REPORT 豒 COMMANDER

Report Commander 2 User Guide

Report Commander 2.5

Generated 6/26/2017

Copyright 2017 Arcana Development, LLC

Note: This document is generated based on the online help. Some content may not display fully or correctly. Refer to the online version of the user guide when necessary.

www.arcanadev.com/reportcommander/documentation

Contents

Overview	13
Modes of Operation	
Command-Line Mode	
Project Mode	14
Comparison of Modes	14
Getting Started with Report Commander	16
If you are new to Report Commander	16
If you have been using Report Commander 1.x	16
Report Commander Resources	17
Sales	17
Product Feedback	17
Evaluation Mode Rights and Limitations	
Temporary License	
Upgrading from Previous Versions	
What's New in Report Commander	19
New project-oriented workflow	19
Save settings in Command Line Builder	19
Support for Crystal Reports 2011	19
E-mail enhancements	19
New syntax for dynamic parameters and file names	20
New program names	20
Backward Compatibility	20
Install Report Commander 2 to old location	21
Use variables	21
Creating Projects from Existing Command Lines	21
Command-Line Conversion from the Command Line	21
Command-Line Conversion in the Project Editor	22

Command-Line Conversion in the Command Line Builder	22
Project Editor	23
Introducing Projects	23
Project Editor	25
Project Workspace	25
Project Navigator	27
Main Toolbar	27
Property Panels	28
Panel Toolbar	
Working with Projects	28
Testing Your Project	29
Creating Projects from Existing Command Lines	29
Command-Line Conversion from the Command Line	29
Command-Line Conversion in the Project Editor	29
Command-Line Conversion in the Command Line Builder	30
Project Properties Panel	
General	32
Variables, Distribution Lists, E-Mail Servers, and File Servers	32
Report	33
Updating the Project to Reflect Report Changes	33
Report Properties Panel	33
General	33
Data Sources	34
Output Group	
Output Group Properties Panel	35
Preview	35
Properties	35
File Output (Export)	36

File Output	
File Output Property Panel	
Test Output	
Properties	
CSV Export Settings	
Settings	
Group Section Export Mode	
Report Section ExportMode	
Preserve Date Formatting	
Preserve Number Formatting	
Field Separator	
String Delimiter	
HTML Export Settings	
Settings	40
PDF Export Settings	40
Settings	40
Excel Export Settings	40
Settings	40
Editable Word/Rich Text Export Settings	
Settings	41
Text Export Settings	
Settings	41
XML Export Settings	41
Settings	41
Print Output	42
Print Output Properties Panel	42
Properties	42
Specifying Additional Printer Options	42

E-Mail Task
E-Mail Task Properties Panel43
Message43
From/To
Attachments
Upload Task
Upload Task Properties Panel46
Settings
Files
Project Execution Commands
Project Runner (adrcexec)
Project Runner
Command-Line Syntax51
Overriding Settings
Logging and Diagnostics
Command-Lne Syntax
Syntax
General Options
Logging Options
Command Line Builder
Command Line Builder55
Basic Command Line Workflow55
Loading Settings from Existing Command Lines55
Using Project Files
Property Pages
Report Page56
CSV Export Options Page
Excel Export Options Page

HTML Export Options Page	60
PDF Export Options Page	60
Text Export Options Page	60
XML Export Options Page	
E-Mail Page	61
Parameters Page	63
Database Logins Page	
Command Line Page	
Preview Page	
Preview	66
Execute	67
User Settings Window	67
Command Runner (adcrutil)	
Command Runner	
Logging and Diagnostics	
Command-Line Syntax	68
Command-Line Syntax	68
Syntax	
Options	69
General Report Options	69
Database Connection Options	
Printing Options	71
Export Options	72
E-Mail Server Options	73
E-Mail Options	74
Logging Options	76
Parameters	76
Conversion Options	

Uploading Output	
FTP or SFTP	78
HTTP	79
HTTP PUT	79
HTTP POST	79
CSV Export Options	
Excel Export Options	80
Excel Data-Only Export Options	82
HTML Export Options	83
HTML E-Mail	83
HTML Formatting Options	83
PDF, RTF, and Word Export Options	
Text Export Options	84
XML Export Options	85
Response Files	
Creating the Response File	
Window Reference	87
Data Source Properties Window	87
Settings	
Distribution Lists	
Distribution List Properties Window	
File Servers	
File Server Properties Window	
E-Mail Servers	
E-Mail Server Properties Window	
Multiple Value Editor Window	
Parameter Editor	
Parameter Types	

Boolean (Yes/No)	
Currency	
Date, Time, Date/Time	
Number	
String	
Range Values	
Specify start [end] value	91
Include starting [ending] value	92
Read Settings from Command Line Window	92
Combining Multiple Commands	
Text Editor	
Variables	94
Date/Time	
Functions	
Variables and Functions	96
Variables and Functions	96 96
Variables and Functions Variables and Functions Using Variables and Functions	
Variables and Functions Variables and Functions Using Variables and Functions Variables	96 96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variables	96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variable Types Managing Variables	96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variable Types Managing Variables Complex Variables	96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variables Variable Types Managing Variables Complex Variables Predefined Variables	96 96 96 96 97 97 97 97
Variables and Functions Variables and Functions Using Variables and Functions Variables Variables Variable Types Managing Variables Complex Variables Predefined Variables Functions	96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variable Types Managing Variables Complex Variables Predefined Variables Functions	96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variable Types Managing Variables Complex Variables Predefined Variables Functions Function Reference Function Syntax	96
Variables and Functions Variables and Functions Using Variables and Functions Variables Variables Variable Types Managing Variables Complex Variables Predefined Variables Functions Function Reference Function Syntax Argument Types	96 96 96 96 97 97 97 97 97 99 99 99 99
Variables and Functions Variables and Functions Using Variables and Functions Variables Variables Variable Types Managing Variables Complex Variables Predefined Variables Functions Function Reference Function Reference Optional Arguments	96 96 96 96 97 97 97 97 97 99 99 99 99

	Date/Time Format	100
		100
		100
	Function Reference	
	AdjustDate	
	DateAdd	102
	EndOfDay	103
	EndOfMonth	
	EndOfQuarter	
	EndOfYear	
	FormatDate	
	MakeDate	105
	MostRecentDay	105
	NextDay	106
	now	
	Examples	
	QuarterNumber	
	StartOfDay	
	StartOfMonth	
	StartOfQuarter	
	StartOfYear	
D	ate/Time Formats	
	Standard Formats	110
	Custom Formats	111
Fı	unction Examples	113
	Yesterday's Date	113
	Start/End of Week	
	Start/End of Month	

Variables with Functions	114
E-Mail Settings	
Distribution Lists	117
Distribution List Properties Window	117
E-Mail Servers	117
E-Mail Server Properties Window	118
Importing E-Mail Address Lists	119
Tutorials and How To	
Basic Project Tutorial	
Scenario	120
Steps	
Add a report to the project	121
Set database logins	
Configure Output Group with parameters for the export	
Configure PDF export	132
Configure e-mail message	136
Save and test the Project	142
Schedule the Project	144
Advanced Project Tutorial	
Scenario	144
Steps	144
Add a report to the project	145
Set database logins	147
Configure Output Group with parameters for first export	149
Configure HTML export	158
Configure Output Group with parameters for second export	
Configure PDF export	165
Configure e-mail message	

Save and test the Project	172
Schedule the Project	173
Scheduling Report Execution	
Important Notes	
Tutorial: Scheduling Using Windows Task Scheduler	
Sharing Settings with Another User or Computer	
Making Settings Available to Another User	
Copying Settings to Another Computer	
Shared Settings Permissions	
Copying Settings Using Copy/Paste	
E-mail Report Output	
Using the Command Line Builder	
Using the Project Editor	
Upload Report Output	
Using the Command Line Builder	
Using the Project Editor	

Overview

Welcome to Report Commander.

Report Commander is a tool to help you automate printing, exporting, and distributing output from Crystal Reports reports. Key features include:

- Works with reports created by Crystal Reports 9.0 or later.
- Crystal Reports does not need to be installed on the computer where Report Commander runs.
- Override database login information at run-time.
- Set parameter values at run-time.
- Export to any format supported by Crystal Reports.
- Print to default or specified printer.
- E-mail export files.
- Upload export files using FTP, SFTP, or HTTP.

Modes of Operation

Report Commander offers two different modes for executing reports: **command-line mode** and **project mode**.

Command-Line Mode

In **command-line mode**, you give Report Commander all the information it needs to process a report using command-line options. Because this mode does not use any configuration files, it is very easy to call Report Commander from an automation tool, batch file, script, or other application that needs to change parameters dynamically or generate export commands onthe-fly.

In command-line mode, each execution of a "task" only works with one report at a time, and can print to a single printer and create a single export file. If you need to export a report to more than one format, you must run Report Commander separately for each format.

To use Report Commander in command-line mode, you can use the <u>Command Line Builder</u>, which is a graphical tool that helps you select processing options and construct the command line that is used to execute your report. Users who are comfortable working directly with command-line options can skip the Command Line Builder and hand-craft their command lines with reference to the command-line syntax documentation.

Once you have constructed a command line, you use the <u>Command Runner</u> to execute the commands. The Command Runner does not have a graphical user interface and typically is called from a scheduler or other automation tool.

Project Mode

In Report Commander version 1, command-line mode was all there was. Beginning with version 2, Report Commander offers **project mode**, which uses a project file to store the settings used to process reports.

In contrast to command-line mode, a Report Commander project can contain any number of reports, and each report can be exported/printed to any number of destinations using the same or different parameters. Exports from multiple reports can be combined in a single e-mail message.

To use Report Commander in project mode, you use the <u>Project Editor</u> to create or modify a project. From the Project Editor you can also preview your report and test your export settings.

Once you have constructed a project, you can configure your scheduler or other automation tool to run the project using the <u>Project Runner</u>.

Comparison of Modes

There is a great deal of overlap between command-line mode and project mode, and in fact the Command Line Builder can read and write projects just like the Project Editor (<u>some</u> <u>limitations apply</u>).

If you need to process multiple reports and/or produce multiple outputs during a single run, you must use the Project Editor and Project Runner, as command-line mode does not support multiple reports or exports.

If you only need to process a single report and produce a single output during each run, you can choose either command-line mode or project mode, based on which user interface experience you prefer.

Feature	Command-Line Mode	Project Mode
Graphical user interface	Command Line Builder allows you to configure most available options. Some uncommon options are not available in the Command Line Builder and must be added to the generated command line.	Project Editor allows you to configure all available options.
Automated execution	<u>Command Runner</u> executes command line constructed in Command Line Builder (or constructed by hand). Can be called from any batch file, script, scheduler, automation tool, or other application.	Project Runner executes a project file. Can be called from any batch file, script, scheduler, automation tool, or other application.
Number of reports	Each run can process only one report, using one set of parameters.	Each run can process any number of reports, and each report can be processed multiple times with different parameters.

The following table compares and contrasts the two modes of operation.

Feature	Command-Line Mode	Project Mode
Number of outputs	Each run can produce one print output and/or one export.	Each run can produce any number of outputs for each report.
Export options	Supports most of the export options available in Crystal Reports, but a few uncommon options are not available.	Supports all of the export options available in Crystal Reports.
Execution from another application	All settings are passed on the command line, so another application can easily generate a command line with the required settings and call Report Commander to produce report outputs.	Project Runner does not accept command-line options to override settings such as export format and export options.
		Variables can be set on the command line and so can be used to override file names, parameters, login credentials, etc.

Getting Started with Report Commander

Here are some recommendations to help you get going quickly.

If you are new to Report Commander

- Start with the <u>Overview</u> if you haven't already read it.
- For new users we recommend <u>Project Mode</u> and the <u>Project Editor</u> rather than Command-Line Mode, but users with simple requirements may prefer the more streamlined interface of the <u>Command Line Builder</u>.
- Launch the <u>Project Editor</u> (from the Windows **Start** menu) and work through the <u>Project</u> <u>Tutorial</u> to create your first project.

If you have been using Report Commander 1.x

- Read about What's New in Report Commander 2.
- Especially read about the new Project Mode.
- If you want to keep using Report Commander in Command-Line Mode (i.e., the same workflow as in Report Commander 1), you'll see some enhancements in the Command Line Builder, but otherwise things will work the same as they always have.
- If you want to start using Project Mode instead, you can create <u>projects from your existing</u> <u>command lines</u>. Doing that with one of your existing Report Commander command lines is a good way to see how the Project Editor works and how projects are structured.

Report Commander Resources

The following additional resources are available for getting technical help with Report Commander:

- The discussion forums let you ask questions and exchange information with other users.
- The <u>Knowledge Base</u> has information on known software issues, usage tips, and more.

If all else fails, you can <u>contact us for support</u>.

Sales

For information on Report Commander pricing, to purchase a license, or for sales-related questions, please visit <u>www.arcanadev.com/shop</u> or contact us by e-mail at <u>sales@arcanadev.com</u>.

Product Feedback

If you have comments about a specific topic in this help document, please use the feedback link found at the bottom of the topic page. This ensures that we receive the information we need to identify the topic.

For general comments about the help document, you can use the form <u>here</u>.

For feature requests, please visit the <u>feature request forum</u>.

Evaluation Mode Rights and Limitations

You are permitted to run Report Commander for evaluation purposes for up to 30 days without purchasing a Report Commander license.

In evaluation mode Report Commander has the following limitations:

- When you run a project or report, Report Commander will display a window with an evaluation message, which you must acknowledge before processing continues.
- If you run Report Commander from a scheduler, script, or other tool that runs it in "hidden" mode, Report Commander will log an error message and terminate without doing any processing, because it cannot display an evaluation message when running in a hidden session.
- E-mail messages sent by Report Commander may have an evaluation notice in the subject or message body.

You can remove all of these limitations by activating the software with a temporary license as discussed below.

Temporary License

You can obtain a temporary, 30-day license for Report Commander to remove the limitations imposed when you run it in evaluation mode without a license.

Use any of the following methods to get a temporary license:

- During installation, select the **Request Evaluation License** option when presented with the evaluation message. This method requires that the computer running Report Commander have an Internet connection.
- After installation, run the License Manager tool from the Report Commander group on the Start menu, then choose **Get Temporary License** from the **License** menu. This method requires that the computer running Report Commander have an Internet connection.
- Go to <u>www.arcanadev.com/licensing/templicense.aspx</u> and follow the instructions to request a temporary license file that you can download and copy to the Report Commander computer if necessary. The computer running Report Commander does not need an Internet connection.

Upgrading from Previous Versions

What's New in Report Commander

Report Commander version 2 offers several changes from version 1.x, as discussed below.

Your existing command lines from Report Commander 1.x will still work with version 2, but see the <u>Backward Compatibility</u> topic for information on changes that may be required to accommodate the new installation location for Report Commander 2.

New project-oriented workflow

In addition to the Command Line Builder and command-line execution, Report Commander now supports project files for configuring report processing options. A single project can process any number of reports and produce any number of outputs. Refer to the <u>modes of operation</u> topic for more information.

The new <u>Project Editor</u> is used to create and edit complex projects. You can <u>convert your</u> <u>existing command lines into projects</u> if you want.

Users with simpler needs may prefer to continue using the <u>Command Line Builder</u>, with its more streamlined user interface and workflow.

Save settings in Command Line Builder

The Command Line Builder can save and load settings to/from the new project file format. This means that even if you prefer to continue using the Command Line Builder instead of the Project Editor, you can save your report settings and retrieve them later if you need to change some options and regenerate your command line. In Report Commander 1.x there was no way to save settings, so if you wanted to modify a command you had to edit the command line directly, or start from scratch in the Command Line Builder.

Even if you don't save your settings as a project, you can now <u>reverse-engineer a command</u> <u>line</u> to populate settings in the Command Line Builder.

Support for Crystal Reports 2011

Report Commander 2 uses the Crystal Reports 2011 runtime, which adds support for the newer Excel XLSX format.

E-mail enhancements

E-mail messages sent by Report Commander can now include exports files from multiple reports in the same message.

You can now define <u>distribution lists</u> in Report Commander to simplify sending reports to groups of recipients. Distribution lists can be created for an individual project, or made available to all projects on the computer.

You can define "shared" mail server settings that are available to all Report Commander projects run on a computer, so you don't have to include these settings in each project/command line that you run.

New syntax for dynamic parameters and file names

The syntax for inserting date/time values in parameters and file names has changed. See the <u>Variable Syntax Changes from Version 1</u> topic for information on the new format. The Command Runner will continue to accept the old format, but any projects or command lines created or edited in the Project Editor or Command Line Builder will use the new format. This means that if you generate a command line in version 2 that uses date/time tokens, the command line won't work correctly if you run it on another computer that has version 1.x.

New program names

In Report Commander 1.x, there was only one Report Commander program: adcrutil.exe, which was used both to invoke the Command Line Builder and to process reports. Now there are four separate programs:

- The adcrutil.exe program is still here and is still what you run to process reports using command line options. It's now referred to as the <u>Command Runner</u>. All of your existing command lines from Report Commander 1.x will still work with the new version.
- The <u>Command Line Builder</u> is now a separate program, which you can run from the shortcut on the Start menu.
- The <u>Project Editor</u> is the graphical user interface for editing project files, and is available from a shortcut on the Start menu.
- The <u>Project Runner</u> is the program that you run to execute a project from a command prompt, automation tool, etc.

Backward Compatibility

The program name (adcrutil.exe) and command-line syntax for the Report Commander 2 <u>Command Runner</u> are the same as for Report Commander 1, so your command lines do not need to be regenerated for version 2.

However, Report Commander 2 is by default installed to a different location that Report Commander 1 (to allow for parallel operation). This means that your scripts, batch files, scheduled tasks, etc., will not point to the correct location for adcrutil.exe if you use the default settings.

The default installation folder for Report Commander 1.x was "C:\Program Files\Arcana Development\Report Commander" or, on 64-bit computers, "C:\Program Files (x86)\Arcana Development\Report Commander".

Report Commander 2.x by default is installed in "C:\Program Files\Arcana Development\Report Commander 2".

Following are suggestions for resolving this problem:

Install Report Commander 2 to old location

If you do not wish to perform parallel testing or have already completed it, you can simply remove Report Commander 1.x and then install the newer version to the old location. To specify a custom installation folder, choose the "Custom" installation type in the setup wizard; this will give you the option to select the target folder.

Use variables

For maximum flexibility, change your configuration to use variables for the Report Commander path, so that in the future you can easily point to different versions of the software. The approach for doing this will depend on the automation tool that you are using.

For example, in adTempus you could define a <u>Job Variable</u> pointing to the Report Commander program folder, and then use that variable in your task configuration instead of hard-coding the path.

For batch files or automation tools that don't support variables, you could define a system environment variable that points to the correct location and use that variable in your execution command.

Creating Projects from Existing Command Lines

So you're excited about the new project file capability of Report Commander, but you have a lot of command lines that you generated using Report Commander 1.x, and you don't want to build projects for all those from scratch. We can help! Report Commander can turn those command lines into projects for you, using any of three methods:

Command-Line Conversion from the Command Line

You can create project files from your existing Report Commander command lines by running the command and adding the **-exportproject** option to the command line.

For example, suppose you have a scheduled task to run this export command every day:

```
"c:\program files\report commander\adcrutil.exe" -report+"C:\repor
```

You can run this command from the command prompt to turn that command line into a project file:

"c:\program files\report commander\adcrutil.exe" -report="C:\repor

After this runs, you will have a new project file created ("c:\my projects\dailysales.rcproject"), which you can then edit using the Command Line Builder or Project Editor.

Using this approach you can create one project per existing command line.



The source report (.rpt file) must be available when you run the conversion, as Report Commander needs to read information from the report file. Make sure the **-report** option points to the file.

Command-Line Conversion in the Project Editor

You can import existing command lines from within the Project Editor, as described in the <u>New</u> <u>Project from Command Line(s)</u> topic. Using this approach you can combine several command lines into a single project, and/or add commands from a command line to an existing project.

Command-Line Conversion in the Command Line Builder

You can import an existing command line from within the Command Line Builder, as described in the <u>Loading Settings from Existing Command Lines</u> topic. You can then update options and re-generate the command line, or save the settings to a project file.

Project Editor

Introducing Projects

A Report Commander **Project** is a file that contains all the settings needed to process one or more reports in Report Commander. Projects are created and edited using the <u>Project Editor</u> and can be executed using the <u>Project Runner</u>.

A Project can contain the following items:



Project Settings. Contains settings such as <u>variable</u> definitions and mail server settings that apply throughout the Project.

<u>Reports</u>. Each Report represents a single Crystal Reports report and stores the database login information needed to run it.

Each Report has one or more <u>Output Groups</u>. An Output Group defines the parameters needed to run the report. If you need to run the same report more than once, with different parameters each time, you would create a separate Output Group for each set of parameters.

Each Output Group has one or more **Outputs**, which define the settings Report Commander needs to export (<u>File Output</u>) or print (<u>Print Output</u>) your report. For example, if you need to export your report to PDF and HTML format, and print it to a printer, all using the same parameters, you would have three Outputs defined for your Output Group.

Output Tasks. An Output Task defines an action that Report Commander should take once the Outputs have been produced. Report Commander supports the following Tasks:

- The E-Mail Task allows you to e-mail export files.
- The <u>Upload Task</u> allows you to upload export files to remote servers using FTP, SFTP, or HTTP.

A Task can operate on files produced by any of your Outputs. For example, an E-Mail Task can send the export files from several different reports in a single e-mail message.

Project Editor

The **Project Editor** provides the user interface for editing <u>Projects</u> in Report Commander. After you have created a Project in the Project Editor, you can automate its execution using the <u>Project Runner</u>.

The Project Editor allows you to edit one Project at a time. If you need to work on more than one Project at once (for example, to compare or copy settings), you can start more than one instance of the Project Editor.



See the <u>Project Tutorial</u> for a step-by-step guide to creating a Project in the Project Editor.

Project Workspace

The Project Editor workspace consists of the following main components:

Sales Tutorial - Report Commander	Main toolbar	
File Help	Maintoobai	_
🛅 🖆 💾 🕨 🗶 🔛 🛅 📑 📑 🕨 🕨		
Project Navigator 4	Project Sales Tutorial Export to PDF file "weeklys	ales.pdf" 🗙
Project "Sales Tutorial"	Format PDF	Export Settings
- SalesExample	Name: un librate off	
⊡ Yesterday's Sales	Walle. We dysales.pdf	⊿ Misc
Export to H I ML 4.0 file "salesreport.htm" Output Group 1	Exp. to temporary file	Generate Boo
⊡ This Week's Sales	The file be deleted when all Report	
Export to PDF file "weeklysales.pdf"	Panel toolb	ar
Send e-mail Sales report for @now("MMMM d. vvvv",-1,	Click Save buttor	to save
	Export Page Range	
	Al	
	O Pages to	
	Enabled (create this output when project runs)	
Device t New instan		
Project Navigator		
		Yes to generate book
		generate by

Project Navigator

The Project Navigator shows the structure of the Project: all of the Reports, Output Groups, Outputs, and Tasks in the Project.

When you select an item in the Project Navigator, you can right-click to get a menu of available commands, some of which are also available from the Main Toolbar.

