



Report Scheduler v1.0.0.87

User Manual

Report Scheduler - Registered Version

NEW SAVE REPORTS RUNNING REFRESH VIEW REPORT MANUALLY SEND REPORT E-MAIL SETTINGS EXIT APPLICATION

Report Format: NATIVE DOCUMENT CRYSTAL REPORT Export Report

Report Description: DEMO TEST REPORT

Export Interval: DAILY WEEKLY MONTHLY Time for Scheduled Export: 11:42:00 Last Export: Friday, 03/26/2010 11:42:00

Report Location: C:\DEMO_CRYSTAL_REPORT.rpt

Export Location: C:\DEMO_CRYSTAL_REPORT.pdf

Email List: useremail@email.com
* List Seperate E-Mails with Comma's


Subject: DEMO TEST CRYSTAL REPORT

Message Body: DEMO TEST CRYSTAL REPORT

... RECORD SAVED ...

Export	Subject	Export Time	LastExport
Checked	DEMO TEST CRYSTAL REPORT	11:42:00	03/26/2010 11:42:00
Checked	DEMO TEST WORD DOCUMENT	11:40:00	03/26/2010 11:40:00

USEFUL TIPS



v1.0.0.87 | REPORTS PROCESSING NOW...

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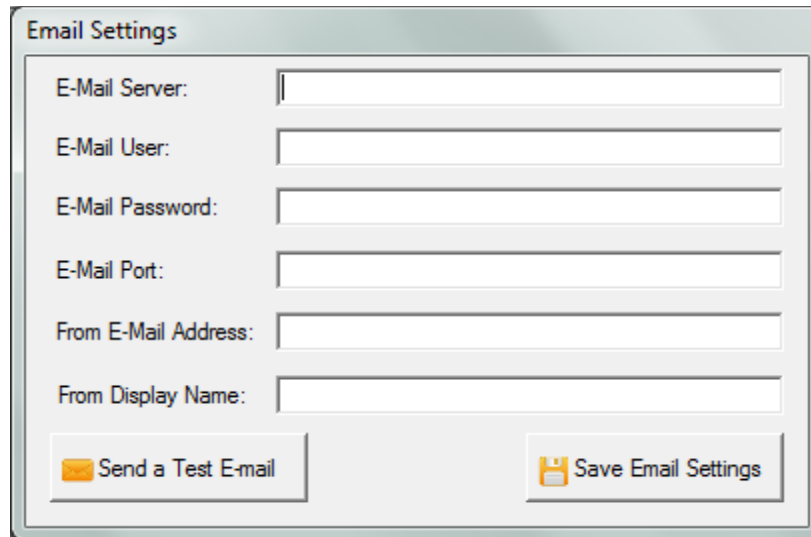
<http://ezsoftware-creations.com>

Thank you for downloading the Report Scheduler Software. We hope that this user manual will help you get started easily with your new software and get you on your way to sending out Crystal Reports and other Documents.

Initial Setup Directions

The first thing you will need to do for the software to work correctly and register correctly will be to setup your email settings.

- Go to “E-mail Settings” on the menu bar and you will see the following screen:



The screenshot shows a dialog box titled "Email Settings". It contains the following fields and buttons:

- E-Mail Server: [Text Input Field]
- E-Mail User: [Text Input Field]
- E-Mail Password: [Text Input Field]
- E-Mail Port: [Text Input Field]
- From E-Mail Address: [Text Input Field]
- From Display Name: [Text Input Field]
- Buttons: "Send a Test E-mail" and "Save Email Settings"

- Here you will need to enter your home or work email settings. (NOTE: You do not need have an email software installed on the machine but you do need a valid email account.)

E-Mail Server

- Your Email server may be any address that is valid for sending email, such as:
 - SMTP.windstream.com
 - SMTP-server.triad.rr.com
- It could also be a Microsoft Exchange Server address

E-mail User:

- This may be a full email address or just a user name, depends on your email provider.

E-mail Password

- Your email password

E-mail Port

- This is typically set to 25 on most email servers, check with you email provider.

From E-mail Address:

- This can be any email address you are allowed to send from (if a Microsoft Exchange account), in most cases this will be the same as the email address that belongs with the login.

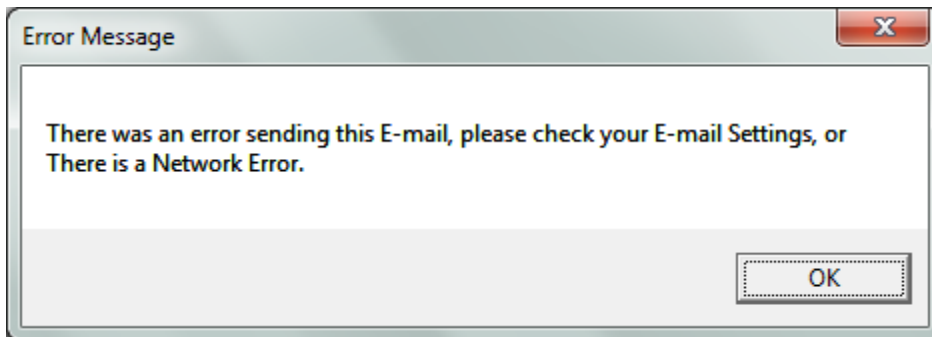
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From Display Name

