PULSE UTILITIES™
QUICK, EASY SOLUTIONS FOR MACOLA

Installation & Operating Instructions

Pulse Dashboard - Scheduler

Getting started with PULSE Dashboard – Scheduler
The PULSE Dashboard Scheduler is designed to streamline the process of automating report distribution via email. Its user-friendly interface lets users set up and initiate a new job within minutes.

Considerations
To ensure smooth operation of the PULSE Scheduler, keep the following in mind:

1. **PULSE must be active on a server or workstation:** For the Scheduler to function correctly, it must have an open session of the Pulse Dashboard. If the Pulse Dashboard isn't running, the system cannot access the report definitions needed to send emails.

2. **Requires a unique user to run the scheduler:** The Scheduler (even for testing) will blank out all other dashboards for this user. For this reason, we recommended creating a dedicated user account specifically for running Scheduler jobs.

3. **SMTP email support:** The email service you use must support SMTP for the Scheduler to send reports successfully.

Create a user to run the scheduler jobs.

1. In the PULSE Dashboard, click on User Control.

    a. Click the down arrow beside Add and choose Manual Entry.

    b. Enter the Domain and new username.

    c. Click Add

    d. Give this user Publisher and Admin rights.

    e. Give this user Authorization for all the modules.

Determine where to store the files generated and then emailed by the Scheduler.

Create a folder on the computer where the reports should go when exported.

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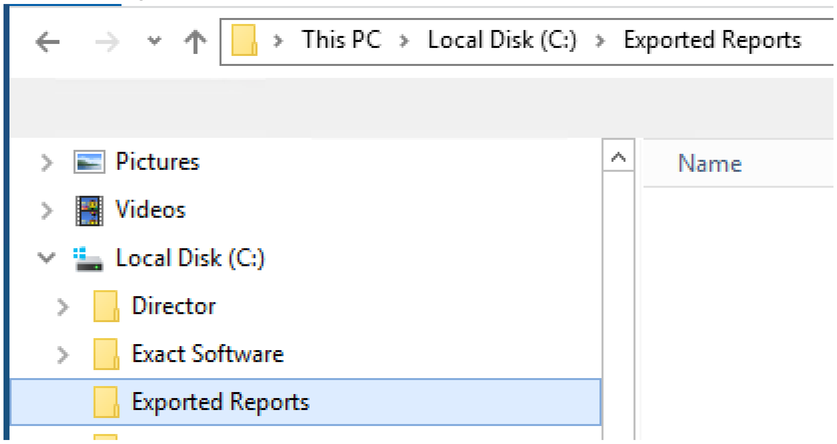
For example:



Save and Share the Reports, Tabs, or Dashboards that will be sent.

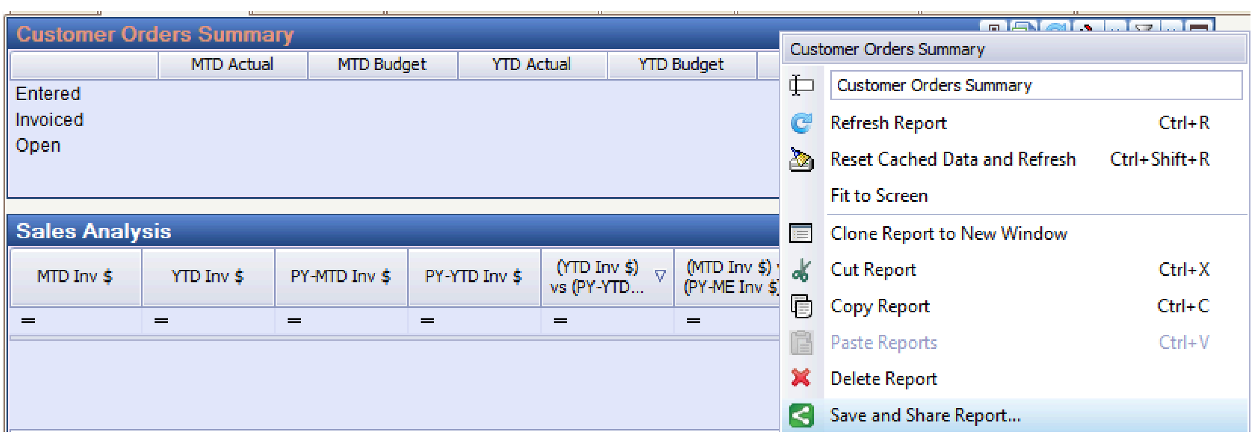
What you choose to Save and Share will depend on the reports you wish to email regularly.

- If you choose to save a tab, all the reports on that tab will be sent in the email.
- If you choose a dashboard, the email will contain all reports from all modules and tabs on that dashboard.