To see the properties (settings) for an item, click its name and use any of these actions to open the Property Panel:

- Double-click the item
- Click the **Properties** (✤) button in the Main Toolbar
- Right-click the item and select **Properties...**

Main Toolbar

The Main Toolbar contains buttons that perform actions on the project as a whole or on the selected item in the Project Navigator.

The standard commands on this toolbar are:

- 🗊 Create a new Project
- 🖆 Open a Project
- Save the Project
- ${}^{\not\!\!P}$ Show the Property Panel for the item selected in the Project Navigator
- X Delete the item selected in the Project Navigator
- 🚺 Add a new Report to the Project
- Mail Task to the Project
- 🎦 Add a new Upload Task to the Project
- 🗇 Add a new Output Group to the selected Report
- If Add a new File Output to the selected Output Group
- ^d Add a new Print Output to the selected Output Group
- Execute the Project

Property Panels

The Property Panels show the properties (settings) for the various components of the Project. Each item that you open from the Project Navigator will be displayed as a separate panel with its own tab across the top.

An open panel behaves similarly to a window with an OK button: Changes you make on the panel are not saved until you click the **Save** button (\square) on the Panel Toolbar. If you are working in a panel and change your mind about the changes you have made, you can click the **Close** button (\square) on the panel's tab to close the panel without saving the changes.

When you click the Save button on the Main Toolbar (or select **Save** from the **File** menu), Report Commander saves all open panels before saving the Project.

Panel Toolbar

The Panel Toolbar is a small toolbar at the top of each panel (below the panel tabs). The buttons on the panel toolbar act only on the open panel.

Working with Projects

When you start the Project Editor, it displays an empty Project that you can begin working with, or you can use the commands on the File menu to open an existing project or <u>create a</u> project from a command-line mode command line.

Changes you make to the Project are not saved until you use the Save button (¹) on the Main Toolbar or the **Save** command from the **File** menu.



See the <u>Project Tutorial</u> for a step-by-step guide to creating a Project in the Project Editor.

The basic workflow for working with a Project is:

- 1. Add a Report to the Project and set the login information in the Report Properties.
- 2. Add an Output Group to the Report and set the report parameters in the <u>Output</u> <u>Group Properties</u>.
- 3. Add an Output to the Output Group and configure the settings in the <u>File Output</u> or <u>Print Output</u> Properties.
- 4. Repeat step 3 as necessary to add additional Outputs (additional exports or print runs using the same parameters).
- 5. Repeat steps 2-4 as necessary to add additional Output Groups (additional outputs using different parameters for the same report).
- 6. Repeat steps 2-5 as necessary to add additional Reports.
- 7. Save and test the project.

Testing Your Project

At any time while you are editing your Project you can click the **Run** button () on the Main Toolbar to have Report Commander execute the project. When you click this button, Report Commander will execute the project exactly as if it were being run in unattended mode: it will produce all outputs (print and export) and execute any tasks (such as sending e-mail) that are configured for the Project.

You can preview and test individual Reports and Outputs using the options available on their property panels.

Creating Projects from Existing Command Lines

So you're excited about the new project file capability of Report Commander, but you have a lot of command lines that you generated using Report Commander 1.x, and you don't want to build projects for all those from scratch. We can help! Report Commander can turn those command lines into projects for you, using any of three methods:

Command-Line Conversion from the Command Line

You can create project files from your existing Report Commander command lines by running the command and adding the **-exportproject** option to the command line.

For example, suppose you have a scheduled task to run this export command every day:

```
"c:\program files\report commander\adcrutil.exe" -report="C:\repor
```

You can run this command from the command prompt to turn that command line into a project file:

```
"c:\program files\report commander\adcrutil.exe" -report="C:\repor
```

After this runs, you will have a new project file created ("c:\my projects\dailysales.rcproject"), which you can then edit using the Command Line Builder or Project Editor.

Using this approach you can create one project per existing command line.



The source report (.rpt file) must be available when you run the conversion, as Report Commander needs to read information from the report file. Make sure the **-report** option points to the file.

Command-Line Conversion in the Project Editor

You can import existing command lines from within the Project Editor, as described in the <u>New</u> <u>Project from Command Line(s)</u> topic. Using this approach you can combine several command lines into a single project, and/or add commands from a command line to an existing project.

Command-Line Conversion in the Command Line Builder

You can import an existing command line from within the Command Line Builder, as described in the <u>Loading Settings from Existing Command Lines</u> topic. You can then update options and re-generate the command line, or save the settings to a project file.

Project Properties Panel

The **Project Properties** panel contains settings that apply to the whole project, and also provides access to settings that can be shared with other projects and users.

To reach this panel, select the project name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Sales Tutorial - Report Commander			
File Help			
File Help Project Navigator Project Sales Tutoia Project Sales Sales Project Sales Sales Project Sales Sales Project Sales Tutoia Project Sales Sales Project Sales Tutoia Project Sales Sales Project Sales Tutoia Project Sales Tutoi	Project Sales Tut Variables Distribution Lists E-Mail Servers	Project Properties pan Project in the Project N click the settings Shared Variables These variables affect all projects run on this computer Name * User Variables These variables affect all projects run by the current user Name	el (select avigator a button)
		Filler StartOfWeek EndOfWeek StartOfMonth EndOfMonth * Project Variables These variables are defined only for this Project Name *	@MostRe @NextDa @StartOf @EndOffv
		1	

General

This tab contains general settings for the Project

Logging

Specify a log file for Report Commander to write messages to during report execution. Check **Append to existing log file** to add to the existing log file on each run, or uncheck the box to overwrite the log file on each run.

The default setting uses $\{Project.Path\} \\ \{Project.Name\}.log\}$ as the log file name, which means the log file will be written to the same folder as the project and will have the same name as the project, with a ".log" extension.



Because Report Commander is designed to run in an automated/unattended mode, it does not show a user interface when you execute reports. Therefore the only way you will be able to review error message if something goes wrong is to use a log file.

This field can contain variables and functions that are replaced at runtime. More... 1

Variables, Distribution Lists, E-Mail Servers, and File Servers

<u>Variables</u>, <u>Distribution Lists</u>, <u>E-Mail Servers</u>, and <u>File Servers</u> can be defined at three different levels, all of which are managed through the Project Properties panel:

- **Shared** settings apply to all users on the computer. You will only be able to add or modify Shared items if you have the <u>necessary permissions</u>. If your Project relies on any shared settings and you plan to run the project on a different computer, be sure to <u>copy the</u> <u>settings</u> to the other computer.
- **User** settings apply to all projects and commands run on the computer by the current user. If you define User settings but then run the Project under a different user account or on a different computer, you will need to copy the settings.
- **Project** settings apply only to this Project. They are saved in the project file and are available regardless of whose account the project runs under or on which computer.

Note that you can copy individual items between lists. For example, if you have defined a variable for this Project and decide you want to make it a User variable, you can copy it to the User Variables list. To copy items between list:

- Select the item in its current location.
- Right-click and select the **Copy** command.
- Right-click inside the destination list and select the **Paste** command.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

You can use copy/paste to copy settings between computers.

Report

A **Report** represents a single source report (Crystal Reports .rpt file) that you want Report Commander to process.

To add a new report to a project, click the **Add Report** button (^[1]) in the main toolbar, and browse to select the report. Then use the settings on the Report Properties Panel to configure basic settings for the report.

You will then add an <u>Output Group</u> to the report and begin configuring file and print outputs for the report.

Updating the Project to Reflect Report Changes

If you modify the Crystal Reports file and change any of the data sources or parameters for the report, you need to reload the report in the Project Editor. Otherwise, the connection and parameter information Report Commander has may not match up with the report at runtime, resulting in errors.

To reload the report, close all open property panels, then right-click the report name in the Project Navigator and select the **Reload** (O) command. After you do this, be sure to review the Data Sources on the Report Properties Panel and the Parameters on all the <u>Output Groups</u> for the report to make sure they are still correct.

Report Properties Panel

To reach this panel, select the report name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Settings on the Report Properties panel apply to all Outputs that get produced for this report.

General

The **General** tab contains basic settings for the report.

Report File

The **Report File** shows the name of the .rpt file. Initially this is set to the full path/name of the report file you selected. You may want to change the path if the report will not always be in the same place, or if the Project may be run on another computer.

For example, you could use a variable as a placeholder for the path.



If you change to point to a different report file than you originally used, or a different version of the original report, be sure to reload the report (see <u>above</u>) so the Project is updated with the correct data source and parameter information.

Convert to relative path

When you click the **Convert to relative path** link, Report Commander will replace the absolute path to the report file with a path relative to the project location. That way even if you move the project and report to another folder or computer, Report Commander will still be able to find the report, as long as the relative path remains valid.

Force refresh of report data when printing or exporting

If your report file has data saved in it (in Crystal Reports, the **Save data with report** option is checked on the **File** menu), check the **Refresh** option to tell Report Commander to discard the saved data and refresh the report from the database.

If there is saved data and you do not check this box, the output will contain only the saved data.

If there is no saved data in the report, this option has no effect.

Enabled

Check this box to enable processing for the report. If you want to temporarily stop processing outputs for this report without deleting it from the project, uncheck the box. All outputs in the report will be skipped if the **Enabled** option is not checked.

ID Code

The **ID Code** is used to identify this item when filtering is applied on the Project Runner command line.

Data Sources

The **Data Sources** tab contains information about the data sources found in the report.

If this list does not match what you expect to see, try reloading the report as described <u>above</u>.

For each data source you can review and override the connection information to set the database login credentials or override the connection to point to a different database. Click the Edit button for a data source to open the Data Source Properties window.

Output Group

An **Output Group** is used to define the parameters that will be passed to a report when it is executed. Each Report in your Project has one or more Output Groups, which allows you to process the same report multiple times, using different parameters each time.

Each Report must have at least one Output Group.

Once you have added the Output Group, you add one or more <u>File Outputs</u> or <u>Print Outputs</u> to the group, to tell Report Commander how to export or print your report. Each Output in the Output Group will use the same set of parameters.

If you need to produce an additional Output using different parameters, you would add an additional Output Group for those parameters, then add the additional Output to that group.

To add a new Output Group to a Report, select the Report in the Project Navigator and click the **Add Output Group** button (\square) on the Main Toolbar.

Output Group Properties Panel

To reach this panel, select the Output Group name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Settings on the Output Group Properties panel apply to all Outputs that are within this group.

Preview

Once you have set the parameters, you can use the **Preview** button (\square) on the Panel Toolbar to display a print preview of the report using these parameters.

If you have correctly configured the parameters and database logins for the report, the Preview window will not prompt you for any information.

If the Preview window prompts you for parameter values or login information, you have not provided Report Commander all of the necessary information, and the report will fail to process when you run the project.

Properties

Group Name

Enter a name for this group. This can be something that describes the parameters (like "Today's Sales").

Enabled

Check this box to enable processing for the group. If you want to temporarily stop processing outputs for this group without deleting them from the project, uncheck the box. All outputs in the group will be skipped if the **Enabled** option is not checked.

Suppress outputs for these parameters if the report does not return any records

Check this box if you do not want Report Commander to e-mail the report output if it did not produce any records.



This option works by checking to see if the report contains detail records, regardless of whether they are displayed, and may not always produce the result you want. More information.

Report Parameters

The Parameters list shows all the parameters found in the report.

Report. If this list does not match what you expect to see, try reloading the report.

For each parameter, click the **Edit** button to open the <u>Parameter Editor</u> and set the value for the parameter.

ID Code

The **ID Code** is used to identify this item when filtering is applied on the Project Runner <u>command line</u>.

File Output (Export)

File Output

A **File Output** is used to export a report to a file using one of the export formats supported by Crystal Reports.

A File Output uses the report parameters specified in the <u>Output Group</u> it belongs to. You can have several File Outputs under one Output Group if you need to export the report to different formats using the same parameters. You can also have a mix of print and file outputs in the same Output Group.

To add a new File Output to an Output Group, select the Output Group in the Project Navigator and click the **Add File Output** button (\square) on the main toolbar.

Once you have exported a report using a File Output, you can optionally e-mail the file using an <u>E-Mail Task</u> or upload it to a remote server using an <u>Upload Task</u>.

File Output Property Panel

To reach this panel, select the Output name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Test Output

Once you have configured your output settings you can test this export by clicking the **Generate** button () on the panel toolbar. When you click this button Report Commander will load the report and export it to the specified export file.



When testing the output using the **Generate** button you should make sure the **Export to temporary file** option is not checked; if it is, the export will be deleted after processing and you will not be able to review it.

Properties

Format

Report Commander supports the same export formats as Crystal Reports, generally with all the same export options. Consult the Crystal Reports documentation for more information about formats.

Select the file format to export to:

Crystal Report

Crystal Report format. Similar to using the "Save Data with Report" option in the Crystal Reports designer.

CSV
CSV (Comma-Separated Values). Additional export settings

HTML 4.0

HTML 4.0 standard. Additional export settings

HTML 3.2

HTML 3.2. Provides backward compatibility with older browsers and e-mail clients that do not support DHTML. Additional export settings

PDF

Adobe Portable Document Format ("Acrobat"). Additional export settings

Excel Workbook (XLSX)

Microsoft Excel Spreadsheet (newer XLSX format with support for larger number of rows). Additional export settings

Excel 97-2003 Workbook (XLS)

Microsoft Excel 97-2003 Spreadsheet (older format). Additional export settings

Excel Data Only

Microsoft Excel Spreadsheet (Data Only). Additional export settings

Microsoft Word

Microsoft Word

Editable Word/Rich Text

Microsoft Word/RTF - Editable. Additional export settings

Text

Plain text. Additional export settings

XML

XML format. Additional export settings

Name

Enter the name (including path and extension) that the report should be exported to.

- If you do not include a path, the file is written to the working directory that Report Commander is run from. If you use a relative path, the path is resolved relative to the working directory.
- If you want to write the file to the folder where the Project is located, use the Project.Path variable: \${Project.Path}\salesreport.pdf
 To write to the folder where the report is located, use the Report.Path variable: \${Report.Path}\salesreport.pdf
- If the file already exists, it will be overwritten. If you want to use a unique file name each time the report is exported, use the <u>now function</u> to include the date and/or time in the file name: \${Project.Path}\salesreport-@now("yyyy-MM-dd").pdf.pdf

This field can contain variables and functions that are replaced at runtime. More...¹



In Report Commander 1.x, you could upload your export file by specifying upload information as part of the export file name. Beginning with Report Commander 2, you use a separate <u>Upload Task</u> instead, and the file name should not include the upload information.

Export to temporary file

Check **Export to temporary file** if you are e-mailing or uploading the file with a Task, and don't want to keep a local copy of the file afterward. When you check this option, you still need to provide a **Name** for the file, but you do not need to include a path (any path you include will be ignored anyway). The report will be exported to a file in a temporary folder, which will be deleted when project execution finishes.

Export Page Range

Select the range of pages to export. This option is not available for all formats.

Enabled

Check this box to enable processing for the output. If you want to temporarily stop producing this export without deleting it from the project, uncheck the box and the output will be skipped when the project is executed.

Export Settings

Additional settings are available for most export formats. Follow the "Additional export settings" links in the export format list above for more information about the additional settings.

Enabled

Determines whether this task is enabled. If you want to temporarily prevent Report Commander from executing this task, uncheck the **Enabled** box.

ID Code

The **ID Code** is used to identify this item when filtering is applied on the Project Runner command line.

CSV Export Settings

The CSV Export Settings are available if you select CSV as the export format.

Settings

Group Section Export Mode

Determines how group headers and footers are exported:

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

- **Export:** Headers and footers are exported as they are encountered in the report.
- **ExportIsolated:** Headers are written once, at the beginning of the file, and all footers are written once, at the end of the file.
- **DoNotExport:** Headers and footers are not exported.

You may need to experiment with settings to get the desired outcome based on how your report is structured. For example, if you are using grouping in your report and need the data from the group headers and footers written to the file, you should choose **All sections exported**.

Report Section ExportMode

Determines how report headers and footers are exported:

- **Export:** Headers and footers are exported as they are encountered in the report.
- **ExportIsolated:** Headers are written once, at the beginning of the file, and all footers are written once, at the end of the file.
- **DoNotExport:** Headers and footers are not exported.

Preserve Date Formatting

Determines whether the formatting applied to date fields is preserved on export.

Preserve Number Formatting

Determines whether the formatting applied to number fields is preserved on export.

Field Separator

The **Separator** is the character that is used to separate the values (columns) on each line of the export file. To use a tab character as the delimiter, enter [tab].

String Delimiter

The **String Delimiter** is the character that is used to enclose string values in the export. Leave the box empty if you do not want to use a delimiter.

Related Topics

CSV	Export Options Page	.58
CSV	Export Options	.80

HTML Export Settings

The **HTML Export Settings** are available if you select HTML 4.0 or HTML 3.2 as the <u>export</u> format.

Settings

Images in Same Directory

If True, images for the report are placed in the same folder as the HTML file(s). If False, the images are placed in a subfolder called "images".

Include Navigation Bar

If True, a navigation bar is included on each page with links to other pages. Only used if **Separate File for Each Page** is True.

Separate File for Each Page

If True, each page of the report is written to a separate HTML document. If False, the entire report is written to a single HTML document.

Related Topics

HTML Export Options Page	60
HTML Export Options	

PDF Export Settings

The **PDF Export Settings** are available if you select PDF as the export format.

Settings

Generate Bookmarks from Headings

This option controls whether bookmarks are created based on the heading structure of the report. Select "Unspecified" to use the default value stored for the report.

Related Topics

PDF Export Options Page.	
PDF, RTF, and Word Export Options	

Excel Export Settings

The **Excel Export Settings** are available if you select Excel Workbook (XLSX or XLS) or Excel Data-Only as the <u>export format</u>.

Settings

The options available depend on whether you are exporting to Excel or Excel Data-Only format. These options correspond to the options available when exporting from the Crystal Reports report designer.

Related Topics

Excel Data-Only Export Options	32
--------------------------------	----

Excel Export Options	
Excel Export Options Page	

Editable Word/Rich Text Export Settings

The **Editable Word/Rich Text Export Settings** are available if you select Editable Word/RTF as the <u>export format</u>.

Settings

Insert Page Breaks

If True, explicit page breaks are inserted in the document. Otherwise page breaks are not inserted.

Text Export Settings

The **Text Export Settings** are available if you selectText as the export format.

Settings

Lines per page

Specify the number of lines that should be written to each page of the resulting text document. A page break character will be inserted to mark the end of each page.

The default value is 60. If you do not want to include page breaks in the file, set **Lines per Page** to "0".

Characters per inch

Specify the number of characters per inch to use when formatting lines within the text document. The default value is 12, and a value between 8 and 16 is recommended.

Related Topics

Text Export Options Page	60
Text Export Options	84

XML Export Settings

The XML Export Settings are available if you select XML as the export format.

Settings

XML Exporting Format

Select the XML Exporting Format that will be used to create the XML document. Exporting Formats are created in the Crystal Reports report designer and saved in the report. If you have not created any Exporting Formats, only the default format will be listed.

Export Selection

The selection to export.

Print Output

A **Print Output** is used to print a report to a physical or virtual printer.

A Print Output uses the report parameters specified in the <u>Output Group</u> it belongs to. You can have several Print Outputs under one Output Group if you need to print the report to different printers using the same parameters. You can also have a mix of print and file outputs in the same Output Group.

To add a new Print Output to an Output Group, select the Output Group in the Project Navigator and click the **Add Print Output** button (🚔) on the main toolbar.

Print Output Properties Panel

To reach this panel, select the Output name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Properties

Printer

Select **Use default printer** to print to the default printer for the user account that the project is executed under. To print to a specific printer, select or enter the printer name. If the project will be executed on a different computer than where it is being edited, you may need to manually enter the proper printer name.

Paper Source

Select the paper source to use when printing.

Copies

Enter the number of copies to print.

Export Page Range

Select the range of pages to print.

Enabled

Check this box to enable processing for the output. If you want to temporarily stop producing this export without deleting it from the project, uncheck the box and the output will be skipped when the project is executed.

Print Engine

Select the print engine to use. Use the "Default" engine unless you encounter a printing problem and the knowledge base indicates that you should use a different setting.

ID Code

The **ID Code** is used to identify this item when filtering is applied on the Project Runner command line.

Specifying Additional Printer Options

The Crystal Reports runtime components that Report Commander uses to print reports do not allow for customization of print settings beyond the settings listed here. If you need to

configure special printing options, the best way to do so is to create a second printer definition for the printer you are using, and configure that copy to use the settings you need as its default settings. Then instruct Report Commander to print to that copy of the printer definition. Refer to this article for additional information.

E-Mail Task

An **E-Mail Task** is used to send an e-mail message containing one or more <u>File Outputs</u> (export files) from the Project. The outputs can come from any report or output group in the project (you can send several reports in one e-mail message).

To add a new E-Mail Task to a Project, click the **Add E-Mail Task** button (¹⁾) in the main toolbar.



Before you can send e-mail, you need to configure Report Commander with connection information for an SMTP mail server. You can do this from the <u>E-Mail Servers tab</u> on the Project Properties panel.

E-Mail Task Properties Panel

To reach this panel, select the Output name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Message

The **Message** tab contains the settings for the e-mail message subject and body (message text).

Subject

Enter the subject for your e-mail message.

This field can contain variables and functions that are replaced at runtime. More...¹

Use HTML format for messages

Check this option if you want to send your message with an HTML-formatted message body. Otherwise the message will be plain text.

 If you are entering the message text directly (Use this text is selected): Report Commander does not provide an HTML message editor, so if you use this option you must provide valid HTML markup for the message text, either composed by hand or pasted from an HTML editor. The text you supply should be a complete HTML document.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

- If you are loading the message body from a file (**Use this file at runtime** is selected): The file must be a complete, valid HTML document.
- If you are using an Output for the message body (**Use this project output** is selected): This setting is ignored. The message will be HTML formatted if the selected output is an HTML output, or plain text if it is a text output.

Use this text

Select this option to enter a fixed (or variable) message. Type in the text that you want to use as the message body.

If you checked the **Use HTML format for messages**, the text you enter must be valid HTML markup code.

This field can contain variables and functions that are replaced at runtime. More... 1

Use this project output

Select this option to use an export file produced by the project as the body of the message. Only HTML and plain text exports can be used as the message body. Exports in other formats can be included as <u>attachments</u>.

Use this file at runtime

Use this option to load the message body from an external file.

If you checked the **Use HTML format for messages**, the file must be a valid HTML document.

This field can contain variables and functions that are replaced at runtime. More...²

Enabled

Determines whether this task is enabled. If you want to temporarily prevent Report Commander from executing this task, uncheck the **Enabled** box.

ID Code

The **ID Code** is used to identify this item when filtering is applied on the Project Runner <u>command line</u>.

From/To

The **From/To** tab contains information about the message sender and recipients.

From

²Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

Enter the address and, optionally, name of the sender of the message. If you do not specify a sender, the default sender configured for the mail server will be used.

You can enter just the e-mail address, or the e-mail address and name, using one of these formats:

```
john.smith@example.com
John Smith <john.smith@example.com>
```

This field can contain variables and functions that are replaced at runtime. More... 1

To/CC/BCC

Enter the e-mail addresses and, optionally, names of the recipients of this message in the To, CC, and BCC lists. A single message will be sent to all the listed recipients.

