devices. The SMS component manufacturer has successfully tested the following GSM Modems and GSM phones with PBRS:

<table>
<thead>
<tr>
<th>Brand</th>
<th>Type</th>
<th>Send</th>
<th>Receive</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ericsson</td>
<td>Ericsson T18s</td>
<td>True</td>
<td>True</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ericsson T28s</td>
<td>True</td>
<td>True</td>
<td></td>
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<tr>
<td></td>
<td>Ericsson T39</td>
<td>True</td>
<td>True</td>
<td></td>
</tr>
<tr>
<td>Itegno</td>
<td>Itegno</td>
<td>True</td>
<td>True</td>
<td>Use modem driver (not Modem)</td>
</tr>
<tr>
<td>Nokia</td>
<td>Nokia 30</td>
<td>True</td>
<td>True</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 3310</td>
<td>False</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 3330</td>
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<td>False</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 3410</td>
<td>False</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 5110</td>
<td>False</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 5190</td>
<td>False</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 5210</td>
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<td>False</td>
<td></td>
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<tr>
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<td></td>
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<td></td>
<td>Nokia 6220</td>
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<td></td>
<td>Nokia 6310i</td>
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</tr>
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<td></td>
<td>Nokia 7600</td>
<td>True</td>
<td>True</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nokia 8910</td>
<td>True</td>
<td>True</td>
<td></td>
</tr>
</tbody>
</table>
Whilst we have provided information here on the phones which have been tested, ChristianSteven Software makes no guarantee that PBRS will work with any of the above phones or any other phones. We do not advise or train on the installation of GSM modems and phones. For more information, please speak to your telephone system administrator and refer to the user manuals and manufacturer of your phone or GSM modem.

Direct Connection to a Cell Phone or GSM Modem

If you have a cell phone connected to a COM port on your PC, PBRS can interface directly with the cell phone and send messages.

*Information located on this page may indicate that SMS could be received by PBRS. However, this function has not been enabled in our software. The SMS component within PBRS can only send SMS. It cannot receive and process SMS messages.*

You can use a GSM Modem or GSM Phone for sending SMS messages. However, we recommend a dedicated GSM modem instead of a GSM phone; a GSM modem is more reliable and faster.

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Updated on 27 November 2018
PBRS supports the majority of the GSM modems available on the market (although we strongly recommend WaveCom Fastrack GSM Modems) and supports most 'business' GSM phones (i.e. GSM phones that support the AT+C command set).

To set up a direct connection to a cell phone or GSM modem, perform the following:

1. Click **Use hardware device to send SMS**.
2. From the Device drop-down select your **modem or COM port**.
3. Enter or confirm the relevant **initialization string**, **data format**, and **speed**.
   
   You may find relevant settings for your specific service provider on the SMS Service Provider Information chart located at the bottom of this page. Alternatively, you can speak with your SMS provider or view your GSM modem or phone's user manual.
4. Click **Send through GSM phone or SMS device**.
5. If you use Arabic, Chinese, or other wide style character sets, check *Use Unicode*. Otherwise, leave this box unchecked.
6. Click **Apply** then **OK** at the bottom of the Options window.

---

**Modem Connected to a Phone Line**

Your cell phone company should have provided you with a special telephone number (SMSC Number). When this number is dialed, an SMS device connects to the line, and PBRS sends the required information to your provider. A normal cell phone works by sending texts to the SMSC number programmed in the phone.

If you use an SMSC dial-in provider to send SMS messages, you just need a standard Hayes compatible modem. Because SMSC centers operate at low speed, you don’t need a fast modem. A Standard 96000 bps modem is already sufficient. When moving through the instructions below, ensure you set your modem to use the speed required by your service provider.

*Information located on this page may indicate that SMS could be received by PBRS. However, this function has not been enabled in our software. Even if this function were enabled in PBRS itself, when using an SMSC dial-in provider, you can only send SMS messages.*

To set up a direct connection to a cell phone or GSM modem, perform the following:

1. Click **Use hardware device to send SMS**.
2. From the Device drop-down select your **modem or COM port**.
3. Enter or confirm the relevant **initialization string**, **data format**, and **speed**.

   *You may find relevant settings for your specific service provider on the SMS Service Provider Information chart located at the bottom of this page. Alternatively, you can speak with your SMS provider or view your GSM modem or phone’s user manual.*

4. Click **Send through service provider**.
5. Enter in the relevant SMSC Number, Provider Protocol, Password (if necessary), and Sender Number.

You may find relevant settings for your specific service provider on the SMS Service Provider Information chart located at the bottom of this page. Alternatively, you can speak with your SMS provider or view your GSM modem or phone's user manual.

6. If you use Arabic, Chinese, or other wide style character sets, check Use Unicode.

7. Click Apply then OK at the bottom of the Options window.

Red Oxygen Web Service

Red Oxygen is a 3rd party text messaging provider. If you (or your company) have a Red Oxygen account, it can be connected with PBRS to send text messages. If you do not have an account or need more information, please visit Red Oxygen.

The most basic plan is all that is necessary in order for PBRS to use this feature. However, pricing and plans can vary depending on your required SMS traffic. Please refer to Red Oxygen for further details.

RedOxygen is not a ChristianSteven Product and is not supported by our technical support team. PBRS is simply compatible with this product. For troubleshooting of Red Oxygen, please refer to Red Oxygen support.

To connect your RedOxygen account, perform the following:

1. Click Use RedOxygen Web Service to send SMS.
2. Enter in your **Red Oxygen Account ID, Email Address, and Password**.
3. Click **Apply** then click **OK** at the bottom of the Options window. From now on when PBRS sends text messages, it will send them via RedOxygen.

**SMS Service Provider Information**

There are many service providers offering pager/SMS services today. At time of publication, we were provided with a list of service providers and the settings they require. However, we cannot guarantee that all of the service providers mentioned below are working fine, or that PBRS will work with your service provider.

For more up to date information, please speak to your own SMS service provider.
<table>
<thead>
<tr>
<th>Country</th>
<th>Provider</th>
<th>Phone (SMSC #)</th>
<th>Protocol</th>
<th>Modem speed</th>
<th>Modem settings (databits, parity, stopbits)</th>
<th>Password</th>
<th>Comments</th>
</tr>
</thead>
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<td>0738326002</td>
<td>TAP</td>
<td>1200</td>
<td>8,n,1</td>
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<td>Orange</td>
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The Scheduler is the key function that determines when and how tasks are triggered. Rather than using Windows Task Scheduler, PBRS uses ChristianSteven's proprietary scheduler to execute tasks. This creates a far more reliable, dedicated scheduling system.

Within PBRS, the following scheduling options are available:

- No Scheduling required
- Use background scheduling application (recommended)
- Use NT Service (advanced users on Windows NT, 2000 or later)
**No Scheduling required**

PBRS can be used as an ad-hoc report managing tool with no scheduling. If you do not want any automated scheduling, select this option. However, this means you will need to execute each schedule manually.

This option is also used to uninstall any previously installed scheduling services.

To choose this options, perform the following:

1. Click the radio button next to **No Schedule Required**.
2. Click **Apply Setting**. This will uninstall any previously installed Schedulers and apply the new settings.
Use Background Scheduling application (recommended)

The background application scheduler is a windows application which monitors PBRS and fires off reports when they become due.

The background scheduler is an application independent of PBRS. Therefore, it will stop working if the user logs off or the server is shut down. If you want to be able to log off the server without stopping PBRS scheduling, then you must install and use the Windows (NT) Service Scheduler.

To use the background application scheduler, perform the following:

1. Select the radio button next to **Use background scheduling application (recommended).**
2. Click **Apply Setting.**
3. Click **Start Service** to start the scheduler.
4. Click **Apply** at the bottom right of the *Options* window.

*Use NT Service (advanced users on Windows NT, 2000 or later)*

The NT service is a Windows service. It installs into the Windows "Services" control panel. As this is a windows service, it will continue to run scheduled reports even when there is no user logged on to the PC.

*The server MUST be powered on in order for the NT Service to work. If the server is not on, the NT Service cannot run and schedules will not kick off as scheduled.*

**IMPORTANT**

Prior to selecting the NT Service option as your Scheduler, you must ensure that the following pre-requisites have been met:

- You are logged onto the server as the NT Service user
- The above listed NT Service user has the following windows security rights on the PC you are installing it on:
  - Act as part of the operating system
  - Log on as a service.
  - Is a member of the Local Administrators security group.
- If you are using MS Exchange Server, the above listed NT Service user must have full rights to the designated email account.

These security requirements are required by Windows. If you are unsure how to set up Windows security settings, your system administrator will be able to help.

**WARNING**

*Installing the NT service, and other configuration activities in PBRS, must **NOT** be done by remote control using Windows XP remote capabilities, or Terminal services. These applications do not save the settings on the PC, only in the virtual "session" you are using at the time. The correct security requirements are therefore not passed to the service or PBRS, and this will cause sporadic results (e.g. Service not polling, or schedules executing at wrong times or on wrong dates). If you must use remote control, we recommend PC Anywhere or VNC.*

**Setting up the NT Service**

Once you have ensured that the above pre-requisites have been met, perform the following:

1. Select the radio button next to **Use NT Service (advanced users on Windows NT, 2000 or later)**.
2. Enter the following credentials:
   - **Windows Domain**: Type in the Domain name. If you are using MS Exchange Server, then this must be your network domain so that PBRS can connect to your Exchange server.
   - **Windows User Name**: Enter the username for the above user.
- **Windows Password**: Enter the password for the above user.

3. Click **Apply Setting**.

4. Verify that each of the requirements listed on the NT Service Checklist window have been met. If so, check each of the boxes and click **Proceed**.

   *If you have not completed the listed requirements and/or do not check all of the boxes, you will be unable to continue setting up the NT Service.*

5. If you have configured PBRS to use MAPI mail, you will be prompted to select the type of email system you are using with PBRS: Stand Alone Outlook, Exchange Server, or Exchange Web Service. Once you have selected the appropriate option from the drop-down menu, click **OK**.
6. The NT Service will now install. Once completed, the service will be visible in the windows "Services" control panel and will be known as PBRS. You should also see **PBRS Monitor**. This is a monitoring service which ensures that the PBRS service is continually running.

7. If it is not already grayed out, select **Start Service**.

8. Click **Apply** at the bottom right of the **Options** window, if available.

   *If any of the above credentials are changed (e.g. the password is changed or times out), the service will stop running.* Under these circumstances, you will have to uninstall it and re-install it ensuring you enter the new credentials correctly. We recommend that your system administrator ensures that the NT user's credentials never change and never time out.
Additional Scheduling Options

- **Use as Backup Scheduler:** PBRS’s Failover module can shunt the processing load from a failing server to a backup server. This option guarantees that your schedules will execute even if the primary server is non-functioning.
  - The primary server must have its scheduler active.
  - The primary PBRS server must have its database stored in an ODBC compliant database.
  - The intended backup installation must be connected to the ODBC compliant database.

**Polling Intervals**

- **Standard:** The schedule polls the PBRS schedule database at regular intervals to see if there are any schedules to execute. The polling interval defines how often you wish scheduler to check.

- **Event Based:** Event-Based Schedules run on their own thread.
- **Pre-Check Database conditions using multiple threads**: Using Multi-threading technology, PBRS will check multiple conditions for multiple schedules using up to 5 threads. This option can increase the speed at which PBRS runs Event Based Schedules.

**Multi-Threading**

- This section allows up to 8 reports to be exported simultaneously.

*System resources will be shared, so this will not always mean that reports will take 1/8 the normal time.*

*EXAMPLE:* You have 4 reports. Each one takes 15 minutes to export. Using a single thread, it would take 1 hour to complete the export. Using multiple threads, you would expect it to take 15 minutes for all 4. However, the sharing of your system resources by 4 reports may result in each report taking longer than 15 minutes and the total time for 4 reports may be more than 15 minutes, but it will be less than an hour.

**Miscellaneous**

- **Do not check and restart**: Used if multiple people are logging into the server while using background scheduling.
- **On editor start-up, delay restarting**: When logging into server should scheduler be delayed to restart.
- **Use blackout times for scheduler**: Set days and times when you do not want the scheduler to run.

---

**PBRS/Scheduler Agent**

Once you have successfully set up the scheduler you will be using, you will gain access to the PBRS/Scheduler Agent, which gives you easy access to many scheduling options. The PBRS/Scheduler Agent appears as a red and white bell icon that is visible in the system tray (next to the clock) when the Scheduler is running. It looks like this:
Double clicking this icon will bring up the full Scheduler Agent.

The full Scheduler Agent is also available within PBRS on the right-hand side of the screen (after you click System).
- **Stopping the Scheduler**: To stop the scheduler using the Agent, open the scheduler agent, and click the **Stop** button. The stop light will switch to yellow then red. This will stop the scheduler and no reports or task will execute. If you open PBRS, the scheduler will automatically restart.
You can turn off the automatic restart of the Scheduler using the instructions listed in the miscellaneous section above.

- **Starting the Scheduler**: To start the Scheduler using the Agent, open the Scheduler Agent, and click the Start button. The light will switch from red to yellow to green. Once enabled, your schedules will resume their normal running.
You can also review other system information such as the polling interval, the number of schedules found during the last poll, and the type of Scheduler the system is using.

If you do not wish to open the PBRS/Scheduler Agent, right-click the system tray icon to gain access to the following functions:

- **Load Editor**: Opens PBRS.
- **Load System Monitor**: Opens just the PBRS System Monitor.
- **Pause**: Pause the schedule.
- **Exit**: Closes the PBRS/Scheduler Agent.
- **Cancel Menu:** Cancel the schedule.

House Keeping

**Components**

From time to time, the main DLLs required to run PBRS successfully will need to be re-registered into your system registry. This need may arise as a result of the install or uninstall process of other applications you may be running on your PC.

**IMPORTANT**
During the component re-registering process, you must ensure that you are logged into the PC as the Local Administrator in order to ensure that you have full security rights to the complete system registry.

To re-register a component, perform the following:

1. Click **Components**.
2. From the list that presents, select the **component** you wish to re-register.  
   *Depending on the version of PBRS you have, you may not have all components in the list. Do not worry. Only components relevant to the version of PBRS you are running will appear.*
3. Click **Register Component**.
4. Once the component has been re-registered, restart the PC to ensure that the new settings are stored by Windows.

**Archiving**

PBRS allows you the option to move disabled schedules to an Archive folder. Schedules moved to the Archive folder can be enabled again and moved to other folders, but this option keeps folders neat and easier to manage.

1. To enable archiving, perform the following:
2. Check **Archive schedules that have been disabled for**.
3. Specify the number of days a disabled schedule can remain at its current location before being moved to the archive folder.
4. Click **Apply** at the bottom right of the Options window.
Folder Housekeeping

Folder housekeeping is a great way to stop your destination folders from getting too full. Different from the folder housekeeping option found in a schedule, this option can monitor any folder and delete items older than a specified time. Folder Housekeeping is run using the system maintenance thread which runs every 5 to 10 minutes.

To enable Folder Housekeeping, perform the following:

1. Click **green plus button** to add a new folder path.

![Folder Housekeeping Component](image)
2. Click (...) button and navigate to the specific folder you wish to monitor.

3. Once you have selected the folder you wish to monitor, indicate how old items in the folder should be before they are deleted.

   ![Housekeeping Path](image)

4. If you want to immediately delete all items in the folder that are older than the specified value, click Purge. Otherwise, click OK.

   ![Housekeeping Path](image)

5. Click Apply at the bottom of the Options window.

   You can delete a housekeeping item by selecting the folder path, then clicking the red X button.
When you first open PBRS's User Defaults window, you will see three tabs: Messaging Defaults, Database Defaults, and Miscellaneous.

**Messaging Defaults**

Using the Messaging Defaults tab, you can set up a standard email message or signature. Then, you can use that message and signature as the email text for scheduled reports (via the use of an Insert).

1. To set a default Email Subject, Email Message, or Email Signature, simply enter the text you wish to use in the applicable field.
2. To set a default Attachment, click (...) **button** and select the appropriate file. Then, click **Open**.
3. Once the Messaging Defaults have been set, click **Apply**.

**How to use Messaging Defaults?**

Once you have set Messaging Defaults in the *Options* window, they can be used in the email output of your schedule. Defaults are applied on a schedule by schedule basis by using the User Defaults inserts on the *Email Destination* window.
To use the Messaging Defaults inserts, perform the following:

1. In your email output section, go to **User Defaults** in the **Inserts Menu**.
2. Drag and drop the default item to the appropriate field.
3. You can then edit the default message if needed.

For each schedule, you can overwrite the default email text and enter your own. For more information on how to do this, see the Export to Email page.

Database Defaults (SSRS Only)

If your SSRS datasets all log into the same database, you can store the database credentials here and save having to enter them into each and every schedule.

Miscellaneous (SSRS Only)

Under the Miscellaneous tab of the User Defaults, you will see two sections: Default Report Location and Default Date Stamp.
- **Default Report Location:** is the path PBRS will always take you to when you are browsing for a SSRS report. If this field is blank, PBRS will begin browsing at the last location you selected a report from. If this field has a path listed, PBRS will automatically begin browsing from this location.

- **Default Date/Time Stamp:** will be what is used when you select to append a date/time stamp of a report destination. If this field has a value, this default format will be prefilled in the Append date/time to report output field when it is selected, saving you from having to select a format each time you write a schedule.
Default Destinations
Adding a Default Destination

To add a Default Destination, perform the following:

1. Click **Add**

2. Select the Type of destination from the drop-down list.
3. Enter the name you wish the destination to be called, click **OK** on the Destination window. Then, click **Apply**.
4. The Default Destination has been successfully created.
Using a Default Destination

To add the Default Destination to a schedule, perform the following:

1. Navigate to the **Destinations** tab of the **Schedule Properties** and click **Import**.

2. Select the Default Destination you wish to use and click **OK**.
3. Click **Apply**.
This report will now use the specified default destination without the need to set up the destination specifics.

**Testing Using a Default Destination**

One of the features of PBRS is the ability to set up specific default destinations for testing purposes (such as a test folder on the server’s C: drive or a testing e-mail address).

To test a schedule using a default destination instead of the schedule’s actual destination, perform the following:

1. Right-click on the schedule you wish to test.
2. Click **Tools**. Then, click **Test**.

3. Click the destination you wish to use from the list of Default Destinations that pops up. Then, click **OK**.
4. Once you click OK, the schedule will automatically execute to the test destination, and you will receive a success or failure message.

**Sharing Default Destinations**

Default Destinations can be assigned to specified user groups. These groups are created in the User Manager. If you want to "pre-make" a destination so that a certain group of users can only have schedules export to that location, you can find how to assign them that default destination.
System Paths

- **Cached Data Folder**: PBRS stores information which is used by event-based and other schedules.
- **Snapshots folder**: This is where Snapshots will be stored.
- **Path to DT Exec (for SSIS Tasks)**: Custom Task which runs SSIS on your SQL Server. DT Exec stores all the location of where DT Exec is.
- **Sent Messages Repository (SMTP)**: PBRS will use this folder to store information on your sent email messages via your configured SMTP server.
  - You can also set PBRS to convert the files to *.msg format for viewing in MS Outlook. Please note that the files are converted on the fly on viewing them from the sent messages section in the System Monitor.

*If you do not check the box next to "convert files to MSG format", sent messages will save to this folder as .eml files. However, if you navigate to the Email Log in the System*
Monitor and click on one of the entries, the .eml file will be converted to a .msg file so that it can be viewed successfully.

- **Temporary Output Folder**: PBRS uses this folder to store temporary files. To automatically clear down this folder so that your PC does not run out of disk space, you can set how long the items in the temporary folder should be kept.
Audit Trail

An audit trail is a chronological record of changes that have been made to a database or file. PBRS can be configured to create an audit trail that will be stored in a given database.

*Audit information is not stored in PBRS and you must create and designate an external ODBC compliant database for storage.*

The audit trail will display which users have executed, refreshed, or edited schedules.

This audit trail will show common activities, such as which user executed a given schedule, what the user did, the schedule that was manipulated, and the type of schedule.
Enabling the Audit Trail

To allow PBRS to create an audit trail, perform the following:

1. On the Audit Trail tab of the Options window, check the box next to Enable Audit Trail. This will enable the Database Setup fields to be modified.
2. Enter the database name and applicable credentials into the DSN Name, UserID, and Password fields. Then, click Connect.

3. If successful, a pop-up will appear: Database connection established. Click OK.

4. Click Apply then at the bottom of the Options window to save these settings.
Default tasks are custom tasks which can be reused each time you create a schedule (without having to create the same custom task over and over again).

You can use the Default Tasks tab to create and store a copy of those most used custom tasks for easy insertion into schedules.
Creating a Default Task

To create a default task, perform the following:

1. From the list of custom tasks, select the one you want to use. Then, drag and drop it into the list.

2. This will pop up a window that will allow you to set up the default custom task.

   The picture shown below may differ from the pop-up window you see. This window varies based on the type of custom task you select.
3. Once you have created the default task, it will display in the Custom Tasks window. Click **Apply**.
Importing a Default Task into a Schedule

To import a default task, perform the following:

Navigate to the **Tasks** tab of the schedule you wish to add the default task to.

*This can be done by right-clicking the schedule, selecting Properties, and then clicking Tasks.*

1. Click **Import**.

2. From the context menu, select **Default Task**.
3. From the list that displays, click on the default task you would like to add to this schedule. Then, click OK.

You can create additional default tasks in this window as well.

4. The default task will now be added to the schedule as a custom task. Click Apply.
How to Create a Task List?

Task Lists are a great way to import multiple task groups into a schedule. To create a Task List, perform the following:

1. On the Default Tasks tab of the Options window, select Export.

2. Enter a task list name for this task list. Then, click OK.
3. If the default task list was created successfully, you will see a success message. Click OK.

4. The Task list is now saved and can be imported into a schedule.

**Importing a Default Task List**

To import a default task list, perform the following:

1. Navigate to the Custom Tasks tab of the schedule you wish to add the default task to. *This can be done by right-clicking the schedule, selecting Properties, and then clicking Tasks.*
2. Click **Import**.
3. Click **Import Task List**.

4. From the list that appears, click the task list you wish to import for this schedule. Then, click **Select**.
5. All tasks associated with that task list will now be added to the schedule. Click **Apply**.
Default Parameters

The Default Parameters tab allows you to set default values for specific parameters that you can then assign to any of your schedules.

Default Parameters are useful for PBRS environments where users are assigned schedules with specific parameter settings that need not be tampered with.

Creating a Default Parameter

To create a default parameter, perform the following:

1. On the Default Parameters tab, enter the name of the parameter in the Define parameter - Name field.
2. For the value, choose one of the following options:
   - **Ignore the parameter** specified.
   - Set its value to **Null**.
   - Set it to a value **you specify** in the **Value** field.

   *You can also drag and drop values from the inserts menu (i.e. date parameters or data items) into the Value field.*

3. Once you are satisfied with the parameter name and value, click the **Check mark** to add it to the Default Parameter list.
4. Repeat steps 1-3 for the remaining parameters you wish to set.
5. Once you have finished entering in parameters, decide if you would like administrators (or those with similar admin rights) to be able to edit the default parameter values you just set.
   - If you do, check the box next to **Allow Administrators to change these values on the parameters screen**.
6. If you would like to apply these default parameter values to all your currently existing schedules, click **Apply to Existing**.

7. Click **Yes**.
8. Click **OK**.

![](image)

9. Click **Apply**.

When reports are added to schedules, the parameters specified will now automatically have the default values you configured.
With the Cloud Storage tab, you can export reports to cloud services such as Dropbox. Adding the cloud storage options on this tab will allow you to use them as a destination for reports to export to when you create schedules in PBRS.
To add a Dropbox account, perform the following:

1. Click **Add**.

2. You will see a pop-up advising you that you will now be redirected to Dropbox.com to grant access to PBRS. Click **OK**.

3. On the dropbox.com browser window that opens, **sign-in to your Dropbox account**.
4. Navigate back to PBRS. You should now see your Dropbox account listed under the Account Name/Account Type section.

5. Click **Apply**.
System Monitor

The System Monitor is used to view scheduling and other system events and processes. Here's where to find it.
Schedule Manager

The schedule manager will show currently executing schedules as well as any schedules scheduled to run (based on filter selected). From here you can remove a schedule from the waiting to execute or currently executing section. You can also go to the properties of a schedule by right-clicking the schedule.

- **Executing**: This screen will display the schedules that are currently executing.
- **Waiting in Queue**: This screen will show the schedules that are waiting in the queue to be executed. You can also group the schedules by Schedule Type.
- **Refreshing the Display**: You can adjust the refresh interval of the schedule manager by using the Refresh Interval scroller which has a range of 2 to 60 seconds.
- **Managing Processes**: The Schedule manager also displays the Process ID which you can use to identify matching processes in the Windows Task Manager.
Context Menu

- **Properties**: Select the schedule, right-click and select "Open Schedule properties". This opens the schedule properties.
- **Show in Explorer**: Select the schedule, right-click and select "Show the schedule in Explorer. This shows the schedule in the PBRS Explorer.
- **Remove From Queue**: Select the schedule, right-click and select "Remove from Queue". The schedule is removed from the queue.
- **Execute Schedule**: Select the schedule, right-click and select "Execute Schedule". The schedule is executed right away if it was waiting.
The email log will show a list of all emails which have been delivered successfully. You can double click on an email to bring it up in an email client as well as search for a specific email using the search field.

*This functionality works for emails sent by SMTP. For Exchange or Office 365 setups, successful emails will be shown in the "Sent Items" folder of the email account that was used to send the email.*
This screen shows a list of all failed emails. If "Resend Failed Emails" has been checked in Options, then PBRS will keep retrying the email until it is manually removed from the queue. As an example, if an email address has been misspelled (.cmo instead of .com). The queue will show when the last attempt was, and what the result was.

- **Send Now**: Select a message, and click this button to attempt an immediate delivery.
- **Remove Selected**: Select a message and click on this button to delete it from the list.
- **Remove All**: Click this button to clear the queue.
- **Only send one email alert per email failure**: This works in conjunction with the "Try resending failed emails" in Options (Tools > Options). If a message cannot be sent and PBRS is configured to notify you of any email failure, this makes sure an alert is sent to you only once and not every time the email fails due to the configured retry.
- **Remove items from the Queue that are older than**: Use this option to perform housekeeping on the email queue.
The error log enables you to view any errors that have been encountered by the system.
You can filter out the entries displayed by using the search field to specify the keywords to filter by.
To view the details of an entry simply select it and the details will be shown in the opposite pane.
This can be very useful for troubleshooting purposes. You can also easily copy the details of a selected error using the "Copy error" button.
Deferred Delivery
Deferring your Reports

1. In any scheduled output, go to Destination and select Misc.
2. Check the Deferred delivery box and indicate the length of the delay before delivery.
Schedule Backup

As much as is possible try to schedule backups at times when you do not have schedules running. This is important as backups may cause delays to your schedule execution.
Simple

- Enable scheduled system backups
- Simple vs. Advanced

- Perform a system backup every:
  - Day
  - Week
  - Month
  - Year

- At: 2:49:10 PM
- And repeat every: 1 day

- Backup Path
- Only keep backups for: 1 day

- Insert:
  - PBRS Constants
  - User Defined Constants
  - Parameters
  - Event-Based Data
  - Data Items
  - User Defaults

- Options (if any): Start Month
- Save
To create a single Ad-Hoc backup at any time, click here.
Read Receipts Enable you to confirm that the recipient has read an email after it has been sent. Tasks can be executed once or repetitively until the read receipt has been confirmed by PBRS. Read Receipts can be used in most Email Destinations.