To save and share:

1. Go to the report or tab.

2. Right-click on the header and choose Save and Share Report (or Tab)…



3. Enter the folder name that will hold your scheduled reports.

4. Share with Everyone

5. Click Save

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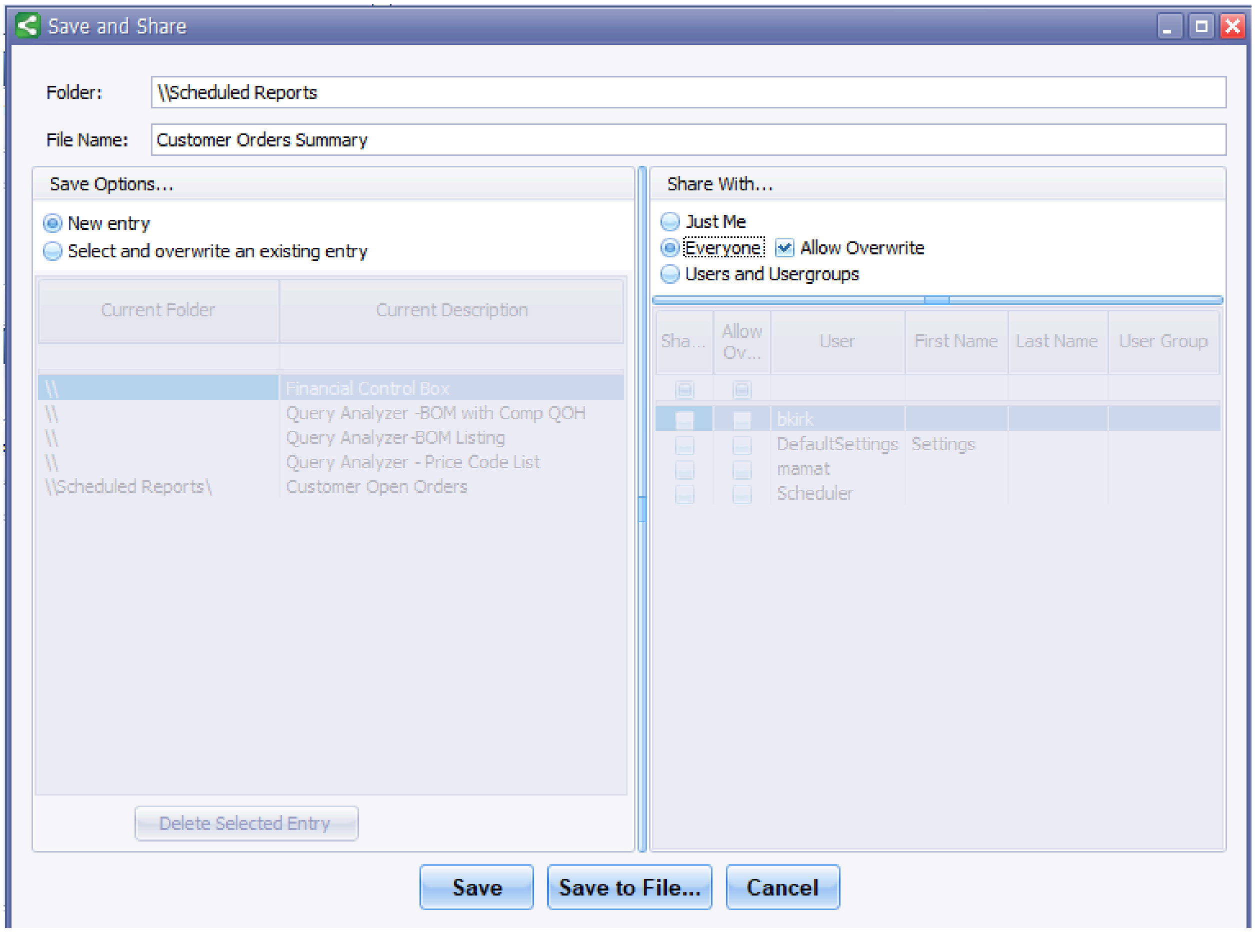

You may get the message "The Folder '\\Scheduled Reports\ does not exist. Would you like to create a new folder?" - choose Yes

Be sure to write down both the folder and report names, as you will need them later.

For example: \\Scheduled Reports\Customer Orders Summary

Verify the Reports or Tabs are saved.

1. Go to Administration | Tools | Save and Share Explorer.
2. Expand the root and find your folder.
3. Select it to see the information saved in that folder.

