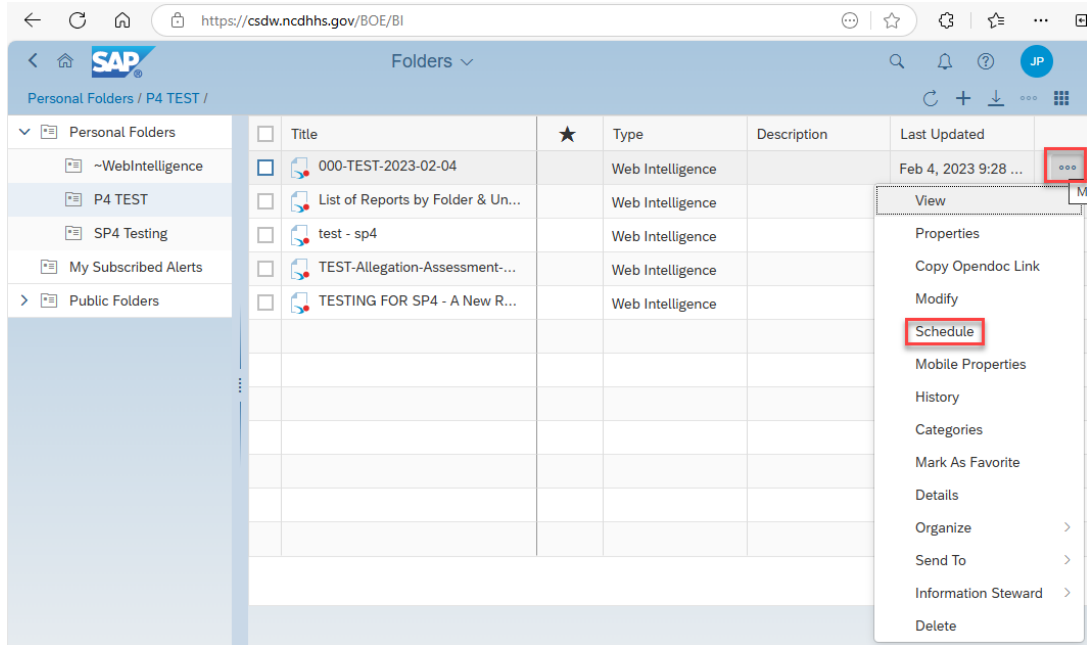


County Instructions for Scheduling a Report to a Specific File Destination

Follow the steps in this document to schedule a CSDW report and have the report output to a remote FTP server to be accessible to a user as an Excel or CSV file. This document covers the “how to” for the situation in which counties want to schedule reports automatically so they can download the output file(s) from an FTP server.

- 1) Go to the folder where the report is located and find the report.
- 2) Please click 3 dots at the far-right side and select “**Schedule**” from the drop-down menu. In the bottom, right-hand corner of the screen is the “Schedule” button. **Do Not** click the schedule option until after you have set all your parameters.



This will open the ‘Schedule’ window:

The screenshot shows the 'Schedule' configuration window. It has a tabbed interface with 'General' and 'Report Features' tabs. The 'General' tab is active, showing fields for 'Instance Title' (with a sub-label 'Title*') and a text input field containing 'Schedule Demo'. Below this is a 'Destinations' section with a yellow 'Add' button and a 'Selected Delivery Destinations' list containing 'File System'. The 'Recurrence' section includes a 'Run Report' dropdown set to 'Now', an 'Allow Retries' toggle set to 'OFF', and an 'Events' section with a 'Wait For' field and a 'Trigger' dropdown. The 'Scheduling Server Group' section includes a 'Default Server' dropdown set to 'Use first available server' and a 'Run at origin site' toggle set to 'OFF'. At the bottom right, there are 'Schedule' and 'Close' buttons.

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3) To schedule a report for a “one-time” single run at a single time of your choosing:

- Under the **“General”** menu (at the top), find the **“Recurrence”** section
- To run the report immediately, select “Now” from the “Run Report” drop-down.
- To run the report later at a different time, select “Once” from the “Run Report drop-down, then choose the desired date and time using the calendar icon on the right side. Choose the same time for both “Start Date” and “End Date” fields.
- Skip to # 6) and continue with the instructions.

The screenshot shows the 'Recurrence' section of a report scheduling interface. It includes a 'Run Report:' dropdown menu set to 'Once'. Below it are 'Start Date:' and 'End Date:' fields, both containing 'Apr 24, 2025, 3:15:36 PM' and featuring a calendar icon on the right. At the bottom, there is an 'Allow Retries' section with a radio button set to 'OFF'.

