

FORTRA



Robot Reports
7
Administrator Guide

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Introduction

No other area is more costly or labor intensive in operating the IBM i than managing report output. Which means there is no other area where the payback in automating these duties is greater.

Report management includes many tasks—running and printing reports, bursting and sorting the resulting stacks of paper, and delivering the reports to the recipients. After reviewing their reports, recipients have to store them. When they need to look up historical information, they have to find and retrieve reports again and again.

Robot Reports is designed to be a total solution to a specific problem — the high cost of report management.

Robot Reports Features

Report Viewing

Robot Reports provides elegant report viewing features that will make report users want to throw out paper reports and switch to report viewing.

- Reformat reports by eliminating, moving, or copying report columns.
- Security can be put on report views so that access to certain columns can be restricted to authorized users.
- Page headings and columns can be frozen during windowing and scrolling just like Lotus™ or Excel™ spreadsheets
- Scan functions make it easy to find action items fast.
- Report information that exceeds management control thresholds can be highlighted in one of 26 designer colors.
- Format report views to Portable Document Format (PDF) or into HyperText Markup Language (HTML).
- Report Notes allow you to add information to a report that is useful to yourself and others.

Automating Operator Report Duties

Virtually any procedure the operator does in reaction to information in a report can be done automatically by Robot Reports.

- Robot Reports bursts reports electronically. It makes new reports from old ones by including only the lines or pages that a recipient needs. For example, it can burst a report into a segment whenever a department name changes or create a segment that summarizes report results by reporting only the lines containing totals.
- Robot Reports can secure a segment so that access to certain lines or pages can be restricted to authorized users. Robot Reports can even use Robot Alert to page experts if reports contain troubling information.
- Robot Reports can also execute commands, send messages, and signal prerequisite job completion to Robot in reaction to information in a report. For example, it can start another job in a closing procedure when balancing report totals agree. All these procedures are easy to code with our powerful OPerator Assistance Language (OPAL).

Report Bundling and Distribution

If you have problems sorting, delivering, or losing reports, Robot Reports is the package for you. Robot Reports automatically bundles all the reports into a recipient packet. Robot Reports even generates a packet cover sheet with an index listing the reports in the packet, the number of pages in each report, and the packet page numbers.

Robot Reports will print a packet at any printer in your IBM i network. Laser printers with special print command requirements are supported, and you don't have to change your report programs.

Robot Reports can create a microfilm file so that the report can be easily output to microfiche. It also can put the report into a directory as a file so that it can be downloaded to a client workstation. It can put the report into PDF format so that it can be viewed and printed by any computer that has the free Adobe Acrobat Reader installed. And, it can format a report using HyperText Markup Language (HTML). These last three options let you transmit the report through the Internet and any intranet.

Report Archiving

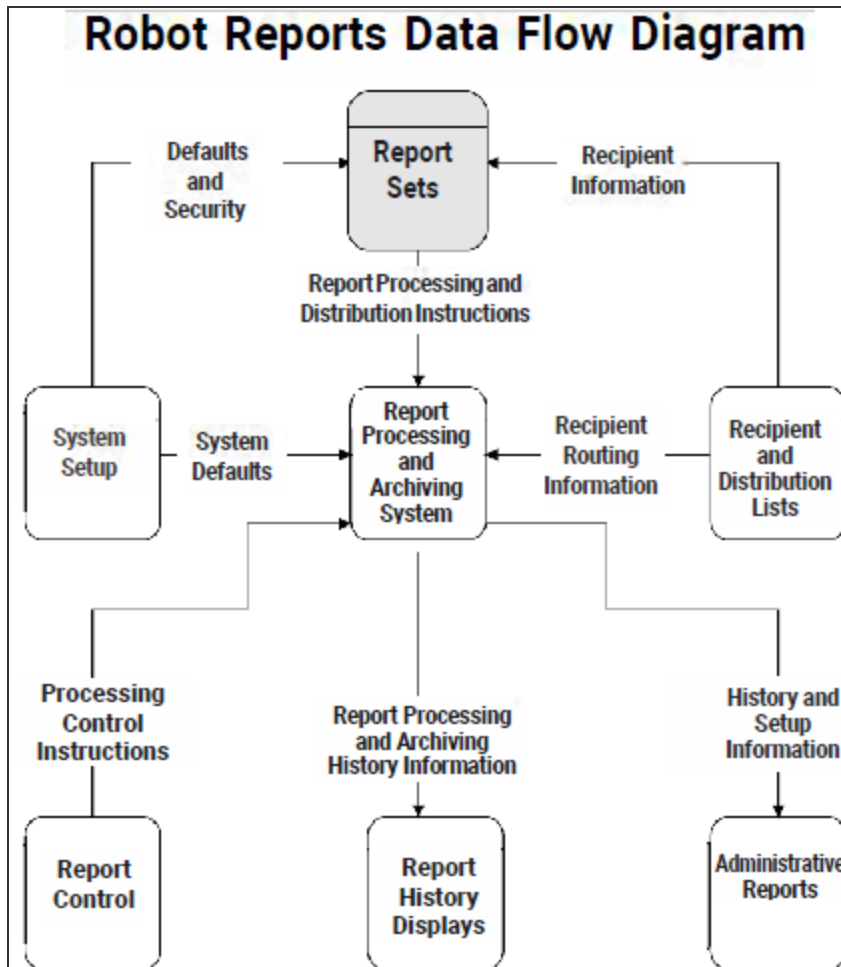
Robot Reports can archive any IBM i spooled file. You can have a different archive strategy for each report. Just tell Robot Reports how many days you want the report to remain in each type of archive and Robot Reports does the rest. You can store reports online for instant access. You can store them in a compressed form for short-term storage using a disk drive, an optical disk drive, a dedicated tape drive, or a tape librarian. Or, store them long term using tape and move them off-site.

