

Setting Up Automatic Scheduled Reports in Pcounter Web Reports 3

**INTRODUCTION**

Pcounter Web Reports can be configured to automatically email reports or save to disk.

This document details how to connect PWR3 to a mail server and how to schedule the reports.

Reports can be emailed or saved to file.

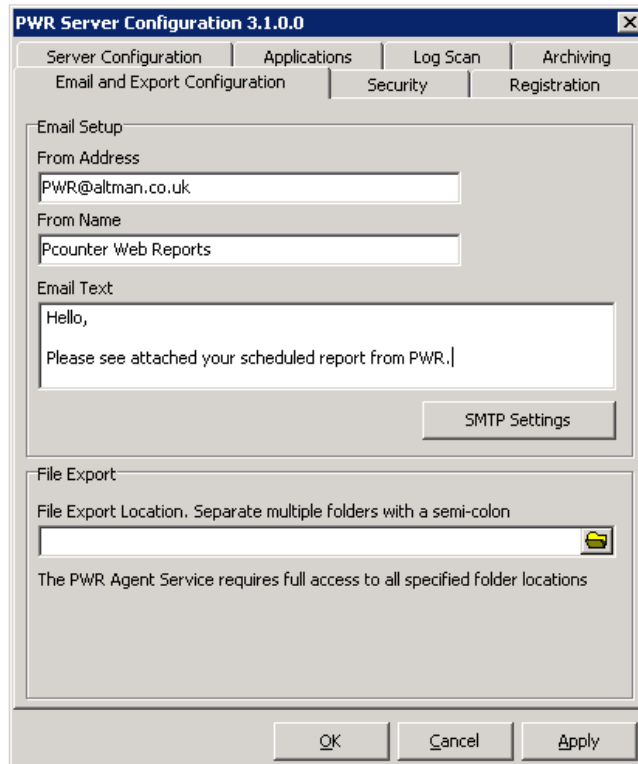
**Pcounter Web Reports 3 is available on a 60 day trial basis from our website:**  
<http://www.altman.co.uk/downloads/print-copy-management>

[Click here to access further How to Guides](#)

For Support  
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**1. Configure Mail or Export Settings**

The mail and export settings are accessed in the **PWR Server Configuration** application which is accessible via Start > Programs > Pcounter Web Reports on the PWR Server.



*Save to Disk*

Browse to the desired location of the files using the **File Export** control. Click **Apply** and **OK** to save these settings and restart the **PWRAgent** service.

*Emailed Reports*

The **From Address**, **From Name** and **Email Text** are entirely optional and free type. The From Address does not need to be a genuine email address.

Next press the **SMTP Settings** button.

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**Important**

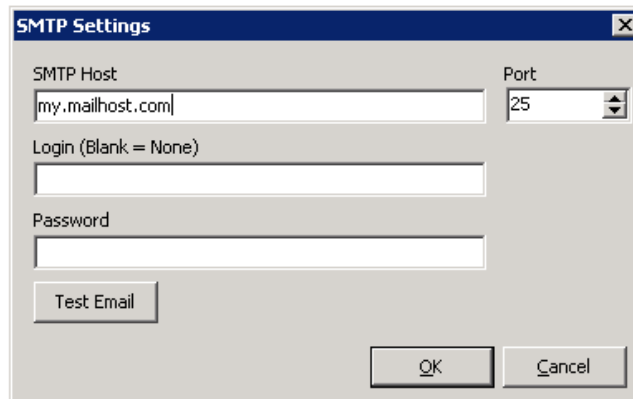
*Email*

At time of writing, neither **TLS** nor **SSL** communication is supported. This is expected in a later release. If your mail server requires communication in either of these protocols then **emailed scheduled reports will not work.**

If you have entered a **none-existent email address**, for the test to work you will need to change this to a genuine email address then change back once the test has been received.

*Save*

The account which is running the PWRAgent service needs a minimum of **Modify rights** to the destination directory.



Enter the relevant details into the new window. If your mail server does not require authentication leave the **Login** and **Password** boxes empty.

Clicking the **Test Email** button will send a test email from and to the **From Address** you previously entered.

Click **Apply** to save the settings. You will be prompted to restart the **PWRAgent** service. Confirm this.

**2. Scheduling a Report**

Each report is scheduled individually. To schedule a report, login to PWR3 as an **Admin User** and select **Reporting**.

Scheduling can be applied to a new report or to an existing report. To apply to an existing report select the report from your list of reports and click the **Edit** button:



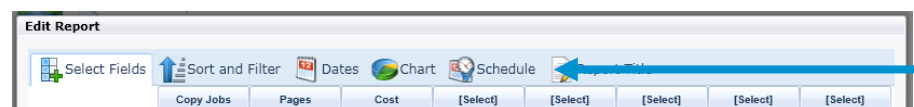
**Edit**

Change report output, chart and scheduling options

Best Practice Tips...