If you have a list of e-mail addresses from another program that you want to add, you can <u>paste in the list</u> rather than adding them one at a time.

If you frequently send messages to a group of people, you should set up a <u>Distribution List</u> so you don't have to enter the recipients for each new E-Mail Task.

To include a Distribution List in the recipient list, enter the name of the list prefixed with "@": @Sales Managers. You can also select from the defined Distribution Lists by rightclicking the recipient list and selecting the list from the **Send to distribution list** menu.

Request read receipt for message

Check this box to have Report Commander request a read receipt for your message. Most users and e-mail clients will ignore this request (and be annoyed by it) but the option is there if you want it.

Attachments

On the **Attachments** page you can attach report exports and other files to your message.

Include the output files from these exports

This list shows all file outputs (export files) produced by this project. Check the box next to each file you want to include as an attachment to the message.



If you already used an output as the body of the message, you don't need to select it here, too. If you do, it will be the body of the message and will also be included as an attachment.

Also attach these files

Use this option to attach additional files to the message. For example, you might have a PDF file with instructions for interpreting the report.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

When you click **Add** or **Edit**, the <u>File to Attach</u> window opens to allow you to specify the file name.

Upload Task

An **Upload Task** is used to upload <u>File Outputs</u> (export files) to a remote server using FTP, SFTP, or HTTP.

To add a new Upload Task to a Project, click the **Add Upload Task** button (\square) in the main toolbar.

Upload Task Properties Panel

To reach this panel, select the Output name in the Project Navigator and click the Settings (\checkmark) button in the main toolbar.

Settings

The **Settings** tab contains basic settings for the upload.

Upload Type

Select the kind of upload to perform:

FTP

Files are uploaded to an FTP server.

SFTP

Files are uploaded to an SFTP server.

HTTP POST

Files are uploaded to an HTTP (Web) server using the POST method.

HTTP PUT

Files are uploaded to an HTTP (Web) server using the PUT method.

Destination server

Select the server to upload files to.

Clicking the **Manage file servers** link takes you to the <u>Project Properties panel</u>, where you can manage the available <u>File Servers</u>.



If the server you reference is a Shared or User file server, be sure to copy the file server settings over if you plan to execute the project on a different computer or under a different user account than the one where you create it. See "Sharing Settings with Another User or Computer" on page 183 for more information.

Target folder or path

Enter the path or folder to upload files to.

- For an FTP or SFTP server, this is the folder to use, relative to the "home" directory that the server assigns you when you log in. If you begin the folder name with "/", it becomes an absolute path (relative to the root of the file structure exposed by the server).
- For an HTTP POST or HTTP PUT upload, this is the path and name of the Web page to POST/PUT to. For example, if you want to upload to the URL "http://www.example.com/filetransfer/upload.aspx", the File Server will be configured as http://www.example.com, and you will set the target path to <a href="//filetransfer/upload.aspx"//filetransfer/upload.aspx"//filetransfer/upload.aspx"//filetransfer/upload.aspx.

To include the name of the file being uploaded as part of the path or query string, use the "\${FileName}" variable. For example, when using the PUT method you could use a path like /filetransfer/upload/\${FileName}.

The file name used for the file is the file name specified in the <u>File Output settings</u> (without the path information).

This field can contain variables and functions that are replaced at runtime. More... 1



Variables and functions are re-evaluated for each file that Report Commander uploads, so it is possible to upload each report output to a different folder on the same server.

HTTP Options

Report an error if the server response does not include this text

If the Web server returns an error code (such as a 404 Not Found error, or 500 Server error), the task will log an error message. However, there may be cases where the file is not uploaded, but the server still returns a success result. For example, if the Web server redirects the upload attempt to a login page, it may still return a 200 Success message, so Report Commander will not know there was a problem.

To solve this problem, your upload page can be coded to return a certain message in the response to indicate that the file was successfully transferred. You can then configure Report Commander to check for this message in the Response.

For example, your upload handler is programmed to return the message "File accepted" when the file is successfully transferred. In Report Commander, check the **Report an error if the server response does not include this text** option and enter File accepted as the text to look for. If the response from the Web server does not include "File accepted," Report Commander will log an error message.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

When you specify text to look for, Report Commander looks for the text anywhere in the response returned by the server, and ignores the case of the text.

For more control over matching you can check the **Use Regular Expressions** option and specify a regular expression as the text to match. Report Commander uses the Microsoft .NET syntax for regular expression matching, with case-insensitive matching. Refer to the <u>Microsoft documentation</u> for more information.

ID Code

The **ID Code** is used to identify this item when filtering is applied on the Project Runner command line.

Files

On the **Files** page you specify the report outputs and other files you want to upload.

Include the output files from these exports

This list shows all file outputs (export files) produced by this project. Check the box next to each file you want to include as an attachment to the message.



If you already used an output as the body of the message, you don't need to select it here, too. If you do, it will be the body of the message and will also be included as an attachment.

Also attach these files

Use this option to attach additional files to the message. For example, you might have a PDF file with instructions for interpreting the report.

When you click **Add** or **Edit**, the <u>File to Attach</u> window opens to allow you to specify the file name.

Project Execution Commands

The **Project Execution Commands** window shows you the commands you need to execute to run your Project from a batch file, scheduler, or other automation tool. You can reach this window by selecting **How to execute project...** from the **Help** menu in the Project Editor.

If you want to run Report Commander from a command prompt or batch file, you can Copy (\Box) the execution command from the top box and paste it into the batch file or command prompt.

If you are using the Windows Task Scheduler or another automation tool, you will probably enter the adrcexec.exe program information and the command line options in separate boxes. You can Copy (1) the relevant information from the **Program to Run** and **Program Arguments**boxes at the bottom of the window.

Project Execution Commands	×
To automate execution of this project, create a task in your favorite scheduling or automation tool to execute this command:	
"C:\Program Files\Arcana Development\Report Commander\adrcexec.exe" -project:"C:\test\Sales Tutorial.rcproject"	D
You may need to enter the program to run and the program options in separate inp	
Program to Run	
"C:\Program Files\Arcana Development\Report Commander\adrcexec.exe"	
Program Arguments	
-project:"C:\test\Sales Tutorial.rcproject"	Ð
-	
Help	ose

For example, if you want to schedule your report in the Windows Task Scheduler, you can copy/paste this information into the Basic Task Wizard as shown below:



See the <u>Scheduling Report Execution</u> topic for a complete tutorial on scheduling report execution with the Windows Task Scheduler.

Project Runner (adrcexec)

Project Runner

The **Project Runner** program (adrcexec.exe) is used to execute a Report Commander Project (created using the <u>Project Editor</u>) from a command prompt, batch file, scheduler, script, or other tool.

See the <u>Scheduling Report Execution</u> topic for more information on how to use the Project Runner with a scheduling tool.

Command-Line Syntax

See the Command-Line Syntax topic for details on how to run the Project Runner.

From within the Project Editor, choose **How to run project** from the **Help** menu to display the execution commands for the project.

Overriding Settings

The Project Runner is designed to execute reports based on the settings stored in project files, and does not offer the same fine-grained control over processing options from the command line that the <u>Command Runner</u> does. If you need to call Report Commander from another application to do on-the-fly processing using ad-hoc settings, you should use the Command Runner instead of the Project Runner and project files.

The extensive support of <u>variables and functions</u> throughout the Report Commander project is intended to eliminate much need for command-line customization of execution.

The Project Runner does allow you to customize project execution in the following ways:

- You can override the values of variables on the command line.
- You can specify a subset of reports, output groups, outputs, and/or tasks to execute, rather than the full project.

See the Command-Line Syntax topic for more information.

Logging and Diagnostics

The program runs as a console-mode program. It writes some progress messages and all warning and error messages to the console (you can use the <u>logging options</u> to adjust the level of information written to the console).

If errors occur, no error information is displayed other than what is written to the console (i.e., no error window is displayed). Therefore if you are running the Command Runner automatically through an automation tool you should configure Report Commander to <u>create a log file</u> when it runs, so you can review the log for messages if things do not work correctly.

The program returns an exit code as follows:

- Exit code 8 if any errors were reported
- Exit code 4 if any warning messages were reported
- 0 if no warnings or errors were reported.

Command-Lne Syntax

The Project Runner (adcrutil) does not use project files (use the <u>Project Runner</u> to execute project files). Instead, all processing is controlled through command-line options. If you don't want to work directly with command-line options, you can use the <u>Command Line Builder</u> to generate the command line for you.

Syntax

```
adrcexec -project=projectfilename [-option[=value] ...] [variable="
```

The only required parameters is the **-project**, which tells Report Commander which project to execute. Report Commander will process all reports, output groups, outputs, and tasks in the project, except for those that have been disabled.

General Options

Option	Description						
-project= projectfilen ame	Provide the complete path and name of the project file to execute. This option is required.						
- report= <i>reportID</i>	Specifies one or more Reports to process. If no -report option is specified, all enabled reports in the project are processed. If the -report option is used, only the specified reports are processed. If you specify a report using this option, it will be processed even if it is disabled in the project.						
	To specify more than one report, repeat this option for each report.						
	The <i>reportID</i> is the name of the report, without the file extension, or the numeric ID Code shown on the report properties panel.						
	For example, execute only the "dailysales" and "weeklysales" reports and the report with ID number 4:						
	-report="dailysales" -report="weeklysales" -report=4						
- group= groupID	Specifies one or more Output Groups to process. If no -group option is specified, all enabled output groups in the project are processed. If the -group option is used, only the specified groups are processed. If you specify a group using this option, it will be processed even if it is disabled in the project. The specified group will be processed even if the -report selections (if present) exclude the parent report.						
	To specify more than one group, repeat this option for each group, or combine						

Option	Description					
	multiple numeric IDs in a single option.					
	If the project has output groups with the same name in more than one report, include the report name as part of the <i>groupID</i> . Alternatively you can use the numeric ID Code shown on the Output Group properties panel.					
	-group="Sales Trend" -group="Retail Location Sales.Yesterday	s	Sa	1]	ale	ales
	(where "Retail Location Sales" is the name of the report that the "Yesterday's Sales" group is in)					
- output= <i>outputID</i>	Specifies one or more Outputs to process. If no -output option is specified, all enabled outputs in the project are processed. If the -output option is used, only the specified outputs are processed. If you specify an output using this option, it will be processed even if it is disabled in the project. The specified output will be processed even if the -report and -group selections (if present) exclude the parent report or group.					
	To specify more than one output, repeat this option for each output.					
	The <i>outputID</i> is the numeric ID Code shown on the properties panel for the output. You may combine multiple <i>outputID</i> s using commas.					
	-output="1" -output="5" -output="3,7"					
- task= <i>taskID</i>	Specifies one or more Output Tasks to process. If no -task option is specified, all enabled tasks in the project are processed. If the -task option is used, only the specified tasks are processed. If you specify a task using this option, it will be processed even if it is disabled in the project.					
	The <i>taskID</i> is the numeric ID Code shown on the properties panel for the task. You may combine multiple <i>taskID</i> s using commas.					
	-task="1" -task="2,3,4"					
	To suppress all output tasks (e.g., to avoid sending e-mail messages while testing), use					
	-task=0					
<i>variable</i> = <i>value</i>	You can override any variable defined in the Project by specifying a new value on the command line.					
	Variable values must come last on the command line, after all options have been set.					
	For example, you have defined a variable named Region in the project, and this variable is passed to the report as a report parameter. you can set the value on the command line by using this syntax					

Option	Descr	iption	
		adrcexec -project="c:\projects\salesreport.rcproject" region=	="East1"

Logging Options

By default the Project Runner will write informational and higher level messages to the console. If a log file is configured in the <u>Project Properties</u>, messages of all levels will be written to that log file.

You can override or supplement logging through the options shown below.

Option	Description
-suppressprojectlog[{+ -}]	If specified, suppresses the log file (if any) configured in the Project Properties (the log file will not be produced). Default: False.
-logfilename= <i>filename</i>	Specifies a log file to write to. If you include - suppressprojectlog , this log will be produced instead of the log file configured in the Project. If you do not include - suppressprojectlog , both logs will be produced.
-appendlog[{+ -}]	Determines whether the log file is appended to (True) or overwritten (False). Default: True. Only used if -logfilename is specified.
<pre>-loglevel= {debug verbose info warning error off}</pre>	Determines the lowest-level message that will be written to the log file. The default is <i>debug</i> , which means that all messages will be written.
	If you have specified -logfilename , this setting applies to that log file. If you have not specified - logfilename , the setting applies to the log file configured in the Project.
-consoleloglevel= {debug verbose info warning error off}	Determines the lowest-level message that will be written to the console. The default is <i>info</i> , which means that informational, warning, and error messages will be written.
-debug	Shortcut for -consoleloglevel=debug.
-verbose	Shortcut for -consoleloglevel=verbose.
-silent	Causes the program to run silently. Has the same effect as -consoleloglevel=off (no messages logged to console), plus the banner (program name and copyright information) is also suppressed.

Command Line Builder

Command Line Builder

The **Command Line Builder** helps you create a command line to process a report using the <u>Command Runner</u>.



Use the Command Line Builder and Command Runner when you only need to process a single report to produce a single output, or if you need to be able to control all aspects of report processing through command-line parameters. For more complex processing (such as multiple reports or multiple outputs in a single run), use the <u>Project Editor</u> and <u>Project Runner</u> instead. See the <u>Modes of Operation</u> topic for more information.

Basic Command Line Workflow

- 1. When the Command Line Builder starts, open the Crystal Reports report that you want to process, or a previously-saved project file to work with.
- 2. Use the settings in the property pages (tabs) of the Command Line Builder to configure Report Commander to print, export, and/or e-mail your report.
- 3. Go to the <u>Preview page</u> to preview the report or test the export.
- Use the information on the <u>Command Line</u> page to execute your report from a command prompt, or to configure your scheduler or other automation tool to run the report automatically. See <u>Scheduling Report Execution</u> for more information
- 5. Optionally, save your settings to a project file so that you use them again later in the Command Line Builder or in the Project Editor. See <u>Using Project Files</u> below for more information.

Loading Settings from Existing Command Lines

If you have an existing command line (created with this or any earlier version of Report Commander), the Report Commander can read that command line to fill in the settings in the Command Line Builder.

To use this feature, choose the **Read Settings from Command Line** command from the **File** menu to open the <u>Read Settings from Command Line</u> window. Paste your existing command line from the clipboard into this window, and Report Commander will extract the settings from it.

Using Project Files

The Command Line Builder can read and save the same project file format that is used by the Project Editor and Project Runner. A project you save from the Command Line Builder can be opened in the Project Editor and executed using the Project Runner.

Projects saved using the Project Editor can be opened using the Command Line Builder as long as they meet these restrictions:

- The project must have exactly one report.
- The report cannot have more than one Output Group.
- The report cannot have more than one File Output.
- The report cannot have more than one **<u>Print Output</u>**.
- The project cannot have more than one E-Mail Task.

If the project does not meet these requirements, the Command Line Builder will show an error message and the project will not be loaded.

Property Pages

Report Page

The **Report** page includes basic processing options for the report.

Report File

Shows the name of the report file to be processed. To select a different report, select **Open** from the **File** menu.

Note that the Command-Line Builder is not able to open report files via HTTP or FTP download. If you want to use the Builder with a report that will be downloaded at runtime, you need to work with a local copy of the report, and then modify the generated command line to point to the HTTP or FTP target.

Force refresh of report data after loading

This option has an effect only if you checked the **Save Data with Report** option in the Crystal Reports Designer before you saved the report. If **Save Data with Report** was checked, **Force refresh of report data after loading** works as follows:

- If **Force refresh of report data after loading** is not checked, Report Commander works only with the data saved in the report. The logins and parameters are not used, because the report is not refreshed from the data source.
- If **Force refresh of report data after loading** is checked, Report Commander refreshes the data, producing the same result as if data were not saved in the report.

Skip further processing if report contains no data

When checked, Report Commander will not export, print, or e-mail the report if it does not contain any data records.



This option works by checking to see if the report contains detail records, regardless of whether they are displayed, and may not always produce the result you want. <u>More information</u>.

Print

The **Print** options are used to print the report to a printer.

Print report

When checked, Report Commander will print the specified number of copies of the report.

Printer

Select **Use default printer** to print the report to the default printer for the user under whose account Report Commander is run. Select **Use this printer** to print to a specific printer.

Paper Source

Select a paper source to print using a specific paper source. Only available if you have selected a specific printer.

Export

The Export options are used to export the report to a file and, optionally, send the exported report by e-mail.

Export the report

The report is exported to a file.

E-mail the report

The report is exported to a file and then sent by e-mail, using the settings on the $\underline{\text{E-Mail}}$ page.

If **Export the report** and **E-mail the report** are both checked, the report is exported to a file and sent to the e-mail recipients, and the exported file remains on the computer in the location specified in the **Name** box.

If **E-mail the report** is checked but **Export the report** is not, the report is exported to a temporary location and sent to the e-mail recipients. The exported file does not remain on the computer after it is sent.

Format

Select the file format for the exported data. See the <u>Command Line Syntax</u> topic for a description of the available formats.

Depending on the format you select, additional formatting options will be available on a separate page. Click the **Set Export Options** link to go to the options page.

Name

Specify the path and name of the export file. Use the ... button to browse for the target.

This field can contain variables and functions that are replaced at runtime. More... 1

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

If **E-mail the report** is checked but **Export the report** is not, only the file name is used (not the path); the report is exported to a temporary directory using the specified file name, then deleted after it is e-mailed.

You can configure Report Commander to upload the export file to an FTP, SFTP, or HTTP (Web) server by specifying the file name in a special format. See the "Uploading Output" on page 78 topic for more information.

Logging

Specify a log file for Report Commander to write messages to during report execution. Check **Append to existing log file** to add to the existing log file on each run, or uncheck the box to overwrite the log file on each run.

The default setting uses \${TEMP}\\${Report.Name}.log as the log file name, which means the log file will be written to your TEMP folder and will have the same name as the report, with a ".log" extension. You could also use \${Report.Path}\\${Report.Name}.log to write the log file to the same folder as the report, or enter any path and name you wish.



Because Report Commander is designed to run in an automated/unattended mode, it does not show a user interface when you execute reports. Therefore the only way you will be able to review error message if something goes wrong is to use a log file.

This field can contain variables and functions that are replaced at runtime. More...¹

Manage variables, distribution lists, and mail servers

This link opens the <u>User Settings</u> window, which allows you to manage <u>variables</u>, <u>mail</u> <u>servers</u>, and <u>distribution lists</u> that are available for all Report Commander projects/commands you run on this computer.

CSV Export Options Page

The **CSV Export Options** page is available if you select CSV as the export format.

Delimiter

The **Delimiter** is the character that is used to enclose string values in the export. Leave the box empty if you do not want to use a delimiter.

Separator

The **Separator** is the character that is used to separate the values (columns) on each line of the export file. You may enter the desired character, or check the **Use tab** box to have a tab character inserted between values.

Section Export

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

The Section Export setting determines how report, page, and group sections are exported.

Crystal Reports default

All sections exported. All your headers and footers are exported, exactly as if the report were being printed.

Export Isolated

All headers are written once, at the beginning of the file, and all footers are written once, at the end of the file.

None

Only Detail records are exported; no headers or footers are exported.

İ

The same setting is applied to report, page, and group headers and footers. If you need separate settings for different kinds of headers/footers, use the Project Editor instead, which offers <u>additional options</u>.



You may need to experiment with this setting to get the desired outcome based on how your report is structured. For example, if you are using grouping in your report and need the data from the group headers and footers written to the file, you should choose **All sections exported**.

Related Topics

CSV	Export Options	80
CSV	Export Settings	38

Excel Export Options Page

The **Excel Export Options** page is available if you select Excel (XLS or XLSX) or Excel Data Only as the <u>export format</u>.

Page Headers and Footers

Controls how page headers and footers will be exported.

Column Widths

Controls how the column widths will be set in the resulting Excel document.

Automatic

The columns will be sized based on their content. If you want to base the sizing on the content in a particular section, you can select it here.

Constant column width

All columns will be set to the fixed width you specify.

Formatting

The **Formatting** section contains additional options to control formatting. The options available depend on whether you are exporting to Excel or Excel Data-Only format. These options correspond to the options available when exporting from the Crystal Reports report designer.

Related Topics

Report Commander 2.5

Excel Data-Only Export Options	82
Excel Export Options.	
Excel Export Settings	40

HTML Export Options Page

The **HTML Export Options** page is available if you select HTML 4.0 or HTML3.2 as the <u>export</u> <u>format</u>.

Separate HTML file for each page

When exporting to HTML, check this option to have Report Commander generate a separate HTML file for each page of the report. If this option is not checked, a single HTML page is created, containing all of the report data, regardless of the number of pages in the original report.

Include navigation bar on each page

When **Separate HTML file for each page** is checked, check **Include navigation bar on each page** to include simple navigation links at the bottom of each HTML page (for navigation between pages).

Images in same directory as HTML

When this option is checked, any images for the report are placed in the same directory as the HTML files. If the option is not checked, the images are placed in a subdirectory called "images" below the export folder you specify.

Related Topics

HTML	Export Options	83
HTML	Export Settings	

PDF Export Options Page

The **PDF Export Options** page is available if you select PDF as the export format.

Create bookmarks from report headings

If this option is checked, the PDF file will have bookmarks created from the report headings. If this option is not checked, the default setting saved in the report will be used.

Related Topics

PDF, RTF, and Word Export Options	. 84
PDF Export Settings.	. 40

Text Export Options Page

The **Text Export Options** page is available if you select Text as the export format.

Lines per page

Specify the number of lines that should be written to each page of the resulting text

document. A page break character will be inserted to mark the end of each page.

The default value is 60. If you do not want to include page breaks in the file, set **Lines per Page** to "0".

Characters per inch

Specify the number of characters per inch to use when formatting lines within the text document. The default value is 12, and a value between 8 and 16 is recommended.

Related Topics

Text Export Options	84
Text Export Settings	41

XML Export Options Page

The XML Export Options page is available if you select XML as the export format.

XML Exporting Format

Select the XML Exporting Format that will be used to create the XML document. Exporting Formats are created in the Crystal Reports report designer and saved in the report. If you have not created any Exporting Formats, only the default format will be listed.

Related Topics

XML	Export Options	85
XML	Export Settings	41

E-Mail Page

The **E-Mail** page defines the settings for sending your report output by e-mail. These options are available only if the **E-mail the report** option is checked on the <u>Report</u> page.

Message From

Specify the e-mail address from which the message will be sent. You must specify a valid e-mail address; most mail servers will reject the message if it does not have a valid sender. If you are using shared settings for your e-mail server (see next section), you can omit the From address and Report Commander will use the default sender configured for the mail server.

To include a "display name" in addition to the e-mail address, use this format: Rachel West <rwest@example.com>

This field can contain variables and functions that are replaced at runtime. More...¹

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

Mail Server

For Report Commander to send e-mail messages, you must provide information about an SMTP mail server that it can use to send the messages through. You can click the **Configure** link to define <u>shared mail servers</u> that will be available for all Report Commander commands and projects you run on this computer.