The report archive history shows the archive status of the report and on which tape volumes it is stored. If a report is needed from short-term storage, the user can easily restore it by pressing a function key. You can also define indexes that span the report archive to allow recipients to retrieve documents easily.

Report History

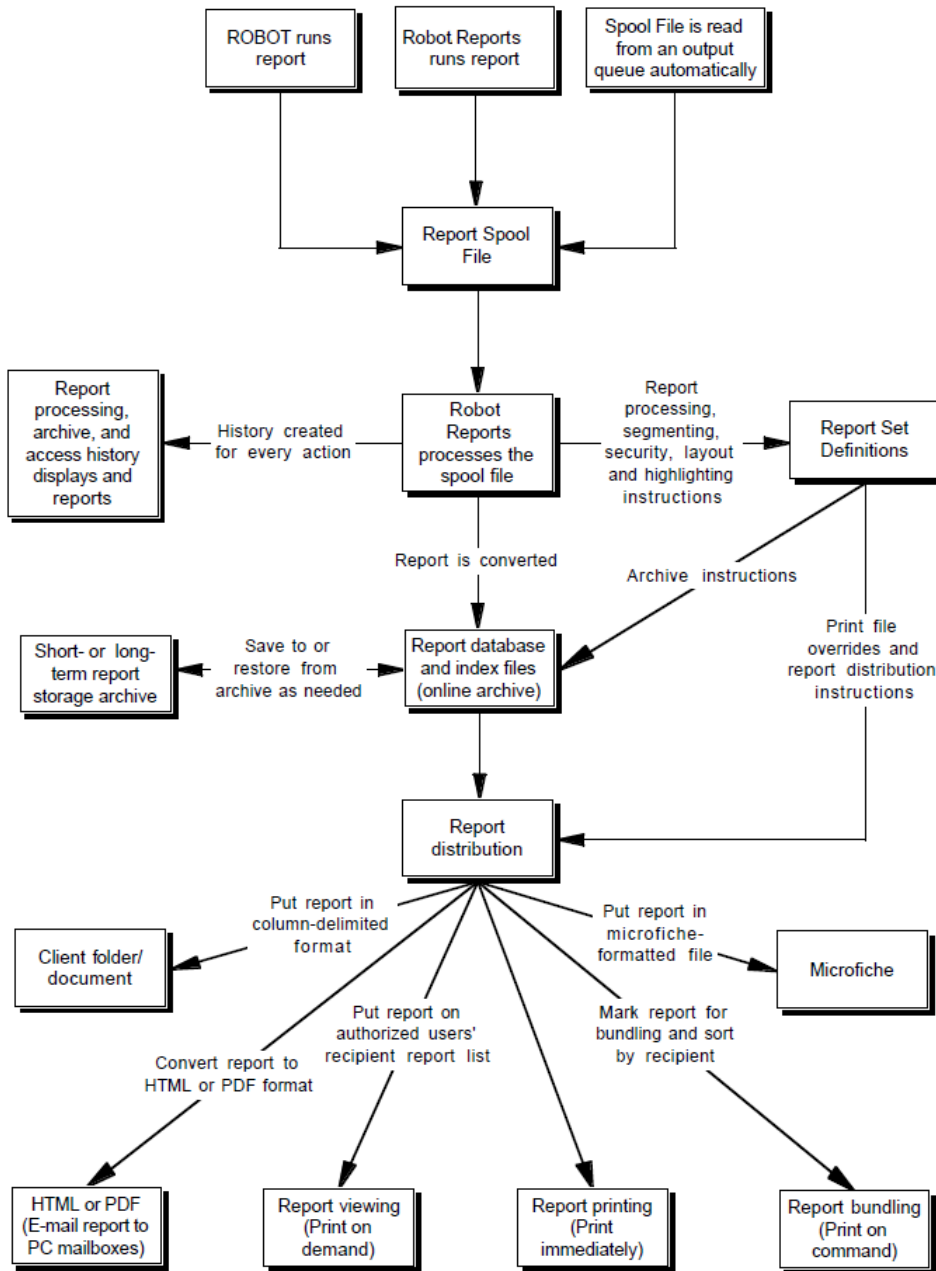
Robot Reports gives you a complete history of every report it processes, whether it is printed or archived on the iSeries. It also gives you the status of every report currently being processed.

The report access history display tells you who viewed or printed the report, including the date and time of access. You can use report access history to detect security violations and to review report usage. All Robot Reports history can be displayed or printed at any time.



How Robot Reports Works

Robot Reports works by following the process below.



1. Create the spooled files. There are three ways to create spooled files for Robot Reports

- The most commonly used method to create a report spooled file is to run your report program normally and divert the output to an output queue that is not attached to a printer. Have Robot Reports monitor this output queue. Robot Reports looks for spooled files that match the information in its report sets. When Robot Reports finds a match, it processes the spooled file. Robot Reports can process any spooled file on the IBM i no matter what its source.

