SQL-RD - SSRS Reports Scheduler

Software Features

This document only outlines the main features of SQL-RD

– please contact us to arrange a demo to see every feature in action.

Call +1 888 781 8966 or email info@christiansteven.com today!

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Event Based Schedules

Distribute SSRS Reports based on events & triggers

Distribute SSRS Reports and respond to your business needs by setting schedules to run based on events and triggers rather than date. Add real-time monitoring to your SSRS Reports distribution process with SQL-RD's Event Based Schedules, reports are fired off when events occur e.g. database value is present, file is modified, window is open, an email is received, etc. SQL-RD makes sure the reports are created and distributed on time and error-free. Just what you want from a SSRS Data Driven Automation.

Event Triggers

Database Record Exists

Apply to new database records only, or to any matching database records.

Database Record Has Been Modified

Choose to include New (Inserted) records and Deleted records. Use this for follow-ups by selecting to only match the condition if the record has been (or not been modified) in x minutes. Repeat the action every x minutes until the condition is no longer true, or run just once.

Unread email is present

Monitor a POP or IMAP mailbox for new emails. Forward or Redirect. Delete mail after processing. Read the body text and other mail sections (sender email, subject, etc.) and use the values to populate report parameters, email addresses, etc. For example, send the report to the sender of the email.

File Exists

Use this trigger to respond to the existence of a new file in a local or network folder.

File has been Modified

Great for monitoring log files, but works equally well for all other types of local or network files.

Process Exists

Great for monitoring for certain key processes on your machine. If those process are not running then SQL-RD can automatically restart them.

Window is Present

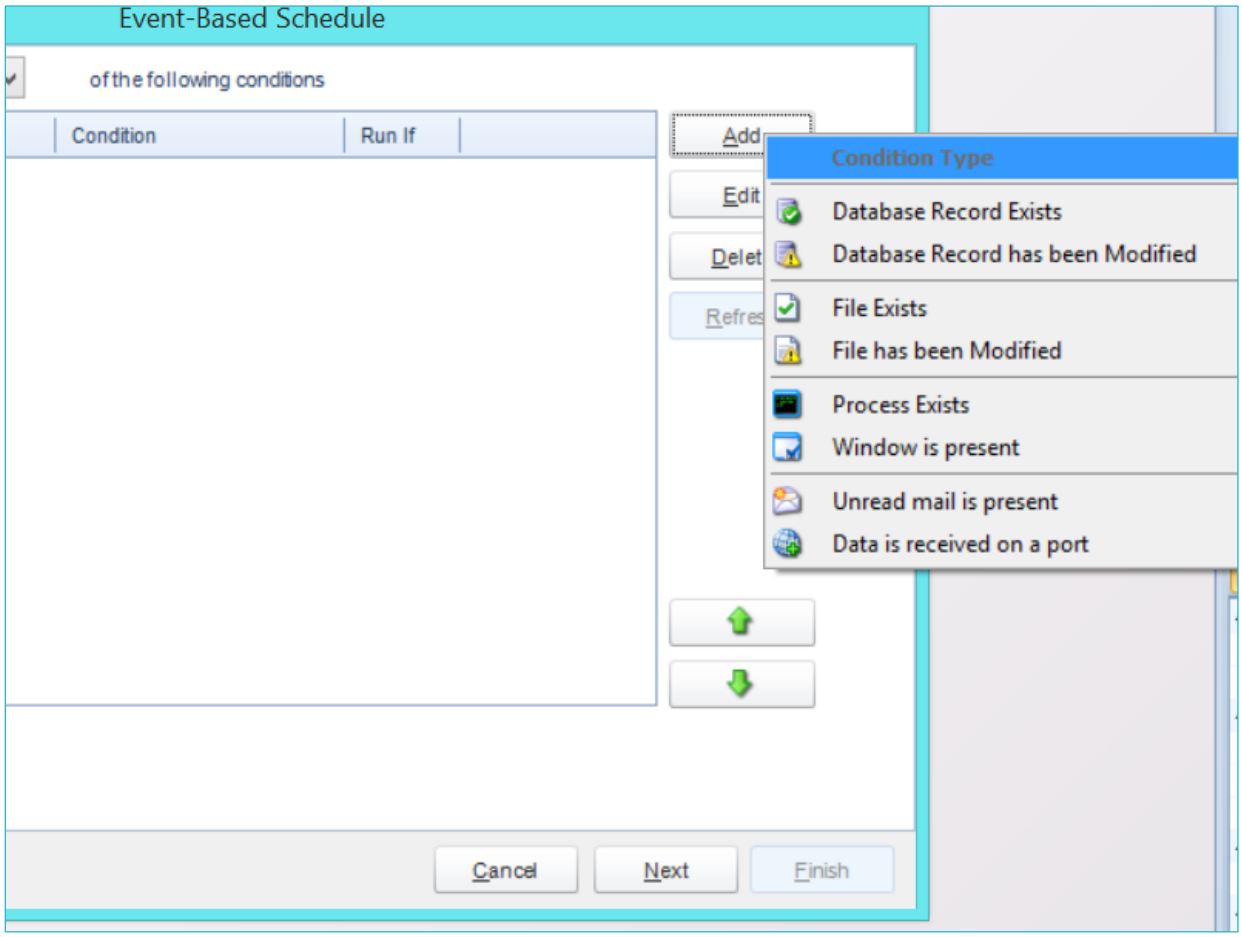
Use this to monitor for open Windows

Data is received on a Port

SQL-RD can monitor specified ports for data and then execute tasks such as reports or database updates.

Event Triggers

Fire off reports when a defined system event occurs.



Single & Package Schedules

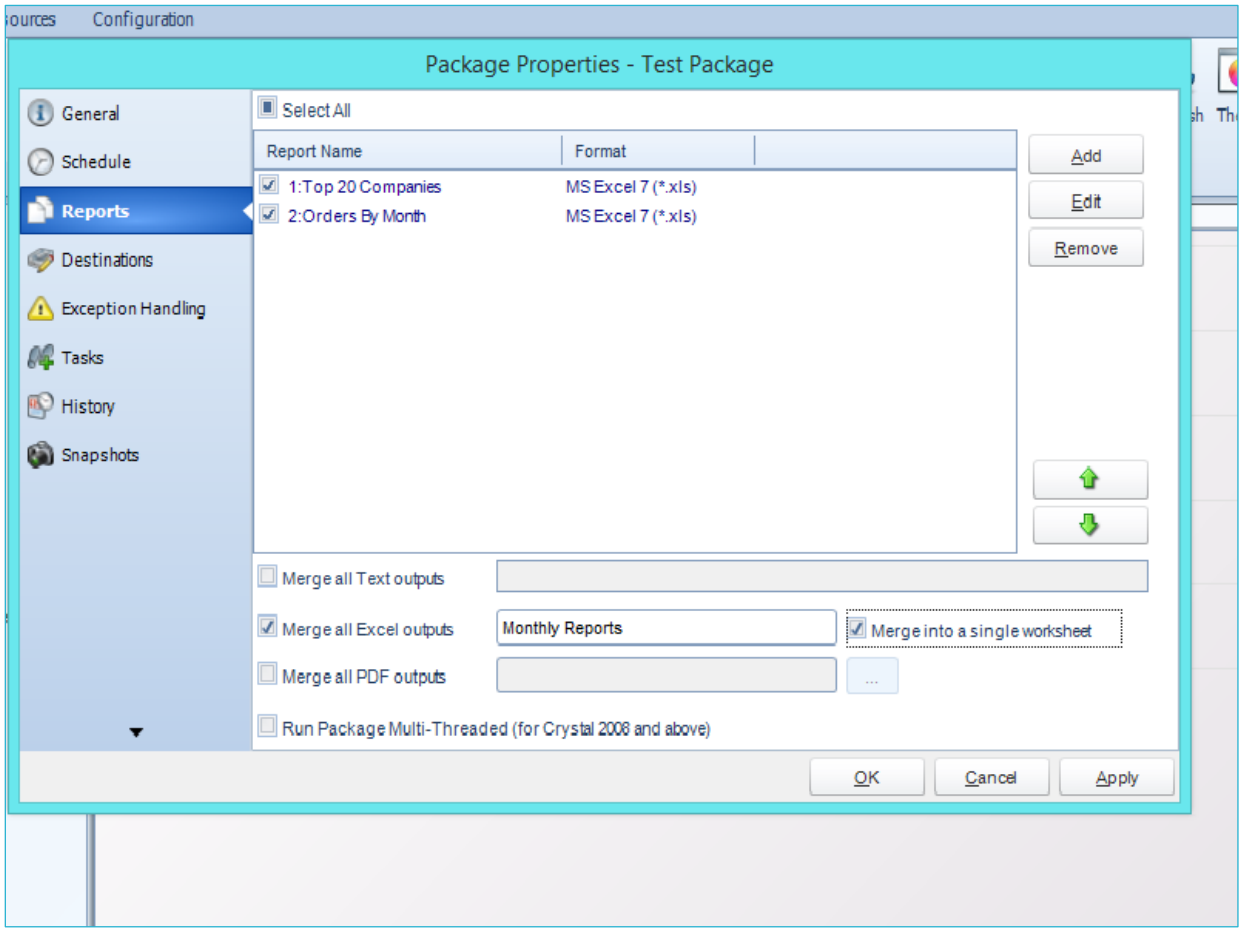
Schedule single or packages of reports

A single report is set to generate at specified intervals: hourly, daily, weekly, etc. It is exported to a specified format. The exported file may be delivered to one or more destinations.

Package reports are for delivering more than one report to one or more destinations at the same time. For example, package reports may be delivered to a client via email. Each report may be an attachment or reports may be merged together.

Create a Package of Reports

A report pack can be sent to a client with all reports compressed into a single zip file, or merged into one Excel workbook.