Alternatively, you can explicitly configure the mail server information for this particular task.

Server Address

Specify the name (address) of the SMTP server through which the mail will be sent. If the server uses a port other than the standard value of 25, include the port prefixed by a colon. For example, to deliver mail through Gmail, use [smtp.gmail.com:465].

Authentication

If your mail server requires authentication for sending mail, enter your user ID and password here. For example, to send through Gmail you would enter your full Gmail address (e.g., example@gmail.com) and password.

If you are unsure what to enter here, check with the administrator of your mail system.

Use TLS (SSL) connection

Check this option if the server requires a TLS or SSL connection. Generally you do not need to check this option, as Report Commander can make the correct choice automatically.

Message To

Specify the e-mail addresses to send the message to. To send to multiple recipients, separate the recipients with commas. You can also include display names in addition to the e-mail addresses. For example:

Rachel West <rwest@example.com>,claire@example.com,Bob <bob@example.com>

You can specify whether a recipient should be included on the To, CC, or BCC list for the message by prefixing the recipient with "to:", "cc:", or "bcc:":

```
to:Rachel West <rwest@example.com>,cc:claire@example.com,bcc:Bob
<bob@example.com>
```

To send the message to members of a <u>Distribution List</u>, specify the name of the distribution list prefixed with "@": <code>@salesmanagers</code>, <code>cc:@projectmanagers</code>.

This field can contain variables and functions that are replaced at runtime. More...¹

Subject

Specify the subject of the message. If none is specified, a default subject will be used.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

This field can contain variables and functions that are replaced at runtime. More...¹

Message Text

Specify the body of the message. Note that only a simple one-line message body can be specified in this way (because anything more complex cannot be passed on the command line).

There are three ways to specify a complex message body:

- Use a <u>response file</u> to specify this parameter. This will allow you to specify a text-based message that can span many lines.
- Load the message body from a file. When this option is checked, the message body will be loaded from the specified file at run time. The file can be a text or HTML file.
- Use the report output as the message body. This option is available only if you have chosen to export the report in HTML or plain text format. When you check this option, the HTML export of the report is used as the body of the message; the export file is *not* also attached to the message.

This field can contain variables and functions that are replaced at runtime. More...²

Parameters Page

The **Parameters** page allows you to define values for the parameters required by your report. This page lists each parameter defined for the report. To specify the value(s) for a parameter, select it in the list and click **Edit** to open the Parameter Edit window.

You cannot add or remove parameters from this list, as it shows all parameters found in the report (and its subreports).

Use named parameters when generating command line

When this option is checked, the generated command-line will define parameters using their names (see the <u>namedparameters</u> command-line option for more information). Otherwise, names are not included.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

²Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

Database Logins Page

The **Database Logins** page shows each database connection that the report uses. Click Edit to open the <u>Data Source Properties</u> window, where you can override a database connection to use a different database or different login credentials.

You cannot add or remove data sources from this list, as it shows all connections found in the report (and its subreports).

Command Line Page

The **Command Line** page shows you the command line constructed from the settings you have specified in the Command Line Builder. Run this command line from a command prompt or automation tool to perform the actions you have requested for the report.

If you want to run Report Commander from a command prompt or batch file, you can Copy (\Box) the execution command from the top box and paste it into the batch file or command prompt.

If you are using the Windows Task Scheduler or another automation tool, you will probably enter the adcrutil.exe program information and the program options in separate boxes. You can Copy (¹) the relevant information from the **Program to Run** and **Program Arguments**boxes at the bottom of the window.

Project Execution Commands	×
To automate execution of this project, create a task in your favorite scheduling or automation tool to execute this command:	
"C:\Program Files\Arcana Development\Report Commander\adrcexec.exe" -project:"C:\test\Sales Tutorial.rcproject"	D
You may need to enter the program to run and the program options in separate inp	
Program to Run	
"C:\Program Files\Arcana Development\Report Commander\adrcexec.exe"	
Program Arguments	
-project:"C:\test\Sales Tutorial.rcproject"	Ŀ
T	
Help	lose

For example, if you want to schedule your report in the Windows Task Scheduler, you can copy/paste this information into the Basic Task Wizard as shown below:



See the <u>Scheduling Report Execution</u> topic for a complete tutorial.

Preview Page

The **Preview** page allows you to view a print preview of your report with the parameters and login information you have specified, and to test the printing and exporting options you have selected. This feature can be used to verify that you have provided the correct settings.

Preview

Click the **Preview** button to display a print preview of your report, using the parameter values and login credentials you have specified.

If you have correctly configured the <u>parameters</u> and <u>database logins</u> for the report, the Preview window will not prompt you for any information.

If the Preview window prompts you for parameter values or login information, you have not provided Report Commander all of the necessary information, and the report will fail to process when you run your execution command.

Execute

Click the **Execute** button to process your report using the settings you have specified. This will process the report exactly as if you were running your execution command from the command line: it will print, export, and e-mail the report, based on your settings.

This option is meant for testing your settings. For regular execution of your report, you will run the <u>Command Runner</u> using the command line shown on the <u>Command Line page</u>.

User Settings Window

The **User Settings** window allows you to configure <u>variables</u>, <u>mail servers</u> and <u>distribution</u> <u>lists</u> that are available for all Report Commander operations run on this computer under your user account.

In the Command Line Builder you can reach this window from the <u>Report Page</u> (click the **Manage variables, distribution lists, and mail servers** link) or the <u>E-Mail page</u> of (click the **Configure** link in the Mail Server section). The shared variables, servers, and distribution lists can also be edited from the <u>Project Properties panel</u> of the Project Editor.

These shared settings are only available for projects run on this computer under your user account. If you create your commands and then execute them under a different user account or on a different computer, be sure that the <u>shared settings are copied</u> <u>over</u> to the other account or computer. You can also use the <u>Project Properties panel</u> of the Project Editor to define settings that apply to all users on this computer.

Command Runner (adcrutil)

Command Runner

The **Command Runner** program (adcrutil.exe) allows you to print, export, and e-mail reports, using command-line options to control all aspects of the export process.

If you really enjoy stringing together command-line arguments for console-mode programs, you can dive right in with the <u>command-line syntax reference</u>. Many users will prefer to use the <u>Command Line Builder</u>, which lets you select processing options using a graphical user interface. It then creates a command line that you can use to execute the report using the Command Runner. See the <u>Command Line Workflow</u> topic for more information.

Once you have your command line built, you can run it from a command prompt, batch file, scheduler, or other automation tool. See the <u>Scheduling Report Execution</u> topic for more information.

Logging and Diagnostics

The program runs as a console-mode program. It writes some progress messages and all warning and error messages to the console (you can use the <u>logging options</u> to adjust the level of information written to the console).

If errors occur, no error information is displayed other than what is written to the console (i.e., no error window is displayed). Therefore if you are running the Command Runner automatically through an automation tool you should configure Report Commander to <u>create a log file</u> when it runs, so you can review the log for messages if things do not work correctly.

The program returns an exit code as follows:

- Exit code 8 if any errors were reported
- Exit code 4 if any warning messages were reported
- 0 if no warnings or errors were reported.

Command-Line Syntax

Command-Line Syntax

The Command Runner (adcrutil) does not use project files (use the <u>Project Runner</u> to execute project files). Instead, all processing is controlled through command-line options. If you don't want to work directly with command-line options, you can use the <u>Command Line Builder</u> to generate the command line for you.

Syntax

```
adcrutil -report=reportfilename [-option[=value] ...]
```

General requirements:

- The **-report** option must be specified
- At least one action must be specified: -print, -preview, -export
- Use -parameters or -namedparameters, but not both.

You can use a <u>response file</u> to supply parameter values. But if you are using response files extensively, you should consider using project files instead, with the <u>Project Editor</u> and <u>Project Runner</u>.

Options

General Report Options

These options tell Report Commander which report to load and provide general processing instructions.

Option	Description
-report= reportfilena me	Provide the complete path and name of the report file to process.
	Download Report
	Report Commander can download the source report file using HTTP or ftp using the following syntax:
	<pre>-report=http://myserver/reports/myreport.rpt -report=http://userid:password@myserver/reports/myreport.rpt -report=http://domain\userid:password@myserver/reports/myreport.rpt -report=ftp://userid:password@myserver/reports/myreport.rpt -report=ftp://domain\userid:password@myserver/reports/myreport.rpt If the server requires authentication, include the user ID and password as part of the UBL as shown above</pre>
	If the Web server uses Windows (integrated) authentication, Report Commander will automatically authenticate using the credentials of the user running the program, if credentials are not included as part of the URL.
-refresh	Specifies that the report should be refreshed after it is loaded (equivalent to pressing F5 in the Crystal Reports Designer). If your report has the Save data with report option checked in Crystal Reports, use this command to force Report Commander to refresh the data (otherwise the saved data will be used). This command is unnecessary if the Save data with report option is not checked for your report.
- suppressemp ty	Specifies that processing should terminate if the report does not contain any data. When this option is included, Report Commander will not print, export, or e-mail your report if the data source does not return any records.

Option

Description



This option works by checking to see if the report contains detail records, regardless of whether they are displayed, and may not always produce the result you want. More information.

Database Connection Options

These options are used to specify database connection information.



Beginning with Report Commander 2.2, there is a new syntax for database logins, as described below. The Command Line Builder will create command lines using this syntax. However, the syntax used in previous versions of Report Commander will still work.

Optio n	Description	
- login= conne ction inform	If database login credentials are required or you need to override the connection to point to a different data source, use the -login option to provide them.	
	If the report uses more than one database connection, provide the credentials for each, in the same order they occur in the report.	
ation	Each "login" parameter consists of one or more of the following sections:	
	<pre>{server:servername} Specify the new server name or address {database:dbname} Specify the new database name {schema:schemaname} Specify the new schema name {userid:userID} Specify the user ID {password:password} Specify the unenecrypted password {encryptedpassword:password} Specify an encrypted password (generated using the -encrypt option) All sections are optional. If the password or encryptedpassword section is used, it</pre>	
	must come last. Do not leave a space between sections.	
	<pre>-login={userid:userid1}{password:password1} -login={userid:userid2</pre>	}{passwo
	Override the connection to use a different database on the same server:	
	<pre>-login={database:mynewdb}{userid:userid1}{password:password1} -log:</pre>	in={user
	If a connection does not require a user ID and password, or you want to use	

Optio n	Description			
	integrated security for the connection, use "-login=", with no credentials. For example:			
	<pre>-login={userid:userid1}{password:password1} -login= -login={useri</pre>	.d:userid3}{]		
	(The second connection does not require credentials)			
	If you are using Report Commander from a batch file or other tool and do not want people to be able to see your database login password, you can encrypt the password for use on the command line. Assuming your password is "mypassword", you would first run:			
	This would return an encrypted value similar to			
	5vFHQI+NNBsoaZqzG9eJTA==			
	You would then use the encryptedpassword option in your batch file:			
	adcrutil -login={userid:myuserid}{encryptedpassword:5vFHQI+NNBso	₁ZqzG9eJTA==		
- encryp t= passw ord	Encrypts a password for later use with the -login! option.			

Printing Options

These options are used to print the report.

Option	Description
-print	Specifies that the report should be printed. If no printer is specified using the -printer option, the report is sent to the default printer for user account under which the program is run.
-printer=" <i>printer</i> <i>name</i> "	Use with the print command to print to a printer other than the default.
	For example:
	-print -printer="HP Laserjet 2000000"
	This value can contain variables and functions that are replaced at

Option	Description
	runtime.
-preview	Opens the report in a preview window instead of printing it. When this option is included, the report is not printed or exported, even if print or export options are specified.
-copies= <i>numcopies</i>	Specifies the number of copies to print. If omitted, one copy is printed.
-printengine= <i>engine</i>	Omit this option to use the default engine, which is correct for most scenarios. Specify a different engine only if you encounter a printing problem and the knowledge base indicates that you should use a different setting.

Export Options

These options are used to export the report to a file. The Command Runner can only export to one format at a time. To produce multiple exports, use the <u>Project Runner</u> instead.

Option	Description
-exportfile="file name"	Export the report to the specified file name. Include the path for the file, or it will be exported to the current working directory.
	If you are using the -removefile option to delete the file after it is e- mailed, you do not need to include the path, as the file will be exported to a temporary location.
	The output file can be uploaded to remote server using HTTP, FTP, or SFTP. See the <u>Uploading Output</u> topic for more information.
	This value can contain <u>variables and functions</u> that are replaced at runtime.
- exportformat=	Specify the format to which the report should be exported. Additional formatting options are available for some export formats.
format	Valid values for <i>format</i> are:
	<i>csv</i> CSV (Comma-Separated Values). <u>More options for CSV exports</u> <i>html</i>
	HTML 4.0. More options for HTML exports
	HTML 3.2. Provides backward compatibility with older browsers and e-mail clients that do not support DHTML. More options for HTML exports
	msword
	pdf
	Adobe Portable Document Format ("Acrobat"). More options for
Option	Description
---------------	--
	PDF exports rpt Crystal Report format. Similar to using the "Save Data with Report" option in the Crystal Reports designer rtf Rich Text Format. More options for RTF exports editablertf Microsoft Word/RTF - Editable. More options for editable RTF exports text Plain text. More options for text exports x/s Microsoft Excel 97-2003 Spreadsheet. More options for Excel exports x/sx Microsoft Excel Spreadsheet (newer XLSX format). More options for Excel options for Excel exports x/sx Microsoft Excel Spreadsheet (Data Only). More options for Excel Data-Only exports xml XML format. More options for XML exports
-removefile	Specifies that the export file should be deleted when the program finishes. Use this option if you want to e-mail the report, but don't want to retain the file afterwards. If -removefile is omitted, the file remains.
-uploadmethod	This option is used when uploading the export file. More information.
-uploadtarget	This option is used when uploading the export file. More information.

E-Mail Server Options

These options tell Report Commander how to connect to an SMTP mail server to e-mail your report.

If you have defined <u>shared e-mail server settings</u> using the Command Line Builder or the Project Editor, you can omit these options and the shared settings will be used. However, be sure that the <u>shared settings are copied over</u> if you run Report Commander under a different user account or on a different computer.

Option	Description
- emserver= <i>serveraddress</i> [: <i>port</i>]	Specify the name or address and optionally the port for the SMTP server through which the message will be sent.

Option	Description
-emuserid= <i>userid</i>	The user ID for your e-mail account, if the SMTP server requires authentication for sending mail.
- empassword= <i>password</i>	The password for your e-mail account, if the SMTP server requires authentication for sending mail.
- empassword!= <i>password</i>	This option is identical to the -password option, except that password is an encrypted password (generated using the <u>-encrypt</u> option).
-emusetls	Use TLS for a secure connection to the mail server. Do not use this option unless your mail server is configured for TLS, or the e-mail send will fail. Generally Report Commander will figure out on its own whether to use TLS, and this option is not necessary.

E-Mail Options

These options are used to send the exported report by e-mail. To e-mail a report you must also specify the necessary options to export it to the desired format.

When specifying an e-mail address, you can specify just the address, or you can optionally include the recipient's name, as shown in the following examples:

```
some.person@example.com
Some Person <some.person@example.com>
```

on	Descr	iption
- ems ende r= <i>emai</i> <i>laddr</i> <i>ess</i>	Specif sent. 3 setting error This v	Ty the e-mail address (and, optionally, name) from which the message will be of this option is omitted, the default sender specified in the <u>shared e-mail</u> as will be used. If no default sender is present, Report Commander will issue an and the e-mail message will not be sent. alue can contain <u>variables and functions</u> that are replaced at runtime.
- emr	Specif can be	y the e-mail address(es) to which the message will be sent. Multiple recipients e specified by using multiple -emrecipient parameters. For example:
ecipi ent=		-emrecipient=person1@example.com -emrecipient="Another Person <per< td=""></per<>
laddr ess	You ca should	an prefix a recipient with "TO:", "CC:", or "BCC:" to specify how the recipient I be added to the message. For example:
		-emrecipient="TO:person1@example.com" -emrecipient="CC:Another Per

Opti on	Description				
	distribution list prefixed with "@":				
	-emrecipient="TO:@salesmanagers" -emrecipient="CC:@projectmanagers"				
	This value can contain variables and functions that are replaced at runtime.				
- ems ubje ct=" <i>mes</i> <i>sage</i> <i>subj</i> <i>ect</i> "	Specify the subject of the e-mail message. If -emsubject is omitted, a default subject will be used.				
	This value can contain <u>variables and functions</u> that are replaced at runtime.				
- emte xt="	Specify the text of the e-mail message. If -emtext is omitted, a default message will be used. If HTML tags are detected in the text, the message will be formatted as an HTML message.				
mes sage	To load the message body from a file, use				
text"	-emtext="@filename"				
	where <i>filename</i> is the file that the body should be loaded from at runtime. If the file starts with an HTML tag, the message will be formatted as an HTML message. Otherwise it will be formatted as a plain text message.				
	If you are exporting your report to HTML or plain text format, you can use the export file as the message body by specifying				
	-emtext=0				
	(with no file name specified)				
- attac hfile =" filen ame "	Attach additional files to the e-mail message when e-mailing the report output. For example, you may want to attach an HTML page with a standard report key or overview. Attach multiple files by using multiple -attachfile parameters. For example:				
	-attachfile="c:\files\note1.htm" -attachfile="c:\files\note2.htm"				
	This value can contain variables and functions that are replaced at runtime.				
- emr ecei pt	Requests a read receipt for the e-mail message.				

Logging Options

Report Commander writes informational and error messages to the console (command prompt window). You may also want to have it write output to a log file for later review.

Option	Description
- logfile=" <i>filename</i> "	Causes Report Commander to write all progress and error messages to the specified log file, in addition to writing them to the console.
mename	This value can contain variables and functions that are replaced at runtime.
- appendlog	If set, output is appended to the existing log file (if it exists). Otherwise the log is overwritten each time Report Commander runs.
-verbose	Causes Report Commander to display additional information as it processes the report, which may be useful in diagnosing problems.

Parameters

Use the **-parameters** or **-namedparameters** option to specify values for the report's parameters.

Automatically inserting date-based values

You can use <u>variables and functions</u> to use the current date (or a date calculated based on the current date) as a parameter value.

Option	Description			
- parameter s	Follow with any parameters required by the report.			
	The -parameters option must come after all other options, and be followed by the parameters, in the order they are expected by the report.			
	Parameters that contain spaces or punctuation must be enclosed in quotation marks.			
	This value can contain variables and functions that are replaced at runtime.			
	Multiple Values			
	For parameters that accept more than one value, use the following syntax:			
	-parameters "value1,value2,value3"			
	Note that parameters containing a quotation mark or comma are not supported.			
	Ranges			
	For parameters that accept a range of values, use the tilde (\sim) to separate the beginning and ending values. For example:			
	-parameters 3.5~26			

Option	Description			
	You may omit the starting and ending value if appropriate:			
	-parameters 20~ -parameters ~18			
	By default the starting and ending value will be included in the range. To exclude a value, prefix it with an exclamation (!). For example:			
	-parameters 1~!4			
	This would include all values in the range from 1 to 4, including 1 but not 4. Example			
	Your report expects three parameters: A start date (date), end date (date) and the names of the regions to report on (multi-value string). The parameters would be specified on the command line as:			
	-parameters "12/1/2003" "12/31/2003" "Region A,Region B, Regi	on C	"	
-	Allows you to specify the parameters for the report by name.			
namedpar ameters	This option must be the last option on the command line, followed by the parameters in the form 'name=value'. This option cannot be used if the - parameters option is used.			
	The syntax for specifying parameter values is the same as the syntax when using the -parameters option.			
	When using the -namedparameters option you can specify the parameters in any order, and omit optional parameters.			
	This value can contain variables and functions that are replaced at runtime.			
	Example			
	Your report expects three parameters: "Start Date" (date), an optional "End Date" (date) and the "Regions" to report on (multi-value string). The parameters would be specified on the command line as:			
	-namedparameters "start date"="12/1/2003" "end date"="12/31/2	003"	rec	jion=
	You could also omit the option end date and specify the parameters as:			
	-namedparameters "start date"="12/1/2003" region="Region A,Re	gion	в,	Regi
	Note: If your parameter name starts with "@" (e.g., "@Parameter1" you must "escape" the name using the "\" character:			

Option	Descr	iption
		-namedparameters \@Parameter1=1234

Conversion Options

Report Commander writes informational and error messages to the console (command prompt window). You may also want to have it write output to a log file for later review.

Option	Description
- exportproject=" <i>filename</i> "	Creates a new Report Commander project file from the command-line options you have specified. See <u>Creating Projects from Existing</u> <u>Command Lines</u> for more information.
	If <i>filename</i> does not have include the ".rcproject" extension, Report Commander will add it.
	If the file you specify already exists, Report Commander will return an error and will not overwrite it.

Uploading Output

Report Commander can upload the export file to a remote server using FTP, SFTP, or HTTP.



When you configure Report Commander to upload the output file, the output file is not saved locally. If you need to upload the file and also keep a local copy, use the Project Editor/Project Runner instead of the Command Runner. (In the Project Editor, use a File Output and an Upload Task.)

FTP or SFTP

To upload the output file using FTP or SFTP, use the following syntax for the <u>-exportfile</u> option:

```
-exportfile="protocol://userID:password@servername:port/path/filena
```

where

protocol

The type of server to connect to: FTP, FTPS, or SFTP.

userID

Optional user ID to use to log in to the server.

password

Optional password to use to log in to the server.

servername

The server name or address.

port

Optional port to connect to.

path

Path or directory on the server

filename.ext

The name of the file to export to/upload.

For example:

Upload to an FTP server using the specified user ID and password:

```
-exportfile="ftp://bob392:mypasswordisweak@ftp.example.com/files/up
```

HTTP

Report Commander can upload to a Web server using either the POST or PUT method. Use the **-uploadmethod** command-line option to specify the method used.

HTTP PUT

When HTTP PUT is used, Report Commander "puts" the file(s) directly to the Web server. This approach works like FTP: you specify only the URL to which the output should be saved. For this method to work, the Web server must be specifically configured to accept files using HTTP PUT.

The command-line syntax for this option is:

```
-uploadmethod=put -exportfile=http://upload.example.com/outputfiles/myreport.pdf
-uploadmethod=put -exportfile=http://userid:password@upload.example.com/outputfiles/
```

HTTP POST

When HTTP POST is used, Report Commander posts the file(s) to a form on the Web server. To use this method, the necessary form must exist on the server, and must contain the necessary programming logic to accept the uploaded files and store them in the proper location.

To upload with HTTP POST, you must specify both the name of the export file and the URL of the form to which the file should be posted. The **-uploadtarget** option is used to specify the URL to upload to.

The command-line syntax for this option is:

```
-uploadmethod=post -exportfile=myreport.pdf -uploadtarget=http://upload.example.com/
-uploadmethod=post -exportfile=myreport.pdf -uploadtarget=https://userid:password@up
```

In these examples, Report Commander exports the report to "myreport.pdf" and then posts the file to the form at upload.example.com/uploadforms/upload.aspx.

CSV Export Options

When you use the CSV export format, everything in your report is interpreted as a record to be written to the file, so your report should not include any extraneous information such as headers and footers.