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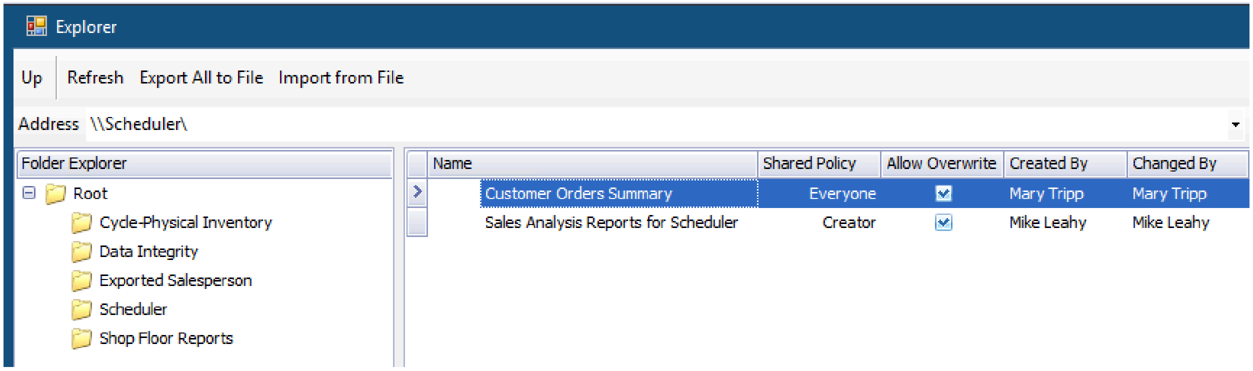
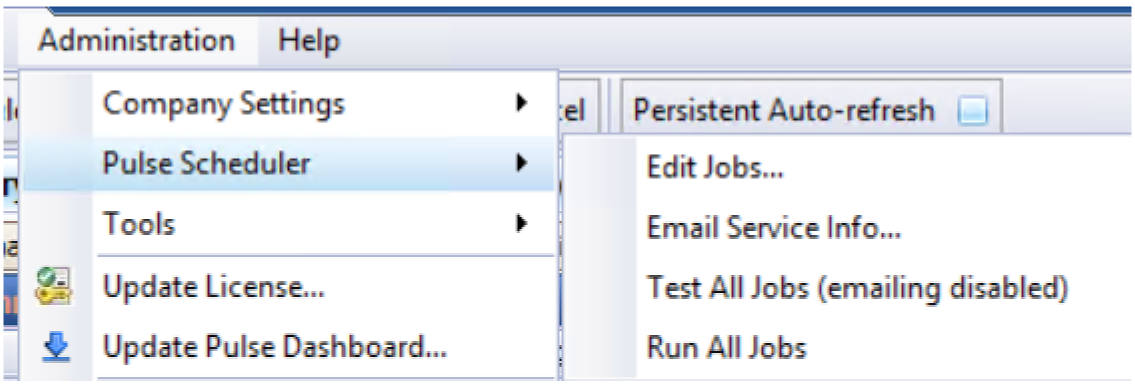
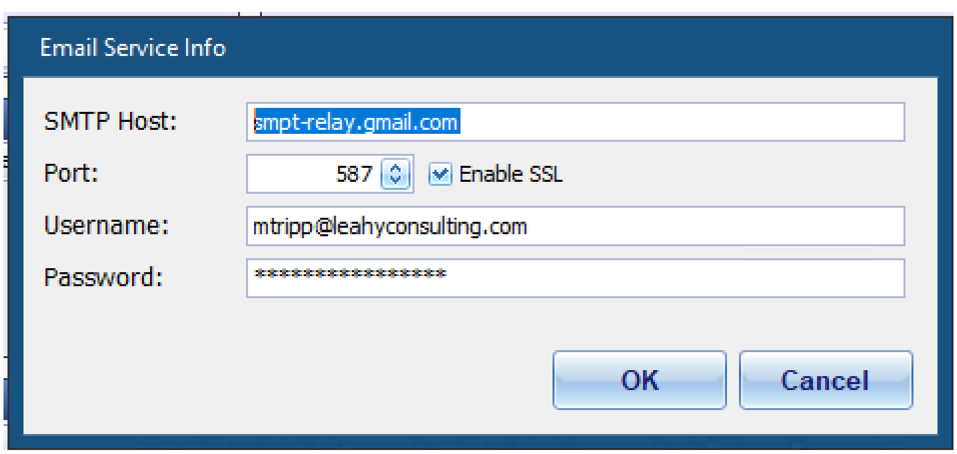


Setup SMTP Email information

1. Go into Pulse Scheduler - Administration | Pulse Scheduler | Email Service Info



2. Enter the information for your SMTP host and information.
    a. The user selected must have the right to send mail through an external SMTP server.



3. Click OK to save

4. **Important:** Setting up and maintaining the SMTP information is the responsibility of the user and not Leahy Consulting.