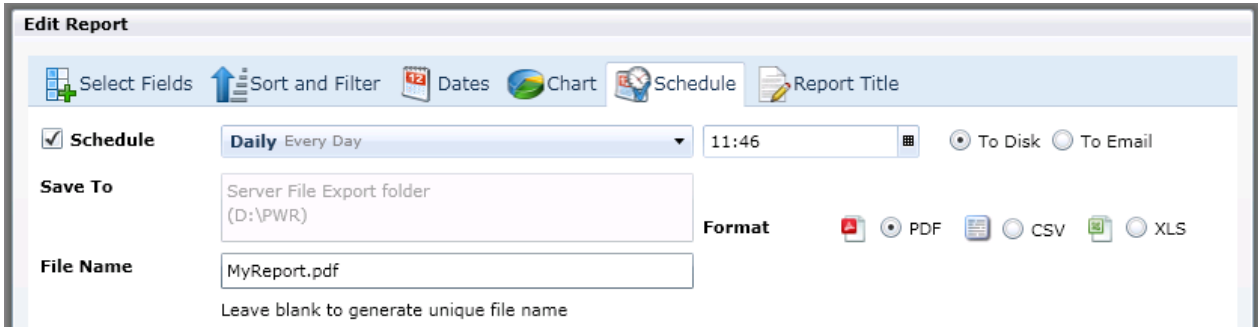
It is recommended to run a few tests to ensure that all the necessary details have been entered correctly.

When in the **Report Editor**, for either a new or an existing report, select the **Schedule** button.



## Setting Up Automatic Scheduled Reports in Pcounter Web Reports 3

### Save to Disk



**Edit Report**

Select Fields Sort and Filter Dates Chart Schedule Report Title

**Schedule** **Daily** Every Day 11:46  To Disk  To Email

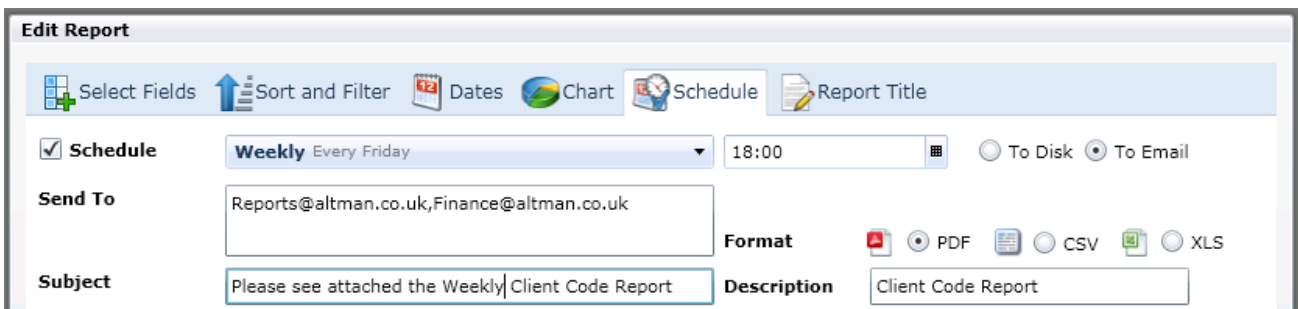
**Save To** Server File Export folder (D:\PWR) **Format** PDF CSV XLS

**File Name** MyReport.pdf  
Leave blank to generate unique file name

To schedule this report to save to disk:

- Check the **Schedule checkbox**
- Select the **To Disk** radio button
- Set the **frequency** of the report and the time which it is run using the drop-down boxes opposite
  - ❖ Choice of frequencies ranges from daily, weekly, quarterly, or specific day of the month.
- **Save To** will display your pre-defined destination folder
- Enter a **Filename** if desired, or leave blank for an auto-generated name
  - ❖ If a filename is entered, remember you **must also include the file extension**
- Select a **file format** from the selection on the right

### Email



**Edit Report**

Select Fields Sort and Filter Dates Chart Schedule Report Title

**Schedule** **Weekly** Every Friday 18:00  To Disk  To Email

**Send To** Reports@altman.co.uk, Finance@altman.co.uk **Format** PDF CSV XLS


**Subject** Please see attached the Weekly Client Code Report **Description** Client Code Report

To schedule this report to email:

- Check the **Schedule checkbox**
- Select the **To Email** radio button
- Set the **frequency** of the report and the time which it is run using the drop-down boxes opposite
  - ❖ Choice of frequencies ranges from daily, weekly, quarterly, or specific day of the month.
- Enter a valid address into the **Send To** control.
  - ❖ Multiple addresses must be separated by commas as above
- Select a **file format** from the selection on the right
- **Subject** and **Description** are optional

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Once the **Emailed** or **Saved** report has been configured, click one of the **Save** buttons. The scheduling information will now be displayed on the **Report options page**.



**Run Report**  
**Opens the report viewer in a new browser window**

Dates	All Dates
Selected columns	User Name, Copy Jobs, Pages, Cost
Schedule	PDF, Daily, Every Day 11:46:00