4) To schedule the report on a recurring basis, (i.e., daily, weekly, or monthly):

- Under the **“General”** menu (at the top), find the **“Recurrence”** section
- Select “Recurring” from the “Run Report” drop-down.
- If you wish the report to run daily or every selected number of days, select “Daily” from the “Repeat” drop-down and enter a number in the “Every” field to indicate how many days between reports. Example: enter a 1 for every day, a 2 for every two days, and so on.
- To run a report on a weekly basis, select “Weekly” from the “Repeat” drop-down and click on the day of the week on which you want the report to run.
- To run a report monthly, select “Monthly” from the “Repeat” drop-down and select the number of months between each report from the “Every” drop-down
- For all the above recurrence types, use the calendar icon to select the start date. The end date, by default, will be ten years from the current date, but you may use the calendar icon to select the desired end date.
- Example screenshots are provided for the weekly and monthly recurrence types.
- Skip to # 6 and continue with the instructions.

The screenshot shows the 'Recurrence' section for a weekly report. The 'Run Report:' dropdown is set to 'Recurring'. The 'Repeat:' dropdown is set to 'Weekly'. Below it, the 'On:' section shows a row of days (Su, Mo, Tu, We, Th, Fr, Sa) with 'Tu' (Tuesday) highlighted. The 'Start Date:' and 'End Date:' fields both show 'Apr 24, 2025, 3:15:36 PM' and 'Apr 24, 2035, 3:15:36 PM' respectively, with calendar icons on the right.

The screenshot shows the 'Recurrence' section for a monthly report. The 'Run Report:' dropdown is set to 'Recurring'. The 'Repeat:' dropdown is set to 'Monthly'. Below it, the 'Every:' field is set to '1'. The 'Month (s)' field is empty. The 'Start Date:' and 'End Date:' fields both show 'Apr 24, 2025, 3:47:05 PM' and 'Apr 24, 2035, 3:47:05 PM' respectively, with calendar icons on the right.

5) To schedule the report so it will run on a recurring basis using a pre-defined “calendar”.

(**NOTE:** In this example, it is assumed that you wish to run a report that uses NC FAST data.)

- Under the “General” menu (at the top), find the “Recurrence” section.
- Select “Calendar” from the “Run Report” drop-down.

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- c) From the “Calendar” drop down select the appropriate NC FAST calendar. For example, NC FAST Daily Calendar.
- d) By “Start Date/Time:” set the time to run to be 12:05 am. Set the start day to be tomorrow’s date. You can leave the default value on the End Date (10 years in the future).

Recurrence

Run Report:

Calendar

Calendar Name:

NC FAST Daily Calendar

Start Date:

Apr 24, 2025 12:05:41 AM

End Date:

Apr 24, 2035, 2:08:41 PM

Allow Retries

OFF

Calendar:

April 2025

14		1	2	3	4	5
15	6	7	8	9	10	11
16	13	14	15	16	17	18
17	20	21	22	23	24	25
18	27	28	29	30		

May 2025

18				1	2	3
19	4	5	6	7	8	9
20	11	12	13	14	15	16
21	18	19	20	21	22	23
22	25	26	27	28	29	30

Show Selected Scheduled Date(s)

- e) Continue with the instructions below.

NOTE: At the earliest, the NC FAST reports run shortly after midnight. The reports will not run until the NC FAST ETLs have completed. Upon completion of the ETLs a trigger (aka an event) is placed on the Event Server. The ETLs are designed to not drop the trigger until at least 12:15 am. The ETL process will delete the trigger daily at 5 pm. The report **MUST** be scheduled to run prior to the receipt of the trigger/event. At 12:05 am the report “wakes up” and starts looking for the trigger/event and will run when it sees the trigger/event added to the Event Server. If there is a trigger/event already there when the report wakes up the report ignores the trigger/event and will not run.

- 6) If the report requires input, then these must be provided by selecting the “Prompts” option under “Report Features” menu (at the top) and modifying the value(s). If there are no prompts in the query, there will be no option to modify the prompts for scheduling.

Prompts

☒ Use prompt values from source document

Schedule Demo

Name	Answered Values
*Enter value(s) for Service Code	Values will be retrieved from the source document at run-time

Delivery Rules

☐ The scheduled content has been successfully refreshed and is not partial. If this condition is not met, return the following status:

☒ Warning

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- 7) To change the format of the report from Web Intelligence to Microsoft Excel or CSV, find the “Formats” section under the “Report Features” menu (at the top), change the default in the drop-down menu from “Web Intelligence” to “Microsoft Excel - Data” or “Comma Separated Values (CSV) - Data”.

Schedule

General ▾ Report Features ▾

Formats

Comma Separated Values (CSV) - Data ▾

- Web Intelligence
- Microsoft Excel - Data
- Microsoft Excel - Reports
- Adobe Acrobat
- Comma Separated Values (CSV) - Data
- Comma Separated Values (CSV) Archive - Reports
- Plain Text
- HTML Archive

☐ The scheduled content has been successfully refreshed and is not partial. If this condition is not met, return the following status:

☒ Warning

- 8) To schedule the report with an event (i.e., to force the scheduling of the report to wait until after the NC FAST daily ETL is finished):
- a) Click on the “General” tab at the top and find the “Events” section (below “Recurrence”)
 - b) Click on the search icon in the right corner of the “Wait For” field (looks like a pair of overlapping boxes). This will bring up the “Select Events” search box.