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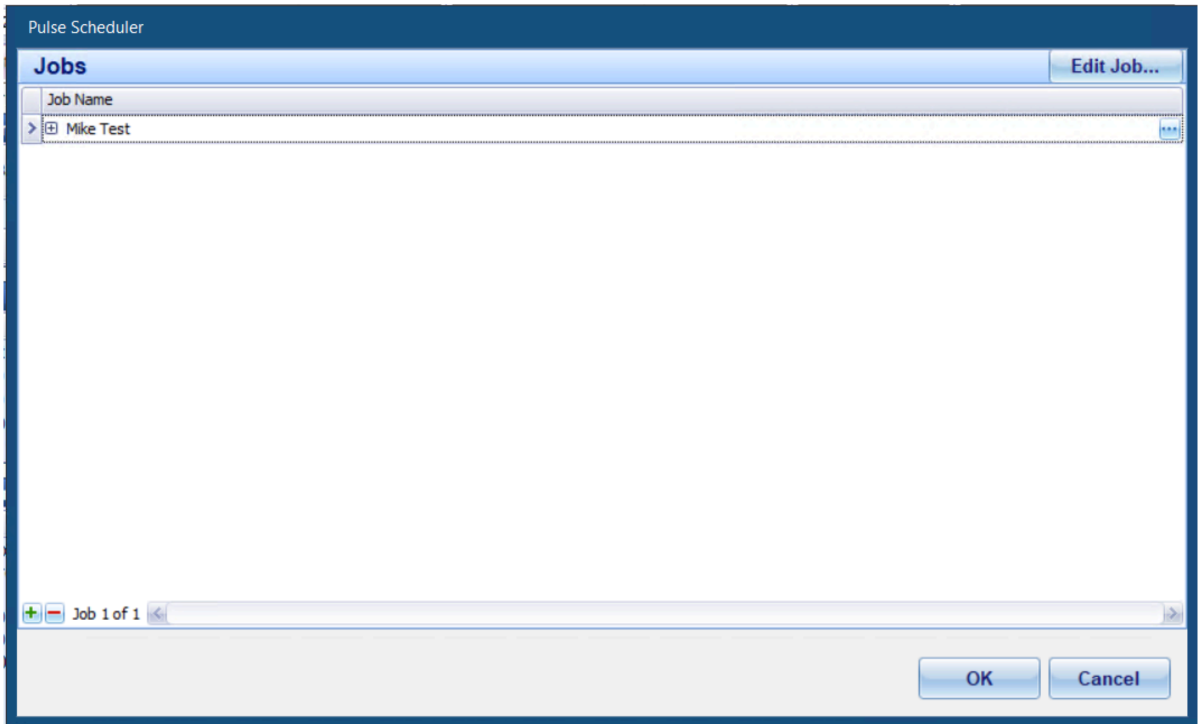
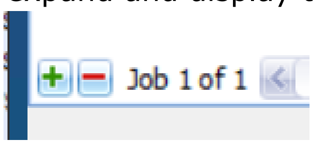
Create the Scheduler Job

1. Go to Administration | Pulse Scheduler | Edit Jobs.

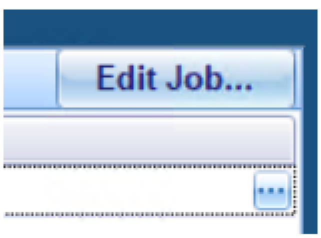


2. Create a job
    a. Click the green + in the lower left corner of the Pulse Scheduler window.
    b. Click the + sign to expand and display the options.



    c. Select a job and click the red - in the lower left corner to remove it.

3. Select the newly created job or one you want to Edit
    a. Click Edit Jobs in the upper right corner or the '…' to the right of the New Job name.



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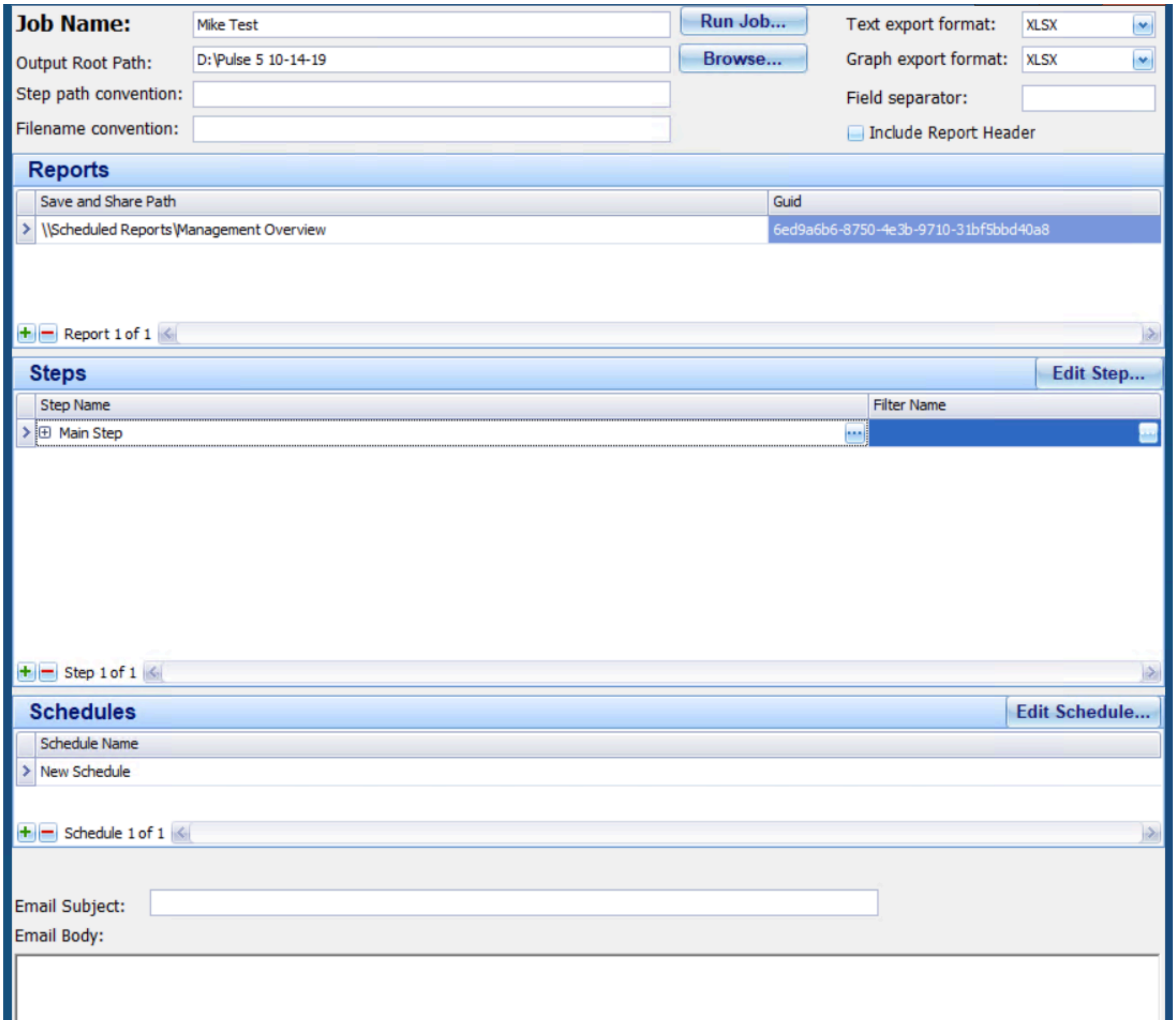