Read Receipts can only be used Exchange email settings.

All emails that are waiting for a read receipt are displayed here. Clicking on filter you can separate your read receipts by delivered, pending or received.

When the email is sent, you will receive a delivery receipt. Once confirmation that the email has been read is received, you will be notified via email as well.
Setting Up Read Receipts

1. To set up Read Receipts for an email, click on the associated schedule and go to Destination.
2. Double click Email.
3. Check Delivery Receipt and this enables read receipts for this email destination.
4. By clicking the triple dots box, you can review additional read receipt options.

5. Click **OK** and then, click **Apply**.

- If a read receipt has not been received within a specified amount of time, custom tasks can be executed as a result.
- In schedules that send multiple emails (i.e. a Dynamic Schedule), a read receipt is triggered for each of the emails sent by the schedule.
- Repeat above tasks every X minutes: Any task you have created will be executed at a determined interval until a read receipt is received.
This screen shows you a history of all schedules (static and dynamic). If one destination out of many fails, the schedule will be marked as a "Partial Success." Expanding the node will reveal which reports or destinations failed.
1. Click **More data** to print, save or manipulate this as a custom report.
<table>
<thead>
<tr>
<th>Frequency</th>
<th>Name</th>
<th>Recurring</th>
<th>Enabled</th>
<th>Last Run</th>
<th>Duration</th>
<th>Success</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>DAILY</td>
<td>WORLDCUP</td>
<td>True</td>
<td></td>
<td>8/1/2018 2:28:14 PM</td>
<td>0.75 seconds</td>
<td>True</td>
<td>Single Schedule: WorldCup Report(s) produced successfully but email failed...</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8/1/2018 2:16:41 PM</td>
<td>5.85 seconds</td>
<td>False</td>
<td>Single Schedule: WorldCup Report(s) produced successfully but email failed...</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8/1/2018 12:10:05 PM</td>
<td>0.77 seconds</td>
<td>False</td>
<td>Single Schedule: WorldCup Report(s) produced successfully but email failed...</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8/1/2018 10:55:21 AM</td>
<td>0.65 seconds</td>
<td>False</td>
<td>Single Schedule: WorldCup Report(s) produced successfully but email failed...</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/3/2018 12:23:54 PM</td>
<td>0.73 seconds</td>
<td>False</td>
<td>Single Schedule: WorldCup Report(s) produced successfully but email failed...</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/3/2018 12:17:29 PM</td>
<td>0.78 seconds</td>
<td>False</td>
<td>Single Schedule: WorldCup Report(s) produced successfully but email failed...</td>
</tr>
</tbody>
</table>
This screen shows you a list of schedules that have failed. If the schedule is set to retry the schedule will continue to show in the list until the schedule is successful or the set retry amount has passed.
Smart Folders

Smart folders are an easy way to group existing schedules together without re-organizing your original folder structure.

- Go to **Smart Folder**.
General Wizard

- **Name:** Type in a name for the Smart Folder.
- **Description (optional):** Type in a description to help you identify what this Smart Folder is set up for.

Definition Wizard

Set up any other conditions required and click **Finish**.

All schedules, which fulfill these conditions, will be shown in the folder.
Smart Folder Context Menu

- Right-Click on a schedule to see the following actions:
  - **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
  - **View as Report**: To view the contents of a smart folder as a report.
  - **Rename**: Rename the folder.
  - **Delete**: Selecting this option will delete the folder.
  - **Refresh**: This will refresh the schedules in the folder.
  - **Disable**: It will disable all the schedules in the folder.
  - **Enable**: It will enable all the schedules in the folder.
  - **Execute**: This button will execute all schedules immediately.
Inserts Menu

The Inserts module, which pops up automatically, gives you the ability to drag and drop constants, variables, user constants and data items into almost any field in PBRS.

![Inserts Menu]

Inserts is arguably one of the most versatile features in PBRS. This feature enables the advanced schedule types to work, deals with variety of parameters, and customizes outputs for recipients.

- The insert function is activated in two ways:
  1. PBRS will automatically launch the insert module at points where it can be used (e.g. in a wizard's parameter screens).
  2. In the field into which you wish to insert a function, right-click and select **Insert**.

- The following types of constants are available:
  - PBRS Constants (@@PBRS Constants)
  - User Defined Constants (@@User Defined Constants)
PBRS Constants

- Current Group Value
- Current Temp File Path
- CurrentDate
- CurrentDateTime
- CurrentDay
- CurrentMonth
- CurrentMonthName
- CurrentScheduleName
- CurrentShortMonthName
- CurrentShortWeekDayName
- CurrentTime
- CurrentWeekDayName
- CurrentYear
- End Last Year
- Exported FileName
- First Day of Next Month
- First Day of this Month
- FiscalWeek
- Friday Last Week
- Friday This Week
- Key Parameter Value
- Last Day of the Month
- LastResult
- LastRun
- LatestResult
- LatestRunTime
- Monday Last Week
- Monday This Week
To use PBRS constants, select @@PBRS Constants from the Type list and then select the constant you want from the resulting Name list. Here is a list of constants to choose from:

- **Current Group Value**: Return the current group value.
- **Current Temp File Path**: Return to the temp file path.
- **CurrentDate**: Returns the current date.
- **CurrentDateTime**: Returns the current date and time.
- **CurrentDay**: Returns the current day date.
- **CurrentMonth**: Returns the current month number.
- **CurrentMonthName**: Returns the current month name.
- **CurrentScheduleName**: Returns the name of the current schedule or package.
- **CurrentShortMonthName**: Returns the name of the short month.
- **CurrentShortWeekDayName**: Returns the name of the short week.
- **CurrentTime**: Returns the current time.
- **CurrentWeekDayName**: Returns the day name of the day the schedule is run.
- **Current Year**: Returns the current year.
- **End Last Year**: Returns the date of the last day of last year.
- **Exported File Name**: Returns to the name of the exported file.
- First Day of the Next Month: Returns to the first day of the next month.
- First Day of this Month: Returns to the first day of the current month.
- FiscalWeek: Returns to the fiscal week.
- Friday Last Week: Returns the date for last Friday.
- Friday This Week: Returns the date for this Friday.
- Key Parameter Value: Returns the current key parameter value in use by a dynamic schedule.
- Last Day of the Month: Returns to the last day of the month.
- LastResult: Returns to the last result.
- Last Run: Returns to the last run of the schedule or package.
- LatestResult: Returns to the latest result of the schedule or package.
- LatestRunTime: Returns to the latest run time of the schedule or package.
- Monday Last Week: Returns the date for last Monday.
- Monday This Week: Returns the date for this Monday.
- MonthEndLastMonth: Returns the date of the last day of last month.
- MonthStartLastMonth: Returns the date of the first day of last month.
- SaturdayLastWeek: Returns the date for last Saturday.
- SaturdayThisWeek: Returns the date for this Saturday.
- Schedule Owner: Returns to the schedule owner.
- Scheduled Time: Returns to the scheduled time.
- StartThisYear: Returns the date of the first day of this year.
- SundayLastWeek: Returns the date for last Sunday.
- SundayThisWeek: Returns the date for this Sunday.
- ThursdayLastWeek: Returns the date for last Thursday.
- ThursdayThisWeek: Returns the date for this Thursday.
- TuesdayLastWeek: Returns the date for last Tuesday.
- TuesdayThisWeek: Returns the date for this Tuesday.
- WednesdayLastWeek: Returns the date for last Wednesday.
- WednesdayThisWeek: Returns the date for this Wednesday.
- Year Start Last Year: Returns the date of the first day of last year.
- Yesterday: Returns the date of before.

- For certain PBRS constants, you can adjust the constant's value by a certain increment (days, hours, minutes etc).
User Defined Constants

![Insert dialog box with PBRS Constants and User Defined Constants]

![Formula Editor window with Formula Name and Definition fields]
To use User Defined Constants, select **@@User Defined** Constants from the **Type** list and then select the constant you want from the resulting **Name** list. Or select **New** to create a new constant. You can insert other constants and create a new formula of your own.

For more information about *User Constants Data*, click here.

**Parameters**

- Use these to insert the current report parameter value into an email, report name, etc.
Event-Based Data

- Used with event-based schedules.
- Data from the database record or email body which triggered off the event can be inserted into emails, reports etc.
- For instructions on how to parse the body of an email, see the last section of this page.
Data-Driven Data

- Used with data-driven schedules. Data from the data driver can be inserted in all possible areas to drive the schedule.
- For more information on Data-Driven schedules, click here.
• Construct a SQL statement to collect the information from a database field. Selecting this option will bring up the **Data Items Module**.
  
  o Here you can pick an already existing SQL script, or construct a new one to query a database and return a specified value.
User Defaults

- **Default Attachment**: This will insert the attachment in the Default Attachment field from the User Defaults menu (in Options).
- **Default Message**: This will insert the wording in the Default Message field from the User Defaults menu (in Options).
- **Default Signature**: This will insert the wording in the Default Signature field from the User Defaults menu (in Options).
- **Default Subject**: This will insert the wording in the Default Subject field from the User Defaults menu (in Options).
  
  For more information on User Defaults, [click here](#).

How to parse the values in the body of an email and insert them into PBRS fields?

- For an **Unread Email** event, PBRS can read the body text of the email and place selected values into **Event-based constants**.

Here is an example:

Mary has an email which will contain values, and she wants the values to update a database. Here’s how she would set it up in PBRS.

Firstly, PBRS will expect the email text to be in the format `[Constant]:[Value]`. Here is how Mary will set up her email:

```
EmployeeID: xxxxx
EmployeeName: yyyyy
```
EmployeeStartDate:zzzzzzzz

As you can see, the required constant is on the left of the colon (:) and the required data is on the right.

To insert the data into her database, Mary uses an "Update a database" custom task as shown below:
She inserts Event-Based Constants, selecting a Custom Constant:

She types in the Custom Field Descriptor:

When she drags the Insert, "<e>Read my Email;To>" is placed in the field:
She clicks down arrow to add the statement to the list. And repeats the process for all the custom constants she will need to parse the email.

The above instruction tells PBRS to read the email body text and to place the value to the right of “EmployeeID:” in the database.

The colon (:) is only required in the email body. It is not used as part of the definition process above, but PBRS will automatically read the value to the left of the colon and apply the data to the right of the colon.
Get Values From Database Interface

The "Get Values From Database" interface helps you to connect to and build queries to extract the information you need from a database. It is used in various parts of PBRS where database information is needed.
• **DSN Name**: Drop down and select a DSN.

_We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off._

_All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility._

_When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions, which Windows places on DSNs._

_When using Windows Authentication, make sure that the PBRS NT Service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database._

_When setting up a DSN to a SQL server, you must ensure that the “Default Database” setting is set to the database you are connecting to (Windows defaults this to "Master")._

• **UserID**: Enter the User ID PBRS should use to log on to the database
• **Password**: Enter the password associated with the above user.
• Click **Connect** to connect to the data source.
• Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
Click **Parse**
- PBRS will display a list of results. Based on your Criteria PBRS will use the returned data to run the report.
• Click Yes

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condiments</td>
<td>Sweet and savory sauces, relishes, spreads, and seasonings</td>
</tr>
</tbody>
</table>
User Constants

User constants allow you to compose and create your own set of constants. This can be useful in reducing the amount of work you would need to do.

- Go to User Constants Data.

User constants allow you to compose and create your own set of constants. This can be useful in reducing the amount of work you would need to do.

- For example, if you have to use several constants to create a report name following a naming convention that is in use in your organization you can create a single User constant that combines these in the format you require and use this constant instead.

- The User Constants module is accessible from the Advanced Toolbar and from the New... drop down item for the @@User Defined Constants in the Insert Menu.

- This module allows you to create your own constants using your own formulas.

- You can use the Insert Menu to enter other constants such as the PBRS Constant for the CurrentDateTime above.

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From the initial screen, you can search and for an existing constant with the option to include the definition of the constant in the search. The matched constants are updated as you type.

Adding a New User Constants Data

- Click **Add**.

**Formula Name:** The name of the constant.
• **Definition:** The definition of the formula.
• Click **Test** and then click **OK**.

This will then be available for use under the @@User Defined Constants name in the Insert Menu.

**Remove a User Defined Constant**

1. Select the User Defined Constant.
2. Click **Remove**.
3. Click **OK**.
Inserting User Constants

- To insert a user constant, use the inserts feature where available. Select User Constants, then simply drag and drop your desired constant to the desired field.
Data Items

The Data Items button provides the ability to set up a number of data queries that PBRS will then store and allow you to call up for use when required.

- Go to Data Items.
Create a new Data Item

- Click **Add**.

- Enter a name for the new data item.
- Select a DSN, provide any necessary credentials and click **Connect**.
You will then be presented with the *Get Values from Database* module where you can build a query using the intuitive simple setup wizard, or paste in your own query in the *Query* field.
- Click **Parse**.

- Click **Yes**.
- Click OK.
Data Item

Data Item Name
Test1

DSN Name
SQL-RD Samples

UserID

Password

Query

```
SELECT DISTINCT Employees.EmployeeID FROM Employees
```
Options

- **Allow multiples values to be returned by query**: This option will separate different values.
- **Replace NULL values with the default value of (SSRS only)**: This option will pass multiple values into SSRS Parameters.
- **If no records found then returned the default value of**: This options is to write a description for the records that will appear in blank.
- **Field delimiter (optional)**: The fields will be surrounded with the special characters that you desired.

The Data Item is successfully created.
Edit a Data Item

- Select a data item and click **Edit**.
- You will be presented with the *Get Values from Database* module where you can modify the query using the intuitive simple setup wizard, or paste in your own query.
Data Item

Data Item Name
Test1

DSN Name
SQL-RD Samples

UserID

Password

Query

```
SELECT DISTINCT Employees.EmployeeID FROM Employees
```
Remove a Data Item

- Select a data item and click **Remove**.

Using Data Items

- With the Insert Menu, you can insert data items into various fields in PBRS.
- If you have several data items, you can use the search field to quickly locate the data item you need.
Custom Task

The Custom Tasks module allows you to write a series of automation actions (macros) which can be set to run before a report is run, after a report is run, or both. (Not applicable to Automation Schedules).

- In the Schedule Wizard, go to **Custom Task**.

- To manage each type of tasks:
  - General
  - Files & Folders
  - Internet
  - Database
  - Registry
General Tasks

- With General Tasks, you can perform basic tasks such as printing documents, waiting, or executing other schedules.

*Run Program/Open Document*

General

![Image of Open Document/Program dialog box]

- **Task Name**: Open Program
- **Program/Document Path**: C:\\WINNT\system32\not.exe
- **Working folder**: C:||Users||karen||Desktop
- **Optional Parameters**: Hello, your schedule has completed.
- **Window Style**: Normal
- **CPU Priority**: Normal
- **Wait for program to exit. Stop waiting for program exit after**: 300 seconds
- **Run As (Optional)**
  - **Domain\User Name**: [Redacted]
  - **Password**: [Redacted]
• Use this task to open a document or run a program or batch file.
  o **Task Name**: Enter a name for the task
  o **Program/Document Path**: Browse to find the path of the program or document
  o **Working Folder**: Browse to find the path of the working folder.
  o **Optional Parameter**: Enter any arguments or parameters
  o **Windows Style**: Choose from Normal, Minimized, Maximized or Hidden.
• You can further instruct PBRS to wait for the program to exit or to stop waiting for the program after a specified amount of time.

**Options**

![Options dialog box]

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Print Document**

**General**

![Print Task dialog box]
• Use this task to print documents to a specified printer.
  o **Task Name:** Enter a name for the task
  o **Printer Name:** Select a printer or print driver from the list.
  o Click (+) button to browse for files to add to the printing list.

**Printer Name:** Select a printer or print driver from the list.
**Files:** Use the (…) to browse for the file(s) to be printed
**Recursive:** Print all folder and/or documents in that path.

Options
- In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Wait/Pause**

**General**

![Pause Task Window]

- Use this task to create pauses between tasks to ensure that one task is fully complete before the next task in the list is started.
- **Task Name**: Enter a name for the task.
- **Pause Interval**: Select the pause interval to suit your requirements.

**Options**

![Options Window]

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Execute Schedule

General

This is a useful facility for "chaining" schedules together. Simply select the schedule you want to run from the list and click **OK**.

**Task Name:** Enter a name for the task.

Options

- After Successful Report Delivery
- After Successful Report Production
• In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Send SMS**

*General*

![Send Text Message](image)

- You can send SMS messages using this task. You will need to make sure your **SMS messaging configuration** in Options is functional.

*Options*

![Options](image)
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Create Exchange Appointment**

**General**

- **Task Name**: Create a meeting
- **Subject**: Monthly meeting
- **Location**: 
- **Attendees (if any)**: karen@christiansteven.com
- **Start Time**: 2018-08-15 14:00:00
- **End Time**: 2018-08-15 16:00:00

**Reminder**: 15 minutes before event

**Files (if Any)**: C:\Users\karen\Desktop\RANDOM\fifa-world-cup\WorldCups.csv

- Use this task to send a meeting request to one person or a group of people.
- **Task Name**: Give the task a name.
- **Subject**: Give the meeting request a title.
- **Location**: Where is the meeting going to be.
- **Attendees**: Enter the email address of required attendees, use inserts to enter email addresses or click on Attendees to bring up different Address book options.
- **Start Time**: Start time of the meeting.
- **End Time**: End time of the meeting.
- **All Day Event**: Check this if the meeting is to last all day.
- **Blank Space**: Free type any additional information about the meeting here. You can use inserts to help compose the meeting request.
- **Reminder**: Set a meeting reminder.
- **Importance**: Set an importance level to the meeting if required.
- **Files**: Attach any files required for the meeting here, this may be reports etc.

**Exchange Details**

- You have the option to use the same email address as the one who is connected to the PBRS.
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Refresh PowerBI Datasets**

**General**

- Use this task to refresh your Power BI Dataset after executing your report.
- **Task Name**: Enter a name for the task.
• **Power BI Account:** Select the account to refresh datasets.
• **Workspace:** The path to the required report.
• **Dataset:** Select the dataset.
• **Notification Options:** Receive a notification after the report is executed, the report failed to execute, or do not receive a notification.
• **After refreshing the datasets above, wait 'X' seconds before running the report.**

Options

![Options](image)

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
File & Folders Tasks

With these tasks you can automatically move and delete files, merge PDF or Excel files, even upload files to SharePoint.
Copy File

General

- Use this task to copy one or more files from one location to another.
- **Task Name:** Enter a name for the task.
- **Files:** Click (+) to browse and select files.
- **Destination Folder:** Browse to select the destination folder.

*Tip: You can use Insert Menu to dynamically choose the destination folder.*

- **Replace existing files at destination:** Check this option if the file being copied is to replace an existing file at the specified destination.
- **Task Name**: Enter a name for the task.
- **Files**: Use (...) to browse and select files.
- **Recursive**: Copy all folder and/or documents in that path.
- **Recreate Folder Structure**: Recreate the folder structure.
- **Destination Folder**: Browse to select the destination folder.

  *Tip: You can use Insert Menu to dynamically choose the destination folder.*

- **Replace existing files at destination**: Check this option if the file being copied is to replace an existing file at the specified destination.

Options
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Rename/Move File**

**General**

- Use this task to move a file. Keep the old name, or rename it by simply typing in a new name. Check to overwrite existing.

**Task Name:** Give the task a name

**Original File Name:** Use (...) to browse to the file that needs to be moved or renamed

**New File Name:** Use (...) to navigate to the location where the new file will be moved to. Here is where you would also enter the new name for the file.

*Tip: Use Insert Menu to rename the file or navigate to a folder destination*

**Overwrite Existing:** Check this option if the new file is going to overwrite an existing file at the specified location.

**Options**
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Delete Files**

**General**

- Use this task to delete old files. This may be used as an alternative to folder housekeeping.

**Task Name**: Give the task a name.

**Files**: Use (+) button to navigate to the required file.

*Tip: You can use Insert Menu for the file name if required.*
• **Task Name:** Give the task a name.
• **Files:** Use (...) button to navigate to the required file.

*Tip: You can use *Insert Menu* for the file name if required.*

• **Recursive:** Delete all folder and/or documents in that path.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Write Text File

General

- Use this task to create or write to existing text files, or append information and create your own log file.

- **Task Name**: Give the task a name.
- **File Name**: Use (...) button to navigate to the file that is going to be written to.
- **Text**: Create the text that you want to write to the desired file.

  *Tip: Use Insert Menu to insert constants or database values.*

- If the File exists…
  - **Overwrite**: If this option is selected then the desired file will be overwritten with the text file and content above.
  - **Append**: Select this option to add the text to an existing file.
In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Folder Housekeeping

General

Local Directory

- Use this task to regularly clear our folders. Sometimes folders used for report outputs can get very large.
- **Task Name:** Give the task a name.
- **Local Directory:** Use (...) to navigate to the folder containing the files that need to be purged.
- **Delete files older than:** Select the desire file life span that will be deleted.
- **Include Subfolders:** Clean any subfolders that contain files older than the specified amount of time.
Remote (FTP) Directory

- **Task Name**: Give the task a name.
- **FTP Server**: Enter your FTP Server details and authentication credentials.
- **Remote Directory**: Browse or enter the folder path for the directory that will be purged.
- **Delete files older than**: Select the desire file life span that will be deleted.
- **Include Subfolders**: Clean any subfolders that contain files older than the specified amount of time.
- You can set Certificate Settings where applicable.
• You can also set Proxy Server details where required. Please make sure to contact your Network Administrator to verify if these are needed.

For more on Folder Housekeeping, click here.

Create Folder

General

• Use this task to create a new folder. Simply browse for the parent folder, and then tell PBRS what the new folder name should be.

![Create Folder dialog box](image)

• **Task Name**: Give the task a name.
• **Parent Folder**: Use (...) button to browse to the parent folder.
• **Folder Name**: Enter the name of the new folder that will be created.

Options

![Options dialog box](image)
• In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Rename/Move Folder**

General

![Rename/Move Folder General](image)

- **Task Name:** Give the task a name.
- **Move**: Click this option to move the folder.
- **Rename**: Click this option to rename a folder.
- **Select Folder**: Use (...) button to browse to the folder you want to move.
- **Destination Folder**: Use (...) button to browse to the location of the new folder.
- **New Name**: Type the new name for the folder.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Zip Files

General

Simple

- Use this option if you need to zip single files from multiple locations.

- **Task Name:** Give the task a name.
- **Files:** Use (+) button to select the required files. You can either select a file or specify a path including wildcards e.g. *.* to select all files.
- **Output Zip File:** Give the outputted zip file a name.

  *Tip: Use Insert Menu in the file name*

- **Zip File Encryption:** Enter the desired Encryption details.
Advanced

- Use this option if you need to zip files in the same folder.

- **Task Name**: Give the task a name.
- **Files**: Use (+) button to select the required files. You can either select a file or specify a path including wildcards e.g. ".*" to select all files.
- **Recursive**: This will search the folder and all sub folders.
- **Maintain Folder Structure**: Select this to ensure files of the same name are not overwritten and have the folder structure maintained. This is useful when using wildcards.
- **Output Zip File**: Give the outputted zip file a name.

  *Tip: Use Insert Menu in the file name.*

- **Zip File Encryption**: Enter the desired Encryption details.
Options

In this section, you have the option to run this task before, after or you can choose both the schedules executes.

Unzip File

Use this task to unzip a selected zip file to a specified folder.

- **Task Name**: Give the task a name.
- **Select Zipped File**: Use (...) button to select the required zip file that is to be extracted out.
• **Password**: If your file requires a password enter it here. If your .zip file requires a password, you can enter the password into the Password field.

• **Destination Folder**: Use (...) button to navigate to the required folder where the extracted files will be stored.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**Merge PDF Files**

**General**

- Use this task to merge PDF files. You can select individual PDF files or a folder containing multiple PDF files.
- **Task Name**: Give the task a name.
- **Merge Multiple Files/Folders**: Select this option to merge files located in different folders.
- **Merge all files in a single folder**: Use this option to merge all files stored in the same folder.
- **Destination File**: Select a destination file that the merged file will be saved to.
- **Replace existing files at destination**: Check this option will delete any existing files at the specified location and replace them with these ones.
PDF Security

- **Enable PDF Options**: Check this option to be able to set Passwords and user permissions.
- **Include the following watermark**: Type the required watermark here, for example: confidential.
- **PDF File Summary:** Any information written here will overwrite the existing file summary
• In this section, you have the option to run this task before, after or you can choose both the schedules executes.

*Manipulate PDF*

General

• Use this task to change the PDF Security and File Summary of a PDF file.

PDF Security
- **Task Name**: Give the task a name.
- **PDF File**: Use (…) button to browse to the PDF file that you want to manipulate.
- **Enable PDF Options**: Check this option to be able to set Passwords and user permissions.
- **Include the following watermark**: Type the required watermark here, for example: confidential.

File Summary
- **PDF File Summary**: Any information written here will overwrite the existing file summary.
- **Task Name:** Give the task a name.
- **Save File As:** Use (...) button to navigate to the folder where the workbook will be stored.
- **Replace if File exists:** Check this option if this workbook is going to be replacing one that already exists.
- **Edit:** Edit a Data set for a workbook.
- **Delete:** Deletes a data set from the workbook.
- **Add a Database:**
  - Click Add.
- Click **OK**.
- Name the Data set.

![Database connection setup](image)

- Use the Query Tool to pull the data from your data source.
- Click **Parse** to review your query results.
Click **Yes**.
- Continue to add data sets until you have completed your workbook.

**Options**

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
• With this task, you can merge multiple Excel files into a single workbook.
• **Add Files:** Use (+) button to add Excel files that need to be merged.
• **Delete Files:** Use (X) button to remove any Excel files that you don’t want to be merged.
• **Destination File:** Use (…) button to browse to the destination folder where the merged files will be stored.
• **Replace existing files at destination:** Check this option to replace the file at the destination if it already exists.
- **Password Protect Workbook**: Check this option to enable a password field.
- **Owner Password**: Enter a password for the Excel file.
- **Excel File Summary**: Any information written here will overwrite the existing Excel File Summary.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**Manipulate Excel**

**General**

- Use this task to edit the file security and the file summary of an excel file.

**Excel Security**

- **Password**: Enter a Password for the Excel File.
- **Read Only**: Check this option if the Excel file will be read only.
File Summary

- **File Summary**: Any information written here will overwrite the existing file summary of the excel file.

