



## How to Set Up Scheduled Reports

### Applicable to SIMS .net version

7.106 onwards.

### Permissions required

You will need to be a member of any of the following User Groups in System Manager to run this function:

*School Administrator, System Manager.*

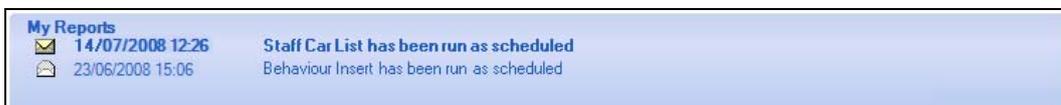
Please see your System Administrator/Manager if you are not sure whether you have the required Permissions.

### Introduction

This document is an extract of the equivalent Chapter in the *School Setup in SIMS .net* handbook and has been provided separately for those users who want to setup their systems to enable reports to be automatically run in SIMS .net.

Scheduled reports can be set up in SIMS .net to automatically run at specified times. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any behaviour incidences. It is possible to schedule these reports to run for both yourself and on behalf of other users.

Once created, the reports are stored on the Document Management Server and a link to the report is displayed on the applicable user's Home page in their **My Reports** panel as shown in the following graphic:



In order for these reports to work, a Windows Scheduled Task must be created to run the `AutoReports.exe` which produces the scheduled reports. This Scheduled Task must be set up on the SIMS SQL Server. In addition, applicable permissions must be assigned to required users in System Manager.

### Considerations

- In order to create the AutoReports Scheduled Task, you may prefer to create a network user account specifically for this purpose, together with a specific SIMS .net account for report scheduling.
- Any users who want to schedule their own reports, or schedule reports for others, will need both permissions to manage scheduled reports and permissions to run reports. They will also need access to any applicable data fields contained within the reports they wish to schedule.

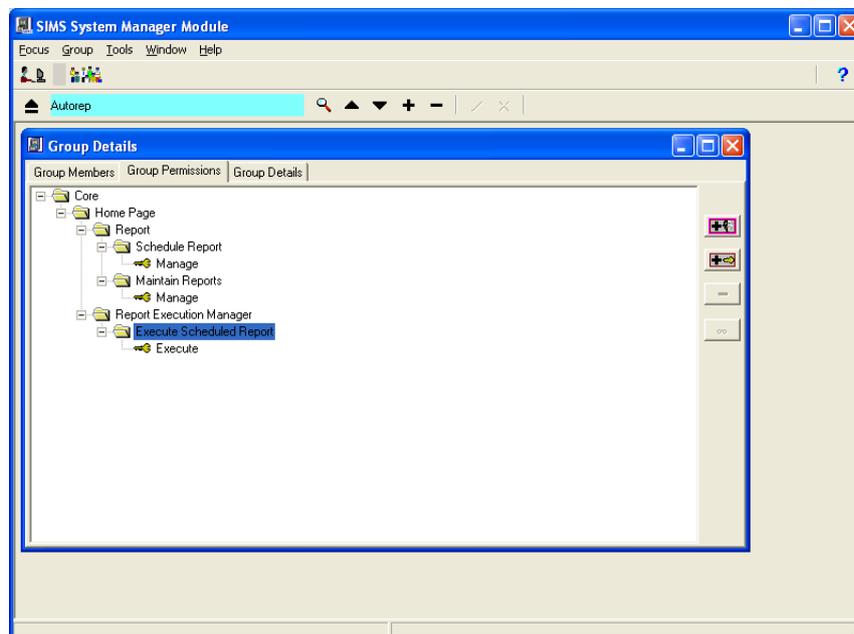
- Consider the frequency that the AutoReports Scheduled Task will run. The frequency of the task will take precedence over the frequency set up in the scheduled reports area of SIMS .net. For example, if the AutoReports Scheduled Task is set to run weekly, but the scheduled report in SIMS .net is set to run daily, the report will be run on a weekly basis. It is therefore advisable to set the AutoReports Scheduled Task to run on a daily basis to provide the maximum flexibility for other SIMS .net users.
- Consider the time that the AutoReports Scheduled Task will run. This will depend on the number of SIMS .net users who are likely to set up scheduled reports. If you have 20 SIMS .net users each setting up 10 reports to run each day, then the AutoReports Scheduled Task will generate 200 reports at the same time. It is therefore recommended that the task is run out of office hours, e.g. in the early hours of the morning.