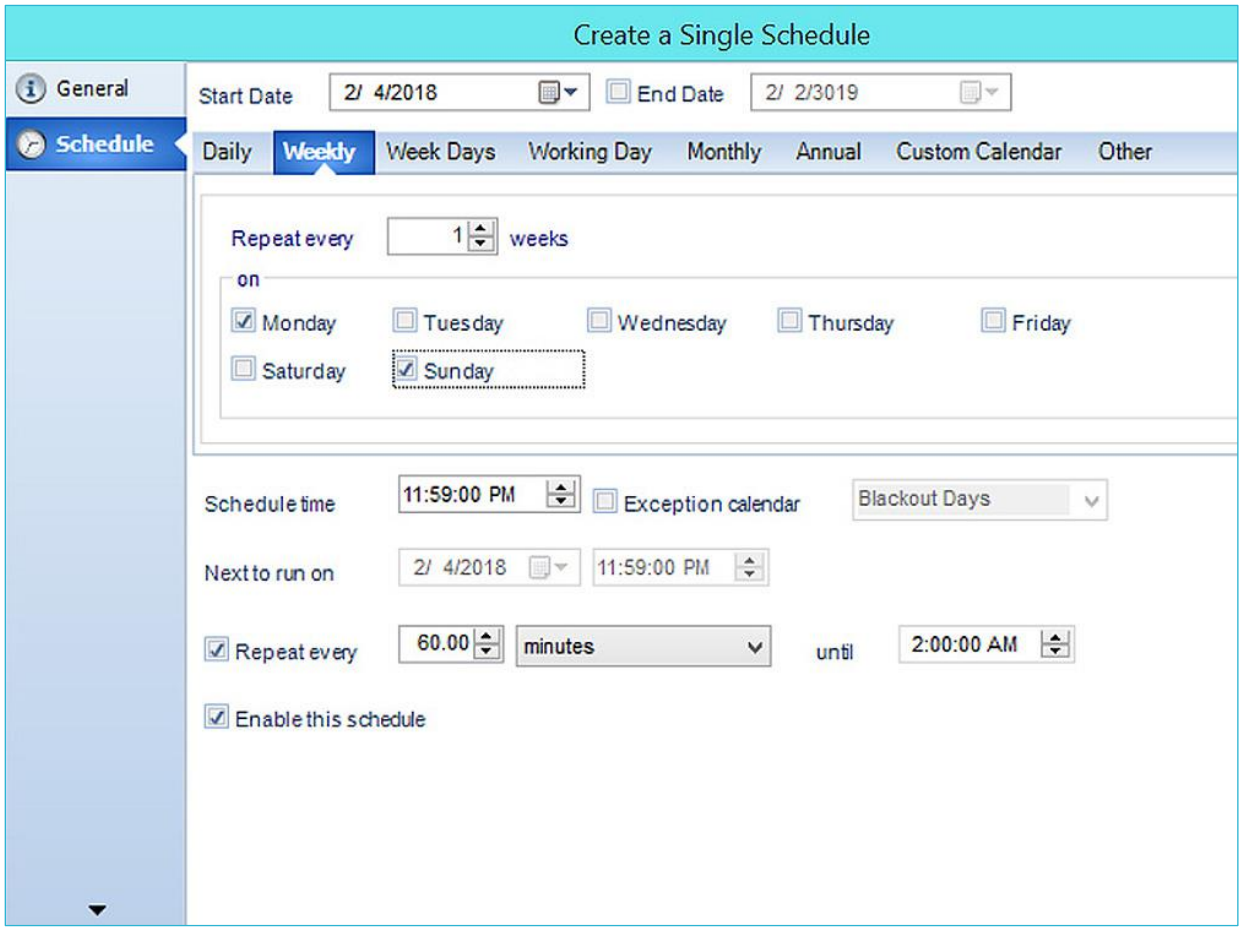
Date & Time Scheduling

Schedule SSRS Reports to run at a specific date and time

It's easy to schedule SSRS Reports to run at a specific date and time, or to run them hourly, daily, weekly, or monthly or set up your own custom frequencies e.g. 4-4-3, every other day, third Monday of the month, and so on. And the same report can be scheduled to be run multiple times with different parameters, formats, frequencies, and destinations. It makes SSRS Reports scheduling simple, hassle-free and convenient for you.

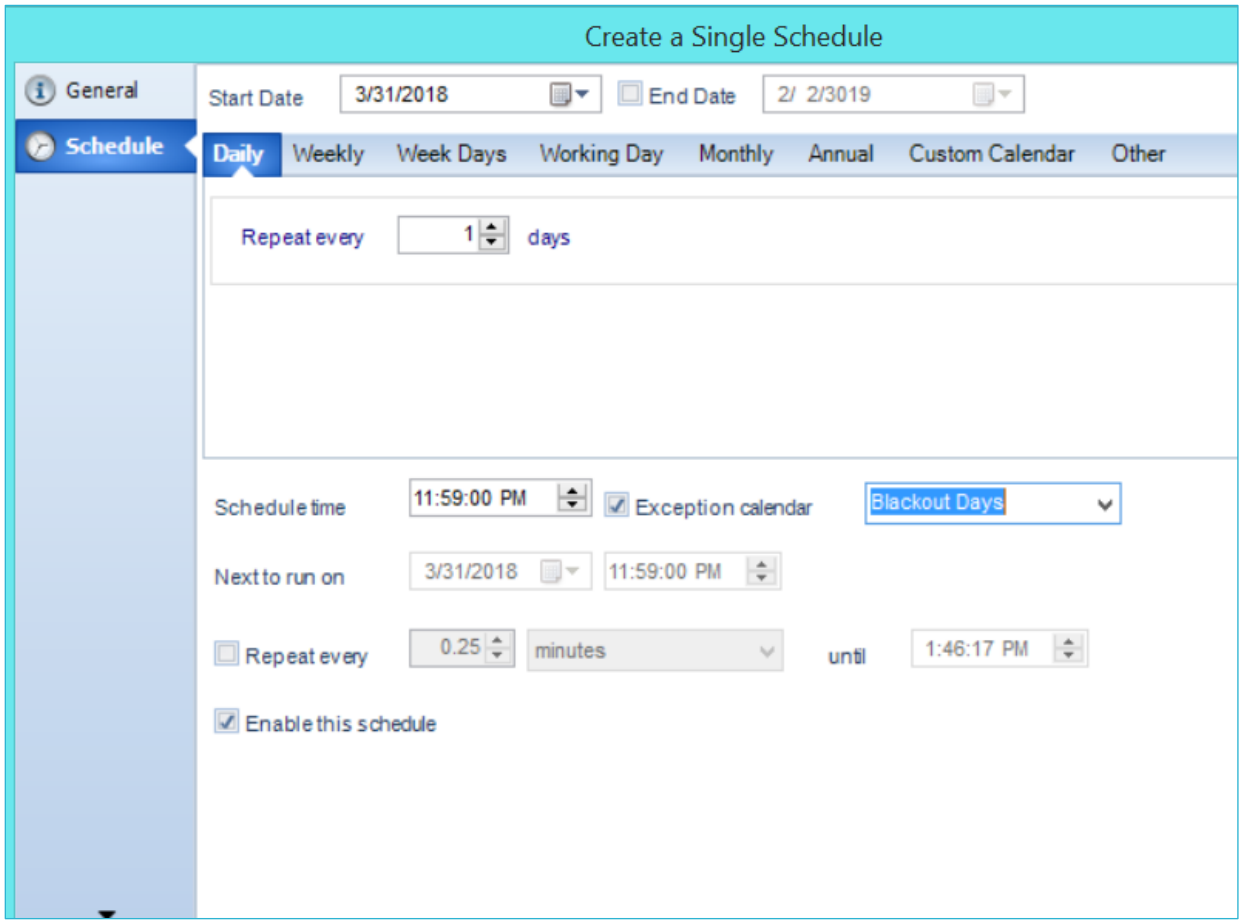
Create your desired scheduling frequency

Set a schedule weekly on a Sunday and a Monday at a set time. Repeat the schedule every x minutes until a certain time.



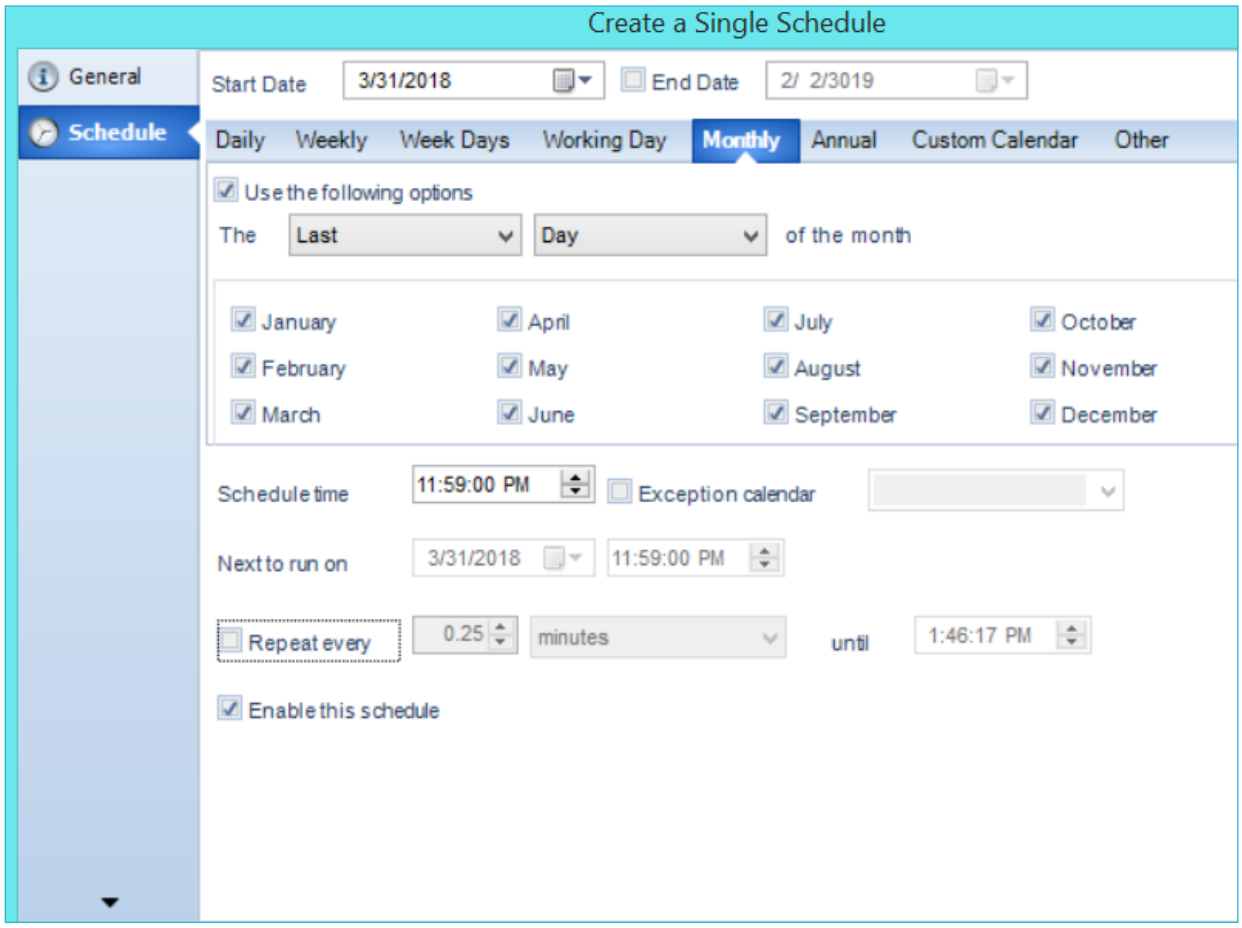
Schedule an SSRS Report to run daily

Schedule a report to run every day at a set time excluding specific days by using exception calendars.