Options
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Upload to SharePoint**

**General**

- **Task Name**: give the task a name.
- **Files**: Use (...) button to navigate to the files that you want to export to the SharePoint Server.
- **SharePoint Server Library**: It will appear the SharePoint Site.
- **SharePoint hosted on Office 365**: Check this option if the SharePoint Server is hosted on office 365.
- **Document Library**: Use (...) button to open the SharePoint Connection Window.
- **SharePoint Server Browser**: Complete the SharePoint Information and navigate to the required Document library.
- **Metadata**: File Metadata Can be uploaded as well. Simply add the column names and values as needed.
• In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Internet Tasks

- The internet module enables you to automate web related tasks. Auto Downloading links, uploading files via FTP, and sending emails can be accomplished here.
Send Email

Task Name: Give the task a name.

To, CC, and BCC:
Choose from:
- **MAPI (Outlook) address book (Only available if you are using MAPI):** Select one or more email addresses or groups.
- **PBRS Address Book:** Select one or more email addresses or groups.
- **Database Source:** Build a SQL query to pick the email address or addresses from a database.
- **Text File:** Store your email addresses as a standard mailing list in a text file (Format: no delimiters, each email address on a new line)
- **Constants**
- **Or simply type in the email address.**

You can use [Inserts Menu] at any time if required.

- **Subject:** Enter a subject Or right-click and select Insert to insert constants, database values and defaults. For more information on Insert function, click here.
- **Attach:** Click to select an attachment. Or right-click and select Insert to insert constants, database values and defaults. For more information on Insert function, click here.

*Hint: Web addresses can be attached as well.*

- **Body:** Type in your email. Or right-click and select Insert to insert constants, database values and email defaults. For more information on Insert function, click here.
- **Mail Format:** Choose from HTML or Text.
  - **Text Format:** In this format it will be just plain message.
• **HTML Format:** In this format, you can format the message.
- You can enter HTML tags by click the HTML icon.
- **Body Style (CSS):** If you want to specify the format that you want, click CSS and you may choose the type of format and change setting accordingly.

![Style Builder](image-url)
Options

In this section, you have the option to run this task before, after or you can choose both the schedules executes.

Open Web Address

General

- Use this task to open a web page.
- **Task Name**: Give the task a name.
- **Web Address**: Enter the Web address of the website that you want to open.

*Tip: If you are not sure the full address, click the browse button. This will start your web browser. Navigate to the page you wish. Exit your browser and the page name will populate the field automatically.*
• **Download file at URL:** Use this option to download a file from a website instead of opening a web page.

Options

![Options](image)

• In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**FTP**

- Use these options to upload and download files from the FTP server. Other options available here are to create directories and delete directories.

*FTP - Upload File(s)*

**General**

**Simple**

![FTP Upload files dialog box](image)

- **Task Name**: Give the task a name.
- Use (+) button to add files you would like to upload.
- **FTP Server**: Enter your FTP Credentials.
- **FTP Directory**: Click the browse button to connect to the server, navigate to the folder you wish to upload the files to.

Advanced

- Use the Advanced view to use wildcards when selecting file(s) to be uploaded.
- **Files**: Use the browse button to add files you would like to upload.
- **Recursive**: This will search the folder and all sub folders.
- **Maintain Folder Structure**: Select this to ensure files of the same name are not overwritten and have the folder structure maintained. This is useful when using wildcards
- **FTP Server**: Enter your FTP Credentials.
- **FTP Directory**: Click the browse button to connect to the server, navigate to the folder you wish to upload the files to.
Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**FTP Download File**

General

- **Task Name**: Give the task a name
- **FTP Server**: Enter your FTP Credentials.
- **FTP Path**: Click the browse button to select the FTP path.
- **Selected File**: Select a file or folder or use wildcards to select the files to download.
- **Recursive**: This will search the folder and all sub folders.
- **Maintain Folder Structure**: Select this to ensure files of the same name are not overwritten and have the folder structure maintained. This is useful when using wildcards
- **FTP Directory**: Click the browse button to connect to the server, navigate to the folder you wish to upload the files to.
• **Download to this folder:** Specify which folder the files should be downloaded to.

Options

![Options](image)

• In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Delete FTP File

General

Use this task to delete a file on an FTP server.

- **Task Name:** Give the task a name.
- **FTP Server:** Enter your FTP Credentials.
- **Retry uploading if the transaction fails:** this option will retry uploading if the transaction fails automatically.
- **FTP File Path:** Use (...) button to navigate to the files that you want to be deleted.

*Tip: You can right click and insert Constants and database values. You may also use wildcards e.g. my*abc*. When doing this please remember that most FTP server are case sensitive.*

Options
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**FTP Create Directory**

**General**

![FTP Create Directory dialog box](image)

- Use this task to create a folder on an FTP server.
- **Task Name**: Give the task a name.
- **FTP Server**: Enter your FTP Credentials.
- **Retry uploading if the transaction fails**: This option will retry uploading if the transaction fails automatically.
- **Base FTP Directory**: Use (...) button to locate the base FTP Directory.

*Tip: Leave this empty to select the root directory.*

- **New Directory Name**: Specify the name of the directory to create.
In this section, you have the option to run this task before, after or you can choose both the schedules executes.
FTP - Delete Directory

General

- Use this task to delete a directory on an FTP server.
- **Task Name:** Give the task a name.
- **FTP Server:** Enter your FTP Credentials.
- **Retry uploading if the transaction fails:** This option will retry uploading if the transaction fails automatically.
- **Delete this Directory:** Specify the name of the directory to delete.

Options
• In this section, you have the option to run this task before, after or you can choose both the schedules executes.

Database Tasks

• One of the most powerful features in PBRS, The Database module forms a core part of PBRS's Data integration capabilities.
• With the ability to automatically update databases, create tables, and edit records, you can automate thousands of database processes.

*Tip: Combine the Database Tasks with the Event Based Schedule to create database alerts and data migration processes.*

*IMPORTANT: These tasks will make modifications to database tables which, in some cases, may be irreversible. Please ensure that you review the resulting scripts and test them thoroughly on a Test system before committing them to your production (live) system.*

*Make sure you take a full backup of your database before any testing.*
**General**

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*
When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID:** Enter the User ID PBRS should use to log on to the database.
- **Password:** Enter the password associated with the above user.
- **Connect:** Click Connect to connect to the Database.
- **Script Location:** Browse to locate the script.
- **Click OK** to save the script.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**Execute an SSIS Package**

General

SQL Server

*IMPORTANT: PBRS requires SQL Server Integration Services Standard or Enterprise X86 (32bit) installed on the PBRS server. ***64bit is not supported***

- **Task Name**: Give the task a name.
- **SQL Server**: Enter the SQL Server credentials.
- **Package Name**: Select the package from the drop down list.
- **Click OK** to save.

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DTS Server

- **DTS Server**: Enter the DTS Server credentials.
- **Package Path**: Write down the package location.
- **Package Name**: Select the package from the drop down list.
- Click **OK** to save.
Local File

- **Package Path**: Click (...) to search the package location.
- **Package Name**: Select the package from the drop down list.
- Click OK to save.
Variables

- Add and delete variables for the SSIS package.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Update a record

General

- **ODBC Datasource Name**: Drop down and select a DSN.

  We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off. All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.

  When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

  When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").
• **UserID**: Enter the User ID PBRS should use to log on to the database.
• **Password**: Enter the password associated with the above user.
• **Connect**: Click Connect to connect to the Database.
• Click **green arrow** to continue.

![Update database records](image)

- **Table**: Select the table containing the record you wish to update.
- **Update this column**: Select the Column you wish to update.
- **Set its value to**: Enter the new value.

*Tip: Use Event or Data Driven data to update multiple records in the table. It is as easy as drag and drop!*

- Click **green down arrow** to add the change.
- Click **green right arrow** to continue.
• Review the completed script and make any modifications manually where required.
• Click **OK** to save the task.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
• **ODBC Datasource Name**: Drop down and select a DSN.

  We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.

  All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility. When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions, which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

  When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").
- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Click **green arrow** to continue.

### Insert a database record

**Task Name**: Insert a Database Record

**General**

### Table to insert into

- **Employees**

**Set this column's value**

<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmployeeID</td>
<td>3</td>
</tr>
</tbody>
</table>

**Column**

- **HireDate**: 11/15/1994 12:00:00 AM
- **LastName**: Davolio
- **FirstName**: Anne
- **EmployeeID**: 3

### Click **green down arrow** to add to the list.

### Click **green right arrow** to continue.

- **Table**: Select the table to insert the record.
- **Column Value**: Select a column.
- **Value**: Provide a value.
- Click **green down arrow** to add to the list.
- Click **green right arrow** to continue.
• Review the SQL statement and make modifications manually where required.
• Click OK to save the task.
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Delete a record**

General

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off. All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*
When setting up a DSN to a SQL server, you must ensure that the “Default Database” setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- **Click green arrow** to continue.

**Table**: Select the table to insert the record.
- **Column Value**: Select a column.
- **Value**: Provide a value.
- **Click green down arrow** to add to the list.
- **Click green right arrow** to continue.
• Review the SQL statement and make modifications manually where required.
• Click OK to save the task.

Options

• In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Run a stored procedure

General

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off. All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*
When setting up a DSN to a SQL server, you must ensure that the “Default Database” setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Select a Stored Procedure from the list and enter any required parameters.

  For example, if you would normally run your stored procedure by using the query
  
  `execute myproc para1 para2 para3`
  
  then

  Connect to the database and select “myproc” from the list.
  Enter in the parameters box: para1 para2 para3

- Click **OK** to save.

**Options**

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**Export data to a report**

**General**

With this task, you can pull data directly from a data source and in any output format, then deliver the report to a destination.

**Data Source**

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password*
are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Build your query using the Query Tool.
- **Parse:** Test the Query.

Destination

- Go to the Destination Tab. There you can add a destination for the report.
- For more information of Destination, click here.
- For more information of Output Formats, click here.
In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**Task Name:** Give the task a name.
**SQL-Server Connection properties:** Enter the SQL Server credentials.
**Table:** Select the table from the drop down list.
**Column:** Select the column.
**Value:** Set the value of the column.
Use (+) to add more columns a values as required.
Click OK to save.
Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Get BLOB from SQL Server

General

Download From SQL Server

Task Name

General Options

SQL Server Connection Properties

Server Name: autoserver2012
User Name: heat

Database
Password: ********

Connect

Select the table and column where the file is stored

Table: TeamBase
Column

Select the record where

Simple Advanced

Name = John
AND

File location

Select where the file should be saved

File path

OK Cancel
### Download From SQL Server

- **Task Name**: Give the task a name.
- **SQL-Server Connection properties**: Enter the SQL Server credentials.
- **Table**: Select the table from the drop down list.

#### General

<table>
<thead>
<tr>
<th>Server Name</th>
<th>Database</th>
</tr>
</thead>
<tbody>
<tr>
<td>autoserver2012</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>heat</td>
<td></td>
</tr>
</tbody>
</table>

#### SQL Server Connection Properties

- **Connect**

#### Data

- **Table**
  - TeamBase
- **Column**

- **Simple**

#### Simple SQL

```sql
SELECT [TeamBase].[] FROM TeamBase WHERE Name = 'John'
```

#### File location

- **File path**
  - ...

#### Options

- Parse

**OK**  **Cancel**
• **Column**: Select the column.
• **Records**: Define which records are to be downloaded from the table using a SQL Query.
• **Parse**: Test the query, ensure the correct data is being shown.
• **File path**: Use (...) button to navigate to the folder where the data is to be stored.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
**Table**

*Create a table*

**General**

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*
When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Click **green arrow** to continue.

![Create a new table dialog box](image)

- **Table Name**: Give the new table a name.
- **Column Name**: Give the column a name.
- **Column Type**: What type of data will be written in the column.
- **Column Size**: How many character allowed in column.
- Click **down arrow** to save the column information. Continue adding as many columns as required.
- Review the final script and make manual adjustments if required.
- Click OK to continue.

Options
• In this section, you have the option to run this task before, after or you can choose both the schedules executes.

Delete a table

General

• **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off. All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*

  *When setting up a DSN to a SQL server, you must ensure that the “Default Database” setting is set to the database you are connecting to (Windows defaults this to “Master”).*
- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- **Table Name**: Select the table you wish to delete from the list.
- **Click OK** to save.

*Important* This operation CANNOT be undone. Be sure of your settings before you commit to this task. It is highly recommended that you backup up database as well.

**Options**

In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Add column to table

General

- **ODBC Datasource Name**: Drop down and select a DSN.

  We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.

  All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.

  When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

  When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.

- **Password**: Enter the password associated with the above user.

- **Connect**: Click Connect to connect to the Database.
- Click **green arrow** to continue.

![Modify Table](image)

- **Task Name**: Give the task a name.
- **Table to Modify**: Select the Table that you need to modify.
- **How to modify the Table**: Select **ADD COLUMN**.
- **Column Name**: Give the column a name.
- **Type**: Select the type of data that will be written in the column.
- **Size**: How many characters should be allowed in the column.
- Click **green arrow** to continue.
- Review the script and make modifications manually if required.
- Click OK to save.

Options
In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Delete column from table**

**General**

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off. All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*

  *When setting up a DSN to a SQL server, you must ensure that the “Default Database” setting is set to the database you are connecting to (Windows defaults this to “Master”).*
- **UserID:** Enter the User ID PBRS should use to log on to the database.
- **Password:** Enter the password associated with the above user.
- **Connect:** Click Connect to connect to the Database.
- Click **green arrow** to continue.

![Modify Table Image]

- **Task Name:** Give the task a name.
- **Table to Modify:** Select the Table that you need to modify.
- **How to modify the Table:** Select DROP COLUMN.
- **Column Name:** Select the column that needs to be deleted.
- **Type:** This will be greyed out.
- **Size:** This will be greyed out.
- Click **green arrow** to continue.
• Review the script and make modifications manually if required.
• Click OK to save.

Options

• In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Registry Tasks

- Registry Tasks enable you to create registry keys, set values, and more. This a powerful module and only those knowledgeable of windows and their systems should use this functionality.

Set Value

General

- **Task Name**: Give the Task a name.
- **Registry Key**: Select the registry key from the drop down menu.
- **Registry Value**: Enter the new value.
- Click **OK** to save.
Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.

**Delete Key**

**General**

```
Delete Registry Key
```

Please select the parent key

```
My Computer
  - HKEY_LOCAL_MACHINE
    - BCD00000000
    - HARDWARE
    - SAM
    - SECURITY
    - SOFTWARE
    - SYSTEM
    - HKEY_CURRENT_USER

HKEY_LOCAL_MACHINE
```

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• **Task Name**: Give the Task a name.
• **General**: navigate to the key that needs to be deleted.
• Click **OK** to save.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.

*Create Key*

**General**

![Create Registry Key window](image)
- **Task Name**: Give the Task a name
- Navigate to the base key you would like to add a sub-key to.
- **New Key Name**: Enter the name for the new key
- Click **OK** when you are done.

*Hint:* To create a new key and assign it a value, you must first create the key, then use the Set Value task to set the value for this new key.

Options

- In this section, you have the option to run this task before, after or you can choose both the schedules executes.
Destinations

The Destinations tab allows you to determine where you would like your SSRS and Power BI reports to be delivered.

- In the Schedule Wizard, go to **Destinations**.
• **Add**: Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, Sharepoint, SMS, and Dropbox.

![Add options](image)

• **Edit**: Select a destination and click to edit its properties. Or simply double-click on the destination.

• **Delete**: Select a destination and click this button to delete it.

• **Import**: Click here to import from the list of default destinations.

Types of Destination

To manage each Destination:

- Email
- Disk
- Fax
- Slack
- Google Sheets
- FTP
- Printer
- SharePoint
- SMS
- Dropbox
Email Destination

Using the Email Destination, you can send SSRS & Power BI reports embedded in emails; or send emails in HTML or plain text with reports as attachments. You can use Inserts to customize the message body, use mailing lists & much more.
Email

To, CC, and BCC:
Choose from:
- **MAPI (Outlook) address book (Only available if you are using MAPI)**: Select one or more email addresses or groups.
- **PBRS Address Book**: Select one or more email addresses or groups.
- **Database Source**: Build a SQL query to pick the email address or addresses from a database.
- **Text File**: Store your email addresses as a standard mailing list in a text file (Format: no delimiters, each email address on a new line)
- **Constants**
- Or simply type in the email address.

You can use "Inserts" at any time if required.

**Subject**: Enter a subject or right-click and select Insert to insert constants, database values and defaults. For more information on Insert function.

**Attach**: Click to select an attachment. Or right-click and select Insert to insert constants, database values and defaults. For more information on Insert function, click here.

*Hint: Web addresses can be attached as well.*

**Body**: Type in your email. Or right-click and select Insert to insert constants, database values and email defaults. For more information on Insert function.

**Mail Format**: Choose from HTML or Text.
- **Text Format**: In this format it will be just plain message.
Hello,


• **HTML Format:** In this format, you can format the message.

Hello,


• You can enter HTML tags by click the HTML icon.

• **Body Style (CSS):** If you want to specify the format that you want, click CSS and you may choose the type of format and change setting accordingly.
Embed Report: Check this option to embed the report into the email body. When using MAPI messaging you can only embed reports in Text format. To embed reports in HTML format you will need to change your messaging type to SMTP.
- You can click (...) button to edit the output format options as required.
- By default, if a report is embedded in the email body, there will be no attachment.
- If you are uncertain whether the recipient can read html formatted mails, you can click Include Attachment so that the recipient receives an additional attachment of the same report in any other format e.g. a PDF, word document, etc.

Mail Server: This can be changed if the email is to be sent from a different server than the default one that was originally set up.

Delivery receipt: Check this option if a delivery receipt is required. Use it if you require Custom Actions to be used once a receipt has been/has not been received.

Customize Sender Details: This is where the name of the sender and the sender email may be changed. For example, it could be set to Donotreply@mycompany.com.
- For information on format tab, click here.
Disk Destination

The Disk Destination allows you to send exports of SSRS & Power BI reports directly to local or network folders.

- **Destination Name**: Give the destination a name.
- **Connect using dial-up networking**: Select this option if you wish to connect to the destination network using Dial-Up Networking or RAS. Select an already existing connection from your existing Windows connections list.
- **Destination Directory**: Browse to select a folder, or type in a path.
- **Enable Housekeeping for this destination**: Check this option if you want to delete reports on a regular basis, which are older than a specified date.
- **Insert**: You can insert constants, formulas and database field values instead of a static "typed in" value.
  - Right-click in the above field to expose the Inserts menu.

  - For information on format tab, [click here](#).
Fax Destination
Automatically FAX your SSRS & Power BI reports.

- **Destination Name**: Give the destination a name.
- **Fax No**: Click to select a FAX number from the address book, or type one in the space provided.
• **Cover Page:** Enter details as required.

  *In order to send a FAX, PBRS requires a V90 Voice Fax Modem installed.*

• You can use [Insert Menu](#) in the fax destination as well. It can be used to customize the cover page for each recipient in Data-driven Schedule. Time, date, and user constants can be inserted as well.
Slack Destination

The Slack Destination allows you to send exports of SSRS & Power BI reports directly to your slack account and deliver to different channels.
- **Slack Account**: Select the account to export the report.
  - If there's no account added, select **Add New Account**.
    
    *For more information about adding a Slack account, [click here](#).*

- **Comment**: You can write down a message.
  
  *You can use "Inserts" at any time if required. For more information about Inserts, [click here](#).*

- **Deliver these Channels**: Select the Channels you want to deliver the report. You may choose more than one channel.
Google Sheets

Using the Google Sheets you can export SSRS & Power BI reports directly to Google Sheets.
• Google Sheets allows you to send the report via Google Sheets which can be accessed on any machine with the user credentials.

• **Google Sheets Account**: Select the account.
  - If there’s no account added, click **Add New Account**.

  *For more information about adding a Google Sheets account, click here.*
Output Format

The only output format available in Google Sheets destination is Google Sheets.

To add visual data click Add.
• **Visual Title:** Select the Visual data's titles you want to export.

  *In order for PBRS to see a Visual, the Visual MUST have a title already set in Power BI and SSRS.*

• **Data Export Type**  
  o **Summarized data:** Select this option if you want to export data for what you see in that visual.  
  o **Underlying data:** Select this option if you want to see the data in the visual and additional data from the model.

  *For more a more detailed explanation of the Data Export Types, click here.*

• **Click OK.**
FTP Destination

Deliver your Power BI reports to FTP & Secure FTP directories.

[Image of FTP Destination settings dialog box]

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FTP

General

- **Destination Name**: Give the destination a name.
- **FTP Server**: Type in the FTP server address.
- **FTP Username**: Type in the FTP server user name.
- **FTP Password**: Type in the FTP password.
- **FTP Type**: There are several types of FTP that are supported.

You can also choose whether to use passive or active mode FTP sessions.

- **Remote Directory**: Enter the directory, or leave blank for the root directory
- **Verify**: Click **Verify** to test your connection.

Certificate

You can set Certificate Settings where applicable.
Proxy Server

- You can also set Proxy Server details where required. Please make sure to contact your Network Administrator to verify if these are needed.
  - For information on format tab, click here.
Print your SSRS & Power BI reports automatically to local or remote printers.

- You can schedule a report to export to a printer or any other print drivers you have installed on the PC e.g. FAX print drivers.
- **Destination Name**: Give the destination a name.
• **Select Printers**: Select a printer from the dropdown list. Click **arrow down button** to add to the list.

![Select Printers]

- Click **OK** when completed.
SharePoint Destination

Deliver your SSRS & Power BI reports directly to SharePoint libraries and folders.

- Exporting to SharePoint allows you to deliver report output to a SharePoint Library.
- You can also select a configured location and click the Edit or Remove to edit or remove the destination respectively.
- Click the **Add** to specify a location to export to.

**SharePoint Site**: Enter the path for your SharePoint Site.

**Domain/Username**: Enter the Domain and username required to connect to the site.

**Password**: Enter the password for the username specified above.

Click **Connect** to connect to the site, once connected you can browse and select the SharePoint Library and path to export to.

Click **OK** to save the destination.
For information on format tab, click here.
SMS Destination

Cell Phone Text, or SMS, allows you to send a short SSRS or Power BI report as an informative alert.

- **Destination Name**: Give the destination a name.
• **To:** Click to select a Cell Phone number from the address book, or type one in the space provided.

• **Cover Page:** Enter a short introductory message (if required).

• Please see [SMS Configuration](#) for setting up the SMS destination.
  - For information on format tab, [click here](#).
Dropbox Destination

The Dropbox Destination allows you to deliver your SSRS & Power BI reports to a dropbox folder. Use in conjunction with the Email Custom Task to send the URL to the file to a recipient.

![Dropbox Destination screenshot](image)
• Dropbox allows you to send the report via Dropbox which can be accessed on any server with the user credentials.
• A Dropbox account must be set up in Options settings at Cloud Storage section before using as a destination.
• Select the Account name.
• Click (...) to search the folder.

- Click OK.
For information on format tab, click here.
Output Formats

Reports may be exported to the following formats. Some formats have advanced options to help provide richer functionality and greater customization of the exported report.

- Go to Destination

- Select the type of destination.
- Select Format.
<table>
<thead>
<tr>
<th>Format Options</th>
<th>Options</th>
<th>File Summary</th>
</tr>
</thead>
</table>

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To manage each section:

For Power BI:

- PDF
- Epub
- HTML
- JPG
- MS Excel – Data Only
- MS Excel
- CSV
- MS Word (.doc)
- MS Word (.docx)
- PNG
- PowerPoint
For SSRS:

- PDF
- CSV
- Custom
- Data Interchange Format
- dBase II
- dBase III
- dBase IV
- HTML
- Lotus 1-2-3 (wk1)
- Lotus 1-2-3 (wk3)
- Lotus 1-2-3 (wk 4)
- Lotus 1-2-3 (wks)
- MS Excel 2007
- MS Excel 97 - 2000
- MS Word - Text
- MS Word
- MS Word 2007
- Rich Text Format
- Text
- Tiff
- Web Archive
- XML
Acrobat Format (*.pdf) outputs for Power BI & SSRS

Export Power BI & SSRS reports to PDF & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations. PBRS lets you customize them before delivery. Here's how.

- To export to Acrobat Format (*.pdf) in Power BI and SSRS follow the following steps:

![Image of PDF export settings](image)

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

**Format Options**

PBRS can export your report in PDF Format. Additionally, you can customize your PDF output by using the options below.

- **Enable PDF options:** You can enable extra PDF options. If you choose not to use the options, a standard pdf file will be exported.
- **File Permissions:** Enter passwords and select the options you require. Files will be encrypted using pdf 128 Bit encryption. The resulting files can only be opened with versions of Acrobat which can handle this level of encryption e.g. Acrobat 6 and above.
- **Include the following watermark/stamp:** You can include a watermark or stamp to be inserted in the PDF document. Click (...) button for more options.
Your Watermark can be a graphic such as a corporate logo.
Options

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
CSV (*.csv) outputs in Power BI

To export CSV outputs in Power BI, follow these steps:

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*
CSV exports data from specified visuals to CSV file.

- To add visual data click **Add**.

### Format Options

![Format Options](image)

Add the visual(s) whose data you would like to export. Each visual's data will be exported to an individual CSV file.

<table>
<thead>
<tr>
<th>Page</th>
<th>Visual Title</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Visual Title**: Select the Visual data's titles you want to export.

![Visual Title](image)

- **Data Export Type**
  - **Summarized data**: Select this option if you want to export data for what you see in that visual.
  - **Underlying data**: Select this option if you want to see the data in the visual and additional data from the model.

For more a more detailed explanation of the Data Export Types, click **here**.
• Click OK.

CSV Options

- You can enter any character or use tab as separator.
- You can enter any character as Delimiter.

Options

- Append to existing file: Determine whether to append to a file if one already exists at the disk destination.

File Summary
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
• **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.

• **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.

• **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.

**Misc**

- **Compress (ZIP) Output:** Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption:** Check the option to encrypt and password protect the zip file.
- **Defer Delivery:** The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to [Deferred Delivery](#)
CSV (*.csv) outputs in SSRS

To export CSV outputs in SSRS, follow these steps:

- You can enter any character or tab as separator.
- You can enter any character as Delimiter.

**Format**

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

**Format Option**

- **Export Engine**: You can choose between Standard and Excel.

**Options**

- **Export Page Ranges**: You can choose All Pages or specify a Page Range. The From and To fields allow you to specify the range of pages to export.
- **Append to existing file**: You can choose to append to a file if one already exists (disk destination).
• **Append to existing file:** Determine whether to append to a file if one already exists at
  the disk destination.