However, this may affect the validity of the data in certain reports. For example, if a SIMS .net user wants to run a daily report listing pupil/students absent from morning registration, then the report must be run after such data is entered, e.g. after 9.30am. If the AutoReports Scheduled Task is set to run at 3am, then it will produce a report with data from the previous day. Therefore, consideration needs to be given to both the time that the task is set to run and the types of report that are produced.

## Assigning Permissions to Execute Scheduled Reports

To enable users to **Execute the Scheduled Reports**, they require additional permissions. There are specific permissions available from the **Group | Core | Home Page** area of System Manager.

1. In SIMS .net, click the **System** shortcut in the **SIMS Shortcuts** bar to open the **System Manager** module.
2. Click the **Close** button on the initial welcome page and click the **Group** button to open the **Group Browse** dialog.
3. Click the **Add** button and enter a unique **Group Name** for those individuals who will be granted access to run the AutoReports scheduler, e.g. Alerts Scheduled Reports.
4. Enter a unique **Code**, e.g. RepSched and click the **Save** button.
5. Click the **Apply Roles to Group** button and select the roles of the individuals who will be responsible for setting up the scheduling of AutoReports, e.g. School Administrator and System Manager.
6. In the **Group Permissions** tab, expand the **Core** folder and the embedded **Home Page** folder until the **Report Execution Manager** and **Execute Scheduled Report** permissions are displayed.
7. Click the **Add Permissions to the Group** button, expand the **Core** folder and the embedded **Home Page** folder until the **Report Execution Manager** and **Execute Scheduled Report** permissions are displayed.
8. Right-click the drop-down arrow adjacent to the **Execute Scheduled Report** permission and select **All access area permissions will be applied to this group** from the options displayed.
9. Click the **Save** button to save the permissions for the new group.



## **Other Permissions Required**

For users to run any of the scheduled reports, permissions for the following processes in SIMS .net is required:

- **Designing or Running a Report** - users must have sufficient access rights to design or run the existing report.
- **Document Management Server** - users must have sufficient rights to access the Document Management Server (DMS), to ensure that it is configured and running correctly. This permission is also required for running the report definitions and for storing the report outcomes on the Document Management Server.

## **Setting Up the Server to Run AutoReports.EXE**

Scheduling tasks can be a complex activity because there is no user interface to assist you through the process. We have therefore provided processes outlined in the following sections. This method will enable you to check permissions and the progress of the setup at each step. It assumes that your server is in a domain.

### **Step 1**

Create a Windows User Account, for example `MyDomain\AutoReportsUser`. This user needs access to the SQL Server hard drives, be able to log into SIMS and be a 'SIMS User' on the network. In addition to being able to access the server, this user should also be able to login to a sample workstation and run SIMS.

This user will have high level permissions to SIMS data (to ensure that all applicable reports can be un in SIMS .net) and hence it works better as an NT User, where the Network Administrators can manage the password and ensure that it complies with good passwording policies.

### **Step 2**

1. On a workstation, login to SIMS as a System Manager and run the System Manager application.
2. Create a new user for the `MyDomain\AutoReportsUser`. Ensure that the user name is `MyDomain\AutoReportsUser`.
3. Grant this user access to all of the permission groups. The reason for this is that this user may be asked to produce reports for every SIMS user in the school and will therefore need access to all the data in SIMS in order to successfully produce the reports.

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**IMPORTANT NOTE:** For obvious reasons, the compromise of this user's password would lead to a significant security issue within the school.

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### **Step 3**

1. Login to a workstation as `MyDomain\AutoReportsUser` and check that you can access SIMS .net and create/run reports.
2. Select **Focus | Alerts | Schedule Reports** and add a report to the report scheduler ensuring that **AutoReportsUser** is selected as the recipient. For more information on scheduling reports, please see the *Scheduling Reports to Run Automatically* section in the *Maintaining Pupil/Student Data* handbook which can be accessed by clicking **Other Handbooks** in the SIMS .net **Documentation** panel then selecting the appropriate title.
3. Go to the **Home Page**. Click the **Configure** button and ensure that the **My Reports** panel is selected. For more information, please see the *Configuring the Home Page* section of the *Maintaining Pupil/Student Data* handbook.
4. Ideally, password lock the machine and leave it on so that you can return and check that everything is working.