- An easy way to create your report spooled file is to use ROBOT, our job scheduler. ROBOT takes care of the overrides and diverts the spooled file to Robot Reports for processing.
- You can also use the command REPRUNSET to create your report spooled file. This command runs your report program and has Robot Reports process the resulting spooled files.

2. Process the spooled file.

A report set contains the instructions Robot Reports needs to process spooled files and print the reports. Using report set instructions, Robot Reports puts the spooled file data into secured IBM i objects. Report segmentation and line highlighting are also done at this time. Report segment viewing and printing security authorizations are contained in the report set.

A report processing history record is created for each spooled file processed. This history can be displayed or printed at any time.

3. Distribute Reports. Robot Reports has many output options:

- Print copies immediately with a report banner page showing how many copies each person gets. Robot Reports supports output to all kinds of laser printers.
- Convert a report to a microfiche-formatted file so it can be easily output to microfiche or downloaded to a PC.
- Bundle all the night's reports for a recipient into an indexed packet and print it at the recipient's chosen printer.
- Archive the report and add it to each recipient's report list for later viewing or printing.
- Convert the report to column-delimited format and transfer it to a directory on the IBM i for later downloading by a client workstation. You can email these reports to a PC mailbox automatically if you have Robot Alert, Fortra's IBM i paging and messaging software.
- Convert the report to PDF format, which can be viewed and printed by any computer that has the free Adobe Acrobat Reader installed. Or, you can convert the report to HTML format, which can be viewed using a web browser. You can email these reports to a PC mailbox automatically if you have Robot Alert.
- Or, use all of the above on the same report. Just create a distribution record for each type of output wanted. Distribution records are easily created by picking from a list of recipients or using a distribution list. A distribution list is a list of recipients who commonly receive the same reports.

4. Bundle Reports.

Report bundling replaces the operator duties of bursting all of the night's report copies and sorting them by recipient for delivery in the morning.

If the distribution instructions are to bundle the report into a recipient's packet, the recipient's report record is marked ready for bundling rather than printing the report. When the command `REPBUNDLE` is executed early in the morning, all the reports marked for bundling are placed on the output queues in recipient order. This bundle command bundles all reports run since the last time the command was executed.

Each recipient's report packet can have a packet banner page that contains an index of the reports in the packet along with the report page numbers and packet page number.

5. View Reports.

Recipients can access a list of reports they have been authorized to view or print from their workstations. From their report list, they choose a report title and see all of the archived report versions available to them. If the report is still online, they can view the information instantly. They can print any pages they want to any printer they want. They can print the report in its original format or in a report view format. They can create, change, or delete report notes. If the report is not online, the recipients or an operator can quickly retrieve it from short- or long-term storage with the press of a function key.

With Robot Reports you can reformat a report to suit your needs. These report formats are called report views. Recipients can create as many views as they want.

The report access history display shows who viewed or printed the report including the date and time of access. You can use report access history to detect security violations and to review report usage.

6. Archive Reports.

The advanced architecture of Robot Reports can use any save media supported by IBM's save commands. The archive strategy for the report is in the report set. Robot Reports supports three stages of report archive:

- **Instant Online Storage.** The report is stored online in a normal data library for instant report viewing.
- **Short-term Storage.** The report is moved from an online library and placed on a short-term save device that can do unattended restoration. This device can be a disk drive or Auxiliary Storage Pool (ASP), an optical disk drive, a dedicated tape drive, or a tape librarian.
- **Long-term Storage.** The report is shifted to a long-term save device, usually the one used to do the normal backups. These tapes or optical disks are typically kept for a year or more.

Robot Reports will move the reports from one archive stage to another automatically according to your archive plan, when you execute the command `REPARCHIVE`. An archive history record is kept for each report so you remain informed and in control. The report, its search indexes, and report viewing formats are all archived and

restored together. So you can look at any version of the report no matter how often its layout changes.

Getting Around

Robot Reports is designed to make report administrators' lives easier. This guide is meant to be used as a reference while you work. It is organized in the same order you will find options within the product. Another source of help is the online help text that comes with the product. Press F1 (or your Help key) for help on any panel.

Robot Reports Menus

The following are the major functions behind each option on Robot Reports main menu.

```

REP290          Robot REPORTS Main Menu          12:32:21
R07M731210416                                     SYSTEM

                1. Report Sets Menu
                2. Recipient and Distribution List Menu
                3. Report History Menu
                4. Control Menu
                5. Administrative Reports
                6. System Setup Menu

                Select Option:  _

F3=Exit      F21=System Command

```

Report Sets Menu

A report set is created for each report you want Robot Reports to process, and allows you to specify such things as:

- Report segmentation instructions to electronically burst or to selectively print pages, or lines, of a report
- Print override instructions, including laser print commands, to reduce CL programming
- Management action thresholds
- Report views
- Security instructions for report views and segments

- Report set documentation
- Report Indexes

Recipient and Distribution Menu

Recipient records and distribution lists are created and maintained through this menu. You can enter a complete record for each recipient describing the recipient's delivery information and report output requirements. Once a recipient record is established, it can be accessed by any number of reports. The report administrator can access a list of all the reports each recipient is authorized to view or print. Distribution lists save time by creating report distribution instructions for a single report that goes to multiple people.