---

**File Summary**

<table>
<thead>
<tr>
<th>Format Options</th>
<th>Options</th>
<th>File Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Producer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td>Tuesday, August 7, 2018</td>
<td></td>
</tr>
<tr>
<td>Keywords/Comments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PDF Expiry Date</td>
<td>Tuesday, August 7, 2018</td>
<td></td>
</tr>
<tr>
<td>PDF Expiry Message</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Naming

These options determine how the exported file will be named:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: `reportname.format extension`, e.g. `Catalog Report.pdf`.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
Custom (*.*) outputs in SSRS

Export SSRS reports to custom format & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

- To export Custom outputs in SSRS, follow these steps:

  Format
  
  The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

  Format Option
  
  - Custom Rendering Extension Name (e.g PDF, TXT): Choose any extension name you want to export the report.

  Option
  
  - Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
EPUB (*.epub) outputs in Power BI

EPUB is an e-book file format. EPUB files can be read on smartphones, tablets etc. Export Power BI reports to EPUB & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

Format

*The output format is selected as part of the Destinations setup for each destination type.*
*The tab above can be found in the Destinations section of a schedule.*

Options

- Use this option to select to export all pages or just a selection.
- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be named:

- **Default Naming Convention**: PBRS will name the output file in the following format: `reportname.format extension`, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
To export Power BI reports to MS Excel - Data Only, follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

- MS Excel - Data Only exports data from specified visuals to Excel.
- To add visual data click Add.
• **Visual Title**: Select the Visual data's titles you want to export.

  ![Visual Title dropdown menu](image)

  *In order for PBRS to see a Visual (for exporting to CSV or Excel), the Visual MUST have a title already set in Power BI.*

• **Data Export Type**
  - *Summarized data*: Select this option if you want to export data for what you see in that visual.
  - *Underlying data*: Select this option if you want to see the data in the visual and additional data from the model.

  *For more a more detailed explanation of the Data Export Types, click here.*

• **Click OK.**

  ![Format options](image)

• When the schedule is executed, each Power BI visual's data will be exported to its own tab (worksheet) in the Excel file (workbook).
Options

- Use this option to select to export all pages or just a selection.

File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  o For more information, go to Deferred Delivery
MS Excel (*.xlsx) outputs for Power BI

To export MS Excel in Power BI follow the following steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.
### File Summary

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td>Wednesday, August 1, 2018</td>
</tr>
<tr>
<td>Keywords/Comments</td>
<td></td>
</tr>
<tr>
<td>PDF Expiry Date</td>
<td>Wednesday, August 1, 2018</td>
</tr>
<tr>
<td>PDF Expiry Message</td>
<td>8/1/2018</td>
</tr>
</tbody>
</table>

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
**Naming**

These options determine how the exported file will be name:

- This is the option where you named the output file.
- Default Naming Convention: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- Customize the output file name: Choose your own filename or right-click and use the Insert Function to insert a value.
- Customize output extension: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- Append date/time: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  o For more information, go to [Deferred Delivery](#)
MS Excel 2007 (*.xlsx) outputs for SSRS

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Format Option

- **Worksheet Name**: Write the name of the worksheet if not it will go by default as Sheet1.
- **Workbook Password**: Here you may have the option to create a password for the format.
Options

- Export Page Ranges
  - All Pages
  - Page Range
    - From: [0]
    - To: [0]
- Append to existing file
  - [ ] Append to file if one already exists (disk destination)

File Summary

- Title
- Author
- Company
- Subject
- Date Created: Wednesday, August 1, 2018
- Keywords/Comments
- PDF Expiry Date: Wednesday, August 1, 2018
- PDF Expiry Message: 8/1/2018

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
## Naming

These options determine how the exported file will be named:

<table>
<thead>
<tr>
<th>Format</th>
<th>Naming</th>
<th>Misc</th>
<th>PGP</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Image of naming options" /></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
**Misc**

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to [Deferred Delivery](#)
MS Excel 97-2000 (*.xls) for SSRS

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

**Format Option**

- **Worksheet Name**: Write the name of the worksheet if not it will go by default as Sheet1.
- **Workbook Password**: Here you may have the option to create a password for the format.
Options

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be named:

- **This is the option where you named the output file.**

- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.

- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.

- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.

- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
Misc

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to [Deferred Delivery](#)
HTML (*.html) outputs for Power BI

HTML is the standard markup language for creating web pages and web applications. Export Power BI & SSRS reports to HTML & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

To export HTML (*.html) in Power BI follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Format Options

- Use advanced HTML rendering
- Use basic HTML rendering
Options

- Use this option to select to export all pages or just a selection.

File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

- This is the option where you named the output file.
- **Default Naming Convention**: PBRS will name the output file in the following format: `reportname.format extension`, e.g. `Catalog Report.pdf`.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
Misc

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
HTML (*.htm) outputs in SSRS

HTML is the standard markup language for creating web pages and web applications. Export Power BI & SSRS reports to HTML & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

To export HTML (*.htm) in SSRS follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Format Options

- Use advanced HTML rendering
- Use basic HTML rendering
Options

- Use this option to select to export all pages or just a selection.

File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

- This is the option where you named the output file.
- **Default Naming Convention**: PBRS will name the output file in the following format: `reportname.format extension`, e.g. `Catalog Report.pdf`.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
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  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
JPG (*.jpg) outputs for Power BI

JPEG is a commonly used method of lossy compression for digital images. Export Power BI reports to JPG & automatically deliver them to an FTP site, embed them in an email body, or deliver them in a PDF, DOCX or PPT document.

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
MS Word (*.doc) outputs

Export Power BI & SSRS reports to MS Word & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations. PBRS lets you customize them before delivery.

To export MS Word (*.doc) for Power BI and SSRS, follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
**Misc**

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
MS Word (*.docx) outputs for Power BI

Export Power BI & SSRS reports to MS Word & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations. PBRS lets you customize them before delivery.

To export MS Word (*.docx) in Power BI, follow these steps:

Format

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

Options

- Use this option to select to export all pages or just a selection.
**File Summary**

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td>Wednesday, August 1, 2018</td>
</tr>
<tr>
<td>Keywords/Comments</td>
<td></td>
</tr>
<tr>
<td>PDF Expiry Date</td>
<td>Wednesday, August 1, 2018</td>
</tr>
<tr>
<td></td>
<td>8/1/2018</td>
</tr>
<tr>
<td>PDF Expiry Message</td>
<td></td>
</tr>
</tbody>
</table>

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: `reportname.format extension`, e.g. `Catalog Report.pdf`.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
- For more information, go to [Deferred Delivery](#)
MS Word - Text (*.txt) outputs for SSRS

Export Power BI & SSRS reports to MS Word & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations. PBRS lets you customize them before delivery.

To export MS Word - Text in SSRS, follow these steps:

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

**Options**

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
MS Word 2007 (*.docx) outputs for SSRS.

Export Power BI & SSRS reports to MS Word & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations. PBRS lets you customize them before delivery.

To export MS Word 2007 in SSRS, follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be named:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
Misc

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to **Deferred Delivery**
PNG (*.png) outputs for Power BI

PNG’s compression is among the best that can be had without losing image information. Export Power BI reports to PNG & automatically deliver them to an FTP site, embed them in an email body, or deliver them in a PDF, DOCX or PPT document.

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

**Options**

- Use this option to select to export all pages or just a selection.

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Updated on 27 November 2018
## File Summary

### Format Options | Options | File Summary
--- | --- | ---
| **Title** | |  
| **Author** | |  
| **Company** | |  
| **Subject** | |  
| **Date Created** | Wednesday, August 1, 2018 |  
| **Keywords/Comments** | |  
| **PDF Expiry Date** | Wednesday, August 1, 2018 |  
| **PDF Expiry Message** | |  

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be named:

- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
Misc

- **Compress (ZIP) Output**: Zips the output file before delivery.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
Power Point (*.pptx) outputs for Power BI

Looking for the analytical power of Power BI combined with the presentation features of PowerPoint? Export Power BI reports to PowerPoint & automatically send them in emails, or deliver them to any number of other destinations.

Format

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

Options

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
Data Interchange Format (*.dif) for SSRS

Data Interchange Format (.dif) is a text file format used to import/export single spreadsheets between spreadsheet programs. Export SSRS reports to DIF & automatically deliver them to an FTP site, send them in emails, and more.

To export Data Interchange Format, follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
**Misc**

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
Export SSRS reports to dBase & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

**dBase II outputs for SSRS**

**dBase III outputs for SSRS**

**dBase IV outputs for SSRS**
Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.
• Determine file summary by filling in the required properties as illustrated above.
• If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
### Naming

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
**Misc**

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
- For more information, go to Deferred Delivery
Lotus 1-2-3 (*.wk1) outputs for SSRS

Export SSRS reports to Lotus 1-2-3 & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

**Options**

- Export Page Ranges
  - All Pages
  - Page Range
    - From
    - To
- Append to existing file
  - Append to file if one already exists (disk destination)
## File Summary

<table>
<thead>
<tr>
<th>Format Options</th>
<th>Options</th>
<th>File Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Producer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td><strong>Tuesday, August 7, 2018</strong></td>
<td></td>
</tr>
<tr>
<td>Keywords/Comments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PDF Expiry Date</td>
<td><strong>Tuesday, August 7, 2018</strong></td>
<td></td>
</tr>
<tr>
<td>PDF Expiry Message</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Naming**

These options determine how the exported file will be name:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
### Misc

<table>
<thead>
<tr>
<th>Format</th>
<th>Naming</th>
<th>Misc</th>
<th>PGF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
- For more information, go to [Deferred Delivery](#)
Lotus 1-2-3 (*.wk3) outputs for SSRS

Export SSRS reports to Lotus 1-2-3 & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

Format

_The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule._

Options

_Export Page Ranges_

- [ ] All Pages
- [ ] Page Range
  - From: 0
  - To: 0

_Append to existing file_

- [ ] Append to file if one already exists (disk destination)
File Summary
Naming

These options determine how the exported file will be named:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
Misc

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to [Deferred Delivery](#)
Lotus 1-2-3 (*.wk4) outputs for SSRS

Export SSRS reports to Lotus 1-2-3 & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options
File Summary
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: `reportname.format extension`, e.g. `Catalog Report.pdf`.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
Misc

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to [Deferred Delivery](#)
Lotus 1-2-3 (*.wks) outputs for SSRS

Export SSRS reports to Lotus 1-2-3 & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

**Format**

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

**Options**

Export Page Ranges
- All Pages
- Page Range

From: [ ] To: [ ]

Append to existing file
- Append to file if one already exists (disk destination)
File Summary
Naming

These options determine how the exported file will be named:

- This is the option where you named the output file.
- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
Rich Text Format (*.rtf) outputs for SSRS

RTF is a text file format used by Microsoft products, such as Word and Office. Export SSRS reports to RTF & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

To export Rich Text format in SSRS, follow these steps:

Format

The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.

Options

- Use this option to select to export all pages or just a selection.

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Determine file summary by filling in the required properties as illustrated above. If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
Text (*.txt) outputs for SSRS

Export SSRS reports to TXT & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

To export Text format in SSRS, follow these steps:

**Format**

_The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule._

**Format Options**
- **Miraplacid**: Extract a text from a document. By selecting this option, you can arrange the formatting style, character set, end of line style, and white space size of the text.

**Options**

- Use this option to select to export all pages or just a selection.
File Summary

- Determine file summary by filling in the required properties as illustrated above.
- If properties are not filled in or are left blank, the original properties which exist in the exported report will be preserved. To overwrite these with a blank, enter a space in the field you wish to overwrite.
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to **Deferred Delivery**
TIFF (*.tif) outputs for SSRS

The TIFF format is perhaps the most versatile and diverse bitmap format in existence. Export SSRS reports to TIFF & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

To export TIFF in SSRS, follow these steps:

**Format**

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

**Format Option**

- You can use PBRS's default formatting options for TIFF (.tif) files or specify your own settings for the output.
**Naming**

These options determine how the exported file will be name:

- **This is the option where you named the output file.**
- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
**Misc**

- **Compress (ZIP) Output:** Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption:** Check the option to encrypt and password protect the zip file.
- **Defer Delivery:** The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to **Deferred Delivery**
Web Archive (*.mhtml) outputs for SSRS

The web Archive format differs from a standalone HTML file because it also saves linked files such as images, CSS, and JavaScript. Export SSRS reports to Web Archive & automatically deliver them to any number of standard destinations.

To export Web Archive in SSRS, follow these steps:

Format

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

Options

Export Page Ranges
- All Pages
- Page Range
  - From: 0
  - To: 0

Append to existing file
- Append to file if one already exists (disk destination)
Naming

These options determine how the exported file will be name:

- **This is the option where you named the output file.**
- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
**Misc**

- **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
- **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
- **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  - For more information, go to Deferred Delivery
XML (*.xml) outputs for SSRS

Export SSRS reports to XML & automatically deliver them to an FTP site, send them in emails, or deliver them to any number of other destinations.

To export XML outputs in SSRS, follow these steps:

Format

*The output format is selected as part of the Destinations setup for each destination type. The tab above can be found in the Destinations section of a schedule.*

Option
Naming

These options determine how the exported file will be name:

- This is the option where you named the output file.
- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
• **Compress (ZIP) Output**: Zips the output. Ability to use .zip encryption as well.
• **Zip File Encryption**: Check the option to encrypt and password protect the zip file.
• **Defer Delivery**: The report will be generated at the scheduled time, but will not be delivered to the specified destination until later.
  o For more information, go to Deferred Delivery
Single Reports Schedule for Power BI.

The Single Schedule is the simplest and easiest way to schedule a report for delivery. It involves defining the report you wish to schedule, determine its timing, selecting parameters (if any), and setting the destination(s) of the report.

Example: Jamie is a reports developer that must send a daily report to management detailing the number of support tickets currently open. She requires a report to be sent in PDF format at 8:30AM to three individuals.

How to Create a Single Schedule Report for Power BI?

- Go to **Single**.
- Select **For Power BI**.
General Wizard

- **Create In**: This section is for select the folder where you want to create the single report in.
- **Power BI Account**: In this section is to select what Power BI Account you want to create the single report. In this section, you may add a new account in the Add New button.
- **Select Report**: Click on the drop-down menus to navigate to the required report.
- **Schedule Name**: Write in the name of the package.
- **Description (optional)**: you may write a short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword (optional)**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click Next to continue to the next wizard section.
In this section, you will decide when the report will execute. There are varieties of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly:** Run a report on a weekly time frame.
  - **Sub options:** Repeat every X weeks.
    
    *Example:* Run the schedule every 2 Weeks.
  
  - **On:** Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example:* Run every Monday, Wednesday, and Friday.

![Weekly Schedule Options](image1)

• **Week Days:** Run the schedule Monday through Friday.

![Week Days Schedule](image2)

• **Working Day:** Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

![Working Day Schedule](image3)
• **Monthly**: Run the schedule on a monthly time frame.
  - **Use the following options**: Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also, you can include or exclude specific months from the schedule.

• **Annual**: Run the schedule every year at a specified time.

• **Custom Calendar**: Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see [Custom Calendars](#) for more information.
• **Other**: Other scheduling options.
  - Run Schedule every X Minutes, hours, days, weeks, months, years.

  ![Other Scheduling Options](image1)

• **None**: No scheduling is required for this item.

  ![None Scheduling](image2)

• **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.

• **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.

• **Schedule time**: On the Next Run date, the package will run at this time.

• **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.

• **Next to run on**: The package will next run on this date.

• **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  *For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.*

• **Until**: After this date, there will be no automated scheduling of this package.

• **Enable this Schedule**: Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
In this section, you may set up the dashboard/report.

- **Left margin (% of width):** The size of the left margin as a percentage of the page width.
- **Page Height (pixels):** The height of the rendered file.
- **Page width (pixels):** The width of the rendered file.
- **Right margin (% of width):** The size of the right margin as a percentage of the page width.
- **Maximum Loading Time (secs):** The maximum amount of time that the renderer will wait before timing out.
- **Minimum Loading Time (secs):** The amount of time that PBRS will wait for the dashboard/report to load before rendering it to file.
- **Page Number (Optional):** The Power BI page(s) to render. Only applicable to Power BI reports. You can specify a page range e.g. 1-5 or specific e.g. 1,3,5.
- **View Style:** How the report fits on the page: Fit to Page, Fit to Width, or Actual Size.
- **Enable snapshots and keep snapshots for "X" Days.**
- **Preview:** By clicking here you may see the preview dashboard/report.

Click **Next** to continue to the next wizard section.
In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.

- **Preview**: View the dashboard/report output given the selected filters.
- **Filter Type**: You may choose between Basic Filter or Advanced Filter.
- **Filter using this field (Table.column)**: Choose the table and column you would like to set up the filter.
- **Show items when the value matches (Basic Filter)**: Insert the value you would like to add and then click Add.
• **Show Items when the value (Advanced Filter):** In this option, you have the option to show items when the value and select the option from the drop-down menu.
Click **Save Filter** to add the filter.

Click **Next** to continue to the next wizard section.
Refresh Datasets Wizard

In this section select the datasets to refresh before the report is executed.

- **Power BI Account:** Select the account to refresh datasets.
- **Workspace:** The path to the required report.
- **Dataset:** Select the dataset.
- **Notification Options:** Receive a notification after the report is executed, the report failed to execute, or do not receive a notification.

After refreshing the datasets above, wait 'X' seconds before running the report.

Click **Next** to continue to the next wizard section.
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.
• **Add:** Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.

![Add Options]

• **Edit:** Select a destination and click to edit it's properties. Or simply double-click on the destination.

• **Delete:** Select a destination and click this button to delete it.

• **Import:** click here to import from the list of default destinations.

• For more information about Type of Destinations, click [here](#).

• For more information about Output Formats, click [here](#).

Click **Next** to continue to the next wizard section.
**Exception Handling Wizard**

- **Treat as “error” if not completed in X minutes:** If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every:** If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as "Failed."

- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

- **Ignore the report and subsequent tasks:** If the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query:** Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build.**
- Get values from a database window will appear. For more information about Get values from database, [click here](#).
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click Next to continue to the next wizard section.
In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.

For more information on Custom Tasks, click here.

If you have no desire to add a Custom Task, you can click **finish** to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Copy**: Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename**: Rename the package.
- **Enabled**: Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move**: Use this option to move the report into an existing package.
- **Preview**: Preview the report before execution.
- **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete**: Selecting this option will delete the schedule.
- **Test**: Use this option to test the schedule and export it to selected "test" destinations.
- **Convert To Package**: This button will move this report into a package. The package will have the name of the single schedule report.
- **Ad-Hoc Email to Recipients**: Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
- **Ad-Hoc View**: This button allows you to preview the report.

*Single Report Schedule Properties*

- To access your schedule properties, right click on a schedule and select **properties**.
- Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can edit the general information of your schedule from here.
Schedule

You can edit your schedule time from here.
Report Settings

You can edit report settings from here.

Report Filter

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You can add, edit, or delete report filters from here.
Refresh Datasets

You can add, edit, or delete datasets from here.
Destinations

You can add, edit, or delete destination from here.
Exception Handling

You can edit exception-handling options from here.

Task

You can add, edit, or delete tasks from here.
Snapshots: A snapshot is a copy of each report a schedule or a package generates. Keeping snapshots enables you to resend past reports without generating them afresh - especially if the data has changed in the meantime.
Simply select the number of days to keep the snapshots.

**History:** Review the schedules history. Successes, failures, and other data is located here.
Single Reports Schedule for SSRS.

The Single Schedule is the simplest and easiest way to schedule a report for delivery. It involves defining the report you wish to schedule, determine its timing, selecting parameters (if any), and setting the destination(s) of the report.

Example: Jamie is a reports developer that must send a daily report to management detailing the number of support tickets currently open. She requires a report to be sent in PDF format at 8:30AM to three individuals.

How to Create a Single Schedule Report for SSRS?

- Go to Single.
- Select For SSRS.
General Wizard

- **Create In:** This section is for select the folder where you want to create the single report in.
- **Report Service URL:** Enter the address of your reporting services server.
- **Report Location:** Browse through the report server browser to select the desired report. Authenticate to the reports server if necessary.

_Hint: SQL Azure Reporting Services- when writing your report, make sure you have enabled Forms Authentication. You should use the 2010.asmx address for your reporting service URL._
- **Schedule Name**: Write in the name of the package.
- **Description (optional)**: you may write a short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword (optional)**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
In this section, you will decide when the report will execute. There are varieties of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*

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• **Weekly:** Run a report on a weekly time frame.
  o **Sub options:** Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  o **On:** Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

![Weekly Schedule Options]

• **Week Days:** Run the schedule Monday through Friday.

![Week Days Schedule Options]

• **Working Day:** Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

![Working Day Schedule Options]
- **Monthly**: Run the schedule on a monthly time frame.
  - **Use the following options**: Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

- **Annual**: Run the schedule every year at a specified time.

- **Custom Calendar**: Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.
• **Other:** Other scheduling options.
  
  - Run Schedule every X Minutes, hours, days, weeks, months, years.

• **None:** No scheduling is required for this item.

• **Start Date:** Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.

• **End Date:** If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.

• **Schedule time:** On the Next Run date, the package will run at this time.

• **Exception Calendar:** Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.

• **Next to run on:** The package will next run on this date.

• **Repeat Every:** Rerun the package every x minutes from the scheduled time until your specified time.

  
  For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.

• **Until:** After this date, there will be no automated scheduling of this package.

• **Enable this Schedule:** Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
Datasource Wizard

- In this section you will authenticate to the database the report runs against, set snapshots, and other options.
- **Login Required:** Set the authentication information for the report.

- **Enable Snapshots and keep snapshot for X Days:** Save a Picture of the report as it is produced. Choose the amount of time will be stored in the system before deletion.
- **Preview**: View the report prior to execution. Click **Next** to continue to the next wizard section.

**Report Wizard**

- In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.
- There are 3 requirements in order for PBRS to detect your SSRS Report parameters and their parameter values:
  1. The parameter must be in use in the report.
  2. The parameter must be visible.
  3. The parameter must be set to be prompted at run time.
- If these three requirements are achieved, you should see the parameters in your report listed in this screen.
- For each parameter, select from the drop down list the value the report must use. In a single schedule, only one parameter value can be run at a time per parameter. You can type a value into the field, or drag and drop an "insert".
- PBRS can handle SSRS Reports with Cascading parameters, or reports where you can select multiple parameter values.
- **Select All:** Selecting All Available Values will run the report given all the values.
- **Specified Value:** Select the value you want in your report.
- **Null Value:** Set no value for this parameter.
- **Default Value:** It will select the default value.
- **All Values (at run time):** Any new values will automatically will be included at run time.

*Tip: If you are looking to dynamically populate parameter values, the better choice is Data-Driven Schedule.*
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.
• **Add:** Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, Sharepoint, SMS, and Dropbox.

  ![Add options](image)

• **Edit:** Select a destination and click to edit its properties. Or simply double-click on the destination.

• **Delete:** Select a destination and click this button to delete it.

• **Import:** click here to import from the list of default destinations.

• For more information about Type of Destinations, click [here](#).

• For more information about Output Formats, click [here](#).

Click **Next** to continue to the next wizard section.
Exception Handling Wizard

- **Treat as “error” if not completed in X minutes:** If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every:** If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”

- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

- **Ignore the report and subsequent tasks:** if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, [click here](#).

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- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click **Next** to continue to the next wizard section.
Custom Tasks Wizard

- In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.
- For more information on Custom Tasks, click here.
- If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Copy**: Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename**: Rename the package.
- **Enabled**: Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move**: Use this option to move the report into an existing package.
- **Preview**: Preview the report before execution.
- **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete**: Selecting this option will delete the schedule.
- **Test**: Use this option to test the schedule and export it to selected "test" destinations.
- **Convert To Package**: This button will move this report into a package. The package will have the name of the single schedule report.
- **Ad-Hoc Email to Recipients**: Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
- **Ad-Hoc View**: This button allows you to preview the report.
Single Report Schedule Properties

- To access your schedule properties, right click on a schedule and select properties.
- Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can edit the general information of your schedule from here.
Schedule

You can edit your schedule time from here.
Report Options

Single Report Schedule Properties - Supplier Information

<table>
<thead>
<tr>
<th>Data source Name</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northwind</td>
<td>default</td>
</tr>
</tbody>
</table>
Report

You can add, edit, or delete parameters from here.
Destinations
You can add, edit, or delete destinations from here.
Exception Handling

You can edit exception handling options from here.
Tasks

You can add, edit, or delete tasks from here.
**Snapshots:** A snapshot is a copy of each report a schedule or a package generates. Keeping snapshots enables you to resend past reports without generating them afresh - especially if the data has changed in the meantime.

Simply select the number of days to keep the snapshots.
History: Review the schedules history. Successes, failures, and other data is located here.
Package Report Schedule for Power BI.

The purpose of the wizard will be to guide you through the process of setting up a number of reports to be generated at defined intervals and delivered to one or more defined destinations - together.

Example: Your entire monthly report pack (consisting of a number of reports) can be sent to a recipient with all reports attached to the single email. You can also zip up the reports into a single zip file, or export them out to a single Excel workbook, or export them in a single PDF file.

How to Create a Package Schedule Report for Power BI?

- Go to Package.
General Wizard

- **Package Name**: The name of the package.
- **Create In**: The PBRS folder where the package is stored.
- **Description**: A short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword**: Enter some keywords which can be used later by Smart Folders to identify this schedule.
- Click **Next** to continue to the next wizard section.
Schedule Wizard

In this section, you will decide when the report will execute. There are varieties of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly**: Run a report on a weekly time frame.
  o **Sub options**: Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  o **On**: Select the specific days of the week the schedule will run. If only once a week, select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

![Weekly Schedule Options](image1)

• **Week Days**: Run the schedule Monday through Friday.

![Week Days](image2)

• **Working Day**: Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

![Working Day](image3)
- **Monthly:** Run the schedule on a monthly time frame.
  - **Use the following options:** Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

- **Annual:** Run the schedule every year at a specified time.

- **Custom Calendar:** Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.
- **Other**: Other scheduling options.
  - Run Schedule every X Minutes, hours, days, weeks, months, years.

- **None**: No scheduling is required for this item.

- **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.
- **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.
- **Schedule time**: On the Next Run date, the package will run at this time.
- **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.
- **Next to run on**: The package will next run on this date.
- **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.

- **Until**: After this date, there will be no automated scheduling of this package.
- **Enable this Schedule**: Uncheck this option to Disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations' order by clicking on the green up and down arrows.
• **Add:** Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.

![Add Destinations](image)

• **Edit:** Select a destination and click to edit its properties. Or simply double-click on the destination.

• **Delete:** Select a destination and click this button to delete it.

• **Import:** Click here to import from the list of default destinations.

• For more information about Type of Destinations, click [here](#).

• For more information about Output Formats, click [here](#).

Click **Next** to continue to the next wizard section.
A package may be created with no constituent reports and then the reports can be added later. However, you may also add reports at this stage in the wizard - and amend, delete or add some more later.

- **Merge all Text Files:** Check this option to merge all text files and give the file a name.
- **Merge all PDF Files:** Merge PDF outputs into a single PDF file. The reports will appear in the merged PDF in the order they are displayed in the package schedule. Checking this box will bring up additional PDF Options.
• **Merge all Excel Files:** PBRS will then merge all excel outputs in the package into a single excel file.

  ![](image)

  *HINT:* Add Password Protection to this section in this option window rather than the individual report in the package. This will password protect the entire merged workbook.