If you want the first row of the file to contain field names, add a report header that contains the field names, and include the following option on the command line:

-csvstyle=header

The following additional options can be used for CSV exports:

Option	Description
-csvstyle=option	Determines whether column headings will be exported to the report. Valid values for option are:
	crstyle Crystal Reports settings determine style noheader No column headings are exported header The first line of the file contains column headings
-csvchar=character	The character used to separate columns when exporting to CSV. To use a tab character as the separator, specify "{tab}". Default value: ","
- csvdelimiter=character	The character used to enclose string values when exporting to CSV. To use no delimiter, specify "{none}". Default value: double quote (").

Related Topics

CSV Export Options Page.	
CSV Export Settings	

Excel Export Options

The following additional options can be used for Excel (XLS and XLSX) exports:

Option	Description
-	The method for setting column widths.
columnwidthmode=	Valid values for option:

Option	Description
option	reportheader Columns widths are based on objects in the report header pageheader Columns widths are based on objects in the page header groupheader Columns widths are based on objects in group headers detail Columns widths are based on objects in detail sections groupfooter Columns widths are based on objects in group footers pagefooter Columns widths are based on objects in page footers reportfooter Columns widths are based on objects in page footers reportfooter Columns widths are based on objects in report footers vholereport Columns widths are based on objects in report footers wholereport Columns widths are based on objects in the whole report fixed Columns widths are based on objects in the whole report fixed Columns widths are based on objects in the whole report fixed Columns are sized automatically Default value: fixed The column width if you want fixed width columns for an Excel
-columnwidth= <i>size</i>	export. Set to 0 for automatic column width. If a value other than 0 is specified, the columnwidthmode is treated as "fixed". Default value: 0.
- pageheaderfooter= option	Determines how page headers and footers should be exported. Valid values for option are: none Page headers and footers not exported once Page headers and footers are exported once at the beginning of the report all Page headers and footers are exported for each page
- firstpage= pagenumber	The first page of the page range to export.
- lastpage= pagenumber	The last page of the page range to export.
-convertdates [{+ -}]	Convert dates to strings. Default value: False.

Option	Description
-gridlines[{+ -}]	Show grid lines. Default value: False.
-tabheadings[{+ -}]	Tab has column headings. Default value: True.
-areagroup: index	Group number to base column widths on. Default value: 0.
-groupoutlines [{+ -}]	Show group outlines. Default value: False.

Related Topics

Excel Data-Only Export Options.	82
Excel Export Options Page.	59
Excel Export Settings	40

Excel Data-Only Export Options

Tha	following	additional	ontiona	con ho	ucod for	Even	data	anly	ovporte	
nne	TOHOWING	auuluonai	ODLIOUS	call be	used for	Excer	udld-		exports	
								/		-

Option	Description
- pageheaderfooter= option	Determines how page headers and footers should be exported. Valid values for <i>option</i> are:
	none Page headers and footers not exported once Page headers and footers are exported once at the beginning of the report all Page headers and footers are exported for each page
-exportformatting [{+ -}]	Export formatting for objects. If not specified, formatting for objects is not exported. Default: False.
-maintainalignment [{+ -}]	Maintain column alignment. Default value: True.
-maintainposition [{+ -}]	Maintain relative object position. Default value: False.
-simplifyheaders [{+ -}]	Simplify page headers. Default value: True.
-worksheetfunctions [{+ -}]	Use worksheet functions for summaries. Default value: True.
-exportimages [{+ -}]	Export images. Default value: True.

Related Topics

Excel Export Options	
Excel Export Options Page.	
Excel Export Settings	40

HTML Export Options

When you export to HTML, Report Commander by default creates a single HTML file containing the entire report. Use the **-separate** option to generate a separate HTML file for each page of the report. When using this option you will probably want the **-navbar** option as well, which includes a simple navigation bar at the bottom of each page.

Any graphics contained in the report will be exported as image files, saved in a subdirectory below the directory where the HTML pages are placed. Use the **-flattenhtml** option to place the images in the same directory as the HTML files.

When you upload or e-mail the exported report, Report Commander includes all of the pages and image files.

HTML E-Mail

If you are exporting your report to HTML and then sending the output by e-mail, you can use the HTML output as the body of the e-mail message, rather than including it as an attachment. The following command line illustrates this:

```
adcrutil -report="C:\reports\myreport.rpt" -exportformat=html -exportfile="c:\temp\o
```

HTML Formatting Options

Option	Description
-navbar	When exporting to HTML, include a navigation bar on each page of the output.
-separate	When exporting to HTML, generates a separate HTML file for each page of the report.
-flattenhtml	When exporting to HTML, "flattens" the directory structure so that images are in the same directory as the HTML files, rather than a subdirectory.
- firstpage= <i>pagenumber</i>	The first page of the page range to export.
- lastpage= pagenumber	The last page of the page range to export.

When you export to HTML, the following additional command-line options are valid:

Related Topics

HTML	Export Options Page	60
HTML	Export Settings.	39

PDF, RTF, and Word Export Options

The following additional options can be used for PDF, RTF, Editable RTF, and Microsoft Word exports:

Option	Description
- firstpage= <i>pagenumber</i>	The first page of the page range to export.
- lastpage= <i>pagenumber</i>	The last page of the page range to export.
-bookmarks[{+ -}]	Applies only to PDF exports. Forces Report Commander to create bookmarks in the PDF file based on headings in the report. If this option is not specified, Report Commander uses the default setting saved with the report. To suppress bookmarks in a report that is configured to use them by default, use "-bookmarks-".

Related Topics

PDF Export Options Page	
PDF Export Settings	

Text Export Options

The following additional options can be used for plain text exports:

Option	Description
- firstpage= <i>pagenumber</i>	The first page of the page range to export.
- lastpage= <i>pagenumber</i>	The last page of the page range to export.
- linesperpage= <i>number</i>	The number of lines per page (default 60). Specify 0 for no pagination.
- charactersperinch= <i>number</i>	The number of characters per inch (default 12). Recommended to be between 8 and 16.

Related Topics

Text Export Options Page	60
Text Export Settings	41

XML Export Options

The following additional options can be used for XML exports:

Option	Description
-xmlformat:" <i>index</i> "	Specifies the XML exporting format to use for the export. Exporting formats are defined and saved within the report. You may specify the 0-based index of the exporting format, or its name. Be sure to enclose the name in quotes if it contains spaces or punctuation. Specify "0" (the default value) to use the default exporting format, which is present for all reports.

Related Topics

XML Export Options Page	61
XML Export Settings	41

Response Files

A response file can be used to supply all or some of the command-line parameters for Report Commander. To use a response file, include the response file on the command line as show in this example:

adcrutil @c:\parameters.xml

where "c:\parameters.xml" is the name of the response file.

The response file may be placed in any position on the command line. For example:

adcrutil -parameter1:value @c:\parameters.xml -parameter2:value2

When a response file is processed, the parameters in the file are inserted into the command line at the point where the response file command was encountered. If a parameter appears on the command line and in the response file, the relative positions determine which value is used. In the example above, if the response file contains values for parameter1 and parameter2, the value from the file would be used for parameter1, but the value on the command line would be used for parameter2. For parameters that accept multiple values, the list of values is taken from both the file and the command line.



If you are using response files extensively, you should consider using a project-based approach instead of the command-line approach, using the <u>Project Editor</u> and <u>Project Runner</u>.

Creating the Response File

The response file is defined using XML.

You can create a sample parameter file that lists all of the available parameters and shows how to define them in the response file. To generate the sample file, use this command:

adcrutil -!xmlparametertemplate:"c:\sample.xml"

where "c:\sample.xml" is the name of the sample file you want to create. You can edit this file in an XML editor or in a plain text editor like Notepad.

You can also generate a parameter file that contains the values you have specified on the command line. To do this, add the command "-!xmlparameterfile" to the command line, along with the parameters you want to save to the response file:

```
adcrutil -!xmlparameterfile:"c:\response.xml" -parameter1:value -parameter2:value2
```

The program will create "c:\response.xml", containing the values for parameter1 and parameter2.

Window Reference

Data Source Properties Window

The Data Source Properties window allows you to view or override the properties of a report data source (database connection).

You can reach this window from the **Data Sources** tab of the Report Properties panel in the Project Editor, or from the Logins page of the Command Line Builder.

When you first load a report, this window will show the connection settings that are stored in the report. To use those settings, you do not need to make any changes here.

If you need to run the report with different login information than the default, or connect to a different database, make the changes here.



You can override the report to connect to a different database of the same kind as was originally used in the report. For example, if you report was developed against your "Development" database in SQL Server, you can override the report to connect to the "Production" database in SQL Server instead.

However, you cannot use the override to connect to a different kind of database. For example, you cannot override the report to connect to an Oracle database instead of the original SQL Server database.

Settings

Connection Information

Shows the database connection information. You can override the server name/ODBC alias, database name, and/or schema name. Note that not all fields will be applicable for all database types.



If you want to connect using the same settings that are already stored in the report, you do not need to supply this information.

Click the Reset link next to a setting to reset that value to the default value configured in the report.

This field can contain variables and functions that are replaced at runtime. More... 1

Login Information

Shows the database login credentials. Check the **Use integrated security box** to use automatic authentication (if supported by the database) or uncheck the box and enter the user ID and password to use when connecting.

¹Click the **{}** button to display the **text editor**, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

Distribution Lists

Distribution Lists in Report Commander work like group mailing lists in your e-mail system: they give you an easy way to send e-mail messages to a group of people.

For example, if you frequently send reports to your sales managers, you can create a Distribution List called "Sales Managers" that includes all of your sales managers. Then, when you are configuring an <u>E-Mail Task</u>, you can specify the list as a recipient, and Report Commander will send the message to all members of the list.

You can use a Distribution List anywhere in Report Commander that you enter e-mail recipients. Just enter the name of the list, prefixed with an "@" sign: @Sales Managers.

Distribution List Properties Window

You can reach this window from the **Distribution Lists** tab of the <u>Project Properties Panel</u> in the Project Editor, or from the <u>User Settings window</u> in the Command Line Builder.

List Name

Provide a name for the list.

If you create a list with the same name as an existing list (for example, you add a list to your Project that has the same name as a list in the Shared Settings), Report Commander will merge the lists at runtime and send e-mail to all members.

Recipients

Enter the addresses and, optionally, names of the members of this list. You can <u>paste a list</u> of e-mail addresses from the clipboard or enter them one-by-one.

Distribution Lists can contain other Distribution Lists as members. For example, if you are creating a list named "Managers" you can add the Address <code>@Sales Managers</code> and Report will include all members of the "Sales Managers" list in messages sent to the "Managers" list.

File Servers

A File Server defines the settings used by a <u>File Upload Task</u> to upload files to an FTP, SFTP, or HTTP (Web) server.

File server settings are stored centrally rather than individually for each task so that you can easily change settings (such as the password) without having to edit each project separately.

File Server Properties Window

This window is reached from the Project Properties panel of the Project Editor.

Server Type

Select the kind of server you are connecting to: FTP, SFTP, or HTTP (Web server)

Server Name or Address

Specify the name or address of the server to connect to. For example, ftp.example.com.

For an HTTP (Web) server, specify only the server name, not the complete URL of the upload page. For example, enter www.example.com, even if the upload will be going to "www.example.com/uploads/uploadform.htm". You will specify the rest of the URL in the settings for the Upload Task.

Port

If the server uses a port other than the default value for the server type, enter the port number.

Use SSL/TLS Connection

Check this box to use a secure connection. This option does not apply for SFTP connections, which are always encrypted.

Authentication

Enter the user ID and password required to connect to the server.

Test

Click the **Test** button to test the connection settings. Report Commander will attempt to connect to the specified server. This option is not available for HTTP servers.

E-Mail Servers

E-Mail Servers allow you to provide the settings that Report Commander needs in order to connect to an SMTP server to send e-mail messages. To send e-mail messages, you must have at least one mail server configured.

If have more than one server configured, Report Commander will use the first one that it is able to connect to successfully.

E-Mail Server Properties Window

This window is reached from the <u>Project Properties panel</u> of the Project Editor, or the <u>E-Mail</u> <u>page</u> of the Command Line Builder.

Server Name or Address

Specify the name (address) of the SMTP server through which the mail will be sent. For example, to use Gmail, enter smtp.gmail.com.

Port

If the server uses a port other than the standard value of 25, enter the port number.

Return Address for Messages

Enter the e-mail address to be used as the return address for messages sent through this server. Enter only the address, not the name. For example,

reportcommander@example.com.

This value is used by default if you do not specify a return address for a particular e-mail task.

This field can contain variables and functions that are replaced at runtime. More... 1

Sender Display Name

Enter the name to be used in the return address for messages sent through this server. Enter only the name, not the address. For example, Report Commander.

This value is used by default if you do not specify a return address for a particular e-mail task.

This field can contain variables and functions that are replaced at runtime. More...²

Authentication

If your mail server requires authentication for sending mail, enter your user ID and password here. For example, to send through Gmail you would enter your full Gmail address (e.g., example@gmail.com) and password.

If you are unsure what to enter here, check with the administrator of your mail system.

Enabled

Check this box to enable Report Commander to use this mail server. If you want to temporarily prevent Report Commander from using this server, uncheck the box. If there is not at least one enabled mail server available in the Shared Settings and Project Settings, Report Commander will not be able to send any messages.

Test

Click the **Test** button to send a test message using the settings you have provided.

Multiple Value Editor Window

The Multiple Value Editor window appears when you edit a report parameter that allows more than one value to be specified. Use the **Add**, **Edit**, and **Delete** buttons to specify the desired values.

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

²Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

Parameter Editor

The Parameter Edit window appears when you edit the value for a Report Parameter.

Parameter Types

Boolean (Yes/No)

Select either Yes or No for the value, or specify a <u>variable or function</u> to evaluate at runtime.

The variable or function must return a value that can be converted to boolean: yes/no, true/false, or 1/0. Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions.

Currency

Enter a valid currency value, or specify a variable or function to evaluate at runtime.

The variable or function must return a valid currency value. Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions.

Date, Time, Date/Time

Enter a valid date, time, or date/time value, or specify a <u>variable or function</u> to evaluate at runtime. For example, you can use functions to use the date when the report is processed, or a date based on that date.

The variable or function must return a valid date, time, or date/time value. Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions.

Number

Enter a valid number value, or specify a variable or function to evaluate at runtime.

The variable or function must return a valid number value. Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions.

String

Enter a value, or specify a variable or function to evaluate at runtime.

Range Values

If the parameter accepts a range of values, the editor will allow you to specify the Start and End values, with these additional options:

Specify start [end] value

Check this box if you want to specify a value. If this box is not checked, the range is unbounded. For example, if you do not check the **Specify start value** box, no minimum value will be used.

Include starting [ending] value

Check this box to include the Value in the range, or leave it unchecked to exclude the value. For example, if you specify a start value of 4 and check this box, the report will select all values greater than or equal to 4. If you do not check this box, the range will include all values greater than 4.

Read Settings from Command Line Window

The **Read Settings from Command Line** window allows you to reverse-engineer project settings from a set of command line options that you use to run the Command Runner.

This window can be reached from the following locations:

- In the Command Line Builder, from the **FileRead Settings from Command Line** menu command. In this case you may only paste in one command line, and the settings imported from the command line replace all the current settings in the Command Line Builder.
- In the Project Editor, from the FileNew » Project from command line(s) menu command. In this case you may paste in one or more command lines, and the settings from those commands lines are combined to create a new project.
- In the Project Editor, from the AddReports and tasks from command line menu command on the context (right-click) menu for the Project node. In this case you may paste in one or more command lines, and the settings from those commands are used to add additional reports and e-mail tasks to the currently-open project.

To use this tool, copy a command line that you are currently using to run the Command Runner (adcrutil) to the clipboard, and then paste it into this window.

For example, if you have a batch file that runs this command every day:

```
"c:\program files\report commander\adcrutil.exe" -report+"C:\repor
```

You can copy/paste that entire line into the input box in this window.

You can also paste just the command-line options, without the "adcrutil.exe" part:

-report="C:\reports\dailysales.rpt" -login!=dbserv1.customerdb:batc

A Your command line must be on a single line in the input box, even if it's a very long line.



The source report (.rpt file) must be available when you run the conversion, as Report Commander needs to read information from the report file. Make sure the **-report** option points to the file.

When you click OK, Report Commander will read the settings and create or update a project from them.

Combining Multiple Commands

If you are currently running several different commands that you would like to combine into a single project, you can paste all of the command lines into the input box together. Each command line must be on its own, single line in the box.



This option is not available when this tool is invoked from the Command Line Builder, because the Command Line Builder can only work with one report/output.

When you use this option, each command line is used to add a new target report to the project, unless the report names (including path) match, in which case the command line will be used to add a new Output Group to the existing report. In this case, the logins specified on the second command line are ignored.

If the report filename and parameters both match an existing report, the command line will be used to add a new Output to the existing Output Group.

If the command line is configured to e-mail the report output, a new e-mail task is added to the project. The conversion tool does not attempt to combine e-mail operations into a single task.

Text Editor

The **Text Editor** window allows you to edit values in Report Commander that support variables and functions.

Throughout Report Commander, when you see a text entry box with a **{}** button next to it, this indicates that the field supports variables and tokens. When you click the **{}** button, the Text Editor window is displayed to help you select and insert variables and functions.



You do not have to open the Text Editor to add variables and function calls to text boxes: you can always type or paste in the variable or function call using the appropriate syntax.

At the top of the Text Editor window is a text edit box where you can type or paste text. Below this is a preview window that shows you what the text will look like after Report Commander evaluates the variables and functions it finds in the text.

1	Insert Variables and Functions		Same alling
S	{ExportFolder}\salesreport-@now("yyyyMMdd").pdf		
		\langle	Enter text containing variables and function calls
c	\Report Exports\salesreport-20150223.pdf		
			Preview of text with variables and function calls evaluated
	/ariables Date/Time Functions		
	Insert a value based on the current date/time when Report Comma	ander n	runs
	Offset the date/time by		
	Formatting Pattern		
11	yyyy-MM-dd : Current Date	•	
11	уууу-MM-dd		
11	Help for formatting patterns		
11	-		
11	Preview 2015-02-23		(include the insert date function at ourser location, or drag to desi
	Help		
U	111		

If there are any errors in the variables or formulas you have entered, you will see an error message here.

Once you have finished editing your text, click **OK** to return the value to the field you came from.

Variables

The Variables tab lists all Report Commander <u>variables</u> that have been defined for the computer, your user settings, and the project. You can also show the available Windows environment variables by checking the **Show Windows environment variables** box.

To insert a variable into your text, you can click the **Insert** button (10) to insert the variable at the current cursor position, or select the variable in the list and drag it to the location in the text where you want it to appear.

Date/Time

The options on the Date/Time tab help you insert a call to the <u>now function</u>, which is an easy way to insert the current date/time, or a value calculated based on the current date/time.

The "current" date/time will be the date/time when the project is executed.

If you want to use a date calculated based on the current date/time, check the **Offset the date/time by** box and enter the appropriate offset. For example, if you want to use the previous day's date, you would set to the offset to $\boxed{-1 \text{ Day}}$.

Then select the format that you want the date/time to appear in. Choose one of the predefined formats, or create your own using <u>formatting patterns</u>. The **Preview** box will show a preview of the date/time using your selected calculation and format.

Once you have the value you want, click the **Insert** button ($\stackrel{1}{\cong}$) to insert the function call at the current cursor position, or select the button and drag it to the location in the text where you want it to appear.

Representation of the second state and the second state in the second state is the second state in the second state is the sec

Functions

The Functions tab helps you insert <u>function calls</u> into your text. On the left is a list of available functions. The panel on the right shows information about the selected function.

To insert a function call into your text, click the **Insert** button (²) to insert the function call at the current cursor position, or select the function in the list and drag it to the location in the text where you want it to appear.

Report Commander will insert the function call with placeholders for all of the function arguments. You then must edit the function call to replace those placeholders with the appropriate values.

Variables and Functions

Variables and Functions

<u>Variables</u> and <u>functions</u> are related features that allow you to use dynamic content (content that gets calculated when a report is executed) in parameters, file names, and other text in your report processing settings. For example, using variables and functions you can:

- Make it easy to move projects between computers that use different paths for reports and outputs.
- Automatically use the current date/time (or dates calculated based on the current date/time) in report parameters, file names, etc.



Report Commander version 1 had a similar but much more limited capability called dynamic file names and parameters. Dynamic text from the old version will be converted to the new format automatically. See the <u>Variable Syntax Changes from</u> Version 1 topic for more information.

Using Variables and Functions

Variables and functions are supported throughout Report Commander in most place where you need to enter parameters, file names, or other text. Wherever you see a text entry box in the Project Editor that has a **{}** button next to it, this indicates that the field supports variables and functions. When you click the button, the <u>Text Edit</u> window opens. This window provides a list of available variables and functions, and includes tools to help you insert them into your text using the correct syntax.

Variables

Variables allow you to insert predefined text into parameters, file names, and other text boxes in Report Commander.

Suppose that on one computer where you use Report Commander, all the report files are located in the folder "c:\reports". But you also want to be able to execute your projects on a second computer, which reads the reports over the network using the UNC path "\mycomputer\reports". To avoid having to change the report path for your projects when you move them from one computer to the other, you can define a variable named "ReportPath" and set it to "c:\reports" on the first computer, and "\mycomputer\reports" on the second. Then, in all your projects, you use the "ReportPath" variable when specifying the report name, instead of writing in the fixed path.

To do this, you open the <u>Project Properties</u> for one of your projects and go to the <u>Variables</u> <u>tab</u>. Here you add a User Variable named "ReportPath" with the value $c:\reports$. (A "user" variable means that it is available to all projects you work with on the computer, so you only have to define this variable once.)

Then, in the <u>Report Properties</u> where you specify the report filename, instead of entering c:\reports\report1.rpt, you enter \${ReportPath}\report1.rpt. When you execute the

project, Report Commander replaces "\${ReportPath}" with the value of the ReportPath variable.

Now on the second computer, you define the same User Variable called "ReportPath", but you set it to $\$ and when the project is run on that computer, Report Commander will use that value instead.

You might also want to define variables for other values that need to be standardized, or that you want to be able to change easily if the project is run on a different computer. For example, you could define a "CompanyName" variable to make it easy to insert the company name in e-mail messages. Or an "OutputPath" variable to standardize where export files get written.

Variable Types

Report Commander supports four kinds of variables:

- Environment Variables are defined in Windows. You can insert any Windows environment variable using the <a>[\${VariableName}] syntax.
- User Variables are defined in Report Commander and are available to all projects/commands that you run on the computer. Using user variables you can ensure that settings are standardized across all projects, without having to define those settings in each project. You can also share your variables with other users on the same computer or copy them to another computer as described in the <u>Sharing Settings with Another User or Computer</u> topic.
- **Shared Variables** are variables that have been made available to all users on the computer as described in the <u>Sharing Settings with Another User or Computer</u> topic.
- **Project Variables** are defined only for a particular project and do not affect other projects.

Managing Variables

In the Project Editor, user and project variables are managed on the <u>Variables tab of the</u> <u>Project Properties panel</u>. The Command Line Builder does not support project-level variables, but you can manage user variables through the <u>User Settings window</u>.