History Menu

Robot Reports writes several types of history records. It maintains a report processing history for each report it processes. It maintains a report access history that records when a report was viewed or printed and by whom. And, it maintains a report archive history for each report. You can delete report processing and access histories from this menu.

Control Menu

From the control menu, you control many operations of Robot Reports:

- You can start and end the monitoring of output queues.
- You can display the Robot Reports subsystem or a list of monitored output queues.
- You can move reports to the next archive stage.
- You can bundle all the reports that have been processed or bundle them by recipient.

Administrative Reports Menu

Various administrative reports are available on this menu. These reports can be printed out to document system setup, history, and report archives. The Good Morning report, a one page status report of report processing activity, is especially handy.

System Setup Menu

Robot Reports lets you define system defaults and work with secured objects. You can secure report segments and views, and provide security down to the line and column level of a report.

Standard Panel Features and Function Keys

The Robot Reports menu system provides the same user interface you may have used in other Fortra products. Getting acquainted with these features will make Robot Reports easy to use.

Each panel has a standard layout with centered title at the top and available function keys listed at the bottom. In general, function keys have standard assignments. To read about a panel, its fields and function keys, press **F1**.

```

1 REP207
2 Maintain Report Names
3 12:45:48
4 SYSTEM

Report Set . . . . . : BPSET      My first set
Start at Report Name . . . . . : _____
Search Description for . . . . . : _____
Options
A=Add/Copy/Delete      1=Select      ?=More Options

Opt  Report Name  Description
--  -
QPDPSPSTS  WRKSYSSTS

F3=Exit      F4=Prompt      F6=Add Record
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options

```

Panel Features

1. Panel reference number which helps us determine where you are in Robot Reports when you call in for technical support.
2. Panel title.
3. Current system time.
4. System Name.

Standard Function Keys

F1=Help

Displays online help for the panel.

F3=Exit

Exits current panel or pop-up window. Any information that has been typed, but not entered (by pressing the enter key), is discarded.

F4=Prompt

Displays a finder for the field. The finder lists the valid options.

F12=Previous

Enters what you have typed and returns you to the previous panel.

F21=System Command

Gives you a command line to enter system commands.

F22=Preceding Opt

Displays a menu listing the options available from the panel that precedes the previous panel.

F23=Prev Options

Displays a menu listing the options available from the previous panel.

Robot Reports Navigator

Certain Robot Reports panels, such as the Report Set panel, make **F10** available. This navigator key makes setting up report sets and working with them easier. It begins on the Report Set panel (shown below) and ends on the Report Distribution Output Options panel. Panels included in the cycle have **F10** defined as Start Navigator, Next, or End Navigator.

On panels where F10 is available, you can use to move quickly to the next panel. These keys automate the cycle of setting up or working with report sets.

REP210		Report Set		13:09:54	
Report Set Information:					
Report Set	.....	:	BPSET		
Description	.....	:	Mu first set		
Application	.....	:	_____	
Report Program Name	.....	:	_____	Library . . .	: _____
Print Schedule	.....	:	_____	(memo only)	
Accounting Code	.....	:	_____	(F4 = Prompt)	
Hold Set from Processing	:	:	N		
Report Processing Code (1 = Select)					
EXECUTE			ROBOT		1 SEARCH
Do you want to submit report to distribution: N (Y=Yes,N=No)					
Job Queue for Distribution:	_____		Library:	_____	
Days Report Remains in Archive					
Online	.....	:	5		
Short Term Storage	.....	:	20	Long Term Storage:	30
Report Command	.....	:	_____	
(F4 = Prompt Command)					
F3=Exit	F4=Prompt	F6=Add/Copy/Delete	F10=Start Navigator		
F12=Previous	F21=System Command	F22=Preceding Opt	F23=Prev Options		

Option Menus

Many Robot Reports panels, such as the Maintain Report Sets panel, display a list of records. The first column of the list is the **Opt** options field. Use this field to enter an option code that applies to the record on that line. You can view a list of available options by pressing **F4** in the **Opt** field. **F4** calls a pop-up window listing options for the record. You can select an option in the window by placing a **1** next to your choice. The numbers next to the option are the option codes. They can be entered directly in the **Opt** field without calling up the option window.

```

REP201                               Mainta
Start at Report Set . . . . : _____
Search Description for . . . : _____
Options
A=Add/Copy/Delete      1=Select

Opt  Report Set      Description
___  BPSET           My first set
___  STAGEBLP        Staging report set

REP701                               SYSTEM
1=Select Option

  Report Set Information
  - 1=Report Set Detail
  - 2=Report Set Text
  Report Name Information
  - 3=Report Names
  - 4=Bursting Instructions
  - Advanced Options
  Report Processing Info
  - 6=Archive History
  - 7=Processing History
  - 8=Access History
  - 9=Link to ROBOT Job
F3=Exit  F11=More Info  Bottom

F3=Exit    F4=Prompt    F6=Add Record    F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