Let's review each section, starting with the top.

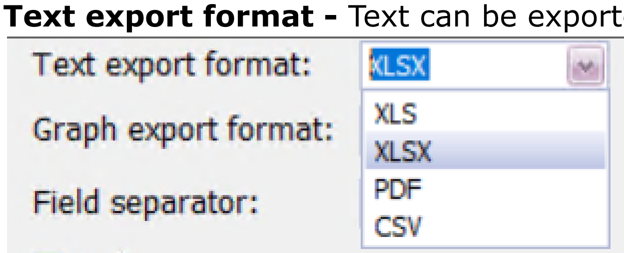
Job Name - unique name for this job

Output Root Path - where the exported data will be saved. Click Browse to find the correct location.

Step Path Convention—This is the folder within the Output Root Path to which the file should be saved. If it is blank, the file will be saved in the folder defined in the Output Root Path.

Filename Convention – This is the file's name that will be created. If this is blank, the file name will be the same as the report/tab being sent.

Text export format - Text can be exported as XLS, XLSX, PDF, or CSV.



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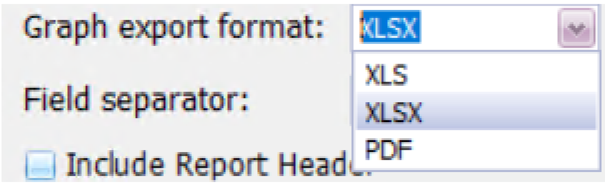
Graph export format - Graphs can be exported as XLS, XLSX, or PDF.



File Separator: This is used with the CSV export format to define the value used to separate the data. Generally, this is a comma, but it could be another value.

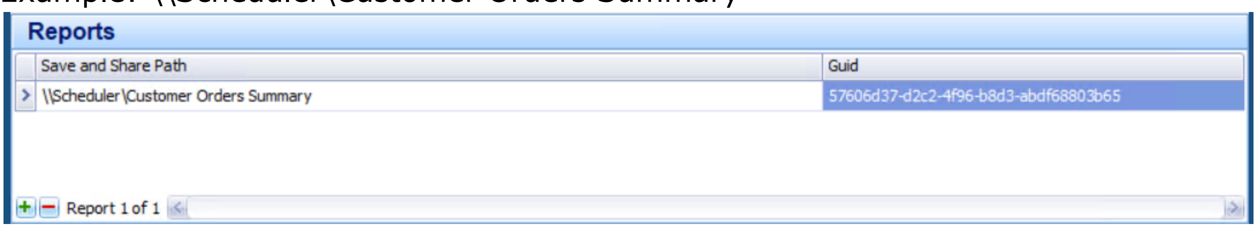
Include Report Header – For reports, do you want to include the heading that appears in the Dashboard?

Reports section

Enter the path and file you created. The system will automatically populate the GUID value.

NOTE: If you don't see the GUID appear, check the spelling of the path and report name.

Example: \\Scheduler\Customer Orders Summary



Steps Section

The steps define who should receive the reports and allow you to filter the report information for that specific person or group. For example, you could create a job to send sales reports to every salesperson. However, for each salesperson, the report should be filtered to show only their information. This can be accomplished when defining the steps.

A file will still be created for the report, even if it does not have data for the selected filter criteria. For example, if you have a management tab that contains several different reports for customers and vendors. Setting a filter for just one customer will result in Excel files being created for the AP report, but those files will have no information.

Click Edit Steps or the '...' in the Step Name field.

