

Glossary of terms for the Server-based scheduling tools

<http://kenhamady.com/cru/comparisons/server-based-scheduling-engines>

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Built-in Proprietary Scheduler:

Has its own internal scheduler as opposed to using an external scheduler like the Windows Task Scheduler.

Runs as a Service::

Runs as a Windows service or equivalent in such a way that it is independent of an individual login, allowing the scheduler to run while users are logged out.

Multiple reports in one scheduled job:

Lets you create a job with multiple related reports. You can change the time of the job in one place and all reports in the job are affected.

Add date/time to file name:

Provide a method for automatically incorporating the current date and time into Exported file name.

Specify parameters in the schedule:

You are allowed to schedule a report that has parameter fields, and specify (in advance) the parameter values to be used by the report at runtime

Relative date parameters (today -2):

Provides an option at the time the report is scheduled to incorporate a date rule that is automatically adjusted relative to today's date. Selection

Store params/dest for repeating jobs:

Can automatically create a duplicate job by copying the parameters and destination settings of another job.

Specify data connection in sched:

When scheduling the job you can override the name of the original data connection used in the report with a new connection.

Encrypt database password:

Stores the database passwords for jobs in an encrypted field.

Jobs can run from command line:

Job only - User can create a batch file. Running that batch file will launch the job.

Job/options - Optional arguments allow the batch file to change parameters, destination, etc.

Web based admin:

User can log into the application and schedule jobs from any browser connected to the Internet.

Built in event based scheduling:

Job can run a SQL Query or check for the existence of a file and then run a job based on the result

Visual representation of scheduled tasks:

Provides a calendar or grid view of all scheduled tasks and when they will run.

Test mode or Test Environment:

Switches all scheduled tasks to be processed locally with all emails being sent to the tester.

Multithreaded engine:

Processing is split by the application into tasks that can be run simultaneously. Allows for faster

processing, especially on multi-core systems.

Bursting:

Take a single grouped report and automatically turn it into multiple exported files, one file for each group. These individual exported files can then be Emailed to the specific Email address associated with that group or saved in specific folders.

Multi-run - The report is refreshed repeatedly and filtered to one group each time

One-pass - Only one pass through the database and can burst a report with saved data

Path/filename from report formulas:

The user can incorporate formulas from the report into the filename and or Path of the exported file

Email content from report formulas:

Body - The user can incorporate formulas from the report into the body of the Email message sent with the exported file.

ALL - The user can also incorporate formulas into the form, to, cc, bcc of the Email.

Conditional destination

User can have the destination determined based on a value in the report itself (i.e. If the group value is x then print else export to file)

Conditional export format

User can have the export format determined based on a value in the report itself (i.e. if a value in the report is x then Excel format else PDF format)

Package delivery

If a job runs multiple reports for the same user, how many Email messages are needed to deliver them?

Multiple - Each attachment is sent with a separate message

Single - One Email with multiple attachments

Exception handling

If the report doesn't complete for some reason, the application will retry up to x attempts every y minutes.

App - the number of attempts and frequency are fixed numbers set within the app and can't be changed

Admin - the number of attempts and frequency are both determined by the administrator and are the same for all reports

User - the number of attempts and frequency are both determined by the user and can be set specifically for any report

Empty report handling

If the report returns no data the system gives the user the following options:

A - Send the empty report the same as a report with data.

B - Do NOT send the empty report

C - Notify the user that the report is empty with a message and no attachment

Run SQL updates before/after job:

User can enter a SQL Query into the application (including INSERT and UPDATE queries), or point to a text file that has a SQL query, and then specify that this query should be run either before or after a scheduled job.

Schedule other (non-RPT) actions:

User can use the application to schedule an EXE or BAT file to be run at a specific time.

Process task on file creation:

System automatically monitors a folder for new files and can run tasks when new files are found.

Can encrypt exported files:

User has the option to store the exported file in encrypted format.

Archive management:

User can specify within the application how long exported instances will be stored. The application will automatically purge expired instances at the specified times.

Dynamic parameters:

A user is scheduling a job and selecting the parameter values for a report. If that report has dynamic parameters then the parameters will query the database for current values. These parameters behave in the same way they would if the report were being run from Crystal Reports.

Cascading parameters:

A user is scheduling a job and selecting the parameter values for a report. If that report has cascading dynamic parameters then the parameters will query the database for current values in the same way they would if the report were being run from Crystal Reports.

Store parameters/destination for repeating jobs:

Once a job has been scheduled, its properties (report, parameter selections, destination, etc) can be re-selected or copied to create the starting point for a new job.

Individual user accounts and groups:

The application requires that users log in individually and allows the admin to specify which users groups can schedule which reports.

Support for Active directory:

Allows sending emails to Active Directory Groups and can use Active Directory security to control user access to features in the software.

Parameter list filtering by user:

The application provides a way for users or groups to be given restricted access to specific parameter values. This prevents the users from seeing (and therefore selecting) inappropriate parameter values, like sales for another department.

Parameter Value List Entry:

When you schedule a report with a single value parameter you are allowed to schedule it with a list of parameter values. The values are passed to the parameter one at a time so that each value generates a separate instance of the output.

Parameter Value List Query:

When you schedule a report with a single value parameter you are allowed to schedule it with a SQL Query. The results of the query are passed to the parameter one at a time so that each value generates a separate instance of the output.

Audit trail of user actions:

System creates a log file that permanently records the timestamp of specific user actions.

Basic - stores user name, report name, schedule frequency and timestamp when that job was scheduled

Detailed - also stores the user selections for that job (parameters, format, destination, etc)

Multiple Security Levels:

Allows application administrators to give different levels of permissions/restrictions to users and groups.

Type(s) of authentication:

Application - Application provides a stand-alone user/group configuration system.

If the application's login can be integrated with another form of authentication (**Active Directory, Windows, Windows Forms**, etc) then those are also listed.

Expanded PDF:

Allows you to do one or more of the following when exporting to PDF:

- 1) merge and split documents as part of the job
- 2) translate the report's group tree into a series of bookmarks.
- 3) create a table of contents or index in the PDF.

Phone support generally available 9-5

Offers the option of receiving support by phone.

Support available 24 x 7 x 365

Offers the option of receiving critical support, with a response time of less than 60 minutes, at any time on any day of they year.