```

Finder Panels

Some fields have the label **F4=Prompt**. For these fields, you can press **F4** or type a **?** to see a finder for that field. The finder lists all values currently defined for the field. Select a value from the list, and the value is copied to the field. If only one value is currently defined for the field, pressing **F4** in the field will automatically copy the value into the field without displaying the finder. To find a name in the finder list, enter the name in the 'Start at' field at the top of the list.

```

REP243                               Recipient Finder                               09:38:53
                                          SYSTEM

Start at Recipient . . . . : _____
Options
1=Select

Opt  Recipient      Department      User Profile
___  ALLOW          _____      QTMLPD
___  ANGIE          _____      ANGIE
___  ANGIE          _____      ANGTEST
___  BEN            _____      BEN1
___  BEN            _____      BEN2
___  BILL          _____      BILLB
___  BOB           _____      BOB
___  BRIAN         _____      BJOHNSON
___  CHRIS        _____      COUNBAR
___  DAN          _____      DSCHULTZ
___  DANA         _____      DANA
___  DARLENE      _____      DARLENE  +

F3=Exit    F6=Add Record    F15=Distribution List Finder

```

Add/Copy/Delete Window

On many Robot Reports panels, **F6** is available for adding a record or for displaying the Add/Copy/Delete window. The Add/Copy/Delete window allows you to add a new record, or

copy or delete an existing record. If you choose the **add** option or the **copy** option, it becomes the default until you change it. This makes it easy to add or copy several records. The **delete** option does not become the default to help you avoid unintentional deletions.

```

REP210          Report Set          13:22:18
                                SYSTEM

Report Set Information:
Report Set . . . . . : BPSET
Description . . . . . : Mu first set
Application . . . . . :
Report Program Name . . . . . :      Library . . . :
Print Schedule . . . . . :      (memo only)
Accounting Code . . . . . :      (F4 = Prompt)
Hold Set from Processing : N
Report Processing Code (1 = Select)
  _ EXECUTE   _ ROBOT   1 SEARCH   RSL700   SYSTEM   -
Do you want to submit report to distri
Job Queue for Distribution:
Days Report Remains in Archive
  Online . . . . . : 5
  Short Term Storage . . . . . : 20
Report Command . . . . . :

F3=Exit      F4=Prompt      F6=A
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options
  
```

Report Sets

A report set contains the instructions Robot Reports needs to process spooled files and print your reports. Using report set instructions, Robot Reports puts the spooled file data into secured IBM i objects. These objects are the online archive for report viewing.

The report set also contains instructions for report segmentation and highlighting. A report segment defines the lines or pages that should be output to give your users just the information they need to do their jobs. Report highlighting is used to spotlight action items in the report.

Report Set Components

Robot Reports needs to know certain things to be able to process your reports. All the components necessary to define a report so that Robot Reports can process it are called a report set.

The report set is the umbrella entity in Robot Reports that defines what spooled files to process and what the printed output will look like. The report set processes, distributes, and archives your reports. Each time you run the report, you create a new version that is placed on the system and remains there until the REPARCHIVE command is run to move it to the next stage.

The components of a report set are:

[Report Set panel](#)

Provides Robot Reports with basic report identification information, report processing options, and report archive options.

Report Set Text panel

Allows you to enter text to document the purpose of the report set or how to use it.

Maintain Report Names panel

The individual reports that your report program creates.

Report Name panel

Gives Robot Reports information for processing the reports, including the OPAL processing type . It also contains spooled file comparison information, allowing Robot Reports to identify which spooled files should be processed.

Bursting Instructions

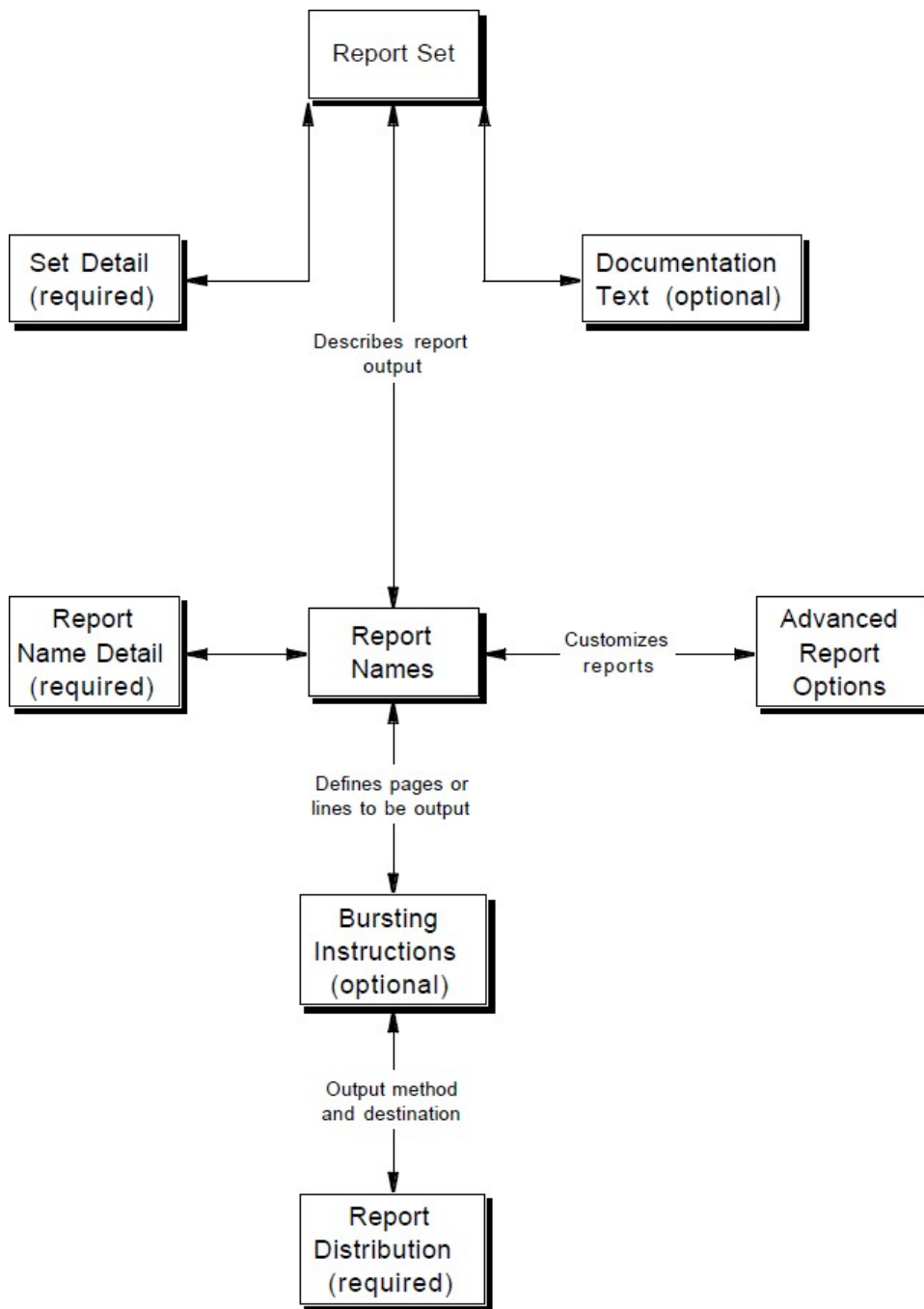
Define the lines and columns that will be included in a portion (segment) of a report. Bursting Instructions allow you to define the distribution for each segment.