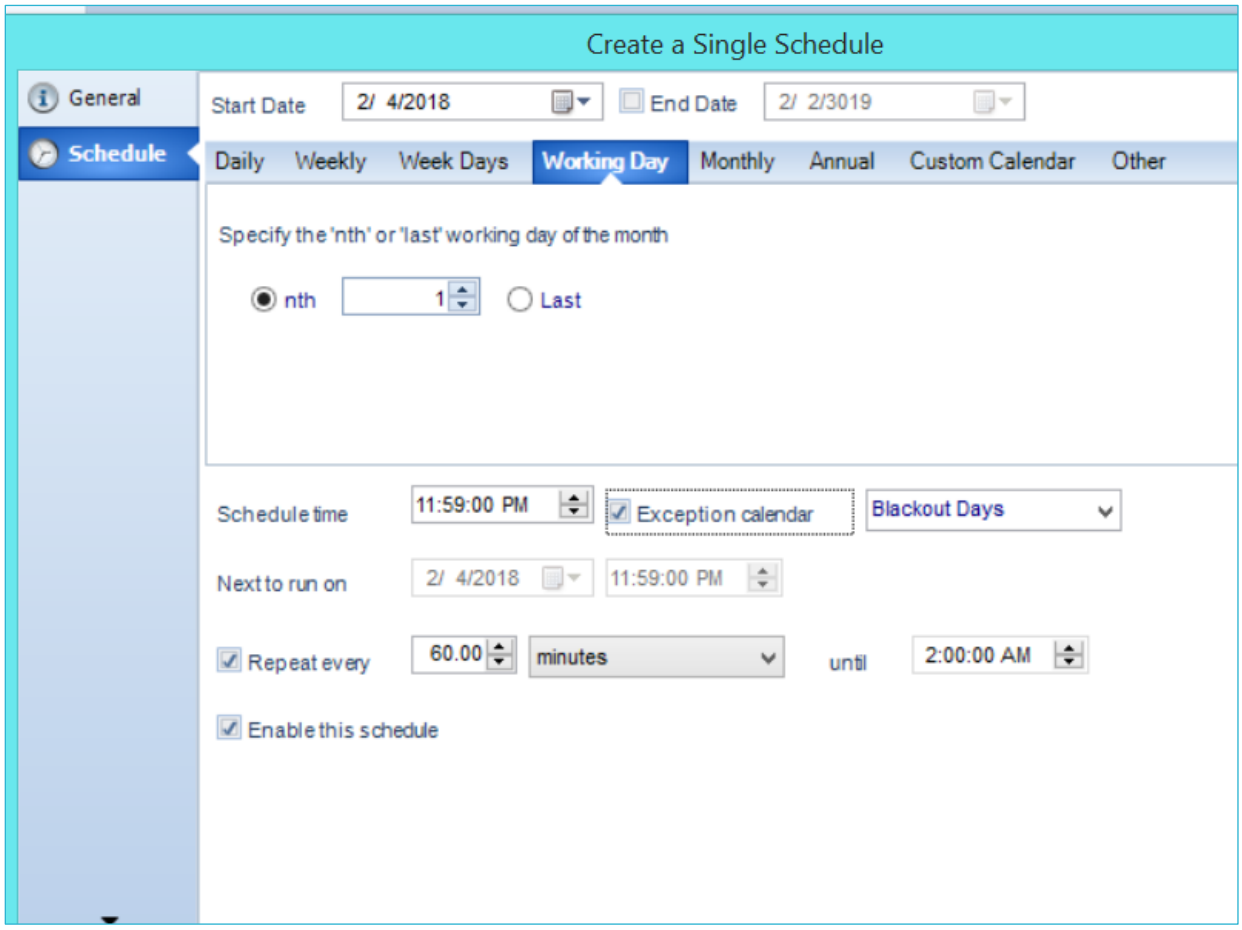
Schedule your Month End SSRS Reports

Schedule a report to run the last day of every month at a set time.



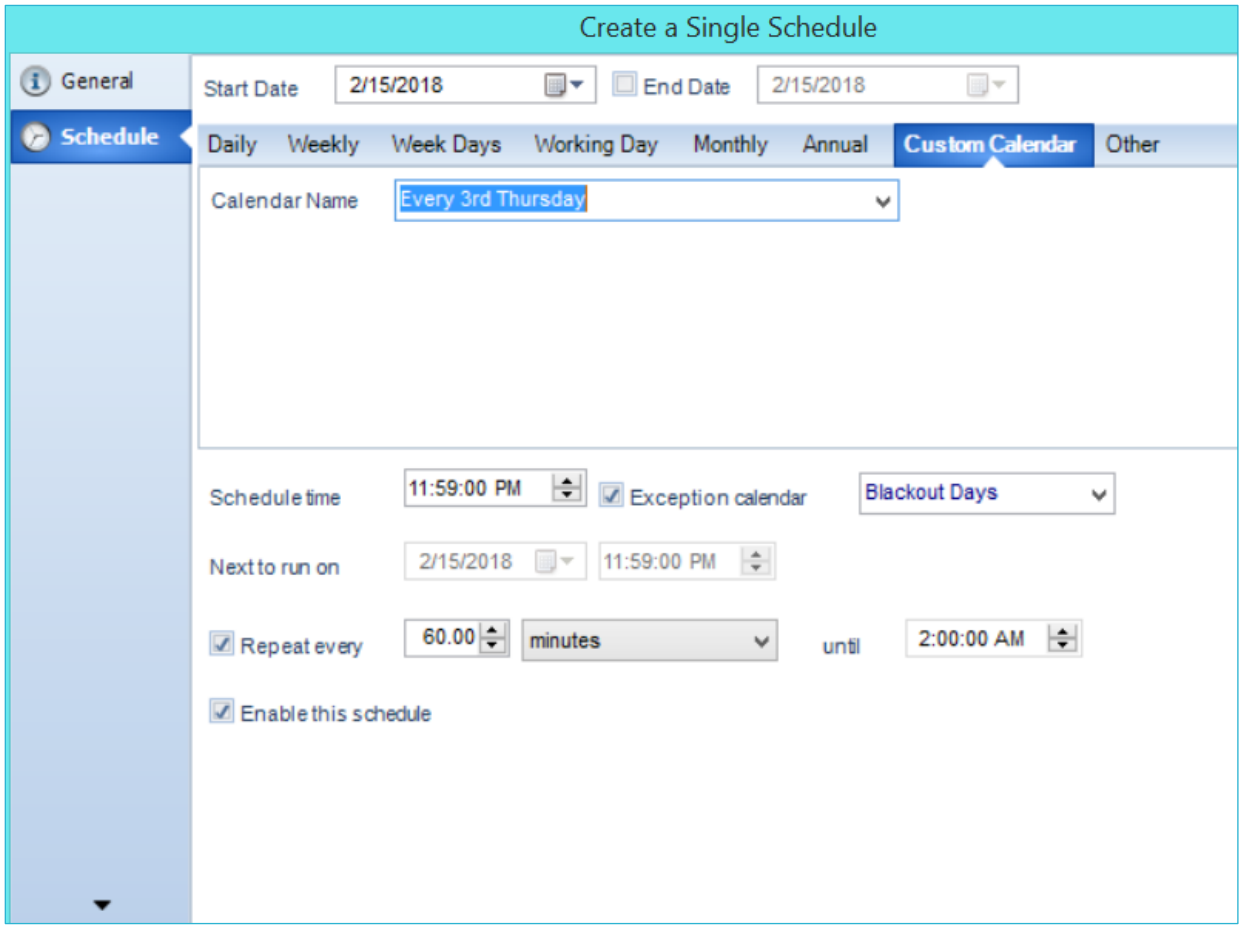
Schedule SSRS Reports for the 1st day of every Month

Schedule an SSRS report on the 1st day of every Month except for certain user specified dates.



Run SSRS Reports on your own schedule

Can't find what you need? Use Custom Calendars to set your own business driven scheduling frequency, e.g. 4-4-3.



Dynamic Schedules & Packages

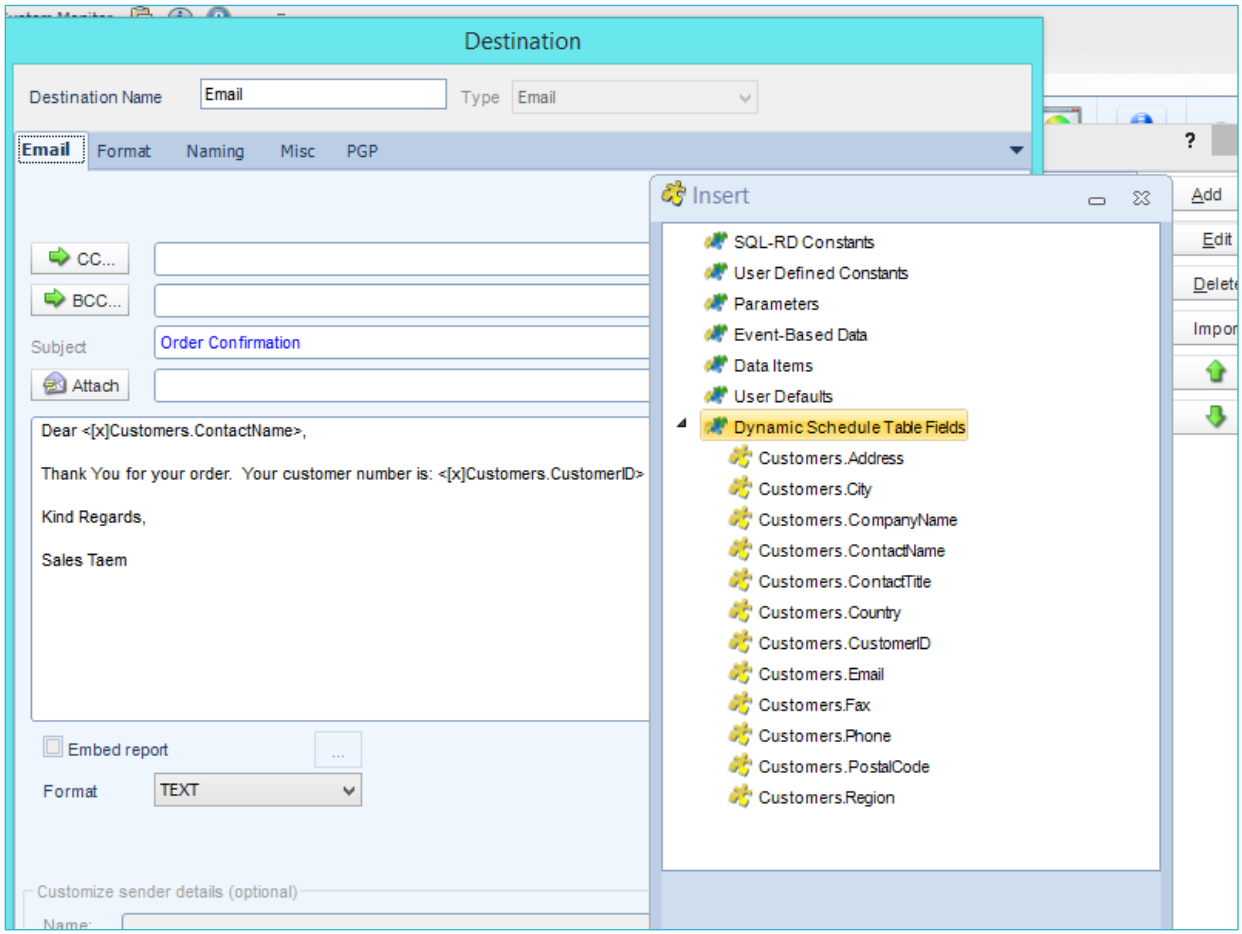
Use SQL-RD's unique Dynamic & Data-Driven Schedule processes

Use Dynamic Schedules to export multiple instances of the same report. For each instance, SQL-RD will automatically enter the required parameter values, export the report and deliver the results to the corresponding email, folder, FTP, printer or fax. The parameters and destination are read from your own database. For example, run the same report for dozens of clients without writing a schedule for each client.