When you execute a project using the <u>Project Runner</u>, you can <u>set or override variable values</u> <u>from the command line</u>.

Complex Variables

Variables can contain other variables. For example, you can define the "ReportDrive" as c: and the "ReportPath" as $\{\text{ReportDrive}\}\$. At runtime, the ReportPath variable will be expanded to $c:\$.

Variables can also include function calls. See the <u>Variables with Functions</u> topic for an example of defining a variable that includes function calls.

Predefined Variables

Report Commander automatically defines some variables for you, which can be used throughout your Project.

Name	Description
now	The current date/time, in the form "yyyy-MM-dd HH:mm:ss". To specify a format, or calculate an offset from the current date/time, use the <u>now</u> <u>function</u> instead.
Project.Name	The name of the project (without the path or file extension)
Project.FileName	The complete path and filename of the project file
Project.Path	The path where the project file is located
Report.Name	The name of the report (without the path or file extension)
Report.FileName	The complete path and file name of the report
Report.Path	The complete path and file name of the report
Group.Name	The name of the Output Group
Group.FullName	The full name of the Output Group (includes the name of the Report)
Output.Name	The name of the Output
Output.FullName	The full name of the Output (includes the name of the Report and Output Group)
Output. <i>n</i> .PathAndFileName	The complete file name (including path) of the export file produced by File Output (export) operation number <i>n</i> , where <i>n</i> is the "ID Code" shown on the properties page for the output. When you are exporting a report using the Command Runner, the ID will always be "1". For example, in an e-mail message task you want to insert the file name created by your export. You can't hard-code the file name in the message because it's generated dynamically based on the date. Instead you can insert the variable token <i>\${Output.1.PathAndFileName}</i> to insert the name at runtime
Output. <i>n</i> .FileName	The file name (without path) of the export file produced by File Output (export) operation number n .
Output.n.Path	The path (without file name) of the export file produced by File Output (export) operation number n .
Parameters. <i>ParameterName</i>	The value of the <i>ParameterName</i> parameter at runtime. A variable is defined for each report parameter. For example, if your report has a parameter named "SalesRegion", you can use <pre>\${Parameters.SalesRegion}</pre> to insert the value of the parameter. Note: Any characters other than a-z, 0-9, "-", "_", and "." are removed from the parameter name when constructing the variable name. For example, of your parameter name is "Customer Record #", the variable

Name	Description	
	would be named "Parameters.CustomerRecord".	

Functions

While variables allow you to easily insert predefined text, functions allow you to insert the results of calculations (similar to using formulas when designing a report).

For example, suppose that each morning you run a report and want that report to return data from the previous day, so you need to pass the previous day's date as a parameter to the report. You don't want to edit your Project each day to change the value of that parameter, so instead you can use a function to calculate the correct date for you: the <u>now function</u> allows you to insert a date calculated based on the current date when the report runs.

So instead of setting the report parameter to the date of 2015-01-23 and changing the value each time you run the report, you could set the parameter to @now("yyyy-MM-dd", -1, "day"). This tells Report Commander to take the current date/time, subtract 1 day, and format the resulting date in year-month-day format.

See the <u>Function Reference</u> for more information on the available functions.

Report Commander.

Related Topics

Function Examples	113
Variables with Functions	114

Reference

Function Reference	
Date/Time Formats	

Function Reference

Function Syntax

To call a function, prefix the name with the @ symbol:

```
@now("yyyy-MM-dd",-1,"day")
```

Argument Types

For string arguments, the argument value must be enclosed in quotes. Other argument types do not require quotes.

If you are using a variable or another function as an argument, do not use quotes. For example: <a>[@now(\${StandardDateFormat})] (assuming you have defined a variable named "StandardDateFormat" that returns a valid date/time formatting string).

Optional Arguments

In the function reference below, brackets [] around an argument indicate that the argument is optional.

If you omit an optional argument but need to specify a subsequent argument, you include the comma after the place where the omitted argument would be. For example, in the **EndOfDay** function, the first argument (*targetDate*) is optional; if you omit it, the current date is used. So you would call <code>@EndOfDay(,"yyyy-MM-dd HH:mm")</code>. If you omit multiple arguments, there will be a comma for each skipped argument.

If you omit arguments and don't need to specify subsequent arguments, no comma is needed. For example, if you want to call the **now** function and specify a format but not an offset, you can call <code>@now("yyyy-MM-dd")</code> rather than <code>@now("yyyy-MM-dd",,)</code>.

Note that the parentheses for the function call are always required, even if you are not supplying any arguments. So <code>@EndOfDay()</code> is valid, but <code>@EndOfDay</code> is not

Combining Functions

Function calls can use variables and other function calls as arguments. For example, this call returns the beginning of the month in which yesterday occurs:

```
@StartOfMonth(@DateAdd(,-1,"day"))
```

Date/Time Format

All of the date/time functions return the date/time formatted as <u>yyyy-MM-dd HH:mm:ss</u> by default. All of the functions accept an optional final argument for specifying a <u>formatting</u> <u>pattern</u>. Calling @EndOfMonth(, "MMMM d, yyyy") is equivalent to calling @FormatDate (@EndOfMonth(), "MMMM d, yyyy").

If you are going to use the result of the function as an argument to another function, you should leave the value in the default format.

Function List

Name	Description
AdjustDate	Adjusts parts of a date/time value
DateAdd	Adds or subtract time increments from a date/time value.
EndOfDay	Gets a date/time value representing 11:59:59 PM on the targetDate.
EndOfMonth	Gets a date/time value representing 11:59:59 on the last day of the month in which targetDate occurs.
EndOfQuarter	Gets the date of the end of the calendar quarter containing a specified date.
EndOfYear	Gets a date/time value representing 11:59:59 on the last day of the year in which targetDate occurs.
FormatDate	Formats a date/time value

Name	Description
MakeDate	Makes a date/time value from years, months, days, hours, minutes, and seconds
MostRecentDay	Gets the most recent occurrence of the specified day of the week, on or before the targetDate.
<u>NextDay</u>	Gets the next occurrence of the specified day of the week, on or after the targetDate.
now	Returns current date/time, with optional format and offset.
QuarterNumber	Gets the number of the calendar quarter $(1-4)$ in which the specified date occurs.
<u>StartOfDay</u>	Gets a date/time value representing 12:00 AM on the targetDate.
<u>StartOfMonth</u>	Gets a date/time value representing 12:00 AM on the first day of the month in which targetDate occurs.
<u>StartOfQuarter</u>	Gets the date of the beginning of the calendar quarter containing a specified date.
<u>StartOfYear</u>	Gets a date/time value representing 12:00 AM on the first day of the year in which targetDate occurs.

Function Reference

AdjustDate

Adjusts parts of a date/time value

```
Syntax: @AdjustDate([targetDateTime], [year], [month], [day], [hour], [minute], [second],
["format"])
```

Arguments

targetDateTime

(DateTime) Optional. The date/time value to adjust. If not specified, the current date/time is used.

year

(Integer) Optional. The year value to use. If not specified, the value from the target date/time is used.

month

(Integer) Optional. The month value to use. If not specified, the value from the target date/time is used.

day

(Integer) Optional. The day value to use. If not specified, the value from the target date/time is used.

hour

(Integer) Optional. The hour value to use. If not specified, the value from the target date/time is used.

minute

(Integer) Optional. The minute value to use. If not specified, the value from the target date/time is used.

second

(Integer) Optional. The second value to use. If not specified, the value from the target date/time is used.

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

This function can be used to change any of the parts (year, month, day, hour, minute, second) of a date. For example, if you need a date/time value representing 0 minutes past the current hour, you can use:

```
@AdjustDate(,,,,0,0)
```

The omitted arguments tell the function to use the current date/time as the starting point, and retain the year, month, day, and hour values, but set the minute and second to 0.

Note that you can accomplish the same thing as AdjustDate using the now function by using literal values in the formatting string.

@now("yyyy-MM-dd HH:00:00")

However, AdjustDate is preferred if the result is being used as an argument to another function or as a report parameter.

DateAdd

Adds or subtract time increments from a date/time value.

```
Syntax: @DateAdd([value], offset, unit, ["format"])
```

Arguments

value

(DateTime) Optional. Date/time value to adjust. This can come from another function that returns a date/time value, or a Variable that provides a date/time value. If not specified, the current date/time is used.

offset

(Integer) Required. Number of units to add or subtract from current date/time

unit

(Choice) Required. Unit to add or subtract. Valid values:

- year
- month
- month
- day
- hour

- minute
- second

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

EndOfDay

Gets a date/time value representing 11:59:59 PM on the targetDate.

Syntax: @EndOfDay([targetDate], ["format"])

Arguments

targetDate

(DateTime) Optional. The day to return the end of. If omitted, the current date is used. *format*

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

EndOfMonth

Gets a date/time value representing 11:59:59 on the last day of the month in which targetDate occurs.

```
Syntax: @EndOfMonth([targetDate], ["format"])
```

Arguments

targetDate

(DateTime) Optional. The day to return the end of the month for. If omitted, the current date is used.

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

EndOfQuarter

Gets the date of the end of the calendar quarter containing a specified date.

Syntax: @EndOfQuarter([targetDate], [month], ["format"])

Arguments

targetDate

(DateTime) Optional. The date/time to find the quarter for. If omitted, the current date/time is used.

month

(Choice) Optional. The month that begins the first quarter of the year. If omitted, January is used.Valid values:

- january
- february
- march
- april
- may
- june
- july
- august
- september
- october
- november
- december

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

EndOfYear

Gets a date/time value representing 11:59:59 on the last day of the year in which targetDate occurs.

```
Syntax: @EndOfYear([targetDate], ["format"])
```

Arguments

targetDate

(DateTime) Optional. The day to return the end of the year for. If omitted, the current date is used.

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

FormatDate

Formats a date/time value

Syntax: @FormatDate(value, "format")

Arguments

value

(DateTime) Required. Date/time value to format. This can come from another function that returns a date/time value, or a Variable that provides a date/time value

format

(String) Required. Formatting pattern to use. See the <u>Date/Time Formats</u> help topic for more information.

MakeDate

Makes a date/time value from years, months, days, hours, minutes, and seconds

Syntax: @MakeDate([year], [month], [day], [hour], [minute], [second], ["format"])

Arguments

year

(Integer) Optional. The year value to use. If not specified, the value from the current date/time is used.

month

(Integer) Optional. The month value to use. If not specified, the value from the current date/time is used.

day

(Integer) Optional. The day value to use. If not specified, the value from the current date/time is used.

hour

(Integer) Optional. The hour value to use. If not specified, the value from the current date/time is used.

minute

(Integer) Optional. The minute value to use. If not specified, the value from the current date/time is used.

second

(Integer) Optional. The second value to use. If not specified, the value from the current date/time is used.

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

Create a date/time where the month and day are coming from variables for some reason:

@MakeDate(2015,\${MonthToUse},\${DayToUse},8,15,0)

MostRecentDay

Gets the most recent occurrence of the specified day of the week, on or before the targetDate.

Syntax: @MostRecentDay([targetDate], day, ["format"])

Arguments

targetDate

(DateTime) Optional. The starting date/time. If omitted, the current date/time is used. *day*

(Choice) Required. The name of the day of the week to look for.Valid values:

- sunday
- monday
- tuesday
- wednesday
- thursday
- friday
- saturday

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

This function can be used to find the beginning of the week in which a date occurs. For example, if you define the first day of the week as Monday, you can call this function to get the start of the current week:

```
@MostRecentDay(${now},"monday")
```

The targetDate argument is optional, so you could also use

@MostRecentDay(,"monday")

to produce the same result

NextDay

Gets the next occurrence of the specified day of the week, on or after the targetDate.

Syntax: @NextDay([targetDate], day, ["format"])

Arguments

targetDate

(DateTime) Optional. The starting date/time. If omitted, the current date/time is used.

day

(Choice) Required. The name of the day of the week to look for.Valid values:

- sunday
- monday
- tuesday
- wednesday
- thursday

- friday
- saturday

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

This function can be used to find the end of the week in which a date occurs. For example, if you define the last day of the week as Friday, you can call this function to get the end of the current week:

```
@NextDay(${now},"friday")
```

now

Returns current date/time, with optional format and offset.

```
Syntax: @now(["format"], [offset], [unit])
```

Arguments

format

(String) Optional. Formatting pattern to use. See the <u>Date/Time Formats</u> help topic for more information.

offset

(Integer) Optional. Number of units to add or subtract from current date/time

unit

(Choice) Optional. Unit to add or subtract. Valid values:

- year
- month
- month
- day
- hour
- minute
- second

The **now** function returns the current date/time, or a date/time based on the current date/time, optionally using a specific format.

Examples

@now()

```
Inserts the current date/time in the standard format "yyyy-MM-dd HH:mm:ss".
Equivalent to using ${now}
@now("MMMM d, yyyy")
```

Inserts the current date/time using the long date format, e.g., "January 3, 2015." @now("MMMM d, yyyy",-1,day)

Subtracts 1 day from the current date/time and inserts the result using the long date format, e.g., "January 3, 2015."

QuarterNumber

Gets the number of the calendar quarter (1-4) in which the specified date occurs.

Syntax: @QuarterNumber([targetDate], [month])

Arguments

targetDate

(DateTime) Optional. The date/time to find the quarter for. If omitted, the current date/time is used.

month

(Choice) Optional. The month that begins the first quarter of the year. If omitted, January is used.Valid values:

- january
- february
- march
- april
- may
- june
- july
- august
- september
- october
- november
- december

StartOfDay

Gets a date/time value representing 12:00 AM on the targetDate.

Syntax: @StartOfDay([targetDate], ["format"])

Arguments

```
targetDate
```

(DateTime) Optional. The day to return the start of. If omitted, the current date is used.
format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

StartOfMonth

Gets a date/time value representing 12:00 AM on the first day of the month in which targetDate occurs.

Syntax: @StartOfMonth([targetDate], ["format"])

Arguments

targetDate

(DateTime) Optional. The day to return the start of the month for. If omitted, the current date is used.

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

StartOfQuarter

Gets the date of the beginning of the calendar quarter containing a specified date.

Syntax: @StartOfQuarter([targetDate], [month], ["format"])

Arguments

targetDate

(DateTime) Optional. The date/time to find the quarter for. If omitted, the current date/time is used.

month

(Choice) Optional. The month that begins the first quarter of the year. If omitted, January is used.Valid values:

- january
- february
- march
- april
- may
- june
- july
- august
- september

- october
- november
- december

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

StartOfYear

Gets a date/time value representing 12:00 AM on the first day of the year in which targetDate occurs.

Syntax: @StartOfYear([targetDate], ["format"])

Arguments

targetDate

(DateTime) Optional. The day to return the start of the year for. If omitted, the current date is used.

format

(String) Optional. Optional <u>formatting pattern</u> to use for the returned value. Not necessary if the returned value is being used by another date/time function.

Related Concepts

Variables and Functions.	96
--------------------------	----

Related Topics

Function Examples	113
Variables with Functions.	114

Date/Time Formats

<u>Functions</u> that work with date/time values all accept a *format* argument that determines how the date/time will be formatted.

Standard Formats

Standard formats are single-character codes representing common date/time formats. Based on the code you enter, the date/time is formatted using the standard format for your locale.

For example, if you use the short date format $[e_{now}("d")]$ in the United States, this would be expanded to 1/23/2015, while in the United Kingdom it would be expanded to 2015/01/23.



example, if you want you date to always appear as "1/23/2015" no matter where it is run, you would use [mow("M/d/yyyy")].

Format	Meaning	Example
d	Short date pattern.	6/15/2014
D	Long date pattern.	Monday, June 15, 2014
f	Full date/time pattern (short time).	Monday, June 15, 2014 1:45 PM
F	Full date/time pattern (long time).	Monday, June 15, 2014 1:45:30 PM
g	General date/time pattern (short time).	6/15/2014 1:45 PM
G	General date/time pattern (long time).	6/15/2014 1:45:30 PM
M, m	Month/day pattern.	June 15
R, r	RFC1123 pattern.	Mon, 15 Jun 2014 20:45:30 GMT
S	Sortable date/time pattern.	2014-06-15T13:45:30
t	Short time pattern.	1:45 PM
Т	Long time pattern.	1:45:30 PM
u	Universal sortable date/time pattern.	2014-06-15 20:45:30Z
U	Universal full date/time pattern.	Monday, June 15, 2014 8:45:30 PM
Ү, у	Year month pattern.	June, 2014

Custom Formats

Custom formatting pattern is built up from tokens that represent parts of a date/time (year, month, day, hour, minute, second) in various formats.

Any character is not a special token is included without change.

For example, to format a date as "January 23, 2015" you would use the pattern MMMM d, yyyy.

The available tokens are described below. Note that tokens are case-sensitive: "M" represents a month, while "m" represents a minute.



If you want to use a single-character custom format to insert a part of a date/time, you must prefix the character with "%" so it does not get interpreted as a Standard Format (see <u>above</u>).

For example, if you use (now("d")), this will be expanded to 1/23/2015. If what you wanted was to insert just the day of the month without a leading 0, you would use (now)

If your custom format string is longer than one character, this restriction does not apply.

Token	Meaning
d	The day of the month. Single-digit days will not have a leading zero (e.g., "1").

Token	Meaning			
dd	The day of the month. Single-digit days will have a leading zero (e.g., "01").			
ddd	The abbreviated name of the day of the week (e.g., "Wed").			
dddd	The full name of the day of the week (e.g., "Wednesday").			
М	The numeric month. Single-digit months will not have a leading zero.			
MM	The numeric month. Single-digit months will have a leading zero.			
MMM	The abbreviated name of the month (e.g., "Jan").			
MMMM	The full name of the month (e.g., "January").			
у	The year without the century. If the year without the century is less than 10, the year is displayed with no leading zero.			
уу	The year without the century. If the year without the century is less than 10, the year is displayed with a leading zero.			
уууу	The year in four digits, including the century.			
<u>g</u> g	The period or era. This pattern is ignored if the date to be formatted does not have an associated period or era string. E.g., "BC" or "AD".			
h	The hour in a 12-hour clock. Single-digit hours will not have a leading zero.			
hh	The hour in a 12-hour clock. Single-digit hours will have a leading zero.			
Н	The hour in a 24-hour clock. Single-digit hours will not have a leading zero.			
HH	The hour in a 24-hour clock. Single-digit hours will have a leading zero.			
m	The minute. Single-digit minutes will not have a leading zero.			
mm	The minute. Single-digit minutes will have a leading zero.			
S	The second. Single-digit seconds will not have a leading zero.			
SS	The second. Single-digit seconds will have a leading zero.			
t	The first character in the AM/PM designator.			
tt	The AM/PM designator.			
Z	The time zone offset ("+" or "-" followed by the hour only). Single-digit hours will not have a leading zero. For example, Pacific Standard Time is "-8".			
ZZ	The time zone offset ("+" or "-" followed by the hour only). Single-digit hours will have a leading zero. For example, Pacific Standard Time is "-08".			
ZZZZ	The full time zone offset ("+" or "-" followed by the hour and minutes). Single-digit hours and minutes will have leading zeros. For example, Pacific Standard Time is "-08:00".			
:	The default time separator defined for the locale.			
/	The default date separator defined for the locale.			

Related Concepts

Related Topics

Function Examples	113
Variables with Functions.	114

Function Examples

The following examples demonstrate how to use functions to calculate various dates.

Ċ

You can define variables as shortcuts for functions that you use frequently. See the Variables with Functions topic for more information.

Yesterday's Date

For use by another function: @DateAdd(,-1,"day")

To insert the date using a specific format: [enow("MMMM d, yyyy",-1,"day")]

Start/End of Week

Show the date of the first and last days of the week containing the current date, treating Monday as the first day of week and Friday as the last day:

- Start of week: @MostRecentDay(, "monday", "MMMM d, yyyy")
- End of week: @NextDay(, "friday", "MMMM d, yyyy")

Show the date of the first and last days of the week that yesterday was part of, treating Monday as the first day of the week and Sunday as the last day.

We first use DateAdd to get yesterday's date, then find out what week it was in:

- Start of week: @MostRecentDay(@DateAdd(,-1,"day"), "monday", "yyyy-MM-dd")
- End of week: @NextDay(@DateAdd(,-1,"day"), "sunday","yyyy-MM-dd")

Start/End of Month

First day of current month: @StartOfMonth(, "yyyy-MM-dd")
Last day of current month: @EndOfMonth(, "yyyy-MM-dd")

The 15th of the Current Month

Get a date/time representing 8:15 AM on the 15th day of the current month: <code>@AdjustDate(,,,15,8,15,0)</code>

The first comma skips the optional *targetDate* argument, telling the function to use the current date/time. The next two commas skip the *year* and *month* arguments, telling the function to use the current year and month. The next four arguments tell the function to use the 15th day of the month, the eighth hour, 15th minute, and 0 seconds.

Related Concepts

Variables and Functions	
Related Topics	
Variables with Functions	
Reference	

Function Reference	99
Date/Time Formats	

Variables with Functions

When you define <u>variables</u> in Report Commander, the value of a variable can contain calls to <u>functions</u>. This makes it possible to create variables as shortcuts for complex function calls so you don't have to create the function call each time you need to use it.

For example, you may find yourself frequently needing this function call to insert yesterday's date in a report parameter: (DateAdd(,-1,"day")). Instead of having to remember/type that in each time you need it, you could define a <u>shared variable</u> named "Yesterday" and set its value to (DateAdd(,-1,"day")). You can do the same thing for other dates you commonly need to use, such as StartOfWeek, EndOfWeek, etc (see the <u>Function Examples</u> topic for samples of common function calls like this).

Here we have defined these variables as shared variables so that they will be available to all projects on the computer (variables are defined on the <u>Project Properties</u> panel):

Sales Tutorial - Report Commander			
File Help			
File Help Project Navigator Project Sales Tutoria Project Sales T	Project Sales Tut Variables Distribution Lists E-Mail Servers	Project Properties pa Project in the Project click the setting Shared Variables These variables affect all projects run on this computer Name * User Variables These variables affect all projects run by the current user	r Value Value
		Fresterday StartOfWeek EndOfWeek StartOfMonth EndOfMonth	@MostRe @NextDa @StartOf @EndOffV
		Project Variables These variables are defined only for this Project	
		Name	Value
4		*	

Now when you need to insert yesterday's date, instead of inserting the full function call you can just use the "\${Yesterday}" variable:

Project Sales Tutoria	Export to	o HTML 4.0 file "salesrepo	ort.htm"	Yesterday's Sales*	х	
∎ "D						
Group Name:	Edit parameter	r StartDate			×	
Suppress outputs	Name:	StartDate]	
	Description:	Enter StartDate:				
Report Parameters	Туре	Report Parameter				
Name Prompt	Value Type:	Date/Time				
StartDate FodDate						-
Liubale	Value		Format String			
	2/22/2015 1	4-26-43	V Use varia	bles or functions		
	2722720131	4.20.43	\${Yesterday}		0	
				ОК	Cancel	

Related Concepts

Variables and Functions	96
Related Topics	
Function Examples	
Reference	
Function Reference.	
Date/Time Formats.	