• **Run Package using multiple threads:** This allows up to 8 reports to be exported simultaneously.
  - Each report in the package can run concurrently.
  - See Multi-threading for more info.

• **Enable snapshots and keep them for (days):** Keep a copy of the report for how many days.
  - System resources will be shared so this will not always mean that reports will take 1/4 the normal time.

  *Example:* You have 4 reports. Each one takes 15 minutes to export. Using a single thread, it would take 1 hour to complete the export. Using multiple threads, you would expect it to take 15 minutes for all 4. However, the sharing of your
system resources by 4 reports may result in each report taking longer than 15 minutes and the total time for 4 reports may be more than 15 minutes, but it will be less than an hour

- Click **Add** and select **For Power BI**.

- Package Report Properties will appear on.
Package Report Properties

a. Report Wizard

- **Power BI Account**: Add the account to send the report.
- **Select Report**: The path to the required report.
- **Report Name**: Enter a name for the report.
- **Enabled**: Enable or Disable this specific report in the Package.
b. Output Format Wizard

- In this section, you will select the output format of the report.
- For more information on Output Format, click here.
c. Report Filter Wizard

In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.

- **Preview**: View the dashboard/report output given the selected filters.
- **Filter Type**: You may choose between Basic Filter or Advanced Filter.
- **Filter using this field (Table.column)**: Choose the table and column you would like to set up the filter.
- **Show items when the value matches (Basic Filter)**: Insert the value you would like to add and then click Add.
- **Show Items when the value (Advanced Filter):** In this option, you have the option to show items when the value and select the option from the drop-down menu.
• Click Save Filter to add the filter.
In this section, you may set up the dashboard/report.

- **Left margin (% of width):** The size of the left margin as a percentage of the page width.
- **Page Height(pixels):** The height of the rendered file.
- **Page width (pixels):** The width of the rendered file.
- **Right margin (% of width):** The size of the right margin as a percentage of the page width.
- **Maximum Loading Time(secs):** The maximum amount of time that the renderer will wait before timing out.
- **Minimum Loading Time(secs):** The amount of time that PBRS will wait for the dashboard/report to load before rendering it to file.
- **Page Number (Optional):** The Power BI page(s) to render. Only applicable to Power BI reports. You can specify a page range e.g 1-5 or specific e.g. 1,3,5.
- **View Style:** How the report fits on the page: Fit to Page, Fit to Width, or Actual Size.
- **Enable snapshots and keep snapshots for "X" Days.**
• **Preview:** By clicking here you may see the preview dashboard/report.
e. **Refresh Datasets**

In this section select the datasets to refresh before the report is executed.

- **Power BI Account**: Select the account to refresh datasets.
- **Workspace**: The path to the required report.
- **Dataset**: Select the dataset.
- **Notification Options**: Receive a notification after the report is executed, the report failed to execute, or do not receive a notification.
- **After refreshing the datasets above, wait 'X' seconds before running the report.**
f. Naming (Optional)

- **Default Naming Convention**: PBRS will name the output file in the following format: reportname.format extension, e.g. *Catalog Report.pdf*.

- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.

- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.

- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
- You can track which reports ran and when they ran by looking at what the report is named.
g. Exception Handling Wizard

- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
- **Ignore the report and subsequent tasks:** if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query:** Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, click here.
• **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

  Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

- Click OK.
Exception Handling Wizard

- **Treat as “error” if not completed in X minutes**: If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every**: If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”
• **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

• **Ignore the report and subsequent tasks:** If the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.

**Method**

- Select the Method that will determine whether a report is blank.
- **SQL Query:** Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, click here.
- **File size check**: Assume reports is blank if size is under "X" bytes.

![Diagram of Get values from database](image_url)
## Actions

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<td></td>
<td>Rename/Move File</td>
</tr>
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<td></td>
<td>Delete File</td>
</tr>
</tbody>
</table>

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

*Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.*

Click **Next** to continue to the next wizard section.
- In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.
- For more information on Custom Tasks, click here.
- If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Open**: This will open the package and show its constituent reports.
  
  o You can right-click on each of the constituent reports to see the context-sensitive menu shown in the picture above.
  o **Enabled**: Use this to enable or disable the constituent report.
  o **Refresh**: Pulls through changes to just that report which were made outside PBRS.
  o **Rename**: Renames the selected report.
- **Preview:** Generates a preview of the selected report.
- **Delete:** Deletes the selected report from package.
- **Properties:** Displays the configuration properties of just that report.

- **Add Report:** Use this to add one or more reports to an existing package.
- **Copy:** Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename:** Rename the package.
- **Enabled:** Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move:** Use this option to move the report into an existing package.
- **Execute:** This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete:** Selecting this option will delete the schedule.
- **Test Package:** Use this option to test the schedule and export it to selected “test” destinations.
- **Split into Single Schedules:** This will split all the constituent reports in the package into Single Report Schedules.

  This process will automatically delete the package once the splitting process is completed.

- **Ad-Hoc Email to Recipients:** Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
- **Create Shortcut:** Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
To access your schedule properties, right click on a schedule and select **properties**. Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can edit the general information of your package from here.
Schedule

You can edit schedule time of your package from here.
Reports

You can add, edit, or delete reports of your package from here.
Destinations

You can add, edit or delete destinations from here.
Exception Handling

You can edit exception handling options from here.
History: Review the schedules history. Successes, failures, and other data is located here.
Tasks

You can add, edit, or delete tasks from here.
**Snapshots:** A snapshot is a copy of each report a schedule or a package generates. Keeping snapshots enables you to resend past reports without generating them afresh - especially if the data has changed in the meantime.

Simply select the number of days to keep the snapshots.
Package Report Schedule for SSRS.

The purpose of the wizard will be to guide you through the process of setting up a number of reports to be generated at defined intervals and delivered to one or more defined destinations - together.

_Example:_ Your entire monthly report pack (consisting of a number of reports) can be sent to a recipient with all reports attached to the single email. You can also zip up the reports into a single zip file, or export them out to a single Excel workbook, or export & merge them into a single PDF file.

**How to Create a Package Schedule Report for SSRS?**

- Go to **Package.**
General Wizard

- **Package Name**: The name of the package.
- **Create In**: The PBRS folder where the package is stored.
- **Description**: A short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
In this section, you will decide when the report will execute. There are varieties of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly:** Run a report on a weekly time frame.
  - **Sub options:** Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  - **On:** Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

• **Week Days:** Run the schedule Monday through Friday.

• **Working Day:** Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.
- **Monthly:** Run the schedule on a monthly time frame.
  - **Use the following options:** Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

- **Annual:** Run the schedule every year at a specified time.

- **Custom Calendar:** Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.
- **Other**: Other scheduling options.
  - Run Schedule every X Minutes, hours, days, weeks, months, years.

  ![Scheduling Options](image)

- **None**: No scheduling is required for this item.

  ![No Scheduling](image)

- **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.
- **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.
- **Schedule time**: On the Next Run date, the package will run at this time.
- **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.
- **Next to run on**: The package will next run on this date.
- **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  *For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.*

- **Until**: After this date, there will be no automated scheduling of this package.
- **Enable this Schedule**: Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
Destinations Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.
- **Add**: Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.

- **Edit**: Select a destination and click to edit its properties. Or simply double-click on the destination.
- **Delete**: Select a destination and click this button to delete it.
- **Import**: click here to import from the list of default destinations.
- For more information about Type of Destinations, click [here](#).
- For more information about Output Formats, click [here](#).

Click **Next** to continue to the next wizard section.
A package may be created with no constituent reports and then the reports can be added later. However, you may also add reports at this stage in the wizard - and amend, delete or add some more.

- **Merge all Text Files:** Check this option to merge all text files and give the file a name.
- **Merge all PDF Files:** Merge PDF outputs into a single PDF file. The reports will appear in the merged PDF in the order they are displayed in the package schedule. Checking this box will bring up additional PDF Options.
• **Merge all Excel Files:** PBRS will then merge all excel outputs in the package into a single excel file.

![Output Options]

_HINT:_ Add Password Protection to this section in this option window rather than the individual report in the package. This will password protect the entire merged workbook.

• **Run Package using multiple threads:** This allows up to 8 reports to be exported simultaneously.
  - Each report in the package can run concurrently.
  - See Multi-threading for more info.

• **Enable snapshots and keep them for (days):** Keep a copy of the report for how many days.
  - System resources will be shared so this will not always mean that reports will take 1/4 the normal time.

  _Example:_ You have 4 reports. Each one takes 15 minutes to export. Using a single thread, it would take 1 hour to complete the export. Using multiple threads, you would expect it to take 15 minutes for all 4. However, the sharing of your
system resources by 4 reports may result in each report taking longer than 15 minutes and the total time for 4 reports may be more than 15 minutes, but it will be less than an hour

- Click Add and select For SSRS.

Package Report Properties

a. Report Wizard

- **Report Service URL**: Enter the address of your reporting services server.
- **Report Location**: Browse through the report server browser to select the desired report. Authenticate to the reports server if necessary.

*Hint: SQL Azure Reporting Services - when writing your report, make sure you have enabled Forms Authentication. You should use the 2010 .asmx address for your reporting service URL.*
- **Report Name**: Write in the name of the package.
- **Format**: Select the output format for the report.
b. Datasource Wizard

- In this section you will authenticate to the database the report runs against, set snapshots, and other options.
- **Login Required:** Set the authentication information for the report.

- **Preview:** View the report prior to execution.
c. Parameters Wizard

- In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.
- There are 3 requirements in order for PBRS to detect your SSRS Report parameters and their parameter values:
  1. The parameter must be in use in the report.
  2. The parameter must be visible.
  3. The parameter must be set to be prompted at run time.
- If these three requirements are achieved, you should see the parameters in your report listed in this screen.
- For each parameter, select from the drop down list the value the report must use. You can type a value into the field as well.
- PBRS can handle SSRS Reports with Cascading parameters, or reports where you can select multiple parameter values.
  - **Select All**: Selecting All Available Values will run the report given all the values.
  - **Specified Value**: Select the value you want in your report.
  - **Null Value**: Set no value for this parameter.
- **Default Value:** It will select the default value.
- **All Values (at run time):** Any new values will automatically be included at run time.

  *Tip: If you are looking to dynamically populate parameter values, the better choice is Data-Driven Schedule.*
d. Naming (Optional) Wizard

- **Default Naming Convention**: PBRS will name the output file in the following format: `reportname.format extension`, e.g. *Catalog Report.pdf*.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
e. Exception Handling Wizard

- **Check if the Report is Blank**: If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
- **Ignore the report and subsequent tasks**: if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, click here.
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

*Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.*

- Click OK.
**Exception Handling Wizard**

- **Treat as “error” if not completed in X minutes:** If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every:** If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”
- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
- **Ignore the report and subsequent tasks:** if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.

### Method

- Select the Method that will determine whether a report is blank.
- **SQL Query:** Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- **Click Build.**
- Get values from a database window will appear. For more information about Get values from database, click here.
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click Next to continue to the next wizard section.
In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.

For more information on Custom Tasks, click here.

If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Open**: This will open the package and show its constituent reports.
  - You can right-click on each of the constituent reports to see the context-sensitive menu shown in the picture above.
  - **Enabled**: Use this to enable or disable the constituent report.
  - **Refresh**: Pulls through changes to just that report which were made outside PBRS.
  - **Rename**: Renames the selected report.
• **Preview:** Generates a preview of the selected report.
• **Delete:** Deletes the selected report from package.
• **Properties:** Displays the configuration properties of just that report.

- **Add Report:** Use this to add one or more reports to an existing package.
- **Copy:** Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename:** Rename the package.
- **Enabled:** Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move:** Use this option to move the report into an existing package.
- **Execute:** This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete:** Selecting this option will delete the schedule.
- **Test Package:** Use this option to test the schedule and export it to selected “test” destinations.
- **Split into Single Schedules:** This will split all the constituent reports in the package into Single Report Schedules.

  *This process will automatically delete the package once the splitting process is completed.*

- **Ad-Hoc Email to Recipients:** Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
- **Create Shortcut:** Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
To access your schedule properties, right click on a schedule and select properties.
Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can edit the general information of your package from here.
Schedule

You can edit the schedule time of your package from here.
Reports

You can add, edit, or delete reports of your package from here.
Destinations

You can add, edit, or delete destinations from here.
Exception Handling

You can edit exception handling options from here.
**History:** Review the schedules history. Successes, failures, and other data is located here.
Tasks

You can add, edit, or delete tasks from here.
**Snapshots:** A snapshot is a copy of each report a schedule or a package generates. Keeping snapshots enables you to resend past reports without generating them afresh - especially if the data has changed in the meantime.

Simply select the number of days to keep the snapshots.
Event Based Schedule for Power BI & SSRS.

Event-Based Schedules give you the ability to run any already existing schedule (enabled or disabled) when an event occurs. The purpose of the wizard will be to guide you through the process of setting up an Event-Based Schedule. Use this schedule on its own, or in addition to a regular time based schedule for the same report.

With Event Based Schedules you can unlock the power of PBRS's process scheduling engine. Combine Event Based schedules with Custom tasks to automate processes such as updating databases, server management, or system alerts.

How to Create an Event Based Schedule for Power BI & SSRS?

- Go to Event Based.
General Wizard

- **Parent Folder**: The PBRS folder where the schedule is stored.
- **Schedule Name**: The name of the schedule.
- **Description**: A short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
Conditions Wizard

- **Fulfill:**
  - **ANY:** The schedule will work if ANY of the conditions are met.
  - **ALL:** The schedule will only work if ALL of the specified conditions are met.
- **Enabled:** Check this option to enable or disable the schedule.
- Click **Add** to see all the Conditions type.
Condition Type

- Database Record Exists
- Database Record has been Modified
- File Exists
- File has been Modified
- Process Exists
- Window is present
- Unread mail is present
- Data is received on a port
**Database Record Exists**

- This condition will cause the schedule to be executed if a database record exists.
- If set to **True**, the schedule will be executed if the record exists e.g. when it is created.
- If set to **False**, the condition will be executed if the record does not exist.
- **ODBC DSN Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*

  *When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.*

  *When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").*

- **UserID**: Enter the User ID PBRS should use to log on to the database
• **Password**: Enter the password associated with the above user.
• Click **green arrow** to continue.

![Database Record Exists Dialog Box](image)

• Click **Build**.
- **ODBC Datasource Name:** Drop down and select a DSN.
- **UserID:** Enter the User ID PBRS should use to log on to the database.
- **Password:** Enter the password associated with the above user.
- **Connect:** Click Connect to connect to the Database.
- Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
- Click **Parse**.
- For more information of "Get Values From Database" interface, [click here](#).
• Click **green arrow** to continue.

- Select the Column that identifies the data in each row. This must be unique. It is typically referred to as the Primary key.
- **Detect - New Records Only:** The schedule will only act on records that were created after you wrote the schedule and the schedule will only be fired once for each record. After the first run, it is deemed not to be new anymore and the schedule will not fire.
• **Detect - Any Matching Records:** If this option is selected you should ensure that your query limits the returned values to just the record you are after. You must also write a custom action to update the database so that this record no longer fulfills the condition once the schedule has been executed, otherwise the schedule will continue to run each time it finds the same record.

For example:

*The schedule should execute when a new sale over $1000 is entered: Select order id from sale stable where amount >= 1000*

*Now limit the query further by adding a second condition: Select order id from sale stable where amount >= 1000 and schedule sent <> 'T'*

The schedule will only execute if it finds a sale over $1000 and the schedule sent field is not "T".

*Now write a custom Task to update the database record and set schedule sent to 'T'. Update sale stable set schedule sent = 'T' where amount >= 1000 and schedule sent <> 'T'*

• When the schedule has executed, it will mark the record and thus ensure that the schedule does not repeat itself each time PBRS polls the database.

• **Click** green arrow to continue.

• Click OK.
Database Record Has Been Modified

- This condition will cause the schedule to be executed if a database record exists.
- If set to True, the schedule will be executed if the record exists e.g. when it is created.
- If set to False, the condition will be executed if the record does not exist.
- **ODBC DSN Name**: Drop down and select a DSN.
- **UserID**: Enter the User ID PBRS should use to log on to the database
- **Password**: Enter the password associated with the above user.
- Click **green arrow** to continue.
• Click **Build**.
- **ODBC Datasource Name**: Drop down and select a DSN.
- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
- Click **Parse**.
- For more information of "Get Values From Database" interface, [click here](#).
• Click green arrow to continue.

• Select the Column that identifies the data in each row. This must be unique. It is typically referred to as the Primary key.

• **Detect Inserted and deleted Rows**: PBRS will monitor for inserted and deleted rows as well as data that has been modified.
• If Database Record has been / has not been modified: Check for records that have been / have not been changed within a set time frame.
• Click green arrow to continue.

Condition - Database Record Modified

Setting up of condition completed. Click OK to finish

• Click OK.
This condition will cause the schedule to be executed if a file exists.
- If set to True, the schedule will be executed if the file exists e.g. when it is created.
- If set to False, the condition will be executed if the file does not exist e.g. if it is deleted.
- **Run once for all files found**: The schedule will perform the specified actions once for each file found that matches the criteria.
- **Run for each file found**: The schedule will perform the specified actions ONCE only irrespective of how many files are found.

**File Details:**
- **Local File**: Monitor for files on Local File.
  
  *Hint: You can use the insert menu to create an ever changing file name.*

- **Remote (FTP) File**: Event Based Schedule can also monitor for files on an FTP server.
• Enter the FTP Server Information.
• **Verify**: Authenticate to the server and enter the path where the file should be located.

*Hint: Combine this feature with Custom Actions FTP and FTP Folder Housekeeping to set up automatic FTP maintenance.*
• This condition will cause the schedule to be executed if a file has been modified.
• If set to **True**, the schedule will be executed if the file exists e.g. when it is created.
• If set to **False**, the condition will be executed if the file does not exists e.g. if it is deleted.
• **Run once for all files found:** The schedule will perform the specified actions once for each file found that matches the criteria.
• **Run for each file found:** The schedule will perform the specified actions ONCE only irrespective of how many files are found.

*Hint: You can use the insert menu to create an ever changing file name.*
Process Exists

- This condition will cause the schedule to be executed if a process exists.
- If set to **True**, the schedule will be executed if the process exists.
- If set to **False**, the condition will be executed if the process does not exist.
- Type the name of the process in the drop down box or use the drop down arrow to select from a list of currently running processes.

**Tip:** Try setting up the schedule that will monitor for certain key processes on your server. If those processes are not running then PBRS can automatically restart them.
Window is Present

This condition will cause the schedule to be executed if a window is present.
If set to True, the schedule will be executed if the window is present.
If set to False, the condition will be executed if the window is not present
Type in the window name, or use the drop down to pick from a list of currently open windows.

Tip: Try setting up the schedule that will monitor for certain open Windows on your server. If those processes are running then PBRS can automatically stop them.
Unread Email Exists

Users can send report requests to a specified email address. PBRS will read the email, and, if the conditions are met, fire off the specified report.

- Fill in your server credentials.
- Click Test.
- If you have entered them correctly, the green arrow will become available.
• Select the folder that will be monitored.
• Specify the condition. Select the email fields to determine what would meet your requirements.
• **Forward the Email**: Forward the email to another address.
• **Redirect the Email**: Send the incoming mail directly to another address instead of keeping it in the inbox.
• **Save Attachments**: Pull attachments from the email and save them directly to a folder.
• **Remove Matched mail from Server**: Choose to clear the email from the inbox once PBRS has processed it.
• If you do use this function with the condition set to false, then be sure to remove the found email from the mailbox so that the report doesn't get fired off again (each time read emails are found).
• Click OK.
How to parse the values in the body of an email and insert them into PBRS fields?

For an "Unread Email" event, PBRS can read the body text of the email and place selected values into Event-based constants.

You can also use the "Exact Match" option which will match the Case of the email text. In addition, when this option is used, spaces before and after the phrase are NOT removed and form part of the matching string.

Here is an example:

*Mary has an email which will contain values, and she wants the values to update a database. Here's how she would set it up in PBRS.*

*Firstly, PBRS will expect the email text to be in the format [Constant]:[Value]. Here is how Mary will set up her email:*

- EmployeeID: xxxxx
- EmployeeName: yyyyy
- EmployeeStartDate: zzzzzzz

As you can see, the required constant is on the left of the colon (:) and the required data is on the right.

To insert the data into her database, Mary uses an "Update a database" custom task as shown below:
She inserts Event-Based Constants, selecting a Custom Constant:
She types in the Custom Field Descriptor:

When she drags the Insert, "<e>Read my Email;To>" is placed in the field:
She clicks **down arrow** to add the statement to the list. And repeats the process for all the custom constants she will need to parse the email.

The above instruction tells PBRS to read the email body text and to place the value to the right of "EmployeeID:" in the database.

*The colon (:) is only required in the email body. It is not used as part of the definition process above, but PBRS will automatically read the value to the left of the colon and apply the data to the right of the colon.*

*Tip: Use email body parsing to customize other tasks! Pull information from one email and send an email using the data. Use it to create new database records, and much more!*
Data received on a port

- PBRS can monitor specified ports for data and then execute tasks such as reports or database updates.
- **Name**: Name the Condition.
- **If data has been received**: Select true if you wish to monitor for data in the given port, or false if you wish to monitor for the absence of data in the given port.
- Data is received on the following:
  - **Port Number**: Enter the port number that will be monitored.
  - **Monitor on a Specific IP address**: Enter the IP address that will be monitored.
- **Received Data**: Select the data criteria using the lower menu. PBRS will monitor for this data for any data matching your criteria.
Report Type Wizard

**Event-Based Schedule**

- **New Reports**: Display a screen where you can create a new reports schedule.
  - For Power BI, [click here](#).
  - For SSRS, [click here](#).
- **Existing Schedules**: Displays a list of existing schedules in PBRS for you to choose from.
  - Go to the Existing Schedule Wizard, [here](#).
- **None**: Select this option if no schedules are to be ran if the conditions are met and only Customs Actions will be used.
New Power BI Reports

- Select New Reports and click Next.
- Click Add and select Power BI.

Report Properties will appear.
Report Properties

Report

- **Power BI Account:** Add the account to send the report.
- **Select Report:** The path to the required report.
- **Report Name:** Enter a name for the report.
In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.

- **Preview**: View the dashboard/report output given the selected filters.
- **Filter Type**: You may choose between Basic Filter or Advanced Filter.
- **Filter using this field (Table.column)**: Choose the table and column you would like to set up the filter.
- **Show items when the value matches (Basic Filter)**: Insert the value you would like to add and then click Add.
- **Show Items when the value (Advanced Filter)**: In this option, you have the option to show items when the value and select the option from the drop-down menu.
- Click **Save Filter** to add the filter.
Report Settings

In this section, you may set up the dashboard/report.

- **Left margin (% of width):** The size of the left margin as a percentage of the page width.
- **Page Height (pixels):** The height of the rendered file.
- **Page width (pixels):** The width of the rendered file.
- **Right margin (% of width):** The size of the right margin as a percentage of the page width.
- **Maximum Loading Time (secs):** The maximum amount of time that the renderer will wait before timing out.
- **Minimum Loading Time (secs):** The amount of time that PBRS will wait for the dashboard/report to load before rendering it to file.
- **Page Number (Optional):** The Power BI page(s) to render. Only applicable to Power BI reports. You can specify a page range e.g. 1-5 or specific e.g. 1,3,5.
- **View Style:** How the report fits on the page: Fit to Page, Fit to Width, or Actual Size.
- **Enable snapshots and keep snapshots for "X" Days.**
• **Preview:** By clicking here you may see the preview dashboard/report.
Refresh Datasets

In this section select the datasets to refresh before the report is executed.

- **Power BI Account**: Select the account to refresh datasets.
- **Workspace**: The path to the required report.
- **Dataset**: Select the dataset.
- **Notification Options**: Receive a notification after the report is executed, the report failed to execute, or do not receive a notification.
- **After refreshing the datasets above, wait 'X' seconds before running the report.**
Naming (Optional)

With PBRS, you can use Event Based Data inserts to customize the output file name of the report.

- **Default Naming Convention**: PBRS will name the output file in the following format: `reportname.format extension`, e.g. `Catalog Report.pdf`.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending
date and time to the filename, each file remains unique, and no files are overwritten.

- You can track which reports ran and when they ran by looking at what the report is named.
Exception Handling

- **Check if the Report is Blank**: If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
- **Ignore the report and subsequent tasks**: if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, [click here](#).
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

• Select an action from the task list. This task will be executed in the event that a schedule is blank.
• For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.
Destination

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.
• **Add:** Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, Sharepoint, SMS, and Dropbox.

  ![Add Options]

  - Email
  - Disk
  - Fax
  - FTP
  - ODBC
  - Printer
  - Sharepoint
  - SMS
  - Dropbox

• **Edit:** Select a destination and click to edit its properties. Or simply double-click on the destination.

• **Delete:** Select a destination and click this button to delete it.

• **Import:** Click here to import from the list of default destinations.

  For more information about Type of Destinations, click here.

  For more information about Output Formats, click here.

• Click **OK.**
Customize Recipient Messaging

You can also customize the messaging the recipient receives. Using Event Based Data Inserts, PBRS will automatically pull data from the record that triggered the schedule and use it to customize the subject, body or report format.

- Simply drag and drop fields from your table to the desired position.
For example, to customize an email greeting, type the greeting, and add the recipient’s name as shown above.
New SSRS Reports

- Select **New Reports** and click **Next**.
• Click **Add**.
• Report Properties will appear.
Report Properties

Report Wizard

- **Report Service URL:** Enter the address of your reporting services server.
- **Report Location:** Browse through the report server browser to select the desired report.Authenticate to the reports server if necessary.

*Hint:* SQL Azure Reporting Services- when writing your report, make sure you have enabled Forms Authentication. You should use the 2010 .asmx address for your reporting service URL.
- **Report Name**: Write in the name of the package.
Datasource Wizard

In this section you will authenticate to the database the report runs against, set snapshots, and other options.

**Login Required:** Set the authentication information for the report.

**Preview:** View the report prior to execution.
Parameters Wizard

- In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.
- With PBRS, you can use the "Event Based" inserts for any parameter in your report. Ensure the filter values for each record are listed in your database. At runtime, the insert will contain the column data from the record that triggered the Event Based schedule.
- Using Event Based Data Inserts you can pull these values into your report.
- Drag and drop your Event Based Data inserts into the desired filter fields. If you do not wish to enter event based data value in your parameter, you can still manually type a value or select them from the drop-down box.
- There are 3 requirements in order for PBRS to detect your SSRS Report parameters and their parameter values:
  1. The parameter must be in use in the report.
  2. The parameter must be visible.
  3. The parameter must be set to be prompted at run time.
- If these three requirements are achieved, you should see the parameters in your report listed in this screen.
• For each parameter, select from the drop down list the value the report must use. You can type a value into the field as well.
• PBRS can handle SSRS Reports with Cascading parameters, or reports where you can select multiple parameter values.
• **Select All**: Selecting All Available Values will run the report given all the values.
• **Specified Value**: Select the value you want in your report.
• **Null Value**: Set no value for this parameter.
• **Default Value**: It will select the default value.
• **All Values (at run time)**: Any new values will automatically will be included at run time.
With PBRS, you can use Event Based Data inserts to customize the output file name of the report.

**Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.

**Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.

**Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.

**Append date/time:** This is useful for the following reasons:
- If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
You can track which reports ran and when they ran by looking at what the report is named.
Exception Handling Wizard

- **Check if the Report is Blank**: If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
- **Ignore the report and subsequent tasks**: if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, [click here](#).
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

*Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select "check if a report is blank" then select "Ignore the report." In the actions tab, select "Send Email" from the list. Compose your email and save.*
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.
• **Add**: Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, Sharepoint, SMS, and Dropbox.

• **Edit**: Select a destination and click to edit its properties. Or simply double-click on the destination.

• **Delete**: Select a destination and click this button to delete it.

• **Import**: click here to import from the list of default destinations.

• For more information about Type of Destinations, click [here](#).

• For more information about Output Formats, click [here](#).

• Click **OK**.
Customize Recipient Messaging

You can also customize the messaging the recipient receives. Using Event Based Data Inserts, PBRS will automatically pull data from the record that triggered the schedule and use it to customize the subject, body or report format.

![Image of PBRS customization interface]

**Destination**

- **Destination Name**: Email
- **Type**: Email

**Email**

- **To**: `<[e]Name;[Email]>
- **CC**:
- **BCC**:

**Subject**: `<[e]Name;[CustomerID] > Monthly Report`

**Dear <[e]Name;[ContactName]>,**

Here is your report of `<[e]Name;[CompanyName] >`.  

Thank you.

**Options (if any)**

- **Event-Based Data**
  - Name;[Address]
  - Name;[City]
  - Name;[CompanyName]
  - Name;[ContactName]
  - Name;[ContactTitle]
  - Name;[County]
  - Name;[CustomerID]
  - Name;[Email]
  - Name;[Fax]
  - Name;[Phone]
  - Name;[PostalCode]
  - Name;[Region]

**Format**: TEXT

**Mail Server**: Default

**Embed report**: unchecked

**Delivery Receipt**: unchecked

**Customize sender details (optional)**

- **Name**:
- **Address**:
• Simply drag and drop fields from your table to the desired position.

For example, to customize an email greeting, type the greeting, and add the recipients name as shown above.

Existing Reports

• A list of existing schedules will be displayed in the left hand pane.
• Click on the schedule that needs to run if the conditions are met and use the green arrow to select it.
• Schedules that are going to run if the conditions are met are shown in the right hand pane.

Click **Next** to continue.
Exception Handling Wizard

- Reports fail for any number of reasons - database connectivity issues, database busy, network issues and more. This screen gives you the ability to tell PBRS what to do if it encounters an error.

- Treat as “error” if not completed in X minutes: If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.

- On error, retry executing schedule every: If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”
• **Hours of Operation**: Event based schedules can poll 24 hours a day if required. Checking this option will allow you to set a specific time frame for when the event based schedule should run.

• **Schedule Priority**: Set the priority level of the schedule. This will come into play when other schedules are running at the same time. If the priority is set to High then the event based schedule will take priority over other schedules in the queue.

• If the priority level is set to low then it will be at the bottom of the queue and the other schedules will be ran first.

Click **Next** to continue.
Custom Tasks Wizard

- In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.
- For more information on Custom Tasks, click here.
- If you have no desire to add a Custom Task, you can click Next.
- In Event Based Schedule, you can select a custom task to run as a result of any of the conditions being met.

For Example:

Select the DSN name you want to update.

*Hint: In Event Based, you can select another DSN to run tasks.*
Update database records

Table containing records to update
Suppliers

Update this column
SupplierID

Set its value to
<[e]Reports Exists;[CustomerID]>

Set
SupplierID = <[e]Reports Exists;[CustomerID]>

Skip
OK
Cancel
Update database records

Task Name: Update database records

Only update records where

- SupplierID
- IS NOT EMPT

Where

(Suppliers.SupplierID IS NOT NULL AND Suppliers.SupplierID <> *)
Update database records

Task Name: Update database records

Completed SQL Script:

```
UPDATE Suppliers SET SupplierID = l字符Reports Exists;[CustomerID]>
WHERE (Suppliers.SupplierID IS NOT NULL AND Suppliers.SupplierID <> 'x');
```
Hint: When sending an email you can use Event Based inserts to reference the condition that triggered the email.
For Example:

- After adding all the required Custom Actions, click **Next** to continue.
Execution Flow

If you have schedules AND tasks being executed as part of the event based schedule you can determine the order.

For Example:

Run Schedules then the Custom Actions

OR

Run the Custom Actions first, then the schedules, the run the Custom Actions again.

Click Finish.
Event Based Schedule Context Menu

Right-Click on a schedule to see the following actions.

- **Properties**: Access the schedule set up for editing. Or you can just double click on the schedule.
- **Copy**: Use this to copy an existing schedule. You can then paste it into another folder or the same folder. Simply open the folder you wish to paste to, right-click in the "white" space and select "Paste". Follow the on-screen instructions to complete the process.
- **Paste**: Paste a previously copied schedule.
- **Rename**: Rename a schedule.
- **Enabled**: Schedules are enabled when there is a check beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check. Disabled schedules will not run till they are enabled again.
- **Execute Schedule**: This will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. This only moves on if the schedule is run automatically by one of the schedulers.
- **Delete Schedule**: Selecting this option will delete the schedule.
- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
To access your schedule properties, right click on a schedule and select properties.

Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can edit the general information of your schedule from here.

Event-Based Schedule Properties - Report

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
</tr>
<tr>
<td>Schedule Name</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Keywords (opt.)</td>
</tr>
</tbody>
</table>

OK  Cancel  Apply
Conditions

You can add, edit, or delete conditions type of your schedule from here.
Reports

You can add, edit, or delete reports from here.
Schedule Options

You can edit exception handling and schedules options from here.
Tasks

You can add, edit, or delete tasks from here.
Execution Flow

You can edit the execution flow from here.
**History:** Review the schedules history. Successes, failures, and other data is located here.
An Event Based Package Schedule allows you to run several Event Based schedules at the same time. It also allows you to determine the timing and order of execution of the Event Based schedules in the package.

**How do I create Event Based Package in PBRS?**

- Go to Event Based Package.
- **Package Name**: The name of the package.
- **Create In**: The PBRS folder where the package is stored.
- **Description**: A short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
### Schedule Wizard

In this section, you will decide when the report will execute. There are a variety of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  _Example:_ Run the schedule every 3 days.
• **Weekly:** Run a report on a weekly time frame.
  - **Sub options:** Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  - **On:** Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

![Weekly Schedule Options](image1)

• **Week Days:** Run the schedule Monday through Friday.

![Week Days Schedule Options](image2)

• **Working Day:** Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

![Working Day Schedule Options](image3)
• **Monthly:** Run the schedule on a monthly time frame.
  o **Use the following options:** Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

![Monthly Schedule Options](image)

• **Annual:** Run the schedule every year at a specified time.

![Annual Schedule](image)

• **Custom Calendar:** Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.

![Custom Calendar Options](image)

• **Other:** Other scheduling options.
  o Run Schedule every X Minutes, hours, days, weeks, months, years.
- **None**: No scheduling is required for this item.

- **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.
- **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.
- **Schedule time**: On the Next Run date, the package will run at this time.
- **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.
- **Next to run on**: The package will next run on this date.
- **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.

- **Until**: After this date, there will be no automated scheduling of this package.
- **Enable this Schedule**: Uncheck this option to Disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
Schedules Wizard

Event-Based Package

- Click **Add**.

**New Reports**

- Display a screen where you can create a new reports schedule.
- To add a new Event Based Report, click here.

**Existing Schedules**

- Displays a list of existing schedules in PBRS for you to choose from.
• Select the schedule and click **OK**.
Click **Next** to continue to the next wizard section.
In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.

For more information on Custom Tasks, click here.

If you have no desire to add a Custom Task, you can click next.

Click Next to continue to the next wizard section.
If you have schedules AND tasks being executed as part of the event based schedule you can determine the order.

For Example:

*Run Schedules then the Custom Actions*

*OR*

*Run the Custom Actions first, then the schedules, the run the Custom Actions again.*

- Click **Finish**.
Event Based Package Schedule Context Menu

Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Add Schedule**: You may add new reports or existing.
- **Copy**: Use this to copy an existing schedule. You can then paste it into another folder or the same folder. Simply open the folder you wish to paste to, right-click in the "white" space and select "Paste". Follow the on-screen instructions to complete the process.
- **Paste**: Paste a previously copied schedule.
- **Rename**: Rename a schedule.
- **Enabled**: Schedules are enabled when there is a check beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check. Disabled schedules will not run till they are enabled again.
- **Move**: Use this option to move the report into an existing package.
- **Open**: This will open the package and show its constituent reports.
- **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete**: Selecting this option will delete the schedule.
- **Split Package**: This will split all the constituent reports in the package.

    This process will automatically delete the package once the splitting process is completed.

- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
Event Based Package Properties

To access your schedule properties, right click on a schedule and select properties.

Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can change the general information of your schedule from here.

Event-Based Package

- Location: Daily
- Schedule Name: Daily Reports
- Description (optional): 
- Keywords (optional): 

OK  Cancel  Apply
Schedule

You can change the schedule time of your report from here.
Schedules

You can add, edit or delete reports from here.
Tasks

You can add, edit, or delete tasks from here.
Execution Path

You can change the execution path from here.
**History**: Review the schedules history. Successes, failures, and other data is located here.

<table>
<thead>
<tr>
<th>Started</th>
<th>Finished</th>
<th>Details</th>
</tr>
</thead>
</table>
Data-Driven Schedules for Power BI

A data-driven schedule allows you to drive all variables of your reporting requirements (filters, destinations, output formats, etc.) from database tables and queries at run time. You can also use static text and default values should you wish. You can use Data Driven schedules for a number of scenarios.

Here are some examples:

Distribute a report to a fluctuating list of recipients. For example, you can distribute a report throughout a large organization where recipients vary from one month to the next, or use other criteria that determines group membership from an existing set of users. E.g. select * from mytable where firstname = 'john' will generate the report and distribute only for records where the recipient's first name is John.

Filter the report output using report filter values that are retrieved at run time. For example, the filter value returned from the table for Last Name will be “Doe” for John Doe and “Smith” for John Smith.

Determine the delivery type and report format dynamically at run time. For example, John Smith gets the report as a PDF file by email with a customized email body and John Doe gets the report as an excel spreadsheet by FTP upload to his web server.

The following simple example will illustrate the process of creating a Data-Driven Schedule.

Scenario: You have a report which has a large number of filter and destination combinations. Representing the combinations in a table may look something like the example below (Yellow = filters)

<table>
<thead>
<tr>
<th>Region</th>
<th>Area</th>
<th>Country</th>
<th>Sector</th>
<th>FirstName</th>
<th>LastName</th>
<th>email</th>
<th>disk</th>
<th>printer</th>
<th>FTPServer</th>
<th>FTPFolder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas North</td>
<td>United States</td>
<td>1</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:john@mycompany.com">john@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas North</td>
<td>United States</td>
<td>2</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:john@mycompany.com">john@mycompany.com</a></td>
<td></td>
<td><a href="mailto:staffreports@mycompany.com">staffreports@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas North</td>
<td>United States</td>
<td>3</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:john@mycompany.com">john@mycompany.com</a></td>
<td></td>
<td><a href="mailto:staffreports@mycompany.com">staffreports@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas North</td>
<td>Canada</td>
<td>1</td>
<td>Peter</td>
<td>Crimble</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><a href="mailto:staffreports@mycompany.com">staffreports@mycompany.com</a></td>
<td></td>
</tr>
<tr>
<td>Americas South</td>
<td>Brazil</td>
<td>34</td>
<td>Jorge</td>
<td>Minola</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><a href="mailto:staffreports@mycompany.com">staffreports@mycompany.com</a></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Asia</td>
<td>India</td>
<td>2</td>
<td>Anil</td>
<td>Maharaja</td>
<td><a href="mailto:anilmaharaja@mycompany.com">anilmaharaja@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Pacific</td>
<td>Japan</td>
<td>3</td>
<td>John</td>
<td>Wu</td>
<td><a href="mailto:johnwu@mycompany.com">johnwu@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You need to have the report run once for each record. The filter values entered in the table above should populate the filters in the report and the report should be delivered to the destinations shown in the table.

- Please note that with the above data when the schedule runs, the following will occur:
  - John Doe will receive only one email for the reports from sectors 1 and 3. He will also get the reports from sectors 2, 3 and 34 delivered to his reports disk location.
  - Peter Crimble will have his report printed on the Printer he specified.
  - Jorge Minola will have a copy of his report sent to John Doe to the disk location he specified and a copy uploaded to his FTP server and folder.
  - Anil Maharaja will receive an email as requested.
  - John Wu will have his report delivered to his email and FTP server as requested.
Note that as the data changes in the database to reflect the requirements, the reports will be delivered as necessary without requiring any changes to the schedule in PBRS.

Using a Data Driven schedule PBRS will reel through the database table and generate and deliver a report for each record using the information provided.

**How do I create Data-Driven Schedule for Power BI?**

- Go to **Data-Driven** and select **For Power BI**.
Building a Data Driver Wizard

- The Data Driver is where you set up the source for data for your data driven reports. If your data source or data selection criteria changes this is where you will need to make any required changes.
- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*
When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
- Click **Parse**.
- For more information of "Get Values From Database" interface, click here.
- Click **OK**.
• Click **Build** to specify the data selection criteria. This will return you to the Build Data Driver tool.

• **Key Column:** Select the key column for the data that is returned for the reports. The information that drives the schedule is required to have a key column so that each row in the table is uniquely identified by the value in this column. The key column is there as an identifier which is used to troubleshoot in cases where there is a problem with one of the records.

• **Group reports by email address:** You can instruct PBRS to group reports that are sent to the same email address. Please note that enabling this option disables the ability to embed the reports in the email body for email destinations.

Click **Next** to continue to the next wizard section.
General Wizard

- **Create In:** This section is for select the folder where you want to create the single report in.
- **Power BI Account:** In this section is to select what Power BI Account you want to create the single report. In this section, you may add a new account in the Add New button.
- **Select Report:** Click on the drop-down menus to navigate to the required report.
- **Schedule Name:** Write in the name of the package.
- **Description (optional):** you may write a short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword (optional):** Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
In this section, you will decide when the report will execute. There are varieties of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
- **Weekly**: Run a report on a weekly time frame.
  - **Sub options**: Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  - **On**: Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

<table>
<thead>
<tr>
<th>Repeat every</th>
<th>1</th>
<th>weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>on</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monday</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Tuesday</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

- **Week Days**: Run the schedule Monday through Friday.

- **Working Day**: Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

<table>
<thead>
<tr>
<th>Specify the 'nth' or 'last' working day of the month</th>
</tr>
</thead>
<tbody>
<tr>
<td>nth</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>
• **Monthly:** Run the schedule on a monthly time frame.
  - **Use the following options:** Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

• **Annual:** Run the schedule every year at a specified time.

• **Custom Calendar:** Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.
• **Other**: Other scheduling options.
  - Run Schedule every X Minutes, hours, days, weeks, months, years.

• **None**: No scheduling is required for this item.

• **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.
• **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.
• **Schedule time**: On the Next Run date, the package will run at this time.
• **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.
• **Next to run on**: The package will next run on this date.
• **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  *For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.*

• **Until**: After this date, there will be no automated scheduling of this package.
• **Enable this Schedule**: Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.
Click **Next** to continue to the next wizard section.

**Report Setting Wizard**

In this section, you may set up the dashboard/report.

- **Left margin (% of width):** The size of the left margin as a percentage of the page width.
- **Page Height (pixels):** The height of the rendered file.
- **Page width (pixels):** The width of the rendered file.
- **Right margin (% of width):** The size of the right margin as a percentage of the page width.
- **Maximum Loading Time (secs):** The maximum amount of time that the renderer will wait before timing out.
- **Minimum Loading Time (secs):** The amount of time that PBRS will wait for the dashboard/report to load before rendering it to file.
- **Page Number (Optional):** The Power BI page(s) to render. Only applicable to Power BI reports. You can specify a page range e.g 1-5 or specific e.g. 1,3,5.
- **View Style:** How the report fits on the page: Fit to Page, Fit to Width, or Actual Size.
- **Enable snapshots and keep snapshots for "X" Days.**
- **Preview:** By clicking here you may see the preview dashboard/report.

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Click **Next** to continue to the next wizard section.

**Report Filters Wizard**

- In this section, you will determine the filters for your report (if any). If your report has no filters, you may skip this section by clicking next.
- With PBRS, you can Data Drive any filter in your report. Ensure the filter values for each record are listed in your data base.
- Using Data Driven Inserts you can pull these values into your report.
- Drag and drop your Data Driven inserts into the desired filter fields. If you do not wish to enter data driven value in your parameter, you can still manually type a value or select them from the drop-down box.
- **Preview**: View the dashboard/report output given the selected filters.
- **Filter Type**: You may choose between Basic Filter or Advanced Filter.
- **Filter using this field (Table.column)**: Choose the table and column you would like to set up the filter.
- **Show items when the value matches (Basic Filter)**: Insert the value you would like to add and then click Add.
- **Show Items when the value (Advanced Filter):** In this option, you have the option to show items when the value and select the option from the drop-down menu.
• Click **Save Filter** to add the filter.

Click **Next** to continue to the next wizard section.
In this section select the datasets to refresh before the report is executed.

- **Power BI Account**: Select the account to refresh datasets.
- **Workspace**: The path to the required report.
- **Dataset**: Select the dataset.
- **Notification Options**: Receive a notification after the report is executed, the report failed to execute, or do not receive a notification.
- **After refreshing the datasets above, wait 'X' seconds before running the report.**

Click **Next** to continue to the next wizard section.
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.
• **Add:** Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.

![Add destinations menu]

• **Edit:** Select a destination and click to edit its properties. Or simply double-click on the destination.
• **Delete:** Select a destination and click this button to delete it.
• **Import:** Click here to import from the list of default destinations.
• For more information about Type of Destinations, click [here](#).
• For more information about Output Formats, click [here](#).
Customizing the Destination

With the Data Driven Schedule, you can determine the delivery method of your report based on your data. In your table, specify the delivery method by creating a column for each delivery type (FTP, SharePoint, Email etc.). For each record specify their email, fax number, and so on.

<table>
<thead>
<tr>
<th>Region</th>
<th>Area</th>
<th>Country</th>
<th>Sector</th>
<th>FirstName</th>
<th>LastName</th>
<th>email</th>
<th>disk</th>
<th>printer</th>
<th>FTPServer</th>
<th>FTPFolder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>1</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>2</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>South</td>
<td>Brazil</td>
<td>3</td>
<td>Peter</td>
<td>Grindle</td>
<td>Peter@myreportlydoo</td>
<td>HP2003slUpstairs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Asia</td>
<td>India</td>
<td>2</td>
<td>Anil</td>
<td>Maharaja</td>
<td><a href="mailto:mnharaja@mycompany.com">mnharaja@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Pacific</td>
<td>Japan</td>
<td>3</td>
<td>John</td>
<td>Wu</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Tip:** For email destinations, simply add a semicolon after an email address to send the same instance of the report to another email address.

- Data driving the Report’s Distribution
- As mentioned above, PBRS will pull delivery data from your database.
- In this example, we will be using email addresses found in the table.
- With Data Driven inserts, simply drag and drop the field that indicates your desired destination *(email in this case)*.

Now PBRS will deliver a unique report based on a corresponding email address.
Customize Recipient Messaging

You can also customize the messaging the recipient receives. Using Data Driven Inserts, PBRS will automatically pull data from your table and use it to customize the subject, body or report format.
• Simply drag and drop fields from your table to the desired position.

    For example, to customize an email greeting, type the greeting, and add the recipient’s name as shown above.

Click **Next** to continue to the next wizard section.
Exception Handling Wizard

- **Treat as “error” if not completed in X minutes:** If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every:** If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”
• **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

• **Ignore the report and subsequent tasks:** If the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.

**Method**

Select the Method that will determine whether a report is blank.

- **SQL Query:** Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- **Click Build.**
- Get values from a database window will appear. For more information about Get values from database, click here.
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click Next to continue to the next wizard section.
Custom Tasks Wizard

- In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.
- For more information on Custom Tasks, click here.
- If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Data-Driven Schedule Context Menu

Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Copy**: Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename**: Rename the package.
- **Enabled**: Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move**: Use this option to move the report into an existing package.
- **Preview**: Preview the report before execution.
- **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers
- **Delete**: Selecting this option will delete the schedule.
- **Test**: Use this option to test the schedule and export it to selected "test" destinations.
- **Convert To Package**: This button will move this report into a package. The package will have the name of the single schedule report.
- **Ad-Hoc Email to Recipients**: Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
• **Create Shortcut:** Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
• **Ad-Hoc View:** This button allows you to preview the report.
To access your schedule properties, right click on a schedule and select **properties**.

Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can change the general information of your schedule from here.
Schedule
You can change schedule time from here
Report Settings

You can change the report settings of your schedule from here.
Report Filter

You can add, edit, or delete report filters from here.
Refresh Datasets

You can add or delete datasets from here.
Destinations

You can add, edit, or delete destinations from here.
Exception Handling

You can edit exception handling options from here.
Tasks

You can add, edit or delete tasks from here.
Snapshots: A snapshot is a copy of each report a schedule or a package generates. Keeping snapshots enables you to resend past reports without generating them afresh - especially if the data has changed in the meantime.

Simply select the number of days to keep the snapshots.
**History:** Review the schedules history. Successes, failures, and other data is located here.
Data Driver

You can edit data driver from here.

Data-Driven Schedule Properties

Database Connection Setup

- **DSN Name**: SQL RD Samples
- **UserID**: 
- **Password**: 

Data selection criteria

```
SELECT Customers.* FROM Customers WHERE (Customers.Email IS NOT NULL AND Customers.Email <> '')
```
Data-Driven Schedules for SSRS

A data-driven schedule allows you to drive all variables of your reporting requirements (parameters, destinations, output formats, etc.) from database tables and queries at run time. You can also use static text and default values should you wish. You can use Data Driven schedules for a number of scenarios.

Here are some examples:

Distribute a report to a fluctuating list of recipients. For example, you can distribute a report throughout a large organization where recipients vary from one month to the next, or use other criteria that determines group membership from an existing set of users. E.g. select * from mytable where firstname = 'john' will generate the report and distribute only for records where the recipient’s first name is John.

Filter the report output using report parameter values that are retrieved at run time. For example, the parameter value returned from the table for Last Name will be “Doe” for John Doe and “Smith” for John Smith.

Determine the delivery type and report format dynamically at run time. For example, John Smith gets the report as a PDF file by email with a customized email body and John Doe gets the report as an excel spreadsheet by FTP upload to his web server.

The following simple example will illustrate the process of creating a Data-Driven Schedule.

**Scenario:** You have a report which has a large number of parameter and destination combinations. Representing the combinations in a table may look something like the example below (Yellow = parameters)

<table>
<thead>
<tr>
<th>Region</th>
<th>Area</th>
<th>Country</th>
<th>Sector</th>
<th>FirstName</th>
<th>LastName</th>
<th>email</th>
<th>disk</th>
<th>printer</th>
<th>FTPServer</th>
<th>FTPFolder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>1</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>2</td>
<td>John</td>
<td>Doe</td>
<td></td>
<td></td>
<td></td>
<td>myserver/myreports/jdoe</td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>3</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td>myserver/myreports/jdoe</td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>Canada</td>
<td>1</td>
<td>Peter</td>
<td>Crimble</td>
<td></td>
<td></td>
<td></td>
<td>HP2003aUpstairs</td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>South</td>
<td>Brazil</td>
<td>34</td>
<td>Jorge</td>
<td>Minola</td>
<td></td>
<td></td>
<td></td>
<td>myftpserver.com</td>
<td>myminola</td>
</tr>
<tr>
<td>Asia</td>
<td>Asia</td>
<td>India</td>
<td>2</td>
<td>Anil</td>
<td>Maharaja</td>
<td><a href="mailto:mmaharaja@mycompany.com">mmaharaja@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Pacific</td>
<td>Japan</td>
<td>3</td>
<td>John</td>
<td>Wu</td>
<td><a href="mailto:jwu@mycompany.com">jwu@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td>m应用场景 server.com</td>
</tr>
</tbody>
</table>
John Wu will have his report delivered to his email and FTP server as requested.

Note that as the data changes in the database to reflect the requirements, the reports will be delivered as necessary without requiring any changes to the schedule in PBRS.

Using a Data Driven schedule PBRS will reel through the database table and generate and deliver a report for each record using the information provided.

How do I create Data-Driven Schedule for SSRS?

Go to Data-Driven and select For SSRS.
Building a Data Driver Wizard

- The Data Driver is where you set up the source for data for your data driven reports. If your data source or data selection criteria changes this is where you will need to make any required changes.
- **ODBC Datasource Name:** Drop down and select a DSN.
  
  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*
When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID:** Enter the User ID PBRS should use to log on to the database.
- **Password:** Enter the password associated with the above user.
- **Connect:** Click Connect to connect to the Database.
- Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
- Click **Parse**.
- For more information of "Get Values From Database" interface, [click here](#).
- Click **OK**.
• Click **Build** to specify the data selection criteria. This will return you to the Build Data Driver tool.

• **Key Column**: Select the key column for the data that is returned for the reports. The information that drives the schedule is required to have a key column so that each row in the table is uniquely identified by the value in this column. The key column is there as an identifier which is used to troubleshoot in cases where there is a problem with one of the records.

• **Group reports by email address**: You can instruct PBRS to group reports that are sent to the same email address. Please note that enabling this option disables the ability to embed the reports in the email body for email destinations.

Click **Next** to continue to the next wizard section.
General Wizard

- **Create in**: The PBRS folder where the schedule is stored.
- **Report Location**: Browse through the report server browser to select the desired report. Authenticate to the reports server if necessary.

  *Hint: SQL Azure Reporting Services - when writing your report, make sure you have enabled Forms Authentication. You should use the 2010 .asmx address for your reporting service URL.*
- **Schedule Name**: The name of the schedule.  
- **Description**: A short description to help other users identify exactly what this schedule is and what it is expected to do.  
- **Keyword (optional)**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
In this section, you will decide when the report will execute. There are a variety of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly**: Run a report on a weekly time frame.
  - **Sub options**: Repeat every X weeks.

  *Example: Run the schedule every 2 Weeks.*

  - **On**: Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.

  *Example: Run every Monday, Wednesday, and Friday.*

• **Week Days**: Run the schedule Monday through Friday.

• **Working Day**: Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.
• **Monthly:** Run the schedule on a monthly time frame.
  o **Use the following options:** Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

- **Annual:** Run the schedule every year at a specified time.

- **Custom Calendar:** Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see **Custom Calendars** for more information.