Dynamically generate and deliver individualized export packages for multiple recipients using the same set of reports. Dynamic Schedules for Packages! For example, you can use the same set of reports to generate individual monthly report packages for all your clients.

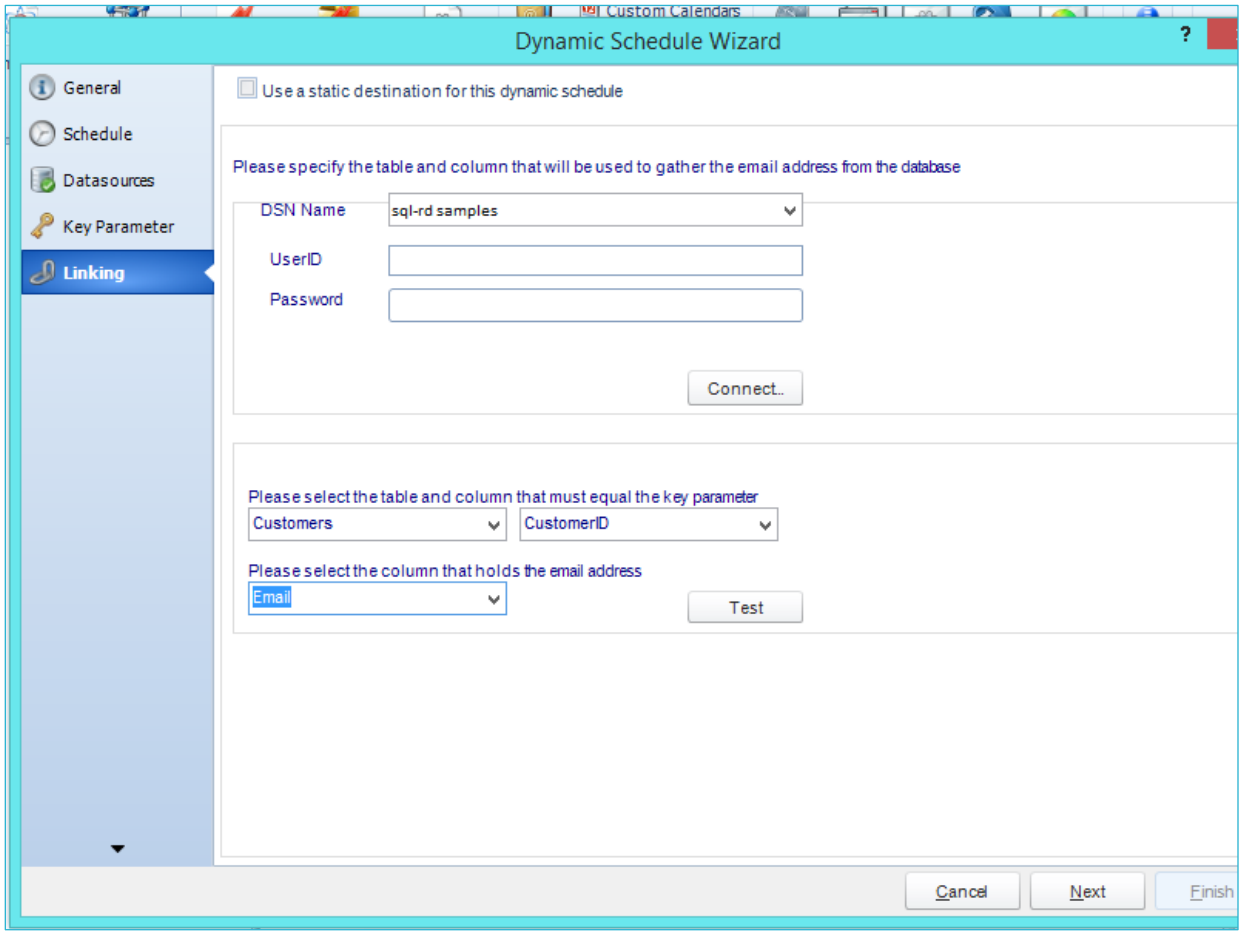
Compose a Dynamic email

Using dynamic inserts SQL-RD will automatically enter the required values from your own database.



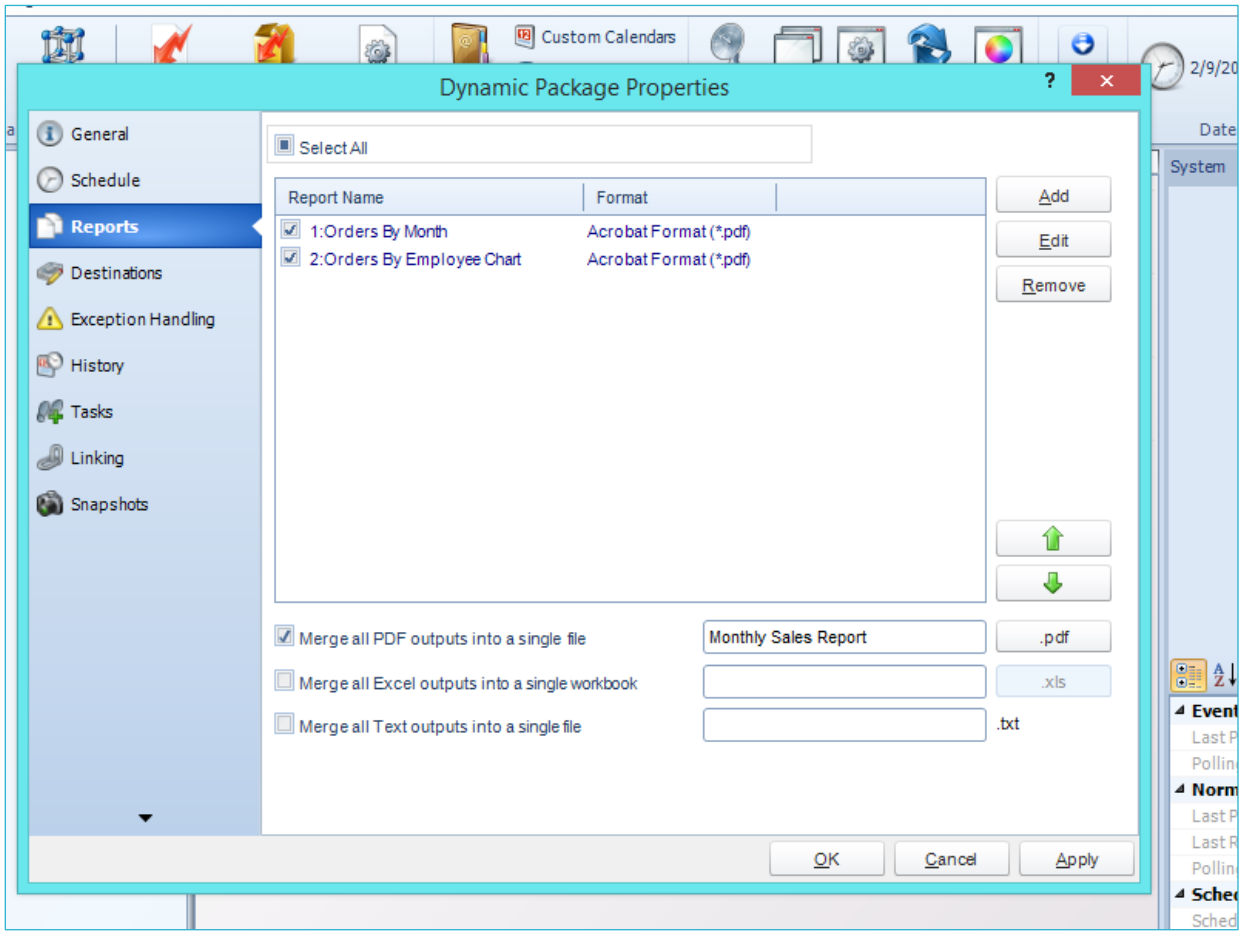
Set up a Dynamic destination

SQL-RD will automatically enter the required parameter values, export & deliver the report to the corresponding email.



Set up packages of Dynamic schedules

Packages make it easy to send many reports in the same email. Reports can be merged before delivery and password protected.



Data Driven Schedules & Packages

Use SQL-RD's unique Data-Driven Schedule processes

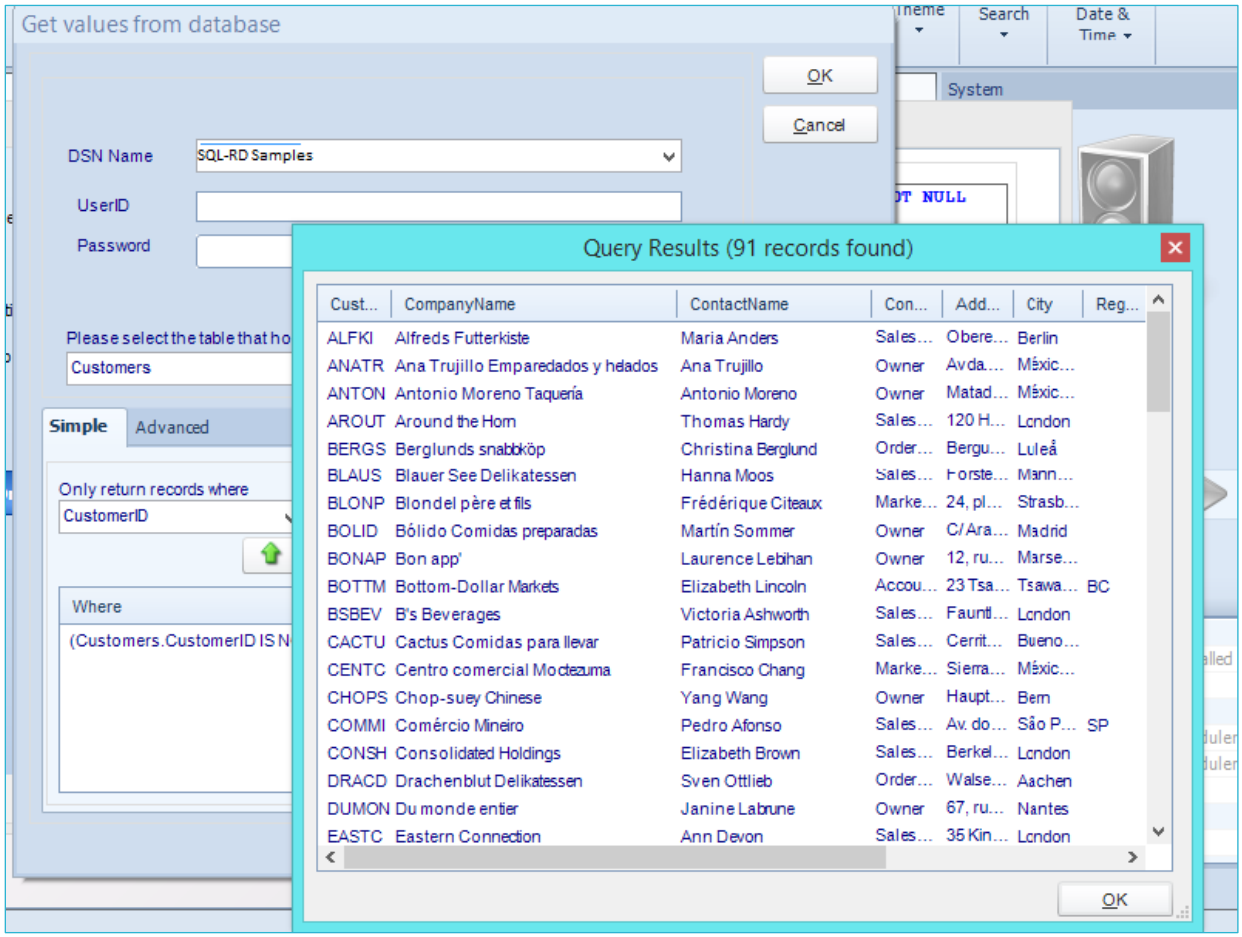
Use Data Driven Schedules to bring Reporting Services functionality to SSRS Reports! Drive all variables of your reporting requirements (parameters, destinations, output format, etc.) from database tables and queries.