Advanced Report Options

Provide advanced users of Robot Reports additional functionality, such as Report Views, Report Indexes, Report Print File Overrides, and Report Segment OPAL.

Report Distribution

Define which recipient will receive a report segment, as well as banner pages and recipient lists.



Automated Report Setup

Robot GUIDE for Automated Report Setup

Robot Reports provides a quick way to set up SEARCH-type report sets. To access Robot GUIDE for Automated Report Setup, enter option **1** on the Report Sets Menu or enter the command **REPLRNOUTQ** on a command line.

You may want to change the output queue for your report program so that its spooled files are placed in an output queue that is not attached to a printer or so that the files are put on hold. This will assure you that the files will be there to set up when you display the output queue.

```

Learn Output Queue (REPLRNOUTQ)

Type choices, press Enter.

Output Queue . . . . . *USRPRF      Character value
Output Queue Library . . . . . *LIBL      Character value

Bottom
F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys

```

You may want to change the output queue for your report program so that its spooled files are placed in an output queue that is not attached to a printer or so that the files are put on hold. This will assure you that the files will be there to set up when you display the output queue.

Changing Robot GUIDE Defaults

When you create your report set, Robot Reports uses some defaults for output and archiving options, the OPAL processing type, and the print file override. You can view and change these defaults in the Maintain Robot GUIDE Defaults panel. If you make changes in this panel and press **Enter**, your values are saved.

They are used on the current report set and will display the next time the Robot GUIDE Defaults panel is accessed. The values do not apply to report sets created previously.

To access the Maintain Robot GUIDE Defaults panel:

1. Either use the **REPLRNOUTQ** command or option **1** on the Reports sets menu.
2. Enter the output queue and library of the spooled files you will be processing.

3. When you press **Enter**, the Robot Reports Learn Output Queue panel displays.

```

REP380          Robot REPORTS Learn Output Queue          15:23:28
                Actual Output Queue: QPRINT      Library: QGPL
Type options, press Enter.
  1=Select  4=Delete  5=Display

  Opt  File      User      User Data  Job Name  Status  Total
  ---  -
  -    QPRTLIBL  QPGMR      +03        RBDDNEW3  *READY  1
  -    QPRTLIBL  QPGMR      +03        RBVNLHATES *READY  1
  -    QPDSPAJB  QPGMR      +03        RBTANYACAL *READY  2
  -    QPRTLIBL  QPGMR      +03        RBDDNEW3  *READY  1
  -    RBT617P  QPGMR      RBT617 +03        RBPRDTSKSP *READY  26
  -    QPRTLIBL  QPGMR      +03        RBVNLHATES *READY  1
  -    QPRTLIBL  QPGMR      +03        RBDDNEW3  *READY  1
  -    RBT617P  QPGMR      RBT617 +03        RBPRDTSKSP *READY  26
  -    QPRTLIBL  QPGMR      +03        RBVNLHATES *READY  1
  -    QPDSPAJB  QPGMR      +03        RBBPMCS   *READY  16
  -    QPDSPAJB  QPGMR      +03        RBTBWCS   *READY  16
  -    QPDSPJOB  QPGMR      +03        RBTBWCS   *READY  12
                                     More...

F3=Exit      F13=Change Robot GUIDE Defaults  F21=System Command
    
```

4. Press **F13** to display the Robot GUIDE Defaults panel

```

REP384          Maintain Robot GUIDE Defaults          15:25:40
Report Name Information:
  OPAL Processing Type . . . . . : 2 (F4=Prompt)

Report Print File Override Information:
  Hold Spool File . . . . . : Y (Y=Yes,N=No)

Days Report Remains in Archive
  Online . . . . . : 5
  Short Term Storage . . . . . : 20      Long Term Storage: 30

Output Options:
  Output Code . . . . . : B (V=View, P=Print, B=Both, M=Fiche, C=Client,
                             D=PDF, H=HTML, T=Transform)
  Bundle Code . . . . . : N (Y=Yes,N=No)
  Output Queue . . . . . : _____ (F4=Prompt)
  Library . . . . . : _____ (F4=Prompt)

F3=Exit      F4=Prompt      F14=Restore HelpSystems Values
    
```

For detailed information about the fields on this panel, press **F1** to display online help, or reference the following sections.