### **Step 4**

1. Login to the SQL Server as the `MyDomain\AutoReportsUser` user and ensure that the SQL Binn folder which contains the `AutoReports.exe` can be accessed.
2. Open a command prompt window and navigate to the SQL Binn folder, e.g. `C:\Microsoft SQL Server\MSSQL.1\MSSQL\Binn`.
3. Run `AutoReports.exe` which should return the following usage instructions in the command window:

```

C:\WINDOWS\system32\cmd.exe
C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn>autoreports.exe
SIMS.net Automated Report Generator 7.106
Parameters :
/U:ABCD           - ABCD is the SIMS user name
/P:ABCD           - ABCD is the SIMS password
/T               - Use Current Windows user
/S:SERVER         - SERVER is the name of the SQL Server
                  instance containing the SIMS database
/D:DATABASE       - DATABASE is name of SIMS .net database
/R:REDIRECTPATH  - REDIRECTPATH is the location of the SIMS .net
                  connect.ini file, e.g. C:\SIMS. <optional>
/?               - Display this help information

It is recommended you schedule the AutoReports.exe
in the Windows scheduler with the above parameters.

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn>

```

### Troubleshooting

If any errors are displayed, it may be caused by the SQL Applications not being up to date. If you are in doubt, run the following file:

```
S:\SIMS\SETUPS\SIMSSQLApplicationSetup.exe
```

(where S:\SIMS\SETUPS is the location of your SIMS File Server Setups folder).

Check that the location of the SQL installation, matches the folder that you are currently in. Faults are often traced to SIMS.INI pointing to the SQL 2000 instance previously in use.

### Step 5

In the command window run:

```
AutoReports♦/S:<Server Name>\Instance Name]♦/D:<Database Name>♦/T
```

Where the ♦ symbol represents a space.

For Example:

```
AutoReports♦/S:MyServer\SIMS2005♦/D:SIMS♦/T
```

From Control Panel, double-click the **Administrative Tools** icon then the **Event Viewer** icon then look at the **Application** event log. Check to ensure that the AutoReports.exe has run successful without any errors reported.

### Step 6

1. Return to the SIMS workstation and unlock it.
2. From the **Home Page** in SIMS .net, click the **Refresh** button to refresh the display. If all is well then the report scheduled to the **AutoReportsUser** should be displayed in the **My Reports** panel.
3. Click on the report hyperlink and make sure that it opens.

### Troubleshooting

If the report does not open, you may need to delete the scheduled report request and create a new one for the same report so that you do not have to wait until tomorrow before you can try again.

- If it is a school holiday ensure the skip holidays box is unchecked via **Focus | Alerts | Schedule Reports**.
- In addition, make sure that the MyDomain\AutoReportsUser can indeed run the report that was selected, i.e. they have applicable permissions to run reports and to the data contained within the report.
- You may also want to check that the Document Management Server is visible to the SQL server via **Tools | Setup | Document Server**. Click the **Test** button to test the connection.

### Step 7

1. Return to the Server.
2. Add a scheduled task to run autoreports with the parameters shown in Step 5. Please see *Setting up the AutoReports Scheduled Task* on page 5 for instructions. Sanity check the time of reports with server backup schedules. It is recommended that the scheduled task is set to Daily so that users requesting a report at the weekend will not be disappointed.
3. Log out and wait for the morning to ensure that the report has been produced at the scheduled time.

### Step 8

Schedule a report to be received by another SIMS user and check that the report has been received at the scheduled time.