Distribute a report to a fluctuating list of recipients. For example, you can distribute a report throughout a large organization where recipients vary from one month to the next or use other criteria to determine group membership from an existing set of users. E.g. select * from mytable where firstname = 'john' will generate the report and distribute only for records where the recipient's first name is John.

Filter the report output using report parameter values that are retrieved at run time. For example, the parameter value returned from the table for Last Name will be Doe for John Doe and Smith for John Smith. Determine the delivery type and report format dynamically at run time. For example John Smith gets the report as a PDF file by email with a customized email body and John Doe gets the report as an Excel spreadsheet by FTP upload to his web server.

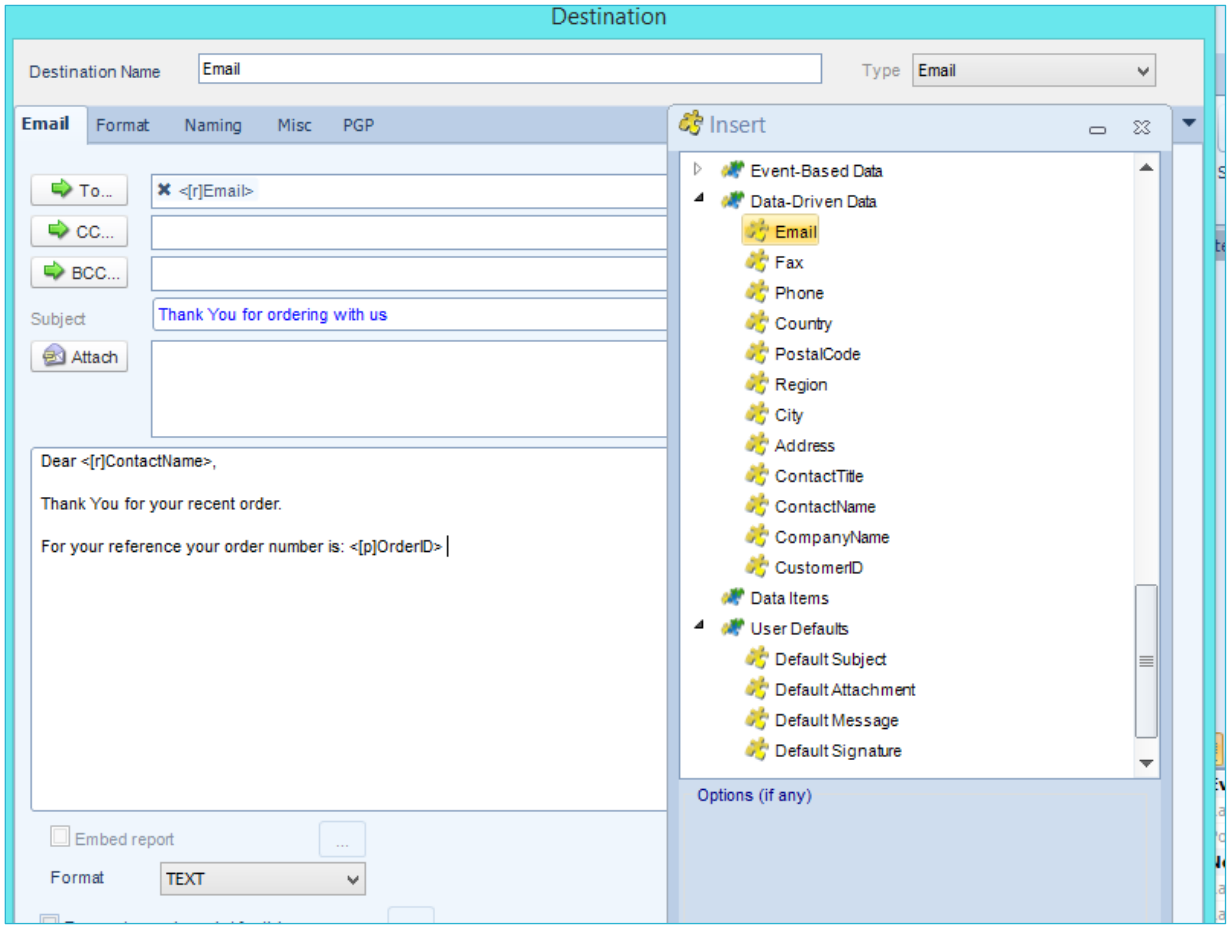
Set up a Data Driver

Use the data in your database to populate report parameters, destinations, formats and much more.



Create a Data Driven Email

Use Data Driven inserts to populate an email with names, dates, order numbers and much more.



Pre & Post Delivery Automation

Use Custom Actions to add Workflows to any schedule

Once your schedule has been executed, why stop there? Use SQL-RD's unique Custom Actions to run another program, enter values in a database, modify a file and lots more.

Use Automation Schedules on their own or as part of a more complex automation solution.

Add a Custom Action to a Schedule

Create a custom action which can be executed at the end of a report schedule to confirm schedule completion for example.

Additional Report Schedules Task Actions

Run Custom Tasks before report delivery.

Run Custom Task after report production.

Run Custom Task after report delivery.

Run Custom Task before and after a report has exported.

Use custom tasks to create Automation Schedules.

Available Custom Tasks

General

Run Program (bat, exe, com)

Open, Print Document

Wait/Pause

Send SMS

Execute Schedule

Create Exchange Appointment

Files and Folders

Copy, Rename, Move, Delete File

Write to Text File

Zip, Unzip Files

Create, Rename, Move Folder

Merge PDF Files.