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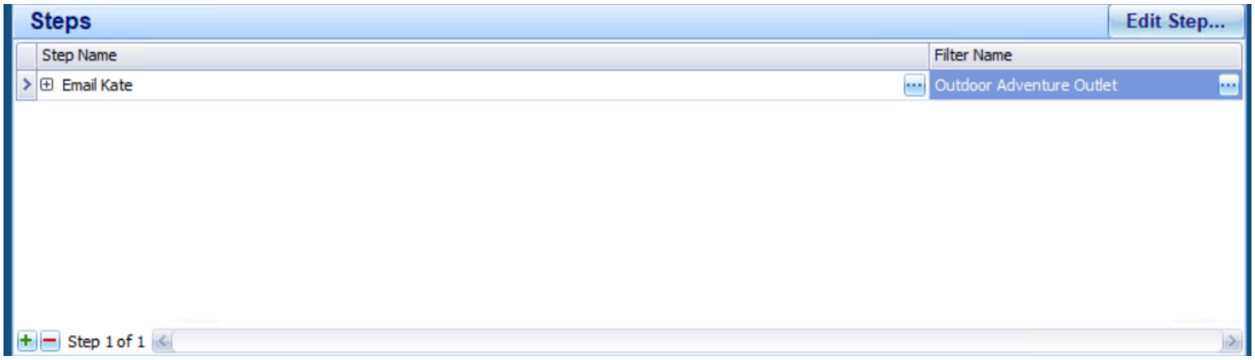

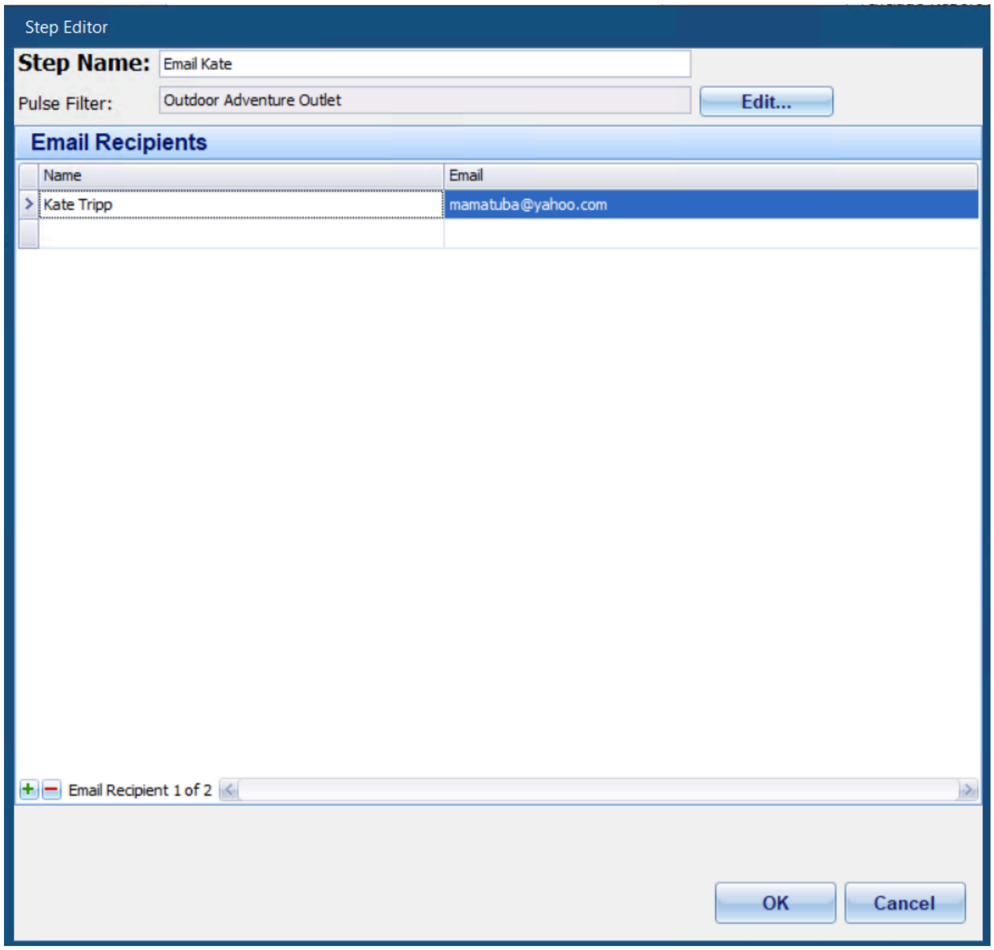

1. Give the step a name that helps you know what it is doing and who it is for.

2. Click the green + in the lower left corner to add an email recipient.

3. To filter the report to send only specific information to that recipient, click the Edit button to the right of the Pulse Filter field.

    a. Click the green + in the lower left corner to add a filter.

    b. Select the field that will be used to filter the report.