Schedule

General ▾ Report Features ▾

Recurrence

Run Report:

Calendar:

Calendar Name:

Start Date:

End Date:

Allow Retries

☐ OFF

Events

Wait For

Trigger

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- c) Drill into the “System Events” folder and select the checkbox next to “NCFast_Tables_Loaded”
- d) Click the “Add” button at the bottom-right corner. This will close the “Select Events” pop-up window and add the “NCFast_Tables_Loaded” event to the “Wait For” field.

The screenshot shows the 'Schedule' dialog box with the 'Recurrence' tab selected. The 'Run Report:' section shows 'Calendar' as the selected calendar, 'NC FAST Daily Calendar' as the calendar name, and 'Apr 25, 2025, 12:05:05 PM' as the start date. The 'End Date' is 'Apr 24, 2035, 3:47:05 PM'. The 'Allow Retries' section has a radio button for 'OFF'. The 'Events' section shows 'Wait For' with a dropdown menu. The 'Select Events' window is open, showing a list of events. The 'System Events' folder is expanded, and the 'NCFast_Tables_Loaded' event is selected with a checkbox. The 'Add' button is highlighted in red.

Title	Description
BW Events	Contains BW Events
Crystal Reports Events	Folder containing the objects that represent alerts within a Crystal report
Custom Events	Contains Custom Events
Monitoring Events	Folder containing the objects that represent alerts within Monitoring
System Events	Contains Schedule Events and File Events
NCFast_Tables_Loaded	This is a file based event. Upon completion of the NCFast ETLs the file ncfast_tables_loaded.trg is placed in the drop box. This event is used with the NCFast calendars in scheduling reports.
NCFast_Tables_Loaded_Oracle	This is a file based event. Upon completion of the NCFast ETLs the file ncfast_tables_loaded.trg is placed in the drop box. This event is used with the NCFast calendars in scheduling reports.

Selected Items: NCFast_Tables_Loaded X

Add Cancel

9. Set the CSDW FTP server as the destination of the report.
 - a) Find the “Destinations” section (just above “Recurrence”) and click the “Add” button. This pops up the “Destinations” dialog box.
 - b) Uncheck the box next to “Default Enterprise Location” and select “File System” instead. Click the “Confirm” button to close the Dialog Box and populate the “Selected Delivery Destinations” field.
 - c) Click “File System” in the “Selected Delivery Destinations” field. This re-opens the “Destinations” dialog box with the correct fields visible.
 - d) For Directory enter the following: [\\CSDWFTP\csdwftp\dhhs\ncfast\county\countyname](#) (where *countyname* is the full name of the county with no spaces, e.g. *NewHanover*)
 - e) **DO NOT** enter a User Name or Password.
 - f) Under **Target Name**, select “Use Specific Name”. Enter “%SI_NAME%.%EXT%” (without the double-quotes) in the File Name field. This will give the report on the server the same name as it has in the BO folder, and it will create the extension based on the chosen format (note

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the checked box next to “Add file extension” – leave it checked). Also please click the “Placeholder” drop-down and select the “Date and Time” option.

g) Click the “Confirm” button to save your choices.

The screenshot shows the 'Schedule' window with the 'Destinations' tab active. The 'File System' destination is selected. In the 'Target Name' section, 'Use specific name' is chosen, and the 'File Name' field contains '%SI_NAME%.%EXT%'. The 'Add file extension' checkbox is checked. The 'Add Placeholder' dropdown menu is open, showing 'Date and Time' as the selected option. The 'Confirm' button is highlighted in red.

h) Once all parameters have been set, click the ‘**Schedule**’ button in the bottom right-hand corner of the Schedule window.

The last section of this document explains how to access the CSDW FTP SSL server.

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FTP Information

If you have not been given access to the CSDW FTP SSL server, it can be requested through a help desk ticket directed to the CSDW team; it will be one of the DBAs on the team who grants access. We will need **the names and NCIDS of the individuals** who will be accessing the ftp folder.

Once we have given you access to the server you can access it using any of several ftp clients. Please use the latest versions as security fixes are critical and must support TLS 1.2 or TLS 1.3. Below is a list of tested clients:

- WinSCP free at URL: https://winscp.net/eng/docs/guide_install
- curl free at URL: <https://curl.haxx.se/download.html>
- Filezilla free at URL: <https://filezilla-project.org/download.php>
- WS-FTP Pro purchase needed at URL: <https://www.ipswitch.com/secure-information-and-file-transfer/wsftp-client>

You will need the following to connect:

- Server Name:** csdwftp.ncdhhs.gov (old server csdwftp.dhhs.state.nc.us has been phased out by DHHS ITD and is no longer valid)
- Port:** 21
- Authentication:** STARTTLS or TLS
- UserId:** NCID@ eads or eads \NCID (This depends on the client you are using)
- Password:** NCID password
- CSDW uses ports 5200-6000 for the data channel for passive mode FTP. Please ask the customer network team responsible for Firewall rules in your organization to allow ports 5200-6000 to the CSDW FTP server at csdwftp.ncdhhs.gov.