### Step 9

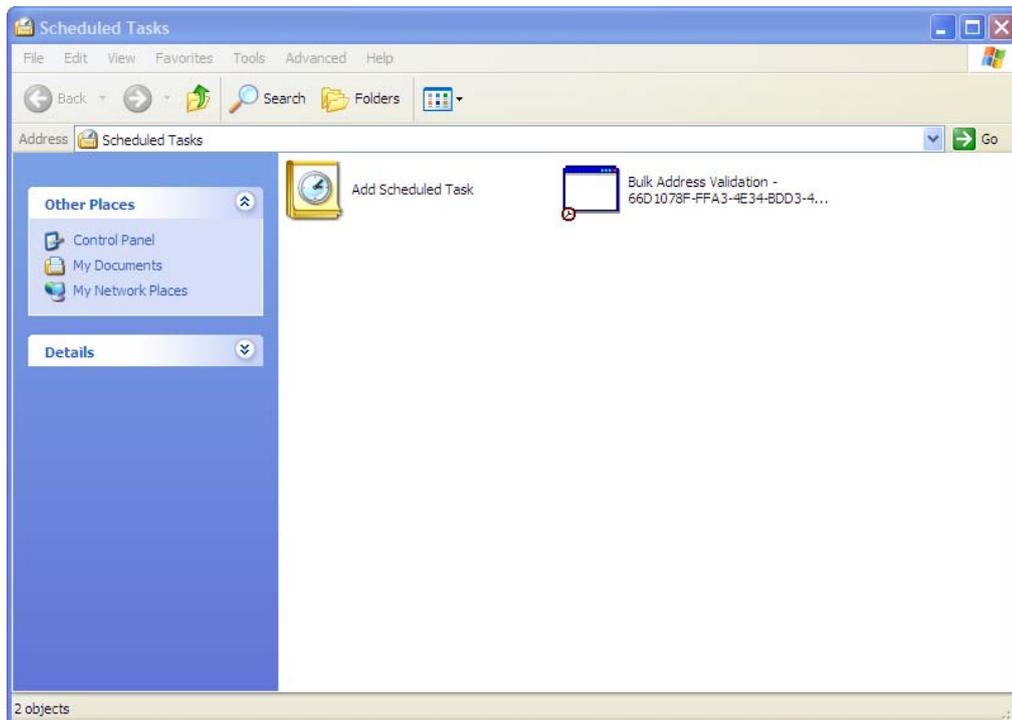
Advise users of the availability of this process. Users will need to add the **My Reports** panel to their **Home Page** to enable them to see reports that are created for them.

## Setting up the AutoReports Scheduled Task

Before being able to schedule reports in SIMS .net, a Windows® Scheduled Task must be created.

The Scheduled Task should be set up on the SIMS SQL server machine where the SIMS database is stored. The task will only run successfully if the Document Management Server and the SIMS SQL server machine are both available. Please ensure you have read the *Considerations* section on page 1 before proceeding.

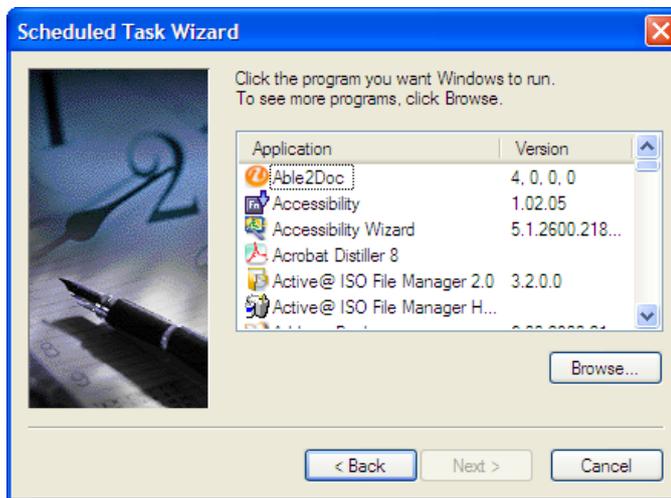
1. Select **Start | All Programs | Accessories | System Tools | Scheduled Tasks** to display the **Scheduled Tasks** window.