- This can be set to any name you would like. Some examples would be:
 Report Scheduler
 Information Services
 Automated Report Service

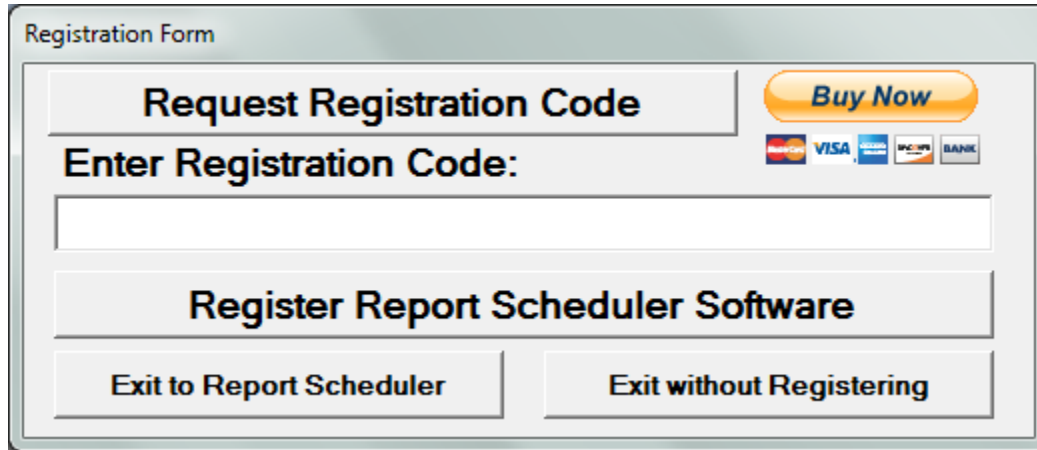
At this point, you should click on “Send a Test E-mail”.

After clicking this button, you will either get an error message (pictured below), with red text in the button that says “Test E-mail Not Sent” or the test will turn green and say “Test E-mail Sent”:



Registering Your Software

You may register your software at anytime but you do have a 15 Day trial. You will notice a blue “Register Now” button that will take you to the Registration window.

A screenshot of a software registration window titled "Registration Form". The window has a light gray border and contains several elements: a button labeled "Request Registration Code" on the left; a yellow button labeled "Buy Now" on the right; a text label "Enter Registration Code:" followed by a small icon strip containing logos for MasterCard, VISA, American Express, and BANK; a large empty text input field below the label; a large button labeled "Register Report Scheduler Software" centered below the input field; and two buttons at the bottom: "Exit to Report Scheduler" on the left and "Exit without Registering" on the right.

When you get to this screen you can click “Request Registration Code” and if it sends correctly, then you will see it change to “Request Sent” and the button will be disabled.

Then you would need to purchase the software before getting the Registration Code. Click the “Buy Now” button and you will be taken to a PayPal webpage to process your payment.

You need to purchase your software and use the same e-mail address that you have in your email settings because this will match with the Registration code that was sent for verification.

You will receive the Registration Code by e-mail when the payment is received.

You can exit back to Report Scheduler and go to the main window or you can Exit without Registering and it will close the program.

If the code does not match or the email does not send you will have a message about it and notification in the button code.

Choosing Report Format

You will need to choose if your report format is a NATIVE DOCUMENT such as Word, Excel, etc OR CRYSTAL REPORT format so that it will send out correctly.

Viewing Crystal Reports and Documents

You can click on “View Report” to view the currently selected Crystal Report.

You will open a new window that will show the report where you can print, export, and view the report.

Manually Sending a Report

You can click on “Manually Send Report” at anytime. It will send the currently selected report.

Refreshing the Report List

The “Refresh” button just refreshes the list of reports at the bottom, if needed.

Creating a New Schedule

When you create a new schedule, the reports will stop running and you will be notified. You must click on the button that says “REPORTS STOPPED” to start the reports again.

This is necessary so that you do not get blank schedules trying to send.

You can also stop reports at anytime by clicking “REPORTS RUNNING” and you will see the test change to “REPORTS STOPPED”

Useful Tips

You will see useful tips on the bottom right side. This will show useful tips in each part of the form to let you know what it is used for, etc.

Schedule Options (Daily, Weekly, Monthly)

- **DAILY**

When you select this, the last exported date will change to the previous day. This is necessary so that when the schedule runs it will know to send the next day.

- **WEEKLY**

When you select this, the last exported date will change to 7 days prior. This is necessary so that when the schedule runs it will know to send the next week on that day. NOTE: You can manually change the previous week to the day you need to.

For example, if you want it to send on 12/6/2009, Sunday. Then you would change the date on last exported to 11/30/2009, Sunday.

- **MONTHLY**

When you select this, the last exported date will change to the previous month. This is necessary so that when the schedule runs it will know to send the next month on that day. NOTE: You can manually change the previous month to the day you need to.

For example, if you want it to send on 12/1/2009. Then you would change the date on Last Exported to 11/1/2009