Folder Housekeeping

Manipulate PDF

Build Excel Workbook

Merge Excel Files

Manipulate Excel

Upload to SharePoint

Internet & FTP

Send an Email

Open a Web Address

Upload to FTP

Download, Delete from FTP

Create, Delete FTP Directory

Database

Execute SQL Script

Run Stored Procedure

Insert, Update, Delete Database Record

Create, Delete Database Table

Create, Delete Table Column

Execute SSIS Package

Export Data to a Report

Save BLOB to SQL Server

Get BLOB from SQL-Server

Registry

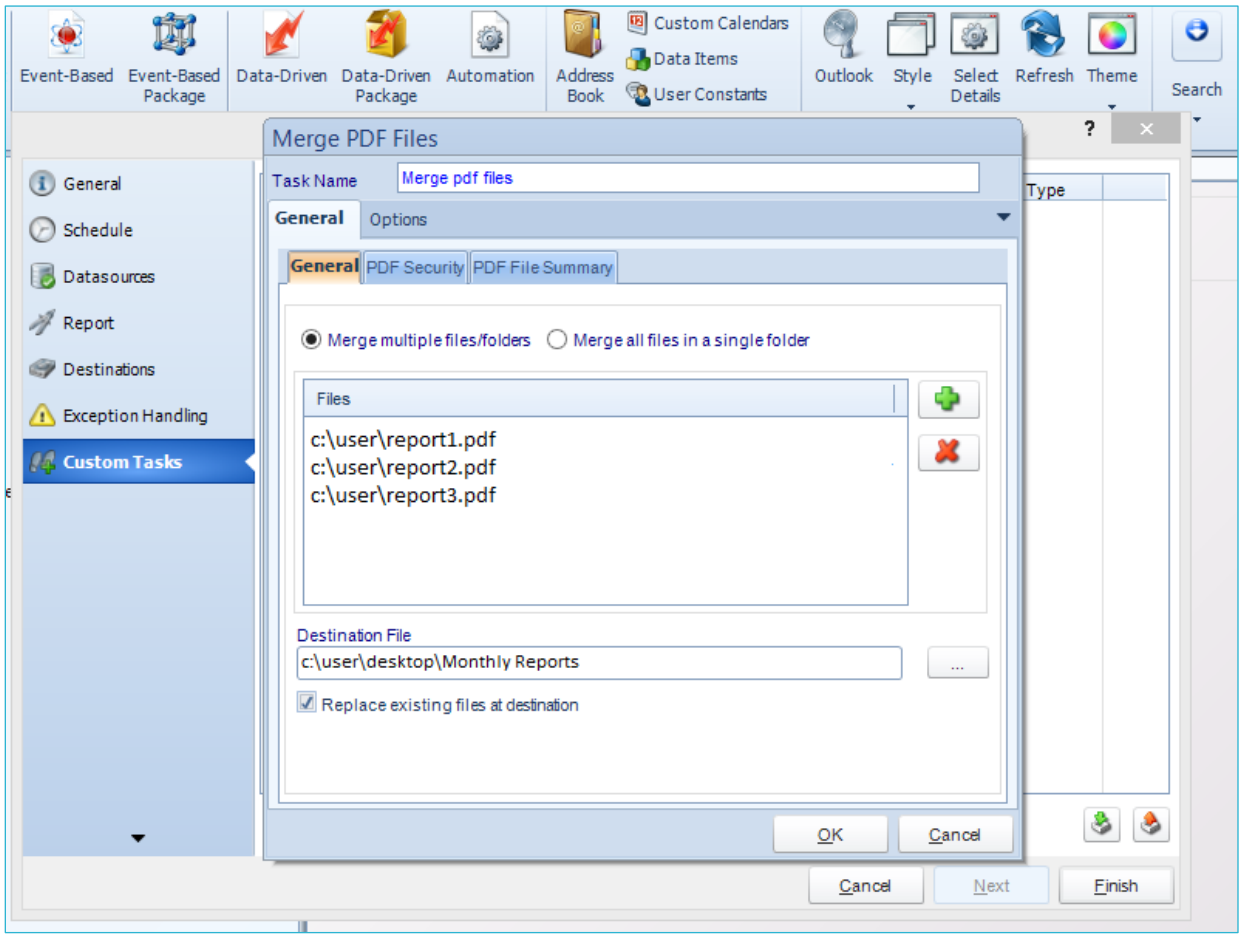
Set Value

Delete Key

Create Key

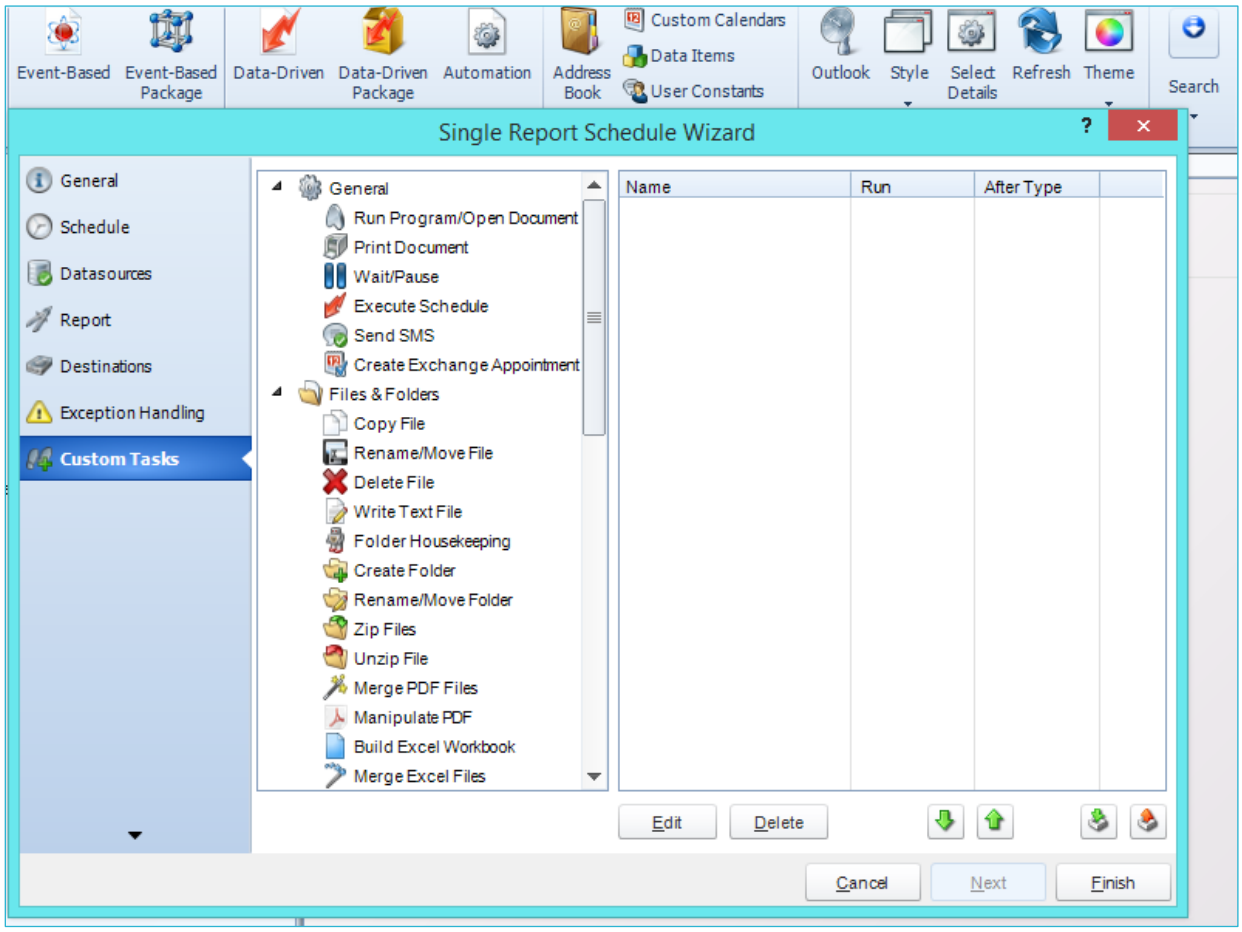
Merge PDF Files

Use Automation Schedules to merge PDF files in a specified folder.



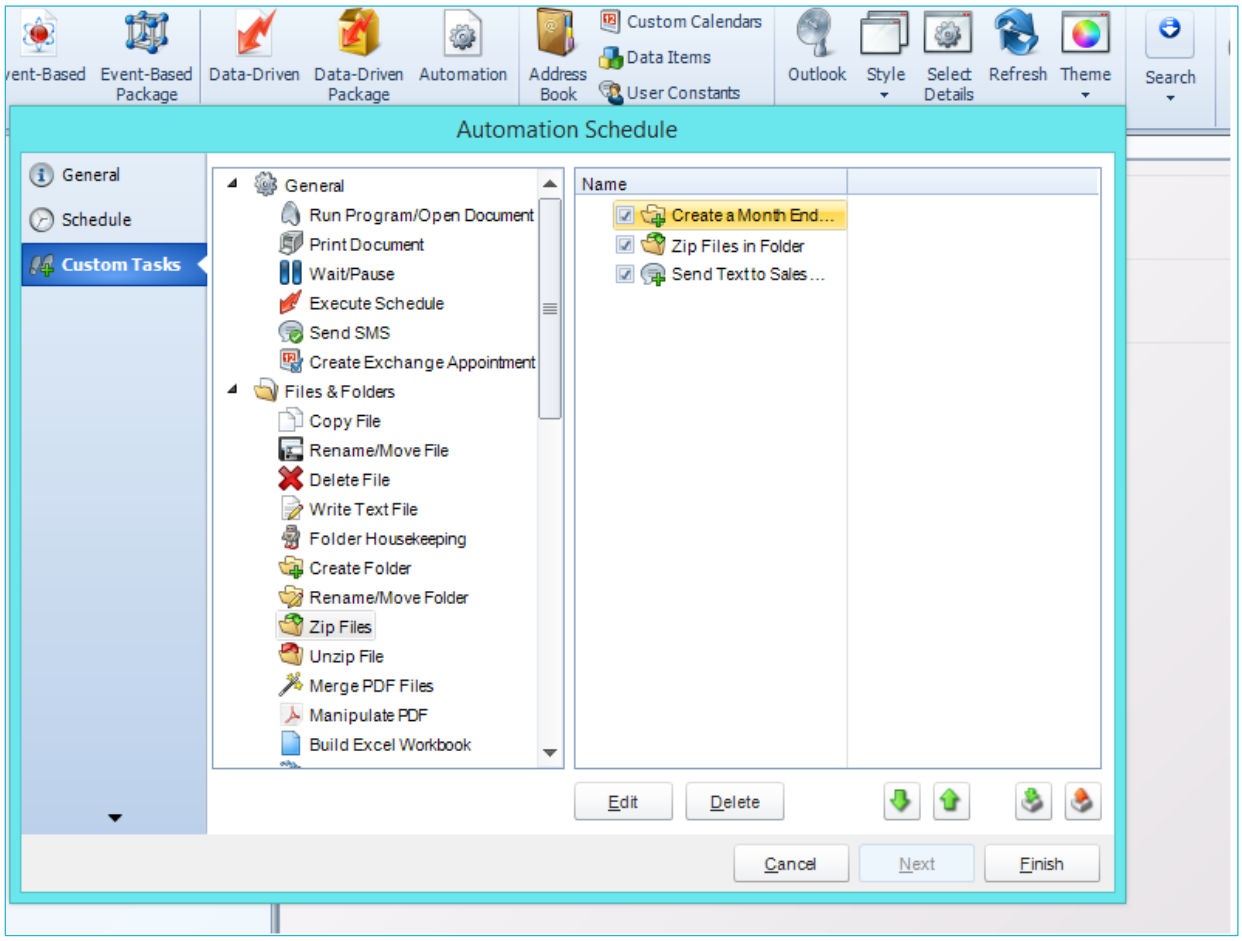
Custom Actions

Use Custom Actions pre or post-delivery of a schedule to create a workflow.



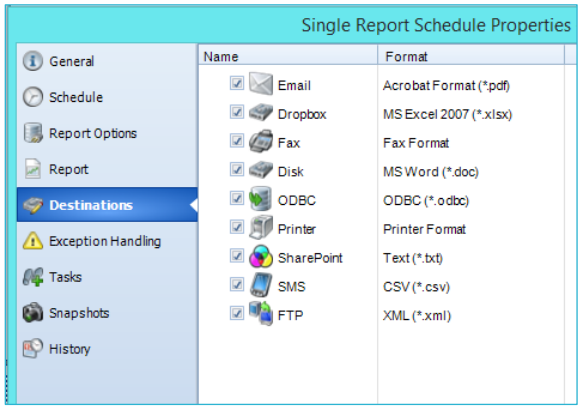
Add several Custom Actions to the same Schedule

Create your own workflows by adding many Custom Actions to an Automation Schedule.



Destinations

Distribute Reports & Dashboards to a variety of destinations



Flexible, highly customizable and function-rich destination functionality.

Distribute Power BI Reports & Dashboards to single or multiple printers.

Email – Static recipient list or a data-driven list of recipients.

Disk/Folder - Power BI Reports & Dashboards to folder or network drive.

Output to local drives or output to network shares and UNC paths.

Microsoft SharePoint - Export Power BI reports & dashboards to SharePoint libraries, folders and lists.

DropBox - Export Power BI reports & dashboards to Dropbox.

FTP/FTPS - Upload Power BI Reports & Dashboards to FTP server.

ODBC – Output report data directly to a database table.

SMS – Mobile text alerts and/or entire reports.

Fax - Reports & dashboards to fax.

Customize Report Outputs

SQL-RD offers a variety of formatting and manipulation options

Acrobat (PDF): Include watermarks & stamp, add bookmarks based on group header, set document properties, add password protection, merge a package of multiple reports into a single PDF file & merge any existing PDF files into a single file.

Character Separated (CSV): Use any character separator, or use "tab", choose comma, or any delimiter.

MS Excel (XLS), 2007 (.xlsx): Customize the worksheet (tab) name, merge a package of multiple reports as individual worksheets (tabs) in a single workbook, set password protection, set document properties.

MS Word (.doc).

MS Word 2007 (.docx): For SSRS 2012 or later.

Tiff (.tif).

Custom rendering (*.*).

HTML: Use advanced or basic HTML rendering.

Other format options available:

Data interchange (.dif).

dBase II, III, IV.

Lotus.