- **Other:** Other scheduling options.
  o Run Schedule every X Minutes, hours, days, weeks, months, years.
- **None**: No scheduling is required for this item.

- **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.
- **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.
- **Schedule time**: On the Next Run date, the package will run at this time.
- **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.
- **Next to run on**: The package will next run on this date.
- **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  *For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.*

- **Until**: After this date, there will be no automated scheduling of this package.
- **Enable this Schedule**: Uncheck this option to Disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
Datasource Wizard

- In this section you will authenticate to the database the report runs against, set snapshots, and other options.
- **Login Required:** Set the authentication information for the report.

  ![Set Table Login](image)

  - **Enable Snapshots and keep snapshot for X Days:** Save a Picture of the report as it is produced. Choose the amount of time will be stored in the system before deletion.
• **Preview**: View the report prior to execution.

Click **Next** to continue to the next wizard section.
In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.

There are 3 requirements in order for PBRS to detect your SSRS Report parameters and their parameter values:
1. The parameter must be in use in the report.
2. The parameter must be visible.
3. The parameter must be set to be prompted at run time.

If these three requirements are achieved, you should see the parameters in your report listed in this screen.

For each parameter, select from the drop down list the value the report must use. In a single schedule, only one parameter value can be run at a time per parameter. You can type a value into the field, or drag and drop an "insert".

PBRS can handle SSRS Reports with Cascading parameters, or reports where you can select multiple parameter values.

- **Select All:** Selecting All Available Values will run the report given all the values.
- **Specified Value:** Select the value you want in your report.
- **Null Value:** Set no value for this parameter.
• **Default Value:** It will select the default value.
• **All Values (at run time):** Any new values will automatically be included at run time.
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.

- **Add**: Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.
- For more information of adding destinations, [click here](#).
- For more information about Output Formats, [click here](#).
• **Edit**: Select a destination and click to edit its properties. Or simply double-click on the destination.
• **Delete**: Select a destination and click this button to delete it.
• **Import**: click here to import from the list of default destinations.
Customizing the Destination

With the Data Driven Schedule, you can determine the delivery method of your report based on your data. In your table, specify the delivery method by creating a column for each delivery type (FTP, SharePoint, Email etc.). For each record specify their email, fax number, and so on.

<table>
<thead>
<tr>
<th>Region</th>
<th>Area</th>
<th>Country</th>
<th>Sect</th>
<th>FirstName</th>
<th>LastName</th>
<th>email</th>
<th>disk</th>
<th>printer</th>
<th>FTPServer</th>
<th>FTPFolder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>1</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td>myserver1/myreports/jdoe</td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>2</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td>myserver1/myreports/jdoe</td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>3</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td>HP2003sUpstairs</td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>Canada</td>
<td>1</td>
<td>Peter</td>
<td>Crumble</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>South</td>
<td>Brazil</td>
<td>3</td>
<td>Jorge</td>
<td>Minola</td>
<td></td>
<td></td>
<td></td>
<td>myserver1/myreports/jdoe</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Asia</td>
<td>India</td>
<td>2</td>
<td>Anil</td>
<td>Maharaja</td>
<td><a href="mailto:mmaharaja@mycompany.com">mmaharaja@mycompany.com</a></td>
<td></td>
<td></td>
<td>myipservers.com</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Pacific</td>
<td>Japan</td>
<td>3</td>
<td>John</td>
<td>Wu</td>
<td><a href="mailto:jwu@mycompany.com">jwu@mycompany.com</a></td>
<td></td>
<td></td>
<td>myotherftpserver.com</td>
<td></td>
</tr>
</tbody>
</table>

**Tip:** For email destinations, simply add a semicolon after an email address to send the same instance of the report to another email address.

- Data driving the Report's Distribution
- As mentioned above, PBRS will pull delivery data from your database.
- In this example, we will be using email addresses found in the table.
- With **Data Driven inserts**, simply drag and drop the field that indicates your desired destination (email in this case).

*Now PBRS will deliver a unique report based on a corresponding email address.*
**Customize Recipient Messaging**

You can also customize the messaging the recipient receives. Using Data Driven Inserts, PBRS will automatically pull data from your table and use it to customize the subject, body or report format.
• Simply drag and drop fields from your table to the desired position.

   For example, to customize an email greeting, type the greeting, and add the recipient’s name as shown above.

Click Next to continue to the next wizard section.
Exception Handling

- **Treat as “error” if not completed in X minutes:** If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every:** If set to 0, PBRS will deem the schedule as "Failed" the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as "Failed."

- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

- **Ignore the report and subsequent tasks:** If the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, click here.
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

**Tip:** You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click **Next** to continue to the next wizard section.
Custom Tasks

- In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.
- For more information on Custom Tasks, click here.
- If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Copy**: Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename**: Rename the package.
- **Enabled**: Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move**: Use this option to move the report into an existing package.
- **Preview**: Preview the report before execution.
- **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete**: Selecting this option will delete the schedule.
- **Test**: Use this option to test the schedule and export it to selected "test" destinations.
- **Convert To Package**: This button will move this report into a package. The package will have the name of the single schedule report.
- **Ad-Hoc Email to Recipients**: Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
- **Ad-Hoc View:** This button allows you to preview the report.

*Data-Driven Schedules Properties*

- To access your schedule properties, right click on a schedule and select **properties**.
- Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can change the general information of your schedule here.
**Schedule**

You can edit the schedule time of your schedule from here.
Report

You can add, edit, or delete parameters from here.
Destinations

You can add, edit, or delete destinations from here.
Exception Handling

You can edit exception handling from here.
Tasks

You can add, edit, or delete tasks from here.
**Snapshots**: A snapshot is a copy of each report a schedule or a package generates. Keeping snapshots enables you to resend past reports without generating them afresh - especially if the data has changed in the meantime.

Simply select the number of days to keep the snapshots.
**History:** Review the schedules history. Successes, failures, and other data is located here.
Data Driver

You can edit data driver from here.
Data-Driven Package Report Schedule for Power BI

Unlike a Data Driven Schedule, a Data Driven Package will determine the data driver further into the schedule. A Data-Driven Package allows you to send a package of reports to an individual or group from one schedule. In this Section we will define the general properties of the package.

How to Create a Data-Driven Package Schedule Report for Power BI?

- Go to Data-Driven Package.
- **Package Name**: The name of the package.
- **Create In**: The PBRS folder where the package is stored.
- **Description**: A short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword**: Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
In this section, you will decide when the report will execute. There are a variety of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly:** Run a report on a weekly time frame.
  - **Sub options:** Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  - **On:** Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

![Weekly Schedule Options](image)

• **Week Days:** Run the schedule Monday through Friday.

![Week Days Schedule](image)

• **Working Day:** Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

![Working Day Schedule](image)
• **Monthly:** Run the schedule on a monthly time frame.
  o **Use the following options:** Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

![Monthly Schedule Options](image1)

• **Annual:** Run the schedule every year at a specified time.

![Annual Schedule Options](image2)

• **Custom Calendar:** Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.

![Custom Calendar Options](image3)

• **Other:** Other scheduling options.
- Run Schedule every X Minutes, hours, days, weeks, months, years.

- **None**: No scheduling is required for this item.

- **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.

- **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.

- **Schedule time**: On the Next Run date, the package will run at this time.

- **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.

- **Next to run on**: The package will next run on this date.

- **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  *For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.*

- **Until**: After this date, there will be no automated scheduling of this package.

- **Enable this Schedule**: Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
The Data Driver is where you set up the source for data for your data driven reports. If your data source or data selection criteria changes this is where you will need to make any required changes.

- **ODBC Datasource Name:** Drop down and select a DSN.

  We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.

  All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.
When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- **Select**: Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
- **Click Parse**.
- **For more information of "Get Values From Database" interface**.
- **Click OK**.
• Click **Build** to specify the data selection criteria. This will return you to the Build Data Driver tool.

• **Key Column:** Select the key column for the data that is returned for the reports. The information that drives the schedule is required to have a key column so that each row in the table is uniquely identified by the value in this column. The key column is there as an identifier which is used to troubleshoot in cases where there is a problem with one of the records.

• **Group reports by email address:** You can instruct PBRS to group reports that are sent to the same email address. Please note that enabling this option disables the ability to embed the reports in the email body for email destinations.

• **Merging Multiple Reports:** Where the reports are grouped you can also instruct PBRS to optionally merge the output of the grouped reports into a single file (PDF and MS Excel formats only). Selecting each option will bring up the options for the output format that you can further customize.
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.

- **Add**: Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.
- For more information of adding destinations.
- For more information about Output Formats.
- **Edit:** Select a destination and click to edit its properties. Or simply double-click on the destination.
- **Delete:** Select a destination and click this button to delete it.
- **Import:** click here to import from the list of default destinations.
Customizing the Destination

With the Data Driven Schedule, you can determine the delivery method of your report based on your data. In your table, specify the delivery method by creating a column for each delivery type (FTP, SharePoint, Email etc.). For each record specify their email, fax number, and so on.

<table>
<thead>
<tr>
<th>Region</th>
<th>Area</th>
<th>Country</th>
<th>Sect</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>disk</th>
<th>printer</th>
<th>FTP Server</th>
<th>FTP Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas North</td>
<td>United States</td>
<td>1 John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas North</td>
<td>United States</td>
<td>2 John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas North</td>
<td>United States</td>
<td>3 John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas North</td>
<td>Canada</td>
<td>1 Peter</td>
<td>Crumble</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas South</td>
<td>Brazil</td>
<td>34 Jorge</td>
<td>Minola</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>India</td>
<td>2 Anil</td>
<td>Maharaja</td>
<td><a href="mailto:min@mycompany.com">min@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Pacific</td>
<td>Japan</td>
<td>3 John</td>
<td>Wu</td>
<td><a href="mailto:jwu@mycompany.com">jwu@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tip: For email destinations, simply add a semicolon after an email address to send the same instance of the report to another email address.

- Data driving the Report’s Distribution
- As mentioned above, PBRS will pull delivery data from your database.
- In this example, we will be using email addresses found in the table.
- With **Data Driven inserts**, simply drag and drop the field that indicates your desired destination (email in this case).

- Now PBRS will deliver a unique report based on a corresponding email address.
Customize Recipient Messaging

You can also customize the messaging the recipient receives. Using Data Driven Inserts, PBRS will automatically pull data from your table and use it to customize the subject, body or report format.
• Simply drag and drop fields from your table to the desired position.

For example, to customize an email greeting, type the greeting, and add the recipient’s name as shown above.

Click **Next** to continue to the next wizard section.
Reports Wizard

• A package may be created with no constituent reports and then the reports can be added later. However, you may also add reports at this stage in the wizard - and amend, delete or add some more.

• **Merge all Excel Files:** PBRS will then merge all excel outputs in the package into a single excel file.
**HINT:** Add Password Protection to this section in this option window rather than the individual report in the package. This will password protect the entire merged workbook.

- **Merge all PDF Files:** Merge PDF outputs into a single PDF file. The reports will appear in the merged PDF in the order they are displayed in the package schedule. Checking this box will bring up additional PDF Options.
Click **Add** and select **For Power BI**.

Package Report Properties will appear on.
Package Report Properties

a. Report Wizard

- **Power BI Account**: Add the account to send the report.
- **Select Report**: The path to the required report.
- **Report Name**: Enter a name for the report.
- **Enabled**: Enable or Disable this specific report in the Package.
b. Output Format Wizard

- In this section, you will select the output format of the report.
- For more information on Output Format, click here.
c. Report Filter Wizard

- In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.
- **Preview**: View the dashboard/report output given the selected filters.
- **Filter Type**: You may choose between Basic Filter or Advanced Filter.
- **Filter using this field (Table.column)**: Choose the table and column you would like to set up the filter.
- **Show items when the value matches (Basic Filter)**: Insert the value you would like to add and then click Add.
- **Show Items when the value (Advanced Filter):** In this option, you have the option to show items when the value and select the option from the drop-down menu.
• Click **Save Filter** to add the filter.
d. Report Settings Wizard

- In this section, you may set up the dashboard/report.
- **Left margin (% of width):** The size of the left margin as a percentage of the page width.
- **Page Height (pixels):** The height of the rendered file.
- **Page width (pixels):** The width of the rendered file.
- **Right margin (% of width):** The size of the right margin as a percentage of the page width.
- **Maximum Loading Time (secs):** The maximum amount of time that the renderer will wait before timing out.
- **Minimum Loading Time (secs):** The amount of time that PBRS will wait for the dashboard/report to load before rendering it to file.
- **Page Number (Optional):** The Power BI page(s) to render. Only applicable to Power BI reports. You can specify a page range e.g 1-5 or specific e.g. 1,3,5.
- **View Style:** How the report fits on the page: Fit to Page, Fit to Width, or Actual Size.
- **Enable snapshots and keep snapshots for "X" Days.**
- **Preview**: By clicking here you may see the preview dashboard/report.

- **Refresh Datasets**

  - **In this section select the datasets to refresh before the report is executed.**
  - **Power BI Account**: Select the account to refresh datasets.
  - **Workspace**: The path to the required report.
  - **Dataset**: Select the dataset.
  - **Notification Options**: Receive a notification after the report is executed, the report failed to execute, or do not receive a notification.
  - **After refreshing the datasets above, wait 'X' seconds before running the report.**
f. Naming (Optional)

- **Default Naming Convention:** PBRS will name the output file in the following format: reportname.format extension, e.g. Catalog Report.pdf.
- **Customize the output file name:** Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension:** Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is “CSV,” but you can give your export an extension of “txt” so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time:** This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
You can track which reports ran and when they ran by looking at what the report is named.
g. Exception Handling Wizard

- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

- **Ignore the report and subsequent tasks:** If the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, click here.
• **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

  Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

- Click OK.
Exception Handling Wizard

- **Treat as “error” if not completed in X minutes:** If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every:** If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”

- **Check if the Report is Blank:** If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.

- **Ignore the report and subsequent tasks:** If the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, [click here](#).
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click Next to continue to the next wizard section.
Custom Tasks Wizard

In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.

For more information on Custom Tasks, click here.

If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Open**: This will open the package and show its constituent reports.
You can right-click on each of the constituent reports to see the context-sensitive menu shown in the picture above.

- **Enabled**: Use this to enable or disable the constituent report.
- **Refresh**: Pulls through changes to just that report which were made outside PBRS.
- **Rename**: Renames the selected report.
- **Preview**: Generates a preview of the selected report.
- **Delete**: Deletes the selected report from package.
- **Properties**: Displays the configuration properties of just that report.

- **Add Report**: Use this to add one or more reports to an existing package.
- **Copy**: Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
- **Rename**: Rename the package.
- **Enabled**: Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
- **Move**: Use this option to move the report into an existing package.
- **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete**: Selecting this option will delete the schedule.
- **Test Package**: Use this option to test the schedule and export it to selected “test” destinations.
- **Split into Single Schedules**: This will split all the constituent reports in the package into Single Report Schedules.
  
  \[
  \text{This process will automatically delete the package once the splitting process is completed.}
  \]
- **Ad-Hoc Email to Recipients**: Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
To access your schedule properties, right click on a schedule and select **properties**.

Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can edit general information of your package from here.
Schedule

You can edit the schedule time of your package from here.
Reports

You can add, edit, or delete reports of your package from here.
Destinations

You can add, edit, or delete destination from here.
Exception Handling

You can edit exception handlings options from here.
**History:** Review the schedules history. Successes, failures, and other data is located here

<table>
<thead>
<tr>
<th>Started</th>
<th>Finished</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/7/2018 10:37:23 AM</td>
<td>9/7/2018 10:40:37 AM</td>
<td>Success</td>
</tr>
</tbody>
</table>
Tasks

You can add, edit, or delete tasks from here.
Data-Driver

You can edit data driver from here.

```
SELECT * FROM Customers WHERE (Customers.Email IS NOT NULL AND Customers.Email <> '')
```

Key Column: CustomerID

Group reports together by email address/directory (email/disk destination only):
- [ ] Merge the group into a single PDF file:
- [ ] Merge the group into a single Excel Workbook:
Data-Driven Package Schedule Report for SSRS

Unlike a Data Driven Schedule, a Data Driven Package will determine the data driver further into the schedule. A Data-Driven Package allows you to send a package of reports to an individual or group from one schedule.

How to Create a Data-Driven Package Schedule Report for SSRS?

- Go to Data-Driven Package.
General Wizard

- **Package Name:** The name of the package.
- **Create In:** The PBRS folder where the package is stored.
- **Description:** A short description to help other users identify exactly what this schedule is and what it is expected to do.
- **Keyword:** Enter some keywords which can be used later by Smart Folders to identify this schedule.

Click **Next** to continue to the next wizard section.
In this section, you will decide when the report will execute. There are a variety of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly**: Run a report on a weekly time frame.
  - **Sub options**: Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  - **On**: Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

![Weekly Schedule options]

• **Week Days**: Run the schedule Monday through Friday.

![Week Days Schedule]

• **Working Day**: Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.

![Working Day Schedule]
- **Monthly**: Run the schedule on a monthly time frame.
  - **Use the following options**: Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

- **Annual**: Run the schedule every year at a specified time.

- **Custom Calendar**: Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.

- **Other**: Other scheduling options.
- Run Schedule every X Minutes, hours, days, weeks, months, years.

- **None**: No scheduling is required for this item.

- **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.

- **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.

- **Schedule time**: On the Next Run date, the package will run at this time.

- **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.

- **Next to run on**: The package will next run on this date.

- **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.

- **Until**: After this date, there will be no automated scheduling of this package.

- **Enable this Schedule**: Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
Building a Data Driver Wizard

The Data Driver is where you set up the source for data for your data driven reports. If your data source or data selection criteria changes this is where you will need to make any required changes.

- **ODBC Datasource Name**: Drop down and select a DSN.

  *We strongly recommend System DSNs so that the DSN is visible to PBRS even when the user associated with the DSN is logged off.*

  *All communication to databases (including Access databases) is done through ODBC, so you must setup a system DSN to the database before you can use this facility.*
When setting up DSNs we recommend (if possible) that you use Windows Authentication (Trusted Connection). This ensures that your username and password are not required to be stored in PBRS (more secure) and overcomes a large number of security restrictions which Windows places on DSNs. When using Windows Authentication, make sure that the PBRS NT service user (or background application service user) has full rights to the database otherwise, though you will connect when you are logged in, automated scheduling will fail if the Service user has not got rights to the database.

When setting up a DSN to a SQL server, you must ensure that the "Default Database" setting is set to the database you are connecting to (Windows defaults this to "Master").

- **UserID**: Enter the User ID PBRS should use to log on to the database.
- **Password**: Enter the password associated with the above user.
- **Connect**: Click Connect to connect to the Database.
- Select the table from the database that holds the required data. You can refine your selection query by using the simple or advanced tabs.
- **Click Parse**.
- For more information of "Get Values From Database" interface, [click here](#).
- **Click OK**.
• **Click Build** to specify the data selection criteria. This will return you to the Build Data Driver tool.

• **Key Column:** Select the key column for the data that is returned for the reports. The information that drives the schedule is required to have a key column so that each row in the table is uniquely identified by the value in this column. The key column is there as an identifier which is used to troubleshoot in cases where there is a problem with one of the records.

• **Group reports by email address:** You can instruct PBRS to group reports that are sent to the same email address. Please note that enabling this option disables the ability to embed the reports in the email body for email destinations.

• **Merging Multiple Reports:** Where the reports are grouped you can also instruct PBRS to optionally merge the output of the grouped reports into a single file (PDF and MS Excel formats only). Selecting each option will bring up the options for the output format that you can further customize.
Destination Wizard

In this section, you will decide where your schedule will be delivered. The list in the center will display the list of destinations you have added to the schedule. You can organize the various destinations’ order by clicking on the green up and down arrows.

- **Add**: Click here to add a destination. You have several options which are: Email, Disk, Fax, FTP, ODBC, Printer, SharePoint, SMS, and Dropbox.
- For more information of adding destinations, [click here](#).
- For more information about Output Formats, [click here](#).
• **Edit**: Select a destination and click to edit its properties. Or simply double-click on the destination.
• **Delete**: Select a destination and click this button to delete it.
• **Import**: click here to import from the list of default destinations.
Customizing the Destination

With the Data Driven Schedule, you can determine the delivery method of your report based on your data. In your table, specify the delivery method by creating a column for each delivery type (FTP, SharePoint, Email etc.). For each record specify their email, fax number, and so on.

<table>
<thead>
<tr>
<th>Region</th>
<th>Area</th>
<th>Country</th>
<th>Sector</th>
<th>FirstName</th>
<th>LastName</th>
<th>email</th>
<th>disk</th>
<th>printer</th>
<th>FTPServer</th>
<th>FTPFolder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>1</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td>myserver@myreports@jdoe</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>2</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td>myserver@myreports@jdoe</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>North</td>
<td>United States</td>
<td>3</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a></td>
<td>myserver@myreports@jdoe</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>South</td>
<td>Brazil</td>
<td>3</td>
<td>Jorge</td>
<td>Minola</td>
<td><a href="mailto:jminola@myserver.com">jminola@myserver.com</a></td>
<td>HP3003stups@</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Asia</td>
<td>India</td>
<td>2</td>
<td>Anil</td>
<td>Maharaja</td>
<td><a href="mailto:m_maharaja@mycompany.com">m_maharaja@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Pacific</td>
<td>Japan</td>
<td>3</td>
<td>John</td>
<td>Wu</td>
<td><a href="mailto:jwu@mycompany.com">jwu@mycompany.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tip: For email destinations, simply add a semicolon after an email address to send the same instance of the report to another email address.

- Data driving the Report's Distribution
- As mentioned above, PBRS will pull delivery data from your database.
- In this example, we will be using email addresses found in the table.
- With Data Driven inserts, simply drag and drop the field that indicates your desired destination (email in this case).

- Now PBRS will deliver a unique report based on a corresponding email address.
Customize Recipient Messaging

You can also customize the messaging the recipient receives. Using Data Driven Inserts, PBRS will automatically pull data from your table and use it to customize the subject, body or report format.
• Simply drag and drop fields from your table to the desired position.

  For example, to customize an email greeting, type the greeting, and add the recipient’s name as shown above.

Click Next to continue to the next wizard section.
Report Wizard

- A package may be created with no constituent reports and then the reports can be added later. However, you may also add reports at this stage in the wizard - and amend, delete or add some more.
- **Merge all Excel Files**: PBRS will then merge all excel outputs in the package into a single excel file.
HINT: Add Password Protection to this section in this option window rather than the individual report in the package. This will password protect the entire merged workbook.

- Merge all PDF Files: Merge PDF outputs into a single PDF file. The reports will appear in the merged PDF in the order they are displayed in the package schedule. Checking this box will bring up additional PDF Options.
• Click **Add** and select **For SSRS**.
• Package Report Properties will appear on.
Package Report Properties

a. Report Wizard

- **Report Service URL**: Enter the address of your reporting services server.
- **Report Location**: Browse through the report server browser to select the desired report. Authenticate to the reports server if necessary.

*Hint: SQL Azure Reporting Services - when writing your report, make sure you have enabled Forms Authentication. You should use the 2010 .asmx address for your reporting service URL.*
- **Report Name**: Write in the name of the package.
- **Format**: Select the output format for the report.
b. Datasources Wizard

- In this section you will authenticate to the database the report runs against, set snapshots, and other options.
- **Login Required**: Set the authentication information for the report.

- **Preview**: View the report prior to execution.
c. Parameters Wizard

- In this section, you will determine the parameters for your report (if any). If your report has no parameters, you may skip this section by clicking next.
- There are 3 requirements in order for PBRS to detect your SSRS Report parameters and their parameter values:
  4. The parameter must be in use in the report.
  5. The parameter must be visible.
  6. The parameter must be set to be prompted at run time.
- If these three requirements are achieved, you should see the parameters in your report listed in this screen.
- For each parameter, select from the drop down list the value the report must use. You can type a value into the field as well.
- PBRS can handle SSRS Reports with Cascading parameters, or reports where you can select multiple parameter values.
  - **Select All:** Selecting All Available Values will run the report given all the values.
  - **Specified Value:** Select the value you want in your report.
  - **Null Value:** Set no value for this parameter.
• **Default Value:** It will select the default value.
• **All Values (at run time):** Any new values will automatically will be included at run time.

  *Tip: If you are looking to dynamically populate parameter values, the better choice is Data-Driven Schedule.*
d. Naming (Optional) Wizard

- **Default Naming Convention**: PBRS will name the output file in the following format: `reportname.format extension`, e.g. *Catalog Report.pdf*.
- **Customize the output file name**: Choose your own filename or right-click and use the Insert Function to insert a value.
- **Customize output extension**: Choose your own extension. This is useful for system integration. For example, the default extension for a character separated file is "CSV," but you can give your export an extension of "txt" so that the file can be read by another already existing system you may have. You may also right-click and use the Insert Function to insert a value.
- **Append date/time**: This is useful for the following reasons:
  - If the filename is the same each time, and it is being exported to the same folder each time, then it will be overwritten by the latest one each time. By appending date and time to the filename, each file remains unique, and no files are overwritten.
  - You can track which reports ran and when they ran by looking at what the report is named.
e. Exception Handling Wizard

- **Check if the Report is Blank**: If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
- **Ignore the report and subsequent tasks**: if the report is blank, do not send the report. The report will not be delivered to the destination. No custom tasks will be run.
Method

- Select the Method that will determine whether a report is blank.
- **SQL Query**: Select this option to use a user made query that will determine if the report is blank. If the query returns no results, the report is blank.
- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, click here.
• **File size check:** Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

Tip: You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

- Click OK.
**Exception Handling Wizard**

- **Treat as “error” if not completed in X minutes**: If a report takes longer than the specified amount of time to run, this option will treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs PBRS automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

  *If manually determining the error timing, please double check the run time of the report in order to get the correct time estimate.*

- **On error, retry executing schedule every**: If set to 0, PBRS will deem the schedule as “Failed” the first time it encounters an error. The schedule will not run again until its next scheduled time. Change the value to tell PBRS how many times you want it to retry running the report before declaring it as “Failed.”

- **Check if the Report is Blank**: If a report is blank because it genuinely returned no data, recipients can misconstrue this as an error with the scheduler. This option allows you to identify genuine empty reports and instruct PBRS on what to do with them.
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**Method**

- Select the Method that will determine whether a report is blank.
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- Click **Build**.
- Get values from a database window will appear. For more information about Get values from database, [click here](#).
- **File size check**: Assume reports is blank if size is under "X" bytes.
Actions

- Select an action from the task list. This task will be executed in the event that a schedule is blank.
- For more information about tasks, click here.

*Tip:* You can send a notification if a report is considered blank instead of sending the report. Simply select “check if a report is blank” then select “Ignore the report.” In the actions tab, select “Send Email” from the list. Compose your email and save.

Click **Next** to continue to the next wizard section.
In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.

For more information on Custom Tasks, click here.

If you have no desire to add a Custom Task, you can click finish to complete the schedule.
Right-Click on a schedule to see the following actions:

- **Properties**: Edit the schedule from here. Or you can just double click on the schedule.
- **Open**: This will open the package and show its constituent reports.