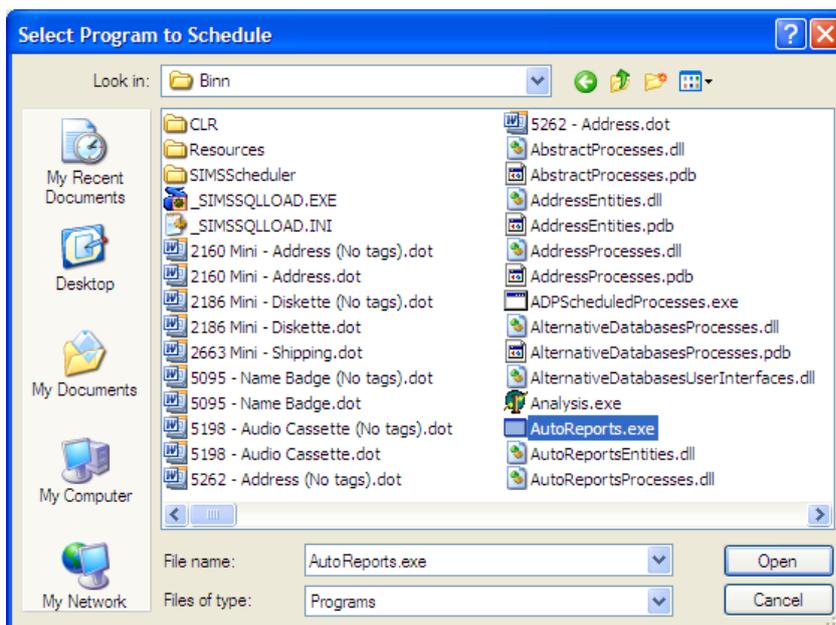
2. Double-click the **Add Scheduled Task** icon to display the welcome page of the **Scheduled Task Wizard**.



3. Click the **Next** button to continue.



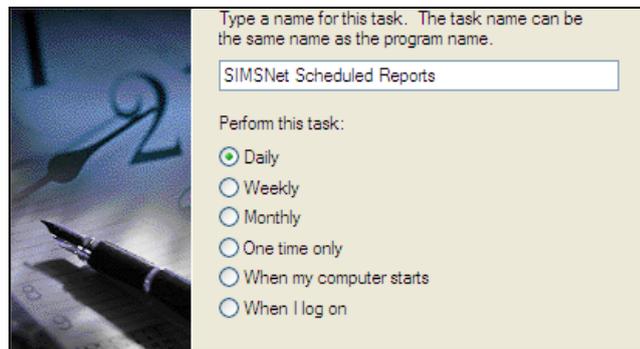
4. Click the **Browse** button to display the **Select Program to Schedule**. Navigate to C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn (where C:\ is the network drive with SIMS .net installed).



5. Highlight the AutoReports.exe and click the **Open** button to return to the **Scheduled Task Wizard**. The name of the selected file is displayed as the default name for the task.



6. Change the name of the task to clearly describe its purpose, e.g. SIMSNet Scheduled Reports. Select the appropriate radio button to indicate how frequently the task should be run, e.g. **Daily**.



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**IMPORTANT NOTE:** Ensure that frequency is set to the most frequent time span that reports will be scheduled in SIMS .net, i.e. Daily. Please see the Considerations section on page 1 for more information.

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7. Click the **Next** button to continue. The content of the next page will vary according to the radio button selected on the previous page, enabling you to select the detail of the task frequency. The following graphic shows the settings for **Daily**:



8. The **Start time** defaults to the system time set on your PC. This time can be changed by clicking the **Up** and **Down** arrows until the required time that you want the task to run is displayed.
9. Select the appropriate radio button to indicate when to **Perform this task**. If you select the **Every** radio button, specify the interval between days by clicking the **Up** and **Down** arrows and selecting the required frequency, e.g. every **2** days.
10. The **Start date** determines the first date that the Scheduled Task should run and defaults to today's date. Set the date as required by clicking the drop-down arrow and selecting an alternative date from the **Calendar**.
11. Click the **Next** button to continue.



12. The **Enter the user name** field is populated automatically from your Windows login name. If you have created a specific Windows account for creating the AutoReports Scheduled Task, enter it here. Alternatively, enter your Windows password in the **Enter the password** field and then re-enter it in the **Confirm password** field.
13. Click the **Next** button to continue.  
A summary of the task you have just created is displayed. Ensure that the time, frequency and start date of the task are listed correctly.