E-Mail Settings

Distribution Lists

Distribution Lists in Report Commander work like group mailing lists in your e-mail system: they give you an easy way to send e-mail messages to a group of people.

For example, if you frequently send reports to your sales managers, you can create a Distribution List called "Sales Managers" that includes all of your sales managers. Then, when you are configuring an <u>E-Mail Task</u>, you can specify the list as a recipient, and Report Commander will send the message to all members of the list.

You can use a Distribution List anywhere in Report Commander that you enter e-mail recipients. Just enter the name of the list, prefixed with an "@" sign: @Sales Managers.

Distribution List Properties Window

You can reach this window from the **Distribution Lists** tab of the <u>Project Properties Panel</u> in the Project Editor, or from the <u>User Settings window</u> in the Command Line Builder.

List Name

Provide a name for the list.

If you create a list with the same name as an existing list (for example, you add a list to your Project that has the same name as a list in the Shared Settings), Report Commander will merge the lists at runtime and send e-mail to all members.

Recipients

Enter the addresses and, optionally, names of the members of this list. You can <u>paste a list</u> of e-mail addresses from the clipboard or enter them one-by-one.

Distribution Lists can contain other Distribution Lists as members. For example, if you are creating a list named "Managers" you can add the Address @Sales_Managers and Report will include all members of the "Sales Managers" list in messages sent to the "Managers" list.

E-Mail Servers

E-Mail Servers allow you to provide the settings that Report Commander needs in order to connect to an SMTP server to send e-mail messages. To send e-mail messages, you must have at least one mail server configured.

If have more than one server configured, Report Commander will use the first one that it is able to connect to successfully.

E-Mail Server Properties Window

This window is reached from the <u>Project Properties panel</u> of the Project Editor, or the <u>E-Mail</u> <u>page</u> of the Command Line Builder.

Server Name or Address

Specify the name (address) of the SMTP server through which the mail will be sent. For example, to use Gmail, enter smtp.gmail.com.

Port

If the server uses a port other than the standard value of 25, enter the port number.

Return Address for Messages

Enter the e-mail address to be used as the return address for messages sent through this server. Enter only the address, not the name. For example,

reportcommander@example.com.

This value is used by default if you do not specify a return address for a particular e-mail task.

This field can contain variables and functions that are replaced at runtime. More... 1

Sender Display Name

Enter the name to be used in the return address for messages sent through this server. Enter only the name, not the address. For example, Report Commander.

This value is used by default if you do not specify a return address for a particular e-mail task.

This field can contain variables and functions that are replaced at runtime. More...²

Authentication

If your mail server requires authentication for sending mail, enter your user ID and password here. For example, to send through Gmail you would enter your full Gmail address (e.g., example@gmail.com) and password.

If you are unsure what to enter here, check with the administrator of your mail system.

Enabled

Check this box to enable Report Commander to use this mail server. If you want to temporarily prevent Report Commander from using this server, uncheck the box. If there

¹Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

²Click the **{}** button to display the <u>text editor</u>, which helps you insert variables and functions into the text. When you hover your mouse pointer over the field for a second, a preview of the "expanded" text will be displayed so you can confirm your variables and functions are working correctly.

is not at least one enabled mail server available in the Shared Settings and Project Settings, Report Commander will not be able to send any messages.

Test

Click the **Test** button to send a test message using the settings you have provided.

Importing E-Mail Address Lists

If you need to add many e-mail recipients to an <u>E-Mail Task</u> or <u>Distribution List</u> and already have a list of those recipients, you can paste the list into Report Commander from the clipboard.

To do so, right-click an e-mail recipient list in Report Commander and select the **Paste recipient list from clipboard** command.

The text on the clipboard must have one recipient per line, and can use any of the following formats for the address and optional name:

```
some.person@example.com
Some Person <some.person@example.com>
some.person@example.com Some Person
Some Person some.person@example.com
```

When you paste the list, invalid and duplicate lines will be ignored.

Tutorials and How To

Basic Project Tutorial

This tutorial walks through the basic steps for creating a Project in the Project Editor.

Scenario

We have a report that lists sales figures for a given date range. At the beginning of each day we need to:

- Run the report to produce a report of the previous day's sales in PDF format.
- Send an e-mail message to various people, attaching the PDF report.

Steps

1. Start the Project Editor and it will show a new, empty project.

	🚏 - Report Commander	······································
	File Help	
	🖥 🖆 💾 🖉 🗶 🛅 🔛 💣 📑	
	Project Navigator 4	
	(New Project) Reports	
	Output Tasks	
į,		
1		
1		
1		
1		
6		
1		
1		
1		
0		
-	[

Add a report to the project

2. Click the **Add Report** button (^[]]) to add a report to the project. You can find the "SalesExample.rpt" report file in the Report Commander program folder. You can use the report file to follow this tutorial, but you won't be able to preview or export data since the

report won't be connected to a database. Or you can follow along with a similar report of your own.



Set database logins

3. After the report is added, the first thing we need to do is set the database login information. To do this, select the report name in the Project Navigator and click the **Properties** (*) button (or double-click the report name) to open the settings page for the report, then select the **Data Sources** tab.

- Report Commander						
File Help						
Project Navigator (New Project) - Bepofis - Output Group - Output Tasks						
Sales Tutorial* - Report Commander						
File Help						
🛅 😩 💾 🗡 🗶 🖽 付 📑						
Project Navigator 4	SalesExample	x				
Project (Calco Trace)						
Project "Sales Tutonal"	General	Name	Server	Database	Schema	Integrated Security
SalesExample	Data Sources	northwind.Northwind	northwind	Northwind		

4. The Data Sources tab lists all of the database connections found in the report. This report is configured to use integrated security, but if you needed to run the report under explicit user credentials instead, or to point to a different database or server, you would click the **Edit** button for each connection to open the <u>Data Source Properties</u> window and supply the necessary information.

Configure Output Group with parameters for the export

5. Report Commander has automatically created the first Output Group for the report, called "Output Group 1." Each Output Group is a collection of Outputs that use the same parameters for the report.

Select "Output Group 1" in the Project Navigator and click the **Properties** (\checkmark) button (or double-click the group name) to open the settings page for the group.

	🚏 - Report Commander	0.00		
	File Help			
	🛅 🖆 💾 🧶 🗙 🛅 🖾 👘 🗗 🖷	÷ ►		
	Project Navigator #	SalesExa	ample 🗙	
	(New Project)			
	⊡- Reports	General	Report File:	C:\test\SalesExample.rpt
	Utput Group 1	Logins		Convert to relative path
	Output Tasks			
			Force refre	sh of report data when printing or exporting
		L [
1	- Report Commander			
[File Help			
	🛐 🔄 💾 🗲 🗶 🛗 🗠 👘 🖯 🖷	4 •		
	Project Navigator 4	SalesExa	ample Out	put Group 1 🗶
	:	" 5		L
	(New Project)			
	i⊖- Reports	Group Na	me: Out	put Group 1
	Utput Group 1	Suppr	ress outputs for th	ese parameters if the report does not return any records

6. We will use this group to produce the report of yesterday's sales. Change the **Group Name** to "Yesterday's Sales."

7. The report takes StartDate and EndDate parameters to tell it which dates to select records for. First click the **Edit** button next to the StartDate in the parameter list to open the <u>Parameter Editor</u>.



8. We don't want to have to update the project every day to give it the correct dates, so we will make use of <u>functions</u> to automatically insert the date when the report runs. Check the **Use variable or functions** box, then paste in this text in the value box: [enow("yyyy-MM-dd", -1, day)]. Click **OK** to save the parameter value.



This is supposed to be a quick tutorial, so take our word for it on the text you just pasted in. For a detailed explanation of where that value came from in. For a detailed explanation of where that value came from, see the advanced tutorial.

Sales Tutorial* - Report Commander	
File Help	
🛅 🖆 💾 👂 🗙 🖬 🖾 📑 🖆 😝 🌖	
Project Navigator 4	👎 Yesterday's Sales 🗴
	日 月
Project 'Sales Tutorial'*	Group Name: Yesterday's Sales
	Suppress outputs for these parameters if the report does not return any reco
Yesterday's Sales	
	Report Parameters
	Name Prompt Name: StartDate
	StartDate Description: Enter StartDate:
	EndDate Type Report Parameter
	Value Type: Date/Time
	Value
	2/25/2015 09/40/22
	2/25/2015 05.40.52 @ 000 V

9. Repeat step 8 for the EndDate parameter.

10. Click the **Save** button (\blacksquare) on the Output Group page to save the settings for this group.

Sales Tutorial - Report Co	omma <mark>nd</mark> er		* *** *		
File Help					
🛅 🖆 💾 🕨 🗶 🗌					
Project Navigator	P	Yesterday	's Sales 🛛 🗙		
		1			
Project Sales Tutonal		Group Nam	ie: Ye	esterday's Sa	les
SalesExample Yesterday's Sales Output Tasks		Suppre	ess outputs for	these param	eters if the report does not return any records
	r	Name	Bramet	Tuno	Current Value
	-	StartDate	riompt	Date/Time	@now("www-MM-dd",-1.dav)
	-	EndDate		Date/Time	@now("yyyy-MM-dd",-1,day)

11. At this point you can use the **Preview** button (\square) to preview the report with the specified parameters and database logins. (It won't work for this tutorial because there is no database for the report.)

Configure PDF export

12. Next we need to tell Report Commander how to export the report. With the "Yesterday's

Sales" Output Group selected in the Project Navigator, click the **Add File Output** button (\Box) to add a new File Output to the group. This will open a new <u>File Output page</u>.

\sim						
	Sales Tutorial - Report Commander					
	File Help					
	🛅 🖆 💾 🕨 🗶 🛯 🛅 📑 📬 🖷	₽ ▶				
	Project Navigator	Yesterday	's Sales 🗙			
		🖺 🔊				
	Project 'Sales Tutorial'	Course Name	×.	ataula da Cal		
	Reports Des Example		ie: Te	esterday's ba	es state a l	
	······ Yesterday's Sales	Suppre	ess outputs for t	these parame	eters if the report does	not return any records
-	Output Tasks					
1		Report Para	ameters			
1		Name	Prompt	Туре	Current Value	
		StartDate		Date/Time	@now("yyyy-MM-dd",	-1,day)
1		EndDate		Date/Time	@now("yyyy-MM-dd",	-1,day)
1						
1						
1						
1						
1						
1						
			_	_		
l						
1	Sales Tutorial - Report Commander					
ſ	File Help					
	🛐 🔄 💾 🔎 🗙 🛗 🗠 👘 🖸 🖷					
	Project Navigator 4	Yesterday	's Sales	Export to P	DF file* ×	
	Project 'Sales Tutorial'					
	⊟ Reports	Format:	PDF		-	Export Settings
	SalesExample	Name:				<mark>₿₽</mark> 2 ↓ □
П	⊟ resterday's bales					4 Misc

13. Change the Format to "PDF," set the Name to salesreport.pdf and check the Export to temporary file box.



In out scenario we're just e-mailing the export and not saving it for future use. So we use the **Export to temporary file** to tell Report Commander not to keep the export file after it has been e-mailed. We don't need to specify a folder for the export file, because it will get saved to a temporary location.

14. Click the **Save** button (\blacksquare) on the File Output page to save the settings for this output. At this point you can use the Run button (\triangleright) on the File Output page to test the export using the settings so far. (It won't work for this tutorial because there is no database for the report.)

Configure e-mail message

Next we will create the e-mail message to deliver the export file.

15. Click the **Add E-Mail Task** button ($\stackrel{\text{IS}}{=}$) to add a new <u>E-Mail Task</u> to the Project.

Sales Tutorial - Report Commander	Support Andrew Street of Street	and the second
File Help		
🖥 🖆 💾 🗡 🗙 🖬 🖆 🗳	i 🕨	
Project Navigator 4	Yesterday's Sales Export to HTML 4.0 file "salesrept	ort.htm" This Week's Sa
Project 'Sales Tutorial'	Format: PDF	Export Settings
⊡. SalesExample		
· Yesterday's Sales	Name: weeklysales.p	▲ Misc
Export to HTML 4.0 file salesreport.nt ⊡ This Week's Sales	Export to temporary file The file will be delated when all Depart	BookmarksFromReport
Export to PDF file "weeklysales.pdf"	Commander tasks have completed.	
····· Output Tasks		
	Export Page Range	
	 All 	
	Pages to	
1		
·	\fbox Enabled (create this output when project runs)	
4		
1		
		BookmarksFromReport F
· · · · · · · · · · · · · · · · · · ·		
Sales Tutorial - Report Commander		
File Help		
🛐 🖕 💾 🔎 🗶 🔝 🖄 💣 🖆		
Project Navigator 4	Yesterday's Sales Export to HTML 4.0 file "salesrepo	ort.htm" This Week's Sa
1		
Project 'Sales Tutorial'		
⊟ Reports	Message Subject:	
Sales	From/To	

- 16. On the **Message** tab, configure the message settings as follows:
- Subject: Sales report for @now("MMMM d, yyyy",-1,day). This will insert yesterday's date in the subject.
- Message Body
 - Check Use this text and enter the message body as Here is the sales report for @now("MMMM d, yyyy",-1,day).

er' deci peri en ap	et lagor the		- 10-10-0
Yesterday's Sales Message Subject From/To Mess □ U ④ U ● U ● U	Export to PDF file "sale ct: Sales report for @no sage Body Jse HTML format for mess Jse this text: I Jse this project output: I Jse this file at runtime: I	esreport.pdf" ow("MMMM d. yyyy' sage Here is the sales rep	Send e-mail
	Yesterday's Sales Message From/To Attachments Image: Complete the second se	Yesterday's Sales Export to PDF file "sale Message Subject: Sales report for @nd From/To Message Body Use HTML format for mess Image: Attachments Image: Body Image: Body Image: Buble the state of the s	Yesterday's Sales Export to PDF file "salesreport.pdf" Message Subject: Sales report for @now("IMMMM d. yyyy" From/To Message Body Attachments Use HTML format for message Image: Use this text: Here is the sales report for Use this project output: Image: Use this file at nuntime: Use this file at nuntime:

17. On the **Attachments** tab, under **Include the output files from these exports**, check the box next to "Yesterday's Sales." This will attach the exported PDF to the message.



18. On the **From/To** tab, add one or more recipients to the **To** list for the message.

Sales Tutorial* - Report Commander		-		* logo "description	- 10 1011
File Help Tools					
File Help Tools Image: Ima	- -	Yesterday's Sal Message From/To Attachments	es From:	Export to PDF file "salesreport.pdf" John Smith <john@example.com> (Optional. The default sender address To CC Bcc Address george.smiley@example.com kim.tucker@example.com</john@example.com>	Send e-mail
				Request read receipt for message Be sure you have configured mail set	rver settings

19. If you have not already configured a mail server for Report Commander to use, click the **mail server settings** link to open the <u>e-mail settings for the Project</u>, where you can do this.

Save and test the Project

20. If you haven't already done so, click the **Save Project** button (¹) on the top toolbar to save the project. Give it the name "sales tutorial" and save it to a convenient location.

File Help Tools Project Navpator Image: Second	Philipper's designations app? - import "disearch, marineeride them	Sales Tutorial* - Report Commander
Project Navgator Project Navgator Project Sales Tu prai* Project Sales Tu p		File Help Tools
Project Navgator Project Navgator Project 'Sales Tuynial" Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial" Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial" Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial" Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial" Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial Project 'Sales Tuynial" Project 'Sales Tuynial Project 'Sa	eē ▶	🛅 🖆 💾 🔎 🗶 🛅 过 💣 📑 🌲 🕨
Project 'Sales Tu vial* Beports Sales Example Yesterda's Saves the entire project Saves the entire project Message om/To Executes the project Address george.smiley@example.com kim.tucker@example.com Request read receipt for message	esterday's Sales Export to PDF file "salesreport.pdf" Send e-mai	Project Navigator 4
Be sure you have configured <u>mail server sett</u>	Request read receipt for message Be sure you have configured mail server settings	Project Navgator

21. You can test the entire project by clicking the **Run Project** () button on the top toolbar. This will run the entire project, creating both export files and sending the e-mail message, and will show you any problems encountered.

Schedule the Project

The **Run Project** button lets you run the Project from within the Project Editor, but once you've finished building the project you probably want to run it automatically. Report Commander doesn't have a built-in scheduler, but you can easily <u>schedule the project using</u> your favorite scheduling or automation tool.

On the **Help** menu, select the **How to execute project...** link and Report Commander will show you the command you need to have your automation tool run to execute this project.

Advanced Project Tutorial

This tutorial walks through creation of a more advanced Project than was created in the <u>basic</u> <u>tutorial</u>.

Scenario

We have a report that lists sales figures for a given date range. At the beginning of each day we need to:

- Run the report to produce a report of the previous day's sales in HTML format.
- Run the report with different parameters to produce a report of week-to-date sales, in PDF format.
- Send an e-mail message to various people, using the HTML report as the body of the email message, and attaching the PDF report.

Steps

1. Start the Project Editor and it will show a new, empty project.
| | 🚏 - Report Commander | ······································ |
|----|--------------------------|--|
| | File Help | |
| | 🛅 🖆 💾 🖉 🗶 🛅 🔛 🗂 📑 | |
| | Project Navigator 4 | |
| | | |
| | (New Project)
Reports | |
| | Output Tasks | |
| į, | | |
| 1 | | |
| 1 | | |
| | | |
| | | |
| | | |
| | | |
| 1 | | |
| | | |
| 1 | | |
| 6 | | |
| | | |
| 1 | | |
| 1 | | |
| | | |
| 1 | | |
| | | |
| | | |
| 0 | | |
| - | [| |
| | | |

Add a report to the project

2. Click the **Add Report** button (^[]]) to add a report to the project. You can find the "SalesExample.rpt" report file in the Report Commander program folder. You can use the report file to follow this tutorial, but you won't be able to preview or export data since the

report won't be connected to a database. Or you can follow along with a similar report of your own.



Set database logins

3. After the report is added, the first thing we need to do is set the database login information. To do this, select the report name in the Project Navigator and click the **Properties** (*) button (or double-click the report name) to open the settings page for the report, then select the **Data Sources** tab.

- Report Commander						
File Help						
🛅 🖆 💾 🖊 🗶 🖽 🖆 🖆						
Project Navigator (New Project) Beports Output Group Output Tasks						
Sales Tutorial* - Report Commander						
File Help						
🛅 😩 💾 🗡 🗶 🔛 📑						
Project Navigator	SalesExample	×				
Device & IColory Transfell*						
Project Sales Tutonal ⊡ Reports	General	Name	Server	Database	Schema	Integrated Security
····· SalesExample ····· Output Tasks	Data Sources	northwind.Northwind	northwind	Northwind		

4. The Data Sources tab lists all of the database connections found in the report. This report is configured to use integrated security, but if you needed to run the report under explicit user credentials instead, or to point to a different database or server, you would click the **Edit** button for each connection to open the <u>Data Source Properties</u> window and supply the necessary information.

Configure Output Group with parameters for first export

5. Report Commander has automatically created the first Output Group for the report, called "Output Group 1." Each Output Group is a collection of Outputs that use the same parameters for the report.

Select "Output Group 1" in the Project Navigator and click the **Properties** (\checkmark) button (or double-click the group name) to open the settings page for the group.

	🚏 - Report Commander	0.00		
	File Help			
	🛅 🖆 💾 🧶 🗙 🛅 🖾 👘 🗗 🖷	÷ ►		
	Project Navigator #	SalesExa	ample 🗙	
	(New Project)			
	⊡- Reports	General	Report File:	C:\test\SalesExample.rpt
	Utput Group 1	Logins		Convert to relative path
	Output Tasks			
			Force refre	sh of report data when printing or exporting
		L [
	- Report Commander			
[File Help			
	🛐 🔄 💾 🗲 🗶 🛗 🗠 👘 🖯 🖷	4 •		
	Project Navigator 4	SalesExa	ample Out	out Group 1 🗶
	:	" 5		L
	(New Project)			
	i⊖- Reports	Group Na	me: Out	put Group 1
	Utput Group 1	Suppr	ress outputs for th	ese parameters if the report does not return any records

6. We will use this group for our first requirement, which is to produce the report of yesterday's sales. Change the **Group Name** to "Yesterday's Sales."

7. The report takes StartDate and EndDate parameters to tell it which dates to select records for. First click the **Edit** button next to the StartDate in the parameter list to open the <u>Parameter Editor</u>.



8. We don't want to have to update the project every day to give it the correct dates, so we will make use of <u>functions</u> to automatically insert the date when the report runs. Check the **Use variable or functions** box, then click the text editor button (**{}**) to open the <u>Variables</u> and Functions window, which will help us insert the correct function.

9. In the **Variables and Functions** window, go to the **Date/Time** tab. When we run the report, we want it to pull data for the previous day, so:

- Check the **Offset the date/time by** box
- Set the adjustment to -1.
- Make sure the adjustment type is Day.
- Click the Insert Function button (1) to add the function to the text edit window.

- Report Commander	
File Help	
🛅 當 💾 🔎 🗙	
Project Navigator	SalesExample Output Group 1 X
1	Insert Variables and Macros
(New Project)	
Reports SalesExample	
Output Group	
Output Tasks	
	Vanables Date fine Macros
	Insert a value based on the current date/time when Report Commander runs
	✓ Offset the date/time by -1 Day
	Fermatting Pattern
	yyyy-MM-dd : Current Date
	vvvv-MM-dd
	Preview
	2015-02-19
	Help

10. The top of the edit window now shows the function code:

@now("yyyy-MM-dd",-1,day)

and below that a preview of what the function call will be replaced with at runtime (the previous day's date).

- Report Commande	
File Help	
🛅 🖆 💾 👂 🗙	
Project Navigator	SalesExample Output Group 1 X
1	Insert Variables and Macros
(New Project) Reports Output Group Output Group Output Tasks	@now("yyyy-MM-dd",-1,day)
	2015-02-19
	Variables Date/Time Macros
	Insert a value based on the current date/time when Report Commander runs
	Offset the date/time by -1 Day -
	Formatting Pattern
	yyyy-MM-dd : Current Date
	yyyy-MM-dd
	Preview
	2015-02-19 Click to insert date macro at c

11. While you're here, highlight the function code [enow("yyyy-MM-dd", -1, day)] and press CTRL-C to copy it to the clipboard. We'll use it again for the EndDate.

12. Click **OK** to return to the parameter editor, then **OK** again to return to the Output Group. The Current Value for the StartDate parameter will now show the function we just created.

13. Click Edit for the EndDate parameter to open the Parameter Editor. We're only running the report for one day, so the EndDate is the same as the StartDate. Check the **Use variables or functions** button and paste in the function code you copied while editing the StartDate. Then click **OK** to return to the Output Group, where both parameters are now set to use yesterday's date.

Click the **Save** button (\blacksquare) on the Output Group page to save the settings for this group.