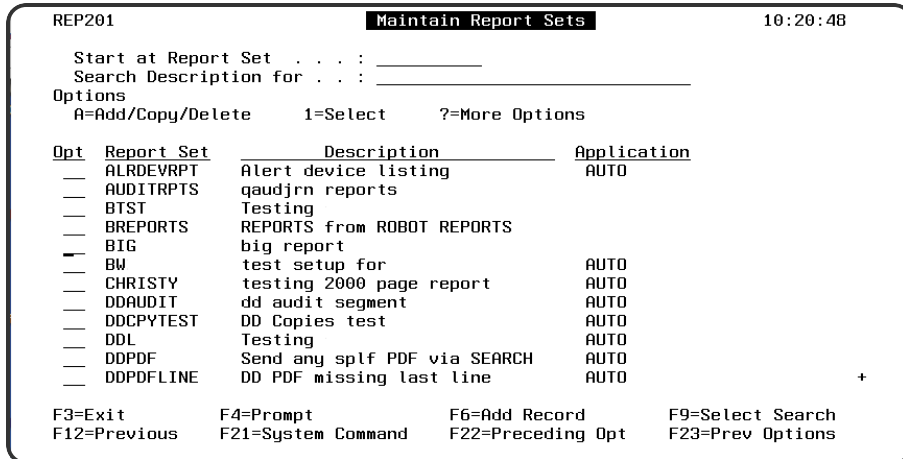
- Opal Processing Type
- Report Print File Overrides
- Report Archiving
- Output options

Creating and Maintaining Report Sets

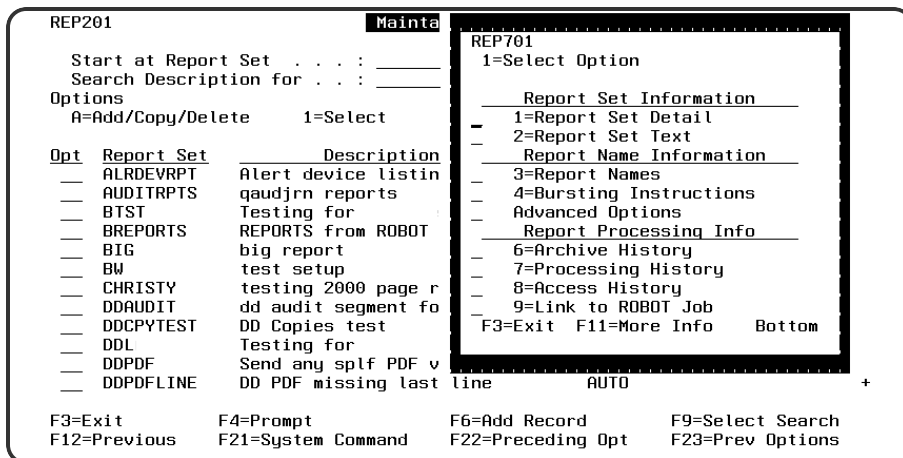
Use the Maintain Report Sets panel to create new report sets or to maintain your current report sets.

1. From the Robot Reports Main Menu, take option **1**, Report Set Menu.
2. Take option **2**, Maintain Report Sets.

The Maintain Report Sets panel lists the report sets that have been created. It lists the name of the report set, the description of the report set, and the application to which the report belongs. If the application listed is AUTO, it indicates the Automated Report Setup was used to create the report set.



- You can search your report sets by Report Set name or by Application. Access the search options menu by pressing **F9** and selecting either Report Set or Application. Then use the 'Start at' field to search.
- To see more detail about a report set, enter a **1** in the Opt field.
- Press **F6** to create a new report set.
- Press **F4** in the Opt field to see more options. Then use the pop-up menu to access additional report set components.



Report Set Panel

To access the Report Set Panel, take option **1** next to the report set you want to update from the Maintain Report Sets panel. If you chose to add a record at the Maintain Report Sets panel, you would see this panel without any information filled in. You can enter or edit information about the report set on this panel.

```

REP210                               Report Set                               10:32:31

Report Set Information:
Report Set . . . . . : ALRDEV RPT
Description . . . . . : Alert device listing
Application . . . . . : AUTO
Report Program Name . . . . . : _____ Library . . . : _____
Print Schedule . . . . . : fridaus _____ (memo only)
Accounting Code . . . . . : _____ (F4 = Prompt)
Hold Set from Processing : N
Report Processing Code (1 = Select)
  _ EXECUTE   _ ROBOT   1 SEARCH
Do you want to submit report to distribution: N (Y=Yes,N=No)
Job Queue for Distribution: _____ Library: _____
Days Report Remains in Archive
Online . . . . . : 1
Short Term Storage . . . . . : 30 Long Term Storage: ____
Report Command . . . . . : _____

(F4 = Prompt Command)
F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=Start Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options

```

Options

Report Set

Enter a logical 10 character name for the report set.