    c. Click Save and Share

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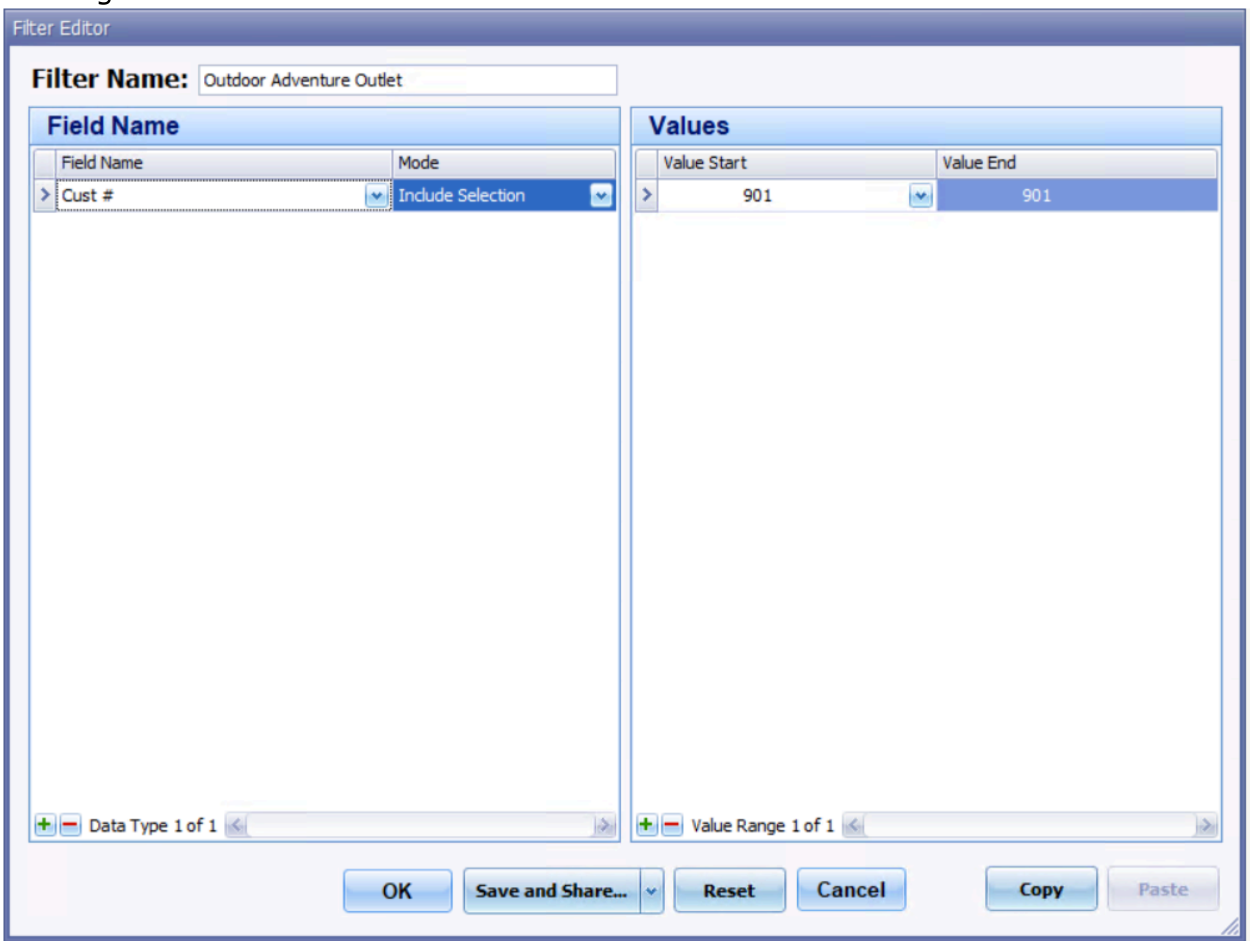
d. Now click the green + to add a value.

e. Then, enter the value.

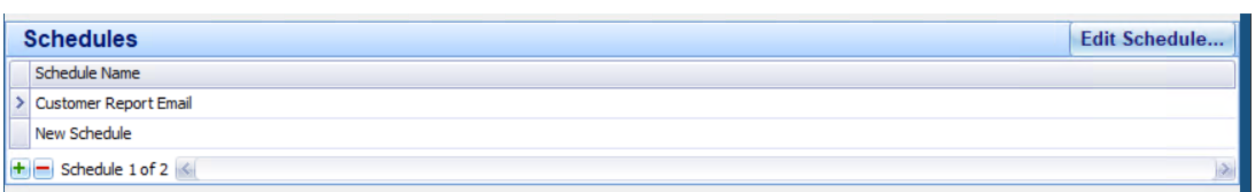
f. You can change the ending value to select a range of values.

g. Click Ok to save



4. Click OK to exit the steps. You can have multiple steps based on the report or tab selected.

Define the schedule:



This will set the frequency and when the job should run.

1. Click Edit Schedule

2. Name - what you want to call this schedule

3. Schedule Type can be Recurring, One Time, or Immediate.

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4. Check Enabled for it to run; uncheck to stop this job.