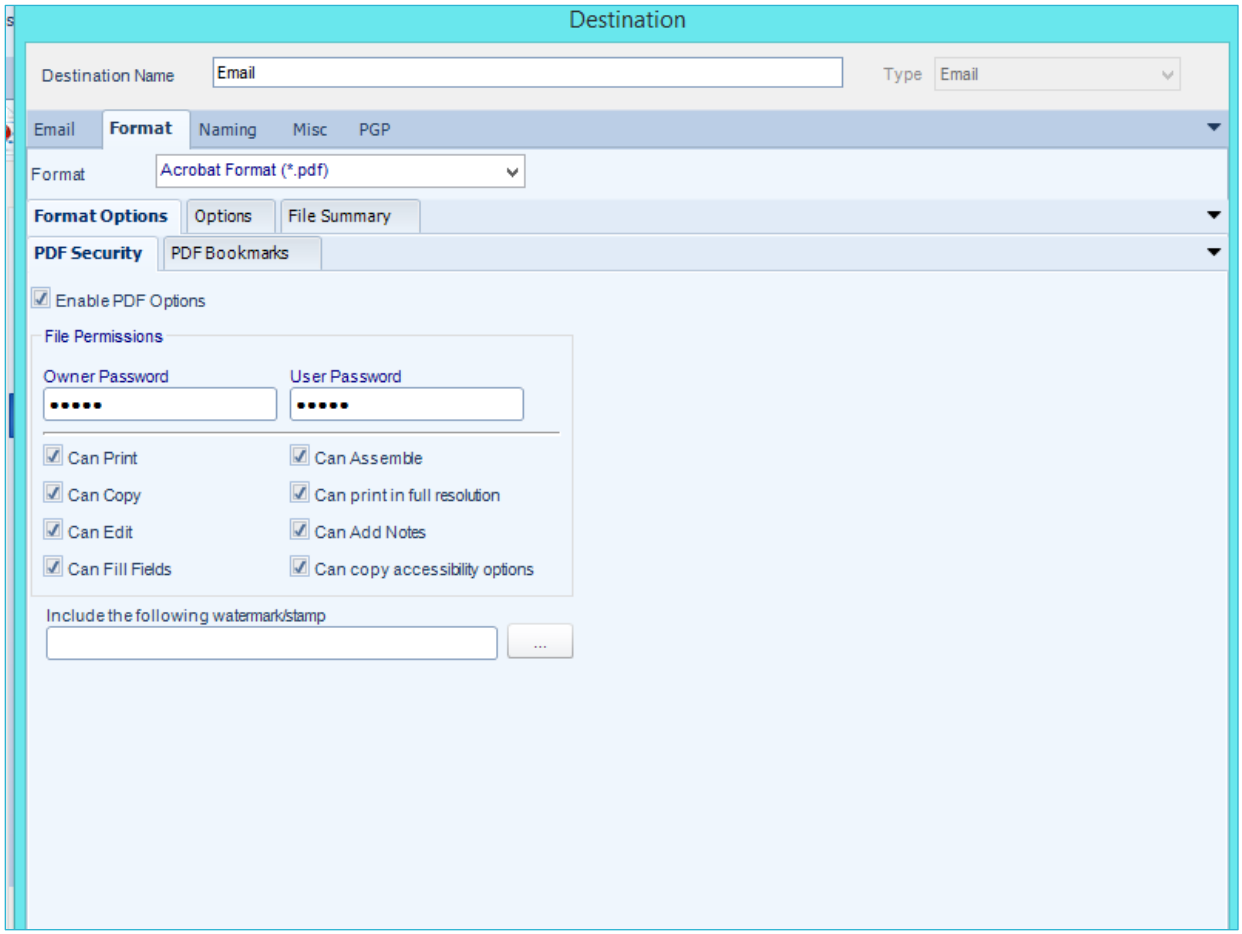
Rich text format (.rtf).

Text.

Web archive (.xml).

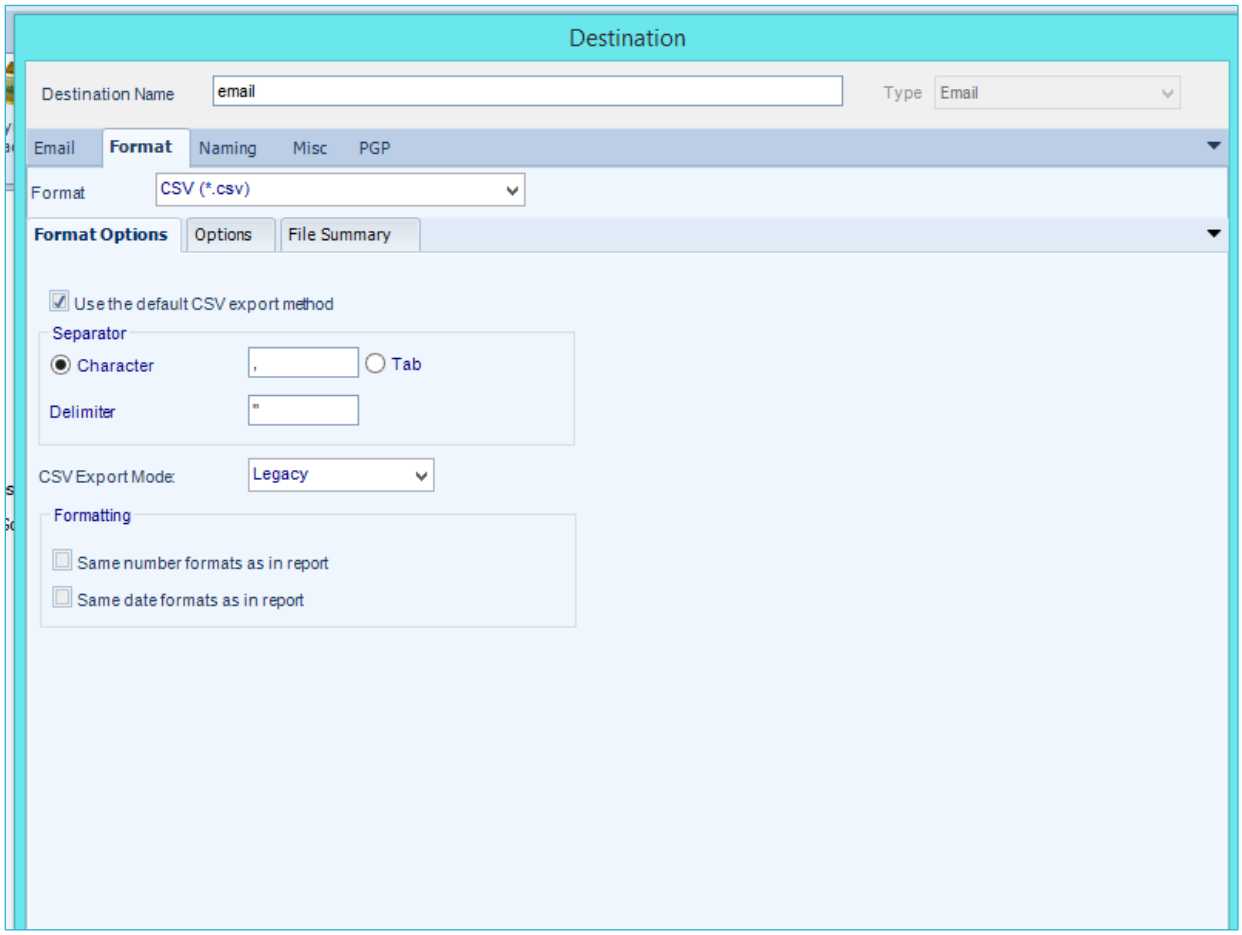
Set Acrobat output format options

Add watermarks, bookmarks, set properties, e.g title. Add password protection, e,g. Print, Edit, Owner & User Passwords.



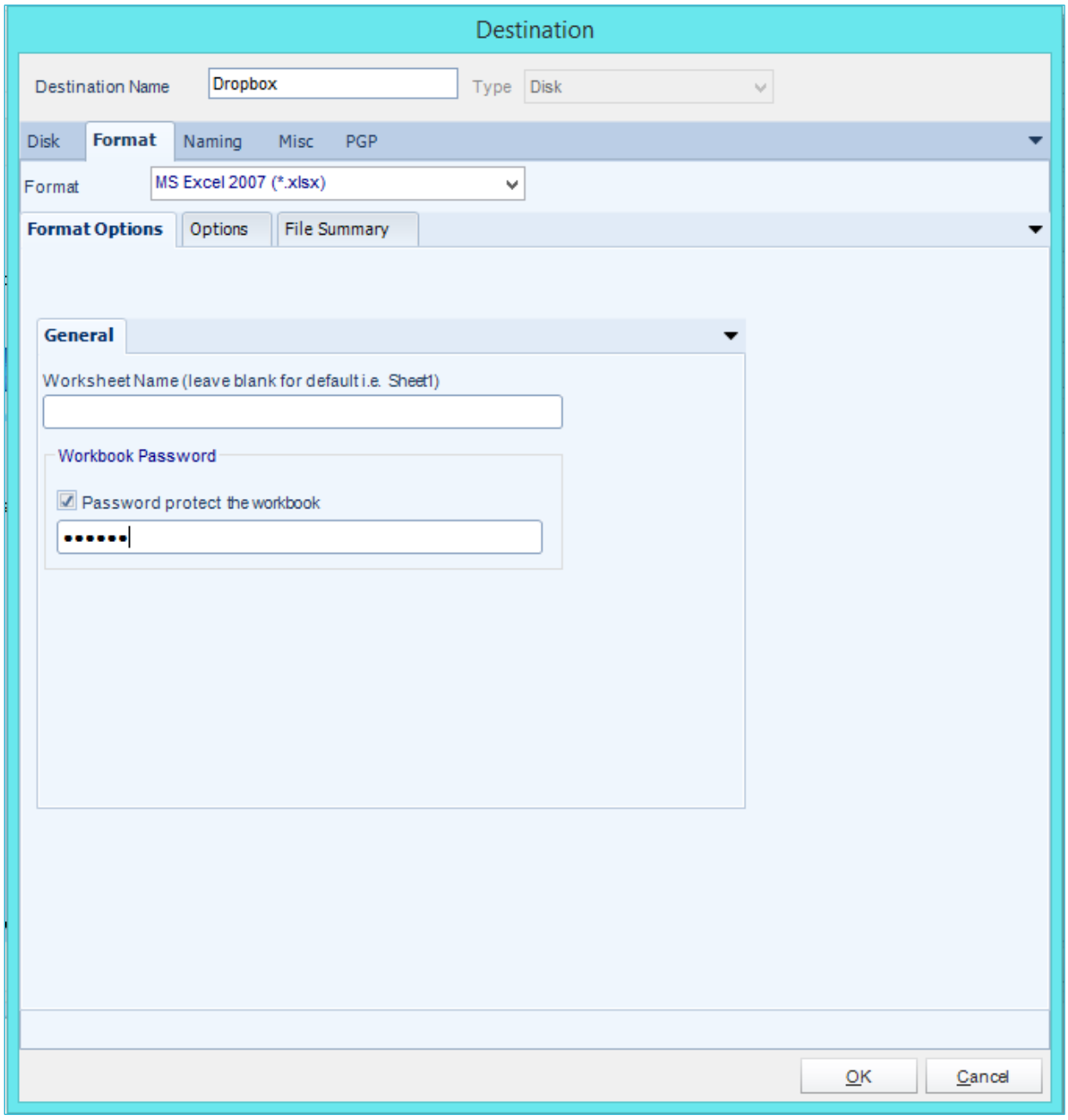
Set CSV output Format options

Use any character separator, or use "tab", choose comma, or any delimiter (or not, if you do not require one).