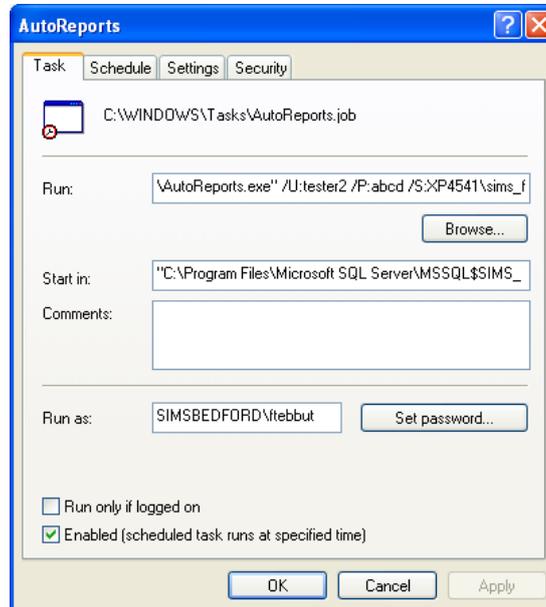


14. Once the task has been created, the advanced properties need to be edited as described in the next section. Select the **Open advanced properties for this task when I click Finish** check box then click the **Finish** button to create the Scheduled Task.

## Editing the Scheduled Task Properties

Once the Windows Scheduled Task has been created, various additional parameters need to be added.

1. After the **Finish** button has been clicked in the previous step, the **<Scheduled Task Name>** dialog is displayed. If you need to edit these parameters in the future, open the scheduled task by selecting **Start | All Programs | Accessories | System Tools | Scheduled Tasks** to display **Scheduled Tasks** window, right-clicking the task name and selecting **Properties**.



The **Run:** field will display the following:

"C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\AutoReports.exe" ' (Where C: is the drive of your SIMS installation.)

2. At the end of the **Run** field, enter the following parameters:

◆/U:username◆/P:password◆/S:machinename\SIMS◆/D:databasename

The ◆ symbol denotes a space which must be included as shown. The following table describes the purpose of each parameter.

Parameter	Example	Purpose
/U:	e.g. grosgr	The SIMS .net user name of the individual running the Scheduled Task. This should be a user who has permissions to all the applicable data in SIMS .net (please see the <i>Considerations</i> section on page 1 for more information).
/P:	e.g. abcd	The SIMS .net password of the individual running the Scheduled Task.
/S:	e.g. XP4541\SIMS	The name of the SQL Server instance containing the SIMS .net database.
/D:	e.g. SIMS	The name of the SIMS .net database
/T:		Logs in using the current Windows User. If you have created a specific windows account for the purpose of report scheduling, add this parameter to use that user's login credentials.

An example of a completed run time parameter is as follows:

"C:\Program◆Files\Microsoft◆SQL◆Server\MSSQL◆1\MSSQL\Binn\AutoReports◆exe" '◆/U:grosgr◆/P:abcd◆/S:XPLT5370◆/D:SIMS

3. Click the **OK** button to save these settings.

## Selecting Reports for Scheduling

Before scheduling any reports to run in SIMS .net, you should consider the following in order for the reports to run successfully:

- Ensure that you have applicable permissions to the data contained within the required report. If this is not the case, the scheduled report will be created, but you will be unable to open the report.
- Consider the validity of the report. Your System Administrator can advise what time of day scheduled reports will run. This is likely to be out of school hours, although this is not always the case. If you want to schedule a daily report, you will need to consider the content of that report. For example, if you are scheduling a report listing pupil/students who were absent at registration, the report will be produced at the time set by the System Administrator. If this is in the early hours of the morning, the report will be produced before today's data is entered and will therefore show yesterday's data (which may be acceptable to you).

For information on setting up scheduled reports, please refer to the *Scheduling Reports to Run Automatically* section in the *Maintaining Pupil/Student Data* handbook.

### For more information, please refer to:

- *School Setup in SIMS .net* (double-click **Schools** on the SIMS .net **Documentation** shortcuts panel.
- For access to all available help sheets, please click **Documentation** on the SupportNet home page (<http://support.capitaes.co.uk>), then select **Help Sheets** from the **Categories** drop-down list.

## Training courses

For information on training courses, please contact your SIMS Support Provider.

## Providing feedback on this help sheet

If you have any suggestions or comments about this or any of our other help sheets, please email [helpsheets@capita.co.uk](mailto:helpsheets@capita.co.uk).

## Help sheet revision history

Doc. Version	Change Description	Date
1119-001	Initial Release	26/08/08