1					
ſ	Sales Tutorial - Report Commander				
	File Help				
1	🏹 🏜 💾 🗡 🗶 I 🛗 🗠 I 📑 🖆			1	
	Project Navigator 4	Yesterday	y's Sales 🛛 🗙		
	: Project 'Sales Tutorial'	1	_		
	i⇔ Reports	Group Nan	ne: Y	esterday's Sa	les
	⊡ Yesterday's Sales Output Tasks	Suppre	ess outputs for	these parame	eters if the report does not return any records
		Report Par	ameters		
		Name	Prompt	Туре	Current Value
		StartDate		Date/Time	@now("yyyy-MM-dd",-1,day)
		EndDate		Date/Time	@now("yyyy-MM-dd",-1,day)
ļ					
1					
1					
L					

14. At this point you can use the **Preview** button (\square) to preview the report with the specified parameters and database logins. (It won't work for this tutorial because there is no database for the report.)

Configure HTML export

15. Next we need to tell Report Commander how to export the report. With the "Yesterday's Sales" Output Group selected in the Project Navigator, click the **Add File Output** button (1) to add a new File Output to the group.

	Sales Tutorial - Report Commander							
	File Help							
				1				
	Project Navigator	Yesterda	y's Sales 🗙					
		💾 🔊						
1	Project 'Sales Tutorial'	Group Nan	ne: Ye	esterday's Sa	les			
1			ess outputs for	these param	eters if the report does not return any records			
	····· <u>Yesterday's Sales</u> ·····Output Tasks							
i		Report Par	rameters					
1		Name	Prompt	Туре	Current Value			
		StartDate		Date/Time	@now("yyyy-MM-dd"1.day)			
1		EndDate		Date/Time	@now("yyyy-MM-dd",-1,day)			
1								
ļ								
í								
1								
1								
1								
1								
1								
1								
1								
L								

This will open a new File Output page.



16. Change the **Format** to "HTML 4.0," set the **Name** to salesreport.htm, and check the **Export to temporary file** box.

In out scenario we're just e-mailing the export and not saving it for future use. So we use the **Export to temporary file** to tell Report Commander not to keep the export



file after it has been e-mailed. We don't need to specify a folder for the export file, because it will get saved to a temporary location.

1				
	Sales Tutorial - Report Commander			
	File Help			
	🛅 🔄 💾 I 🗲 🗙 I 🔝 😒 I 📑 🖸 😝			
1	Project Navigator	Vertend		
	:	Yesterd	ay's Sales Export to PDF file*	
1	in Reports	Format:	HTML 4.0	Export Settings
1	⊡ SalesExample	Name:	salesreport	2↓
	Yesterday's Sales Evport to PDE file	i idino.	Subscription	⊿ Misc
-	Output Tasks		The file will be deleted when all Pepert	ImagesInSameDirectory
ļ			Commander tasks have completed.	SeparateFileForEachPage
		Export	t Page Range	
i		Al		
1		© Pa	ages to	
1				
1		🔍 Ena	hled (create this output when project runs)	
			bieu (create triis output when project runs)	
1				
1				
1				
1				
1				
1				
1				
				ImagesInSameDirectory
				Place images in the same dir

17. Click the **Save** button (\blacksquare) on the File Output page to save the settings for this output. At this point you can use the Run button (\triangleright) on the File Output page to test the export using the settings so far. (It won't work for this tutorial because there is no database for the report.)



Configure Output Group with parameters for second export

Now we need to export the report a second time, with different parameters and a different export format.

18. With the report selected in the Project Navigator, click the **Add Output Group** button (\square) to add a new Output Group.



19. This group will be used to export the report for the week to date, so change the **Group Name** to "This Week's Sales." 20. For this export we want to run the report for the week (defined as Monday through Sunday) that includes yesterday. To do this, edit the StartDate and EndDate parameters, check the **Use variables or functions** box, and set the values as follows:

- StartDate: @MostRecentDay(@DateAdd(,-1,"day"), "monday","yyyy-MM-dd")
- EndDate: @NextDay(@DateAdd(,-1,"day"), "sunday", "yyyy-MM-dd")

This tutorial is already too long, so see the <u>Function Examples</u> topic for an explanation of these values. You can also <u>define variables</u> as <u>shortcuts</u> for complex function calls like this.

As before, you could use the **Preview** button (\square) to preview the report with these parameters, to verify that it produces the expected output.

Configure PDF export

21. Now we need to export "This Week's Sales" to PDF. Select the "This Week's Sales" Output Group in the Project Navigator and click the Add File Output button (\square) to add a new File Output to the group.

22. Select "PDF" as the **Format**, set the name to weeklysales.pdf and check the **Export to temporary file** box. Then click Save () on the File Output page to save the output.

Your project should now look like this:



Configure e-mail message

Next we will create the e-mail message to deliver the two exports we have created.

23. Click the **Add E-Mail Task** button ($\stackrel{\text{IM}}{=}$) to add a new <u>E-Mail Task</u> to the Project.

Sales Tutorial - Report Commander	Support Andrew Street of Street	and the second
File Help		
🖥 🖆 💾 🗡 🗙 🖬 🖆 🗳	i 🕨	
Project Navigator 4	Yesterday's Sales Export to HTML 4.0 file "salesrept	ort.htm" This Week's Sa
1		
Project 'Sales Tutorial'	Format: PDF	Export Settings
⊡. SalesExample		
· Yesterday's Sales	Name: weeklysales.p	▲ Misc
Export to HTML 4.0 file salesreport.nt ⊡ This Week's Sales	Export to temporary file The file will be deleted when all Depart	BookmarksFromReport
Export to PDF file "weeklysales.pdf"	Commander tasks have completed.	
····· Output Tasks		
	Export Page Range	
	 All 	
	Pages to	
1		
·	\fbox Enabled (create this output when project runs)	
4		
1		
		BookmarksFromReport F
· · · · · · · · · · · · · · · · · · ·		
Sales Tutorial - Report Commander		
File Help		
🛐 🖕 💾 🔎 🗶 🔝 🖄 💣 🖆		
Project Navigator 4	Yesterday's Sales Export to HTML 4.0 file "salesrepo	ort.htm" This Week's Sa
1		
Project 'Sales Tutorial'		
⊟ Reports	Message Subject:	
er Vesterday's Sales	From/To	

- 24. On the **Message** tab, configure the message settings as follows:
- Subject: Sales report for @now("MMMM d, yyyy",-1,day). This will insert yesterday's date in the subject.
- Message Body
 - Check Use HTML format for message.
 - Check **Use this project output** and select "Yesterday's Sales Export." This will use the report as the body of the e-mail message.

Sales Tutorial - Report Commander				· Description	-
File Help					
🎁 🖆 💾 🕨 🗶 🔛 📑 📑 🖷					
Project Navigator	Yesterday's S Message From/To Attachments	ales I Subject: Messag Use Use	Export to HTML 4.0 Sales report for @ e Body HTML format for me this text: this project output: this file at runtime:	file "salesreport.htm" now("MMMM d, yyyy",-1 essage SalesExample:Yesterda	ay's Sales:Export (s

25. On the **Attachments** tab, under **Include the output files from these exports**, check the box next to "This Week's Sales." This will attach the exported PDF to the message.

Sales Tutorial - Report Commander			And a local day of the second of	
File Help				
🛅 🖆 💾 🗲 🗙 🔝 🖄 💣 🖆 🖷				
Project Navigator Project Navigator Project 'Sales Tutorial' Project 'Sales Tutorial'	Yesterday's S Message From/To Attachments	ales Include t Sale Also atta	Export to HTML 4.0 file "salesreport.htm" the output files from these exports Example: This Week's Sales: Export (weeklysa esExample: Yesterday's Sales: Export (salesreport ach these files dd Edit Remove	This Week's S

26. On the **From/To** tab, add one or more recipients to the **To** list for the message.

r				
💱 Sales Tutorial - Report Commander				
File Help				
🛅 🖆 💾 🗲 🗶 🔝 付 👘 🖬				
Project Navigator 4	This Week's S	ales	Export to PDF file "weeklysales.pdf" Send e-m	nail Sales re
Project Sales Tutorial Project Sales Tutorial Project Sales Example Project Sales Exampl	Message From/To Attachments	From:	(Optional. The default sender address configured to To CC Bcc Address john@example.com ▶ salesmanagers@example.com * Request read receipt for message Be sure you have configured <u>mail server setting</u>	ior the mail

27. If you have not already configured a mail server for Report Commander to use, click the **mail server settings** link to open the <u>e-mail settings for the Project</u>, where you can do this.

Save and test the Project

28. If you haven't already done so, click the **Save Project** button (¹⁾) on the top toolbar to save the project. Give it the name "sales tutorial" and save it to a convenient location.



29. You can test the entire project by clicking the **Run Project** () button on the top toolbar. This will run the entire project, creating both export files and sending the e-mail message, and will show you any problems encountered.

Schedule the Project

The **Run Project** button lets you run the Project from within the Project Editor, but once you've finished building the project you probably want to run it automatically. Report Commander doesn't have a built-in scheduler, but you can easily <u>schedule the project using</u> your favorite scheduling or automation tool.

On the **Help** menu, select the **How to execute project...** link and Report Commander will show you the command you need to have your automation tool run to execute this project.

Scheduling Report Execution

Report Commander does not have a built-in scheduler, but you can easily schedule Report Commander to run using your existing scheduler or other automation tool. The Task Scheduler built in to Windows will do just fine.

(We would be remiss if we didn't mention that the same team that created Report Commander also happens to sell quite a nice scheduling and automation tool called <u>adTempus</u>, which you should take a look at if you're looking for a comprehensive scheduling solution.)

To automate Report Commander execution you will use either the <u>Project Runner</u> (if you used the Project Editor to create a project) or the <u>Command Runner</u> (if you used the Command Line Builder).

Important Notes

- If you are running Report Commander in evaluation mode, refer to the <u>evaluation mode</u> <u>limitations</u>.
- Be sure you have configured a log file for your project/command (in the <u>Project Editor</u> or <u>Command Line Builder</u>) so that you can review any error messages produced during processing. Report Commander will not show an error window or any other user interface when you run it as a command-line tool.

Tutorial: Scheduling Using Windows Task Scheduler

In this example we will show you how to schedule a project or command using the Windows Task Scheduler. The reports will be generated and e-mailed Monday through Friday at 6:00 AM.



This tutorial uses the Task Scheduler in Windows 7. If you are using a different version of Windows, the screens in the scheduler might look different, or the steps might be slightly different.

- 1. Create your project or command using the Project Editor or Command Line Builder.
- 2. Get the information you need to run Report Commander automatically:

- In the Project Editor, select **How to execute project...** from the **Help** menu to display the <u>Project Execution Commands</u> window.
- In the Command Line Builder, go to the <u>Command Line page</u>.

In either tool, Report Commander shows you the program you need to run and the arguments you need to use. Leave this window/page open; we will come back here in a few steps.

Sales Tutorial - Report Commander	
3 Sales Tutorial - Report Commander	
File Help	
🛅 🔄 💾 🖉 🗶 🛅 🔛 📑 📑 🐳 🕨	
Project Navigator 4	
1	
Project 'Sales Tutorial'	
- Reports	
⊡ SalesExample	
Export to HTML 4.0 file "salesreport.htm"	Project Execution Commands
···· Output Group 1 ⊡·· This Week's Sales	To automate execution of this project, create a task in your favorite schedu
Export to PDF file "weeklysales.pdf"	To detoniate execution of this project, create a task in your revolue schedu
Send e-mail with subject "Sales report for @now("MMM	"C:\Program Files\Arcana Development\Report Commander\adrcexec.exe
	You may need to enter the program to pup and the program options in sena
	Program to Run
	"C:\Program Files\Arcana Development\Report Commander\adroevec.eve
	C. Wrogram nies vicana bevelopment wreport commander varicexec.exe
1	Program Arguments
	-project:"C:\test\Sales Tutorial.rcproject"
	Help
1	

3. Start the Windows Task Scheduler: click the Windows **Start** button and search for "Task Scheduler".

4. In the Task Scheduler, click **Create Basic Task**.

Task Scheduler					
File Action View Help					
🗢 🔿 📊 🚺 🖬					
 Task Scheduler (Local) Task Scheduler Library 	Task Scheduler Summary (Last refre	shed: 2/24/2015 9:23	8:55 AM)		
	Overview of Task Scheduler				- ^
	You can use Task Schedu your computer will carry begin, click a command Tasks are stored in folder perform an operation on Scheduler Library and cli	uler to create and m out automatically a in the Action menu is in the Task Sched an individual task, isk on a command i	anage common at the times you uler Library. To v select the task in n the Action me	tasks that specify. To view or o the Task	
	Task Status				•
	Status of tasks that have started Summary: 117 total - 1 running,	in the following tin 112 succeeded, 0 st	ne pe Last 24 topped, 4 failed	4 hours	•
	Task Name	Run Result	Run Start	Run End	
	 Adobe Flash Player Updater AdobeAAMUpdater-1.0-AR AitAgent (last run succeede AnalyzeSystem (last run succeede	(las CA d at cee			•
				Þ	
	Active Tasks	_	_	_	• •
	Last refreshed at 2/24/2015 9:23:55	AM		Refre	esh

5. In the **Create Basic Task Wizard**, give your task a name and, if you want, a description. Then click **Next**.

Create Basic Task Wizard		×
Create a Basic Task	k	
Create a Basic Task Trigger	Use this wizar such as multi	d to quickly schedule a common task. For more advanced options or settings ple task actions or triggers, use the Create Task command in the Actions pane.
Action	Name:	Run Daily Sales report
Finish	Description:	Run Report Commander to export and e-mail the daily sales report
		< Back Next > Cancel

6. On the **Trigger** page, select **Weekly** and click **Next**.

Create Basic Task Wizard	×
🙋 Task Trigger	
Create a Basic Task Trigger Weekly Action Finish	 When do you want the task to start? Daily Weekly Monthly One time When the computer starts When I log on When a specific event is logged
	< Back Next > Cancel

7. On the **Weekly** page, set the time to 6:00:00 AM and check the boxes for Monday, Tuesday, Wednesday, Thursday, and Friday. Then click **Next**.

Create Basic Task Wizard	×
Weekly	
Create a Basic Task Trigger Weekly Action Finish	Start: 2/ 2/2015 ■▼ 6:00:00 AM ♣ Synchronize across time zones Recur every: 1 Weeks on: Sunday Monday Monday Tuesday Wednesday Thursday Friday Saturday
	< Back Next > Cancel

8. On the Action page select **Start a program** and click **Next**.

9. Leave the **Start a Program** page open in the Task Scheduler and switch back to the Project Editor or Command Line Builder to get the execution command as described in <u>Step 2</u>. Click the **Copy** button (\square) next to **Program to Run**.

automate execution of this project, create a task in your favorite scheduling or automation tool to execute this commande: C:\Program Files\Arcana Development\Report Commander\adrcexec.exe" -project:"C:\test\Sales Tutorial roproject" Copy the command to the Clipboard 'ou may need to enter the program to run and the program options in separate inp 'rogram to Run C:\Program Files\Arcana Development\Report Commander\adrcexec.exe"	Project Execution Commands		×
C:\Program Files\Arcana Development\Report Commander\adrcexec.exe" -project:"C:\test\Sales Tutorial.rcproject" Copy the command to the Clipboard Copy and to the Clipboard Copy and the program options in separate inp Copy and the Clipboard C:\Program Files\Arcana Development\Report Commander\adrcexec.exe" Copy and the program files\Arcana Development\Report Commander\adrcexec.exe Copy and the clipboard C:\Program Arguments C:\Program Arguments C:\Program Files\Sales Tutorial.rcproject C:\C:\test\Sales Tutorial.rcproject C:\C:\test\Sa	To automate execution of this project, create a task in your fa	avorite scheduling or automation tool to execute this command:	
You may need to enter the program to run and the program options in separate inp Yrogram to Run C:\Program Files\Arcana Development\Report Commander\adrcexec.exe''	"C:\Program Files\Arcana Development\Report Commander\	\adrcexec.exe" -project:"C:\test\Sales Tutorial.rcproject"	ß
rogram to Run C:\Program Files\Arcana Development\Report Commander\adrcexec.exe" rogram Arguments roject:"C:\test\Sales Tutorial.rcproject"	You may need to enter the program to run and the program o	Copy the command to the Clipboard	
In the star of th	Program to Kun	· · · · · · · · · · · · · · · · · · ·	
Program Arguments roject:"C:\test\Sales Tutorial.rcproject"	C: (Program Files Wrcana Development (Report Commander)	vadrcexec.exe	Ľ
roject:"C:\test\Sales Tutorial.rcproject"	Program Arguments		
	project:"C:\test\Sales Tutorial.rcproject"		6
-			-
Help	Help		Close

10. Come back to the **Start a Program** page in the Task Scheduler. Right-click in the **Program/script** box and select **Paste** to paste in the command.

11. Go back to Report Commander and copy (\Box) the **Program Arguments**.

12. Come back to the **Start a Program** page in the Task Scheduler. Right-click in the **Add arguments** box and select **Paste** to paste in the arguments.


13. Click **Next** to reach the **Summary** screen. Check the **Open the Properties dialog for this task when I click Finish** box and click **Finish**.

Create Basic Task Wizard		×
Summary		
Create a Basic Task		
Trigger	Name:	Run Daily Sales report
Weekly	Description:	Run Report Commander to export and e-mail the daily sales report
Action		
Start a Program		
Finish		
	Trigger:	Weekly; At 6:00 AM every Monday, Tuesday, Wednesday, Thursday, Friday of
	Action:	Start a program; "C:\Program Files\Arcana Development\Report Commande
	Open the	Droportion dialog for this tack when I click Einich
	Vosen vou cli	ck Finish the new task will be created and added to your Windows schedule.
		< Back Finish Cancel

14. The task properties window will now open. In this window, check the **Run whether user is logged on or not** box to ensure that the task will always run, even if you are not logged in. You can also check the **Hidden** box, because Report Commander will not show a user interface when running in automated mode.

General Trig	gers Actions Conditions Settings History
Name:	Run Daily Sales report
Location:	X
Author:	
Description:	Run Report Commander to export and e-mail the daily sales report
- Security opt	ions
When runn	ing the task, use the following user account:
	Change User or Group
Run only	y when user is logged on
Run only	y when user is logged on ther user is logged on or not
Run only	y when user is logged on ether user is logged on or not not store password. The task will only have access to local computer resources.
Run only Run whe Do n	Change User or Group y when user is logged on ether user is logged on or not not store password. The task will only have access to local computer resources.
Run only Run whe Do n Run with Hidden	Change User or Group y when user is logged on ether user is logged on or not not store password. The task will only have access to local computer resources. In highest privileges Configure for: Windows Vista [™] , Windows Server [™] 2008 ▼

15. Click **OK** to save the task. The Task Scheduler will prompt you for your Windows password.

Run the task. If it doesn't work correctly, check the log file for error messages.

Sharing Settings with Another User or Computer

Using the <u>Project Properties panel</u> or the <u>User Settings window</u> you can define variables, mail servers, file servers, and distribution lists that can be used from any Report Commander project or command that you run on this computer. If you want to make those settings available to other users or on a different computer, you need to copy the settings file to the appropriate location.

For example, if you create Projects while logged in under your own user account, but Projects are executed under a different user account, you will need to copy the shared settings to that account or make them available to all users.

Your user settings are saved in the file "%LocalAppData%\Arcana Development\Report Commander\sharedsettings.xml".



In the procedures below there is no way to **merge** settings from two files: one set of settings will always replace another completely. If you are familiar with XML and promise to be careful, you can edit the files directly and copy over individual pieces as you require.

Making Settings Available to Another User

If you have the <u>appropriate file permissions</u>, you can directly edit Shared settings on the <u>Project Properties Panel</u>. These Shared settings are available to all users on the computer.

If you don't have permission to manage Shared settings directly, you can use one of these approaches to share your settings with other users:

- To make your settings available to all users, an Administrator (or someone else with the necessary permission) can copy your sharedsettings.xml file into the folder
 "%ProgramData%\Arcana Development\Report Commander". This will **replace** any current Shared settings (your settings will become the new Shared settings for all users on the computer.
- To make your settings available to a single user, you can give that user a copy of the sharedsettings.xml file, and that user can copy the file into their own
 "%LocalAppData%\Arcana Development\Report Commander" folder. This will replace their current user settings.

Copying Settings to Another Computer

If you are editing projects on one computer but need to be able to execute them on another, you need to make sure all the User and Shared settings are available on that computer.

To do this you (or a user with the necessary permissions) can copy either your user settings file¹ or the computer's shared settings file² to the other computer. On the other computer you can place the file either in the computer shared settings folder or in the user settings folder of the appropriate user account.

Shared Settings Permissions

Shared settings (shared by all users on a computer) are stored in the file "%ProgramData%\Arcana Development\Report Commander\SharedSettings.xml". Any user who has permission to modify that file will be permitted to add, modify, and delete Shared items in the Project Editor.

Copying Settings Using Copy/Paste

If you need to copy some shared settings from one computer to another but don't want to copy the entire shared settings file, you can use Copy/Paste on the Windows clipboard to copy settings.

^{1(&}quot;%LocalAppData%\Arcana Development\Report Commander\sharedsettings.xml")

²("%ProgramData%\Arcana Development\Report Commander\SharedSettings.xml")

If you have access to both computers at the same time, you can do this directly. For example, suppose you're using Report Commander on your desktop and want to copy settings for a Mail Server to another computer where you're running Report Commander, and you're connected to that computer using Remote Desktop. On your desktop computer, right-click the Mail Server and select the Copy command. Then, in your Remote Desktop session, go to the Mail Server settings, right-click, and paste the mail server definition into the settings. You have now copied the settings to the other computer.

If you can't copy directly like this, you can still copy by using a project file as an intermediary:

- 1. On the source computer, copy the shared Mail Server to the clipboard, then paste it into the Project Mail Servers list (the mail server will now appear twice: in the shared settings and in the project settings).
- 2. Save the project file and copy it to the destination computer.
- 3. On the destination computer, open the project and go to the Mail Server settings. The Mail Server will appear in the Project Mail Servers list only, because it isn't defined on this computer as a shared setting.
- 4. Copy the Mail Server to the clipboard and paste it into the Shared File Servers list to make it available to all projects on the destination computer.
- 5. You can now remove the server from the Project Mail Servers list and save the project.

E-mail Report Output

Report Commander can be configured to e-mail report exports after they are produced.

Using the Command Line Builder

To e-mail an export created with the Command Line Builder, check the **E-mail the report** option on the <u>Report page</u>, then configure e-mail settings on the <u>E-Mail page</u>.

Using the Project Editor

To e-mail exports created using the Project Editor, first configure the appropriate <u>File Output</u> (s) to produce the export file(s) for your report(s).

Then add one or more <u>E-Mail Tasks</u> to the project to e-mail the export files. You can combine exports from multiple reports into a single e-mail message, or send each report's exports separately.

See the "Basic Project Tutorial" on page 120 for an example of creating a simple project to export and e-mail a report.

Upload Report Output

Report Commander can be configured to upload report exports to an FTP, SFTP, or HTTP (Web) server.

Using the Command Line Builder

To upload an export created with the Command Line Builder, you must enter the <u>export file</u> <u>name</u> in a special format and/or modify the command line created by the Command Line Builder. See the "Uploading Output" on page 78 topic for more information

Using the Project Editor

To upload exports created using the Project Editor, first configure the appropriate <u>File Output</u> (s) to produce the export file(s) for your report(s).

Then add one or more Upload Tasks to the project to upload the files.