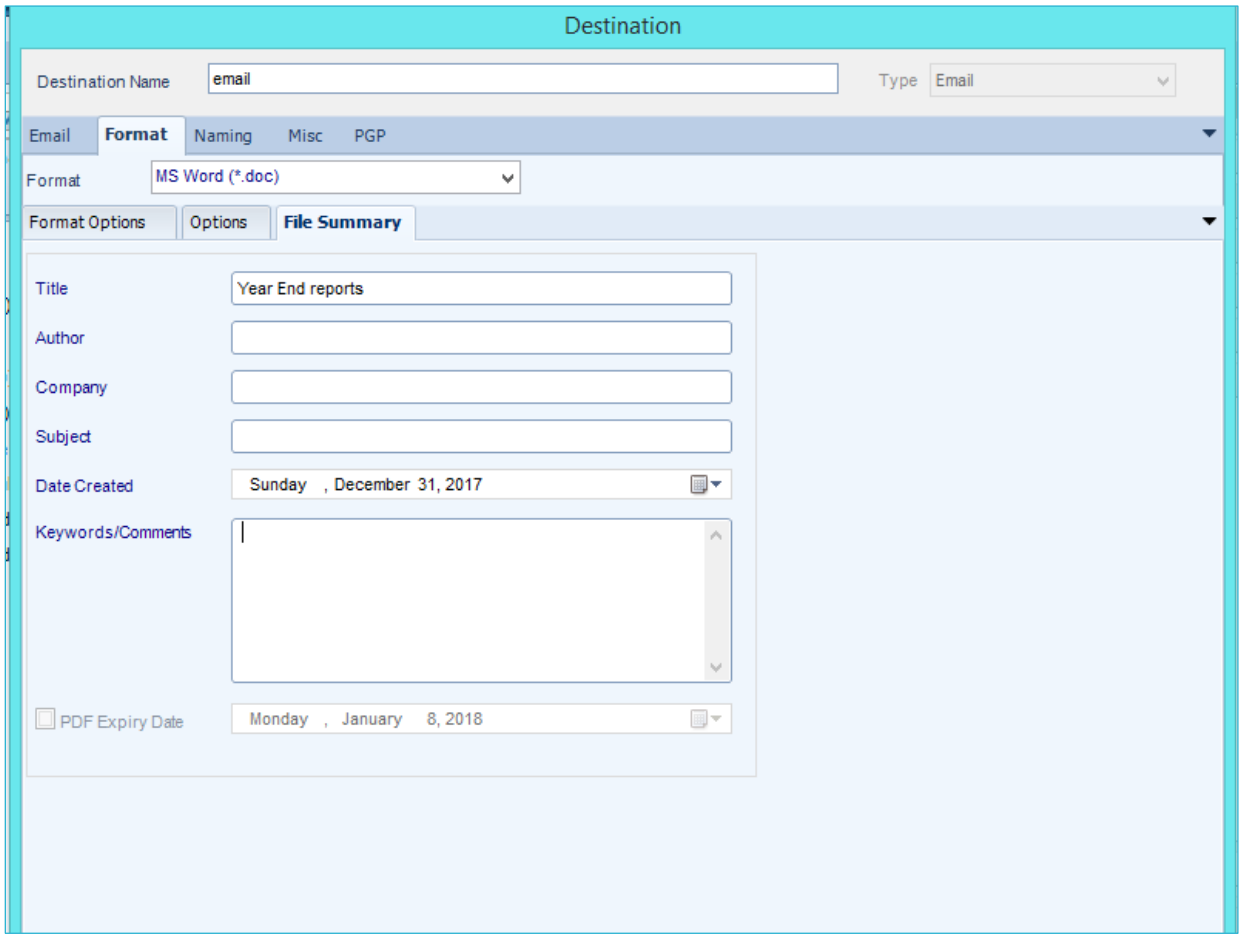
Set MS Excel output format options

For MS Excel (XLS), Excel 2007 & 97-2000.



Set MS Word output format options

For MS Word (DOC): Set document properties (Title, Author, Company, etc.).



Exception Handling

Set error handling for reports and options for blank reports.

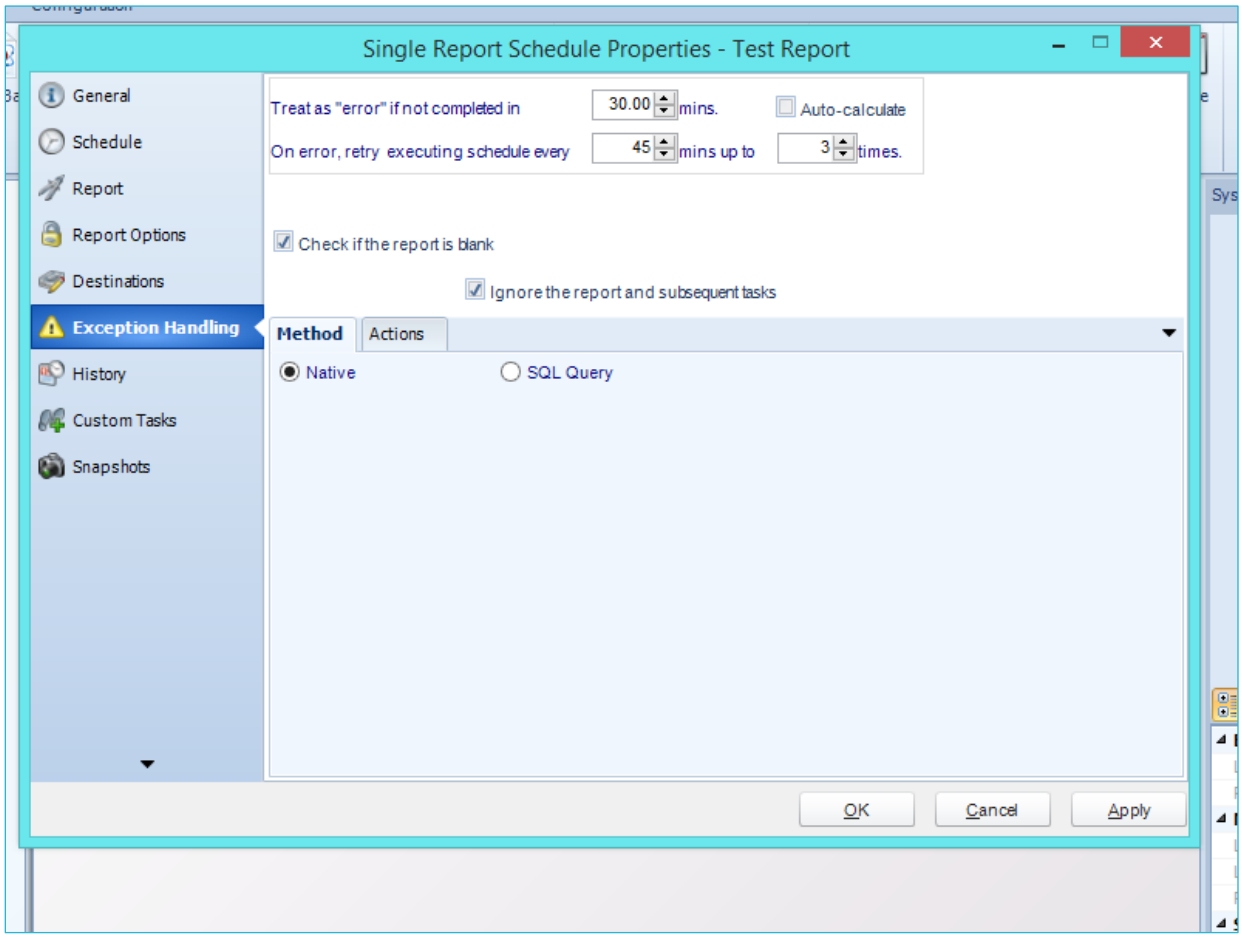
Use Exception handing to determine what should happen if a reports fails to run or if the report executes but contains no data.

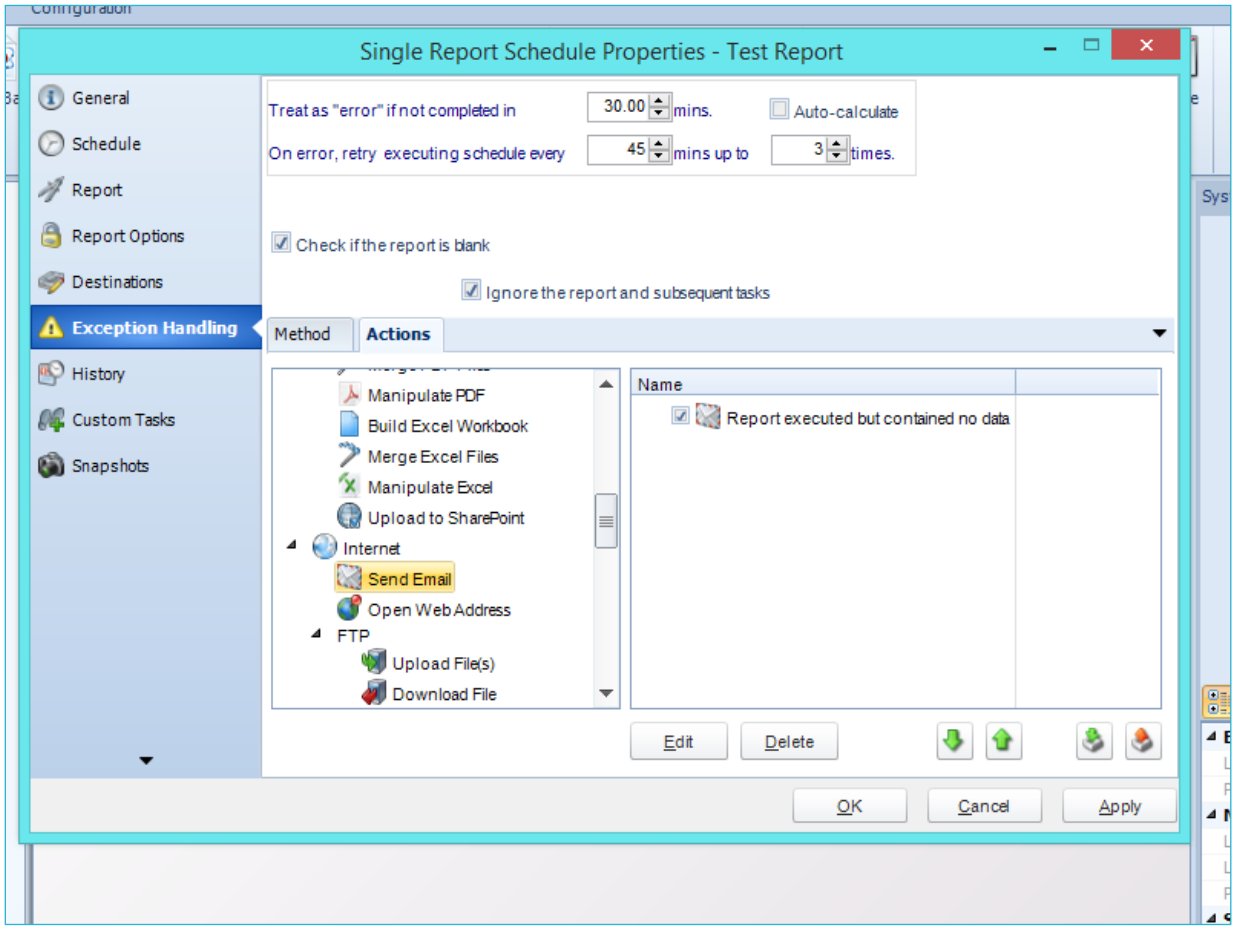
For example: If a report takes longer than the specified amount of time to run, treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs SQL-RD automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error. Should an error occur with a schedule, specify the retry interval and number of times the schedule should attempt a retry.

Check for blank reports and determine what actions should be taken if a blank report is detected.

Exception Handling

Should an error occur, define the action(s) SQL-RD should follow.



Blank report Exception handling

If a report genuinely has no data behind it, SQL-RD can be configured to do a number of things with the report & schedule.