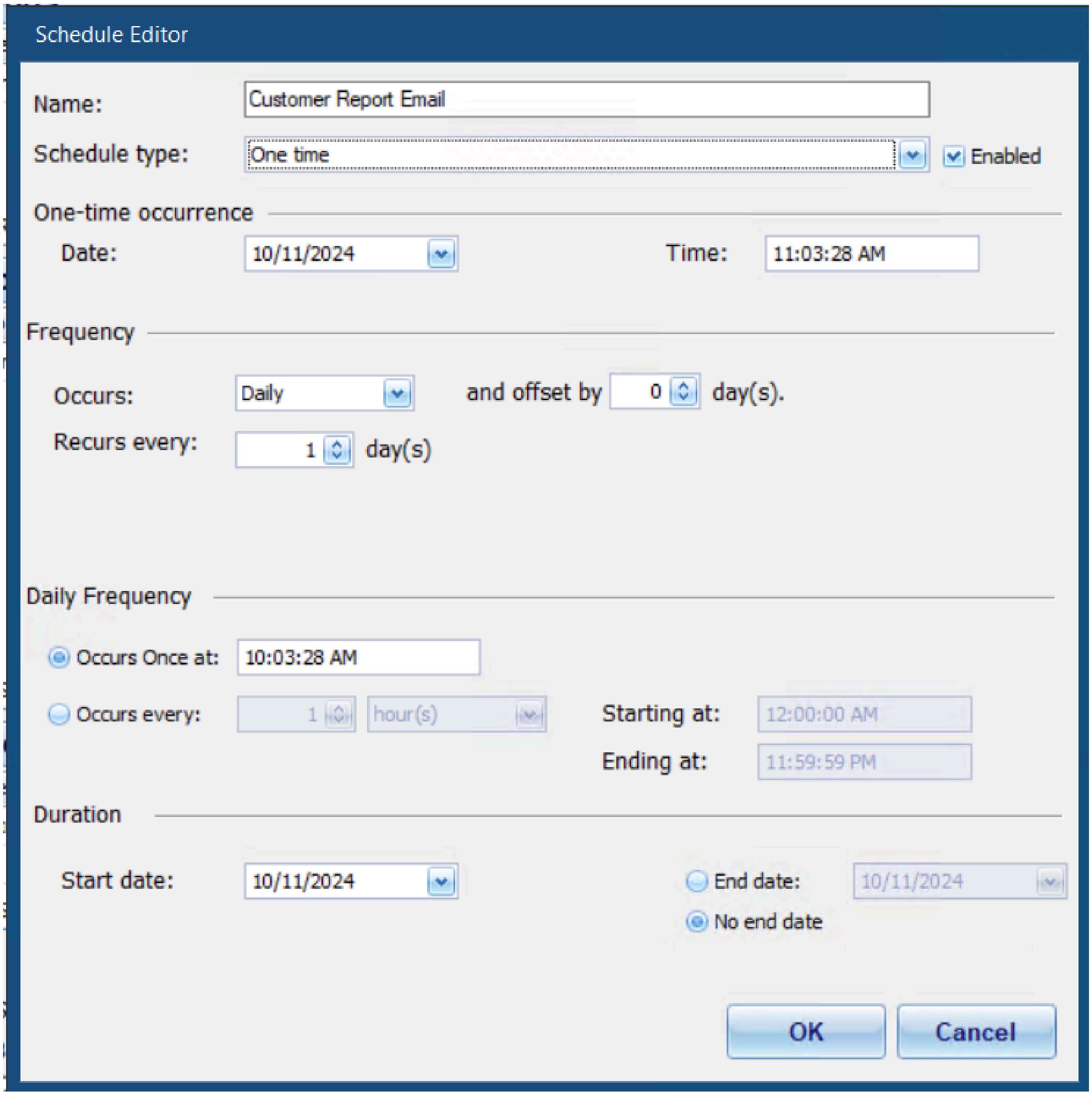
5. For a One-Time occurrence, define the date and time the job should run.

6. For Recurring jobs, set the Frequency values.

7. For Daily occurrences, define the time of day it will run or if it should happen several times during the day.

8. Finally, define the start and end dates for the recurring job.

9. Each time you run the job, the system will overwrite the copy saved to the designated folder.



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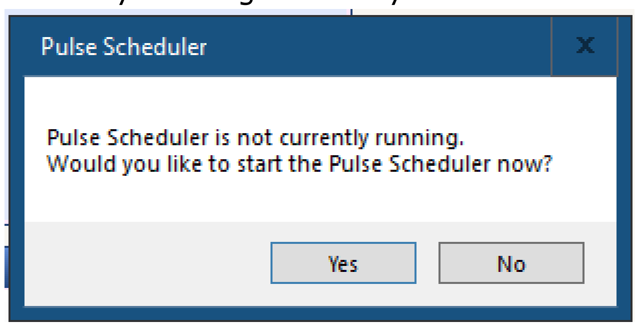
Add email subject and text to the body of the email

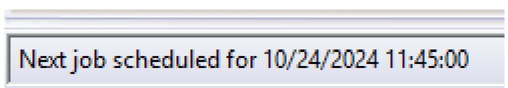
At the bottom, add the Email Subject and any information you would like to appear in the body of the email.

Click OK when you are done.

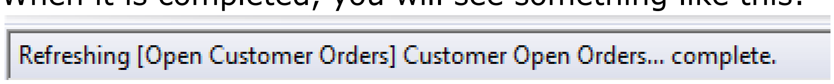
The first-time users save a job, they will get a message: Pulse Scheduler is not currently running. Would you like to start the Pulse Scheduler Now? - choose yes



In the lower-left corner of the screen, you should see when it will run next:



When it is completed, you will see something like this:



Check your output folder to validate that your report or file was created.

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Troubleshooting

Files created but with no values.	Check the filters on the job and ensure they are valid for all reports used in the job.
Error: “Specified argument was out of the range of valid values. Parameter name: value”	Check that you have defined the SMTP settings.
Not all reports from a tab have files created.	Remove the File Name Convention value and test again.
Files and emails were not created.	Check that the Scheduler is running on a workstation.

Please call our PULSE support desk with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

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Independent ERP and Macola® Specialists
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