You can right-click on each of the constituent reports to see the context-sensitive menu shown in the picture above.

- **Enabled**: Use this to enable or disable the constituent report.
- **Refresh**: Pulls through changes to just that report which were made outside PBRS.
• **Rename**: Renames the selected report.
• **Preview**: Generates a preview of the selected report.
• **Delete**: Deletes the selected report from package.
• **Properties**: Displays the configuration properties of just that report.
• **Add Report**: Use this to add one or more reports to an existing package.
• **Copy**: Use this to copy the schedule. Right-click in the "white space" of the folder you wish to copy it to and select Paste button.
• **Rename**: Rename the package.
• **Enabled**: Schedules are enabled when there is a check icon beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check icon. Disabled schedules will not run until they are enabled again.
• **Move**: Use this option to move the report into an existing package.
• **Execute**: This button will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
• **Delete**: Selecting this option will delete the schedule.
• **Test Package**: Use this option to test the schedule and export it to selected "test" destinations.
• **Split into Single Schedules**: This will split all the constituent reports in the package into Single Report Schedules.

  *This process will automatically delete the package once the splitting process is completed.*

• **Ad-Hoc Email to Recipients**: Select this option to send an ad-hoc email to all recipients of this package. You can use this to alert recipients to a planned system outage, or any other useful information.
• **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
**Data-Driven Package Properties**

To access your schedule properties, right click on a schedule and select **properties**. Similar to the schedule wizard, you adjust settings to your schedule such as timing, error handling, or custom tasks.
General

You can change general information of your package from here.

![Data-Driven Package Properties](image)
Schedule

You can edit the schedule time of your package from here.
Reports

You can add, edit or delete reports of your package from here.

![Data-Driven Package Properties](image)
Destinations
You can add, edit, or delete destinations from here.
Exception Handling

You can edit exception-handling options from here.
**History**: Review the schedules history. Successes, failures, and other data is located here.
Tasks
You can add, delete or edit tasks from here.
Data-Driver

You can edit data driver from here.
Automation Schedule

Automation Schedules give you the ability to write automated processes using PBRS’ standard Custom Actions.

Automation Schedules make up the Business automation arm of PBRS. Beyond reporting, you can automatically update databases, set registry keys, move files, and even create reports directly from database data.

Combine multiple tasks to automate database maintenance, integration, or as an automated way to communicate. Combine these functions with other schedules such as the Event based Schedule to unlock even more powerful functionality.

To combine automation tasks with a schedule type, use a custom task. Custom tasks are usually created toward the end of a Report schedule Wizard.

How to Create a Automation Schedule?

- Go to Automation.
Enter your schedule Details. This section determines the most basic properties of a schedule.

- **Parent Folder**: Select the PBRS folder where your schedule will be stored.
- **Schedule Name**: Name your automation schedule.
- **Description**: Add a description to your schedule
- **Keywords**: Add keywords to make the schedule searchable, they can also be used by Smart Folders.
In this section, you will decide when the report will execute. There are a variety of options:

- **Daily**: Run a report every day or at a frequency of days.
  - **Sub options**: Repeat every X Days.

  *Example: Run the schedule every 3 days.*
• **Weekly:** Run a report on a weekly time frame.
  o **Sub options:** Repeat every X weeks.
    
    *Example: Run the schedule every 2 Weeks.*
  o **On:** Select the specific days of the week the schedule will run. If only once a week select only the day of the week it will run.
    
    *Example: Run every Monday, Wednesday, and Friday.*

• **Week Days:** Run the schedule Monday through Friday.

• **Working Day:** Run the schedule starting on a specific day of the month. Indicate which day of the month the schedule will run. E.G. run the schedule on the 4th working day of the month.
- **Monthly**: Run the schedule on a monthly time frame.
  - **Use the following options**: Checking this box will enable you to select frequency options such as the “last Thursday of the month.” Also you can include or exclude specific months from the schedule.

![Monthly Schedule Options](image1)

- **Annual**: Run the schedule every year at a specified time.

![Annual Schedule Options](image2)

- **Custom Calendar**: Select the custom Calendar you wish to use. You can create a new custom calendar from the menu as well. Please see Custom Calendars for more information.

![Custom Calendar Options](image3)

- **Other**: Other scheduling options.
  - Run Schedule every X Minutes, hours, days, weeks, months, years.
• **None**: No scheduling is required for this item.

• **Start Date**: Enter the desired starting date for the schedule. This section can be the current date (providing schedule time has not already passed) or a date in the future.

• **End Date**: If the schedule is due to end after a certain date enter that here. If the schedule is to run indefinitely, then leave it blank.

• **Schedule time**: On the Next Run date, the package will run at this time.

• **Exception Calendar**: Choose a calendar that will instruct the schedule to NOT run on those specified days. Please see Custom Calendars for more information.

• **Next to run on**: The package will next run on this date.

• **Repeat Every**: Rerun the package every x minutes from the scheduled time until your specified time.

  *For example, you can set up a daily package to run every day at 8 am, and to run every hour until 5 pm.*

• **Until**: After this date, there will be no automated scheduling of this package.

• **Enable this Schedule**: Uncheck this option to disable the package. Disabled packages are not deleted, but they do not execute automatically. You can re-start the automatic scheduling at a later date by checking this option again. Or right-clicking this schedule from the main screen and selecting Enable.

Click **Next** to continue to the next wizard section.
Custom Tasks Wizard

- In the section you have the option of setting up custom tasks. Custom tasks are business process automation tools that can be auto triggered before or after a report runs.
- For more information on Custom Tasks, click here.

Click **finish** to complete the schedule.
Automation Schedule Context Menu

To access the schedule’s context Menu right click on the schedule

- **Properties**: Selecting this option will bring up the "Properties" module containing configuration information for that schedule.
- **Copy**: Use this to copy an existing schedule. You can then paste it into another folder or the same folder. Simply open the folder you wish to paste to, right-click in the "white" space and select "Paste". Follow the on-screen instructions to complete the process.
- **Paste**: Paste a previously copied schedule
- **Rename**: Rename a schedule
- **Enabled**: Schedules are enabled when there is a check beside this option. To stop a schedule from running, or to "pause" it for a while, select this option to remove the check. Disabled schedules will not run till they are enabled again.
- **Execute Schedule**: This will execute the schedule immediately. Note that the next run date and time is not moved on as a result of a manual execution. They only move on if the schedule is run automatically by one of the schedulers.
- **Delete Schedule**: Selecting this option will delete the schedule.
- **Create Shortcut**: Use this option to create a shortcut you can save in any location on your PC. Execute the shortcut to execute the schedule in PBRS.
To access your schedule properties, right click on a schedule and select properties.

Similar to the schedule wizard, you adjust settings to your schedule such as timing or custom tasks.
General

You can change the general information of your automation from here.
Schedule

You can change the schedule time from here.

Automation Schedule Properties - Automation Workflow One

Start Date: 8/31/2018
End Date: 8/31/2017

Repeat every 1 days

Schedule time: 11:44:00 AM

Next to run on: 10/17/2018 11:44:00 AM

Repeat every 0.25 hours until 4:06:37 PM

Enable this schedule and execute it on DEFAULT

OK Cancel Apply
**History:** Review the schedules history. Successes, failures, and other data is located here.
Tasks

Automation Schedule Properties - Automation Workflow One

- General
  - Run Program/Open Document
  - Print Document
  - Wait/Pause
  - Execute Schedule
  - Send SMS
  - Create Exchange Appointment

- Files & Folders
  - Copy File
  - Rename/Move File
  - Delete File
  - Write Text File
  - Folder Housekeeping
  - Create Folder
  - Rename/Move Folder
  - Zip Files
Address Book

The PBRS Address book allows you to set up contacts and group contacts for use in schedules.

- Go to Address Book
New Contact

- Click New Contact

- Enter the contacts details and click OK to save.
New Group

- Click **New Group**

- **Group Name**: Enter a name for the Group
- **Add Contact**: Select the name from the drop down list and click **down arrow** button to add to the group.
- Click **OK** to save.
**Menu tab**

You can switch between your groups and contacts by using the tab on the left.

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Email Address</th>
<th>Phone Number</th>
<th>Fax Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Angeles</td>
<td><a href="mailto:karen@christiansten.com">karen@christiansten.com</a></td>
<td>800-300-1000</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Email Address</th>
<th>Phone Number</th>
<th>Fax Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margaret Bold</td>
<td><a href="mailto:mbold@mycompany.com">mbold@mycompany.com</a></td>
<td>908-715-0000</td>
<td></td>
</tr>
<tr>
<td>Lauren Castillo</td>
<td><a href="mailto:lcarrillo@mycompany.com">lcarrillo@mycompany.com</a></td>
<td>800-200-400</td>
<td></td>
</tr>
</tbody>
</table>
- **Delete**: Select a contact or group and click this button to delete.
- **Edit**: Select a contact or group and click this button to edit or simply double-click the contact or group.
- **Import**: Click this button to import a previously exported address book.
- **Export**: Click this button to export your address book.
Custom Calendars

- Go to **Custom Calendars**.

- Create your own scheduling frequencies with Custom Calendars.
New Calendar

- To create a calendar:
- Click **New**.
- Type in a name for the new calendar.
- Click the dates you wish scheduling to occur, click on a date again to remove it from the selection.
- Click **OK** to save.
- **Update Schedules**: Use this button to update all schedule which use this calendar. The schedules will be updated with the new calendar information. If this function is not used, the schedules will retain the old calendar information.
Menu tab

- **Edit**: Select the calendar you wish to edit and click this button.
- **Import**: Use this button to import a calendar.
- **Export**: Use this button to export a calendar.
- **Delete**: Select the calendar from the list and click this button.

Applying a Calendar to a Schedule

- In your schedule go to **Schedule**.
- Click **Custom Calendar**
- Select a calendar from the drop down list.

- All schedules in use by a custom calendar are now disabled when the calendar ends. If a user adds more dates to the calendar the option is now available to re-enable all schedules that use the affected calendar.
Integrations Library

This is where you can add and manage your clouds accounts associated with PBRS. Associating your cloud accounts gives PBRS access to reports you wish to schedule. PBRS will use stored credentials to access and export reports & dashboards.

- Go to **Integration**.
To manage each section:

- Power BI Accounts
- Slack Accounts
- Dropbox Accounts
- Google Sheets
Power BI Accounts

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Client ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen A. Angeles Martinez</td>
<td><a href="mailto:karen@christiansteven.com">karen@christiansteven.com</a></td>
</tr>
</tbody>
</table>

- Click **Add** to add an account.
Adding Office 365 accounts

- Select Office 365 as the Authentication Type.
- Follow the instructions in the blue section of the Add a Power BI Account screen.

To register P8RS with Microsoft PowerBI, please follow the steps below:
1. Click here to go to the PowerBI App Registration Portal and sign in with your account
2. Enter the name of the App as ‘P8RS’ and type as ‘Server-Side Web App’
3. For the Redirect URL enter http://localhost
4. For the Homepage URL enter http://localhost
5. Select all the APIs for access
6. Copy both the ‘Client ID’ and the ‘Client Secret’ codes and paste them above
7. Hit the verify button and follow the browser to authorize access to P8RS

- When you have completed the instructions, click Verify.
If successful, a pop-up will appear: *Power BI account verified successfully*. Click **OK**.
- The Power BI account is now added to PBRS.
Adding Azure Active Directory accounts

- Select **Azure Active Directory** as the Authentication Type.
- Follow the instructions in the blue section of the *Add a Power BI Account* screen.

You will need to be an Azure Global Administrator to be able to successfully give PBRS the required permissions. If you are not an Azure Global Administrator, your Azure Global Administrator must first register an Azure AD app to embed **Power BI content for use with PBRS**, and then provide you with the Client ID and the Azure Tenant ID. Here’s how.

- When you have completed the instructions, click **Verify**.

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Updated on 27 November 2018
If successful, a pop-up will appear: Power BI account verified successfully. Click OK.
- The Power BI account is now added to PBRS.
Slack Accounts

- Click **Add** to add an account.
- **Account Name**: Enter the account credentials.
- **Team Name**: Enter the workspace's Slack URL.
- **Access Token**: After adding slack account credentials, click Connect to acquire the Access Token from Slack.
• **Sign in to your workspace:** Enter your workspace’s Slack URL.
• **Click Continue.**
Enter your email address and password from Slack.

Click **Sign In**.
Click **Authorize**.

*You will return to PBRS with the access token credentials.*
• Click **Save & Close**.
• The Slack account is now added to PBRS.
• Click **Add**.
• You will see a pop-up advising you that you will now be redirected to Dropbox.com to grant access to PBRS. Click **OK**.

  ![PBRS Integration - Dropbox Accounts]

  - On the dropbox.com browser window that opens, **sign-in to your Dropbox account**.
- Navigate back to PBRS. You should now see your Dropbox account listed under the Account Name/Account Type section.
- The Dropbox account is now added to PBRS.
Google Sheets

- Click Add to add an account.
- **Account Name**: Enter the account credentials.
- **Token Data**: After adding account name, click Connect to acquire the Token Data from Google.

  *This will open a web browser.*
Select the account.
Click **Allow** to continue in PBRS.

Received verification code. You may now close this window.

- Close this window.

*You will return to PBRS with the token data credentials.*
• Click **Save & Close**.
• The Google Sheets account is now added to PBRS.
View Section

You can select from a number of themes, colors & viewing styles from the Home menu of PBRS. You can also perform a system search and refresh the home screen from this ribbon section.

View - Home

In the View section you can see the following options:

- Outlook
- Style
- Select Details
- Refresh
- Theme
PBRS Outlook

- Go to Outlook.

- PBRS Outlook is an interface in PBRS that allows you to view your schedules in several different ways.
- The PBRS Outlook view is divided into left and right panes. The left pane contains options and controls which affect the view that is presented in the main viewing pane on the right.

The Calendar

- The first section in the left pane is the Calendar section.
- This allows you to navigate to any desired date by clicking on the date. A selected date has its background grayed and the current date is highlighted with a red border.
- Selecting a range of dates in the calendar item displays that range in the right hand pane with the selected view style.
- You can move through the months and eventually years by clicking on the left and right buttons on <Month> <Year> display area or click any greyed out dates for the next or previous month.
- You can collapse and expand the Calendar or any section by clicking the arrow toggle in the top right hand corner of the section.

The Filter

- The Filter section allows you to select the types of schedules for which information will be presented in the main viewing pane.
- For example, the selection shown in the figure above will mean the current view on the right will present information on all types of schedules that are available.
The View Style

- The view style allows you to change the view that is presented in the viewing pane on the right.
Day View

- This shows you information on schedules for the hours between 12:00am and 11:59pm for the day that you have selected in the Calendar section.
- You can select a schedule and move it to change the scheduled times.
**Week View**

<table>
<thead>
<tr>
<th>5 Sunday</th>
<th>6 Monday</th>
<th>7 Tuesday</th>
<th>8 Wednesday</th>
<th>9 Thursday</th>
<th>10 Friday</th>
<th>11 Saturday</th>
</tr>
</thead>
<tbody>
<tr>
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<td>10 pm</td>
<td></td>
<td></td>
<td></td>
<td>10 pm</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- This shows you information on schedules that fall in the week that contains the day you have selected in the Calendar tool. The Current day if it is in this week is highlighted in orange.
### Month View

The Month view shows by default the information on selected schedules for the current month. You can also scroll through to other months in this view in a 2 year range.
The Gantt chart

- The Gantt view allows you to view the schedules in a Gantt chart which you can further modify using the options below the chart.
Time Intervals

- You can use the time interval section while in the Day view to view schedule with the desired granularity. The time interval ranges from 5 minutes to one hour.
- Click **Refresh** to apply the selected interval to the view.
Style

- Go to **Style**.

- Switch between list view and tile view for your schedules.
- Use the sliding bar to adjust the level of detail displayed for each schedule.
Select Details

- Go to Select Details.
- Check the properties you would like to see when using Detail view.
- Use the arrows to determine the order the columns will be shown.
Refresh

- Go to **Refresh**.

- Refresh the screen to show the latest schedule information.

Theme

- Go to **Theme**.

- Select the color scheme for PBRS. Pick the one that best fits your tastes.
Search

• Go to **Search**.

![Software Interface](image)

• Use search to find a specific schedule.

*Tip: Search looks for a schedule in the highlighted folder. To search all schedules, create a Smart Folder that encompasses every schedule, then use search to find the schedule.*
User Manager

You can set up new users and administrators, set up security groups and manage permissions using the User manager.

System - User Manager

- Go to System.

  ![System Manager](image)

- Select User Manager.

  ![User Manager](image)

What is user management?

- The principle behind the user management is simple:
  - Administrators are able to view and manipulate all schedules
  - Users can only see and manipulate schedules they have created.
  - Create Group policies to determine what user can/cannot access in PBRS
  - Determine if a user has access to PBRS's Web interface.
How to set up a user

- Click **Add User**.
• **First Name**: Enter the user's first name.
• **Last Name**: Enter the user's last name.
• **User ID**: Enter a suitable username for the user.
• **Password**: Create here the password for the user.
• **Verify Password**: verify the user's password.
• **Security Role**: Select a security role.

• **Apply**: Click Apply to create the new user.
• **Automatically logon with this user**: When this option is checked, PBRS will always logon using this user's credentials. When PBRS starts, the splash screen will show this user and the system will automatically log in after 10 seconds. You can interrupt the automatic logon process by typing in a different username and password and manually log on as a different user.
Assigned Schedules

Select the schedule or folder from the left hand pane and assign it to this user by clicking the **green button**.
Amending a user's details

- Click on the user.
- Select **Edit User**.

![User Manager](image)

- Overwrite the existing details with the new details.
- Click **OK**.

You can also double-click on the user.
Deleting a user

- Click on the user.
- Click **Delete User**

![Screenshot of User Manager window with highlighted 'Delete User' button and 'Delete the user 'MRamirez'' confirmation dialog box]

- Click **Yes**.
Security Roles

PBRS comes with the Administrator and User security roles. Roles help you to easily manage which functionality is available to people who will be using PBRS.

You can create new roles by creating groups.

- Click Add to create a new group.
Creating a New User Group

By placing users into different groups, you can determine what they can and cannot access in PBRS. Restrict access to certain functionality, activation/deactivation and even assign blackout times.
Permissions

In the Permissions Tab, you can then specify access to system features such as operational hours, or the options menu. Check the boxes to indicate whether the group has access to these features.
Destinations Restrictions

You can also restrict what destinations the group has access to.

- **Allow all destinations:** This group can access all destinations.
- **Only allow certain destination types:** Check the boxes to indicate which destinations the group has access to.
- **Only allow assigned default destinations:** Use only default destinations (created in the Options menu) and assign them to a specified group as shown below. See: Default Destinations

  Pre-create destinations in this manner and assign these destinations to the specific group. Perfect for avoiding giving out sensitive logon information such as FTP or SharePoint site info.
### Assign Default Destinations to Groups

Select the group(s) to assign destinations to:
- Standards Users

Assign the following destinations to the groups selected above:

<table>
<thead>
<tr>
<th>Name</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Acrobat Format (*.pdf)</td>
</tr>
</tbody>
</table>
Blackout Times

Set Blackout Times to prevent users from scheduling reports during a certain time frame. Use Operational Hours to build time frames.
# Configure Blackout Hours

<table>
<thead>
<tr>
<th>Day</th>
<th>Open</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Monday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Thursday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Friday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Saturday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td>Sunday</td>
<td>12:00 AM</td>
<td>11:59 PM</td>
</tr>
</tbody>
</table>

[OK] [Cancel]
Custom Tasks

- **Allow all Custom Tasks**: All users in this group can use custom tasks.
- **Allow Certain Custom Tasks**: Specify which task types this group has access to.
**Folders**

- Allow the Group to have access to the folders.

After you finish click **OK**.
Enable Windows Integrated Authentication

You will now be able to assign new and existing users to the newly defined security role as below.
Windows Authentication

To enable Windows Authentication check the box in the lower left hand corner of the User Manager.

Windows Authentication allows you to use Windows Authentication to log in to PBRS. This can help save time in creating new users for PBRS. Security roles created in PBRS can also be applied to users under Windows authentication.

Add User

- Add Active Directory users as PBRS users.
- **Domain Name**: Enter the domain name.
- **Group Name**: You can select from the drop down list the group where the user(s) are located.
- **Add the entire group**: All users in the user group will be added to PBRS.
  
  *Users added in this manner WILL NOT be displayed as individual users in the Users list in the User Manager.*

- **Security Role**: Assign a PBRS specific group to the user. The user will then take on the permissions allotted in the user group. User Groups can be created in the Groups Tab.
- **Assigned Schedules**: Assign schedules to the added user/group. Learn more about assigning schedules near the top of this topic.
SMTP Servers

- Go to System.

- Select SMTP Servers.

You can set up a number of SMTP servers and select from the list of existing servers when creating schedules. This allows you to use a different SMTP server for each schedule should you wish. This is useful if you want the "From" name and email address to be different for different recipients.

*Example: Reports and Alerts sent to customers come from the Customer Services Email Account; Alerts And Reports Relating to IT come from the IT Department's Account*
A "check" indicates that this server has been selected as a backup server. If the selected server fails, PBRS will attempt to send the email through the backup server instead. If there is no backup server selected, PBRS will continue to re-try the email (See "Retry Failed Mails") using just the server which has been selected for that schedule.
Add Server

- Click **Add**.

As stated above, you can set this account to be a backup email server.

- Click **Test** to confirm that the settings are correct.
• Click **OK** to continue.
Sending Through Another SMTP Account Or Customize Sender Details

- In any schedule in **Email Destination**, you can customize the sender’s details. Rather than the email appearing to come from a PBRS user, it can appear to come from any individual you desire.
- **Mail Server** to use an added SMTP account simply select it from the drop down box.
Operation Hours

- Go to System.

- Select Operation Hours.

Operational Hours allow you to setup times during which an event is allowed to trigger an Event-Based schedule. If an event occurs during operational hours, the scheduled tasks will execute. For example, if you only wanted PBRS to monitor your database in the overnight hours, then this option would be quite useful.
<table>
<thead>
<tr>
<th>Day</th>
<th>Open Time</th>
<th>Close Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>9:00:00 AM</td>
<td>5:00:00 PM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>9:00:00 AM</td>
<td>5:00:00 PM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>9:00:00 AM</td>
<td>5:00:00 PM</td>
</tr>
<tr>
<td>Thursday</td>
<td>9:00:00 AM</td>
<td>5:00:00 PM</td>
</tr>
<tr>
<td>Friday</td>
<td>9:00:00 AM</td>
<td>5:00:00 PM</td>
</tr>
</tbody>
</table>
Add Operational Hours

- Click Add.
• Once you have specified the hours, click **OK** to save them.
• Select the operational hours and click **Edit** to edit existing operational hours.
Applying Operational Hours

Any defined operational hours will now be available for use with Event-Based Schedules.

- Go to **Exception Handling** of your Event Based Schedule.
- Select your Hours of Operation.
System Backup

Need to create an ad-hoc backup of the PBRS system database and files? This is how to do it.

- Go to **System**.

- Select **Backup**.
- Select the folder where the backup will be stored and click **OK**.

- PBRS will now backup the necessary data files.
• You can schedule backups to happen at frequent intervals automatically. To do this, go to Scheduled Backup.
**Restore Backup**

- Go to **System**.

- Select **Restore**.

This option will restore your PBRS system and files to a previous backup. Simply select the folder where the previous backup is stored.

> When the system is restored, anything that happened after the backup was created will be wiped out.
• Browse for the folder where the restore can be found.

![Screenshot of Browse For Folder dialog box]

```
Desktop
  - OneDrive - ChristianSteven Software
  - Karen A. Angeles Martinez
  - This PC
  - Libraries
  - Network
  - Control Panel
    - Recycle Bin
    - Backup201808021459
    - PBRS ScreenShots
    - PBRS Snagit Editor
    - RANDOM
```

• PBRS will load the Backup and restore the system settings.

![Screenshot of PBRS confirmation dialog box]

```
This will overwrite the existing system files and cached report files. Continue to restore?
```

[Yes] [No]
After the restore, all of your schedules and cached reports will appear.

*If you have changed certain defaults and system paths, please make sure you re point PBRS to these paths.*
About PBRS

Important

- Please ensure you activate your software with the most recent license key provided to you. Failure to do so may result in issues with the use or functionality and usability of PBRS.
- You must have internet access in order to activate PBRS. If you do not have internet access, you will need to perform a manual deactivation/activation. Please open a support ticket and we will help you with this process.

Applying the New License Key

- Each year after renewing your Annual Maintenance, you will receive a new license key for your PBRS installation. This license key authenticates to our servers and gives your server "permission" to run PBRS for another year. Because our records update each time you receive a new license key, you must update the license key the software uses in order for the application to continue functioning as expected without any interruption to your service. To update the license key to the most recent version, perform the following steps.

1. Go to Resources.

2. Select About PBRS.
The About Screen

About PBRS

- **First and Last Name**: Your first and last name goes here.
- **Company Name**: Enter Your Company Name
- **Customer Number**: Enter your provided customer number here.
- **License Key**: Enter your license key here. To enter your license key, click Enter License. The license key field will now be accessible; enter your license key EXACTLY as it appears in your documentation.

*If the incorrect license key is entered, PBRS will fail to update properly.*
Demos

- Go to Resources.

- Select Demos.

- Clicking the Demos button will open ChristianSteven's YouTube Channel in your web browser.
- You can also see our latest videos on the latest videos page on our website.
Check for Updates

PBRS updates are released on a regular basis. The software will notify you when there is an update, but you can force the notification by clicking the button in the Resources tab.

- Go to **Resources**.

- Select **Check for Updates**.
• Check ChristianSteven servers for the newest PBRS version.
Support Files

In order to replicate your system state and analyse technical issues, the help desk may ask you to produce and send Support Files.

- Go to Resources.

- Select Support Files.

- Click Support Files to begin the process.
When this window appears, select the output location for your support files. By default, it will create a .zip file with the following filename: Product_Customer# (i.e. PBRS_12345678)

You do not need select the other options listed. However, if there is information you do not wish to share, you want to keep the file size low, or you need to change the file extension for security reasons, you can do so.

- Click OK
- Now you can
  - Send the support files zip via email.
  - Attach it to the support form.
  - Upload it here in response to a request from ChristianSteven.
  - Upload it to a file service e.g. wetransfer.com, Google Drive, Dropbox etc., and send us the link.
Reports tool

The "Reports" tool exports system data for each type of schedule. You can preview the data, print or save it disk, choose fields to export and create custom reports.

- Go to Configuration

- Select Reports

- This tool exports system data for each type of schedule. You can preview the data, print or save it disk, choose fields to export and create custom reports.
Login Information

At some point, you might want to change the logon credentials of the PBRS database, or point your PBRS application to a different PBRS database.

- Go to **Configuration**.
- Select **Login Information**.
- Select this option to change or update the logon information required by your database.
• Click **Test** to ensure that the information provided is correct.
• Click **OK** and your changes will be saved.