Description

Enter a description of the report.

Application

Enter an application name (optional) to allow you to sort and view reports sets by application.

Report Program Name

Enter the name and the library of the report program for this report set (optional). If you enter this information and run the Robot Reports command REPCHKDATE, Robot Reports compares the creation date of the report program against its record of what the creation date was the last time you ran this command. If the dates don't match, it generates a report to alert you to investigate the layout of the report to see if it has changed. If the layout has changed, you may need to maintain your OPAL code so that it will perform its intended function with the new report layout.

Print Schedule

Enter a description of the print schedule. This field is optional and for memo purposes only. It does not affect the report distribution.

Accounting Code

The accounting code (optional) lets you document which account code should be charged for running this report.

Hold Set from Processing

If you want to hold this set from processing, enter a **Y**. If you do not wish to hold this set, enter an **N**.

Report Processing Code

Robot Reports gives you three ways of processing a spooled file into archive and distributing reports. See more about Report Processing Codes below.

Do you want to submit report to distribution

Robot Reports has the option of submitting report distribution to another job queue. Enter **Y** to submit the report distribution job REPDISTRIB to the job queue specified. Enter the job queue and library information to tell Robot Reports where to process the job. This option is not recommended if you're using Search type processing. This is not the same as [report distribution](#).

Days Report Remains in Archive

Enter the number of days a report should remain in each archive stage. Reports move from one stage to the next when the number of days of storage has elapsed and you run the REARCHIVE command. See more about the archiving options below. Archive retention periods are calculated from the original spooled file's creation date. If you enter **0** (zero) or leave the field blank for online storage, the report stays online for at least 24 hours. After 24 hours, it stays online until the REARCHIVE command is run. If you enter 0 (zero) or blank for short- or long-term storage, the report will not be stored in that stage.

Report Command

If you select the EXECUTE method of report processing, enter the report command here. Press **F4** in this field to access IBM command prompting. When you press the enter key to record your entries, Robot Reports checks the syntax of the command statement for you.

Report Processing Codes

The three options for processing a spooled file for Robot Reports are EXECUTE, SEARCH, and ROBOT.

- **EXECUTE** allows you to enter a command that runs your report. After you have set up an EXECUTE-type report set, run the command REPRUNSET with the report set name to:
 1. Perform the print file overrides as instructed by the report set.
 2. Execute your report command.
 3. Divert the spooled files to Robot Reports, process them into archive, and distribute your reports to the output queues specified for each recipient.

You can only use one command per report set. To execute more than one command for the same report set, you must have Robot Reports call a CL program that executes multiple commands using the report set Report Command.

- **SEARCH** allows you to run the report program just as you do now. The difference is that you tell Robot Reports to monitor the output queues where these reports go. Robot Reports compares the information you supplied on the [report name](#) panel with

the spooled file information on the output queue. When it finds a match, it processes the file and puts the report into the archive. The output queues used for this technique should not be attached to a printer.

- **ROBOT** is the easiest way to have Robot Reports process your reports using Robot Schedule. Enter the report command into a Robot Schedule job and designate it as a Robot Reports job. ROBOT will take care of the overrides and will divert the spooled file to Robot Reports for processing into archive and distribution.

Days Report Remains in Archive

In deciding how many days a report should reside in each archive stage, you need to look at how often the reports are accessed. If there is continual access, you will want to keep the report online for that period so it can be viewed quickly and easily. If the access becomes occasional, move it to short-term storage. When the need for access is rare (but necessary), move the report to long-term storage.

Enter the number of days a report should remain in each archive stage on the Report Set panel. If you enter a zero in any archive stage, the report will stay in that stage zero days. However, all reports processed by Robot Reports stay online until you run the REPARCHIVE command. Once you have report set archive plans defined, you can change them at any time.

REPARCHIVE Command

The REPARCHIVE command checks archive dates and moves reports to their next archive stage when it is appropriate. When all the archive dates for a report have expired (when the report has been in archive for the total number of days entered for online, short-, and long-term storage), running the REPARCHIVE command removes the report and its associated report archive records from the system.

Short-term and Long-Term Storage

As you and your users become more comfortable with archiving reports on iSeries storage devices rather than on paper in filing cabinets, you may want to begin using Robot Reports short-term and long-term storage options. You would change your archive plan to reflect this new storage policy. For example, you might retain a weekly report online for 7 days, then put it in short-term storage for 30 days, and finally in long-term storage for 180 days.

When you archive reports to tape or optical disk, Robot Reports keeps track of which volumes contain which reports on its Report Archive History panels. You can also print out a listing of volumes that contain short-term, long-term, and expired reports from the Administrative Reports menu.

Expired Volumes

At some point, the archive period for all the reports on a volume will have expired. The next time you run the REPARCHIVE command, the volume containing only expired reports will show up with a status of EXPIRED on the Report Archive History panel. The presence of expired volumes, tells you it is time to reinitialize the volume and delete the expired record by entering the appropriate option on the Report Archive History panel. The net effect is to recycle the volumes so they can receive new reports.

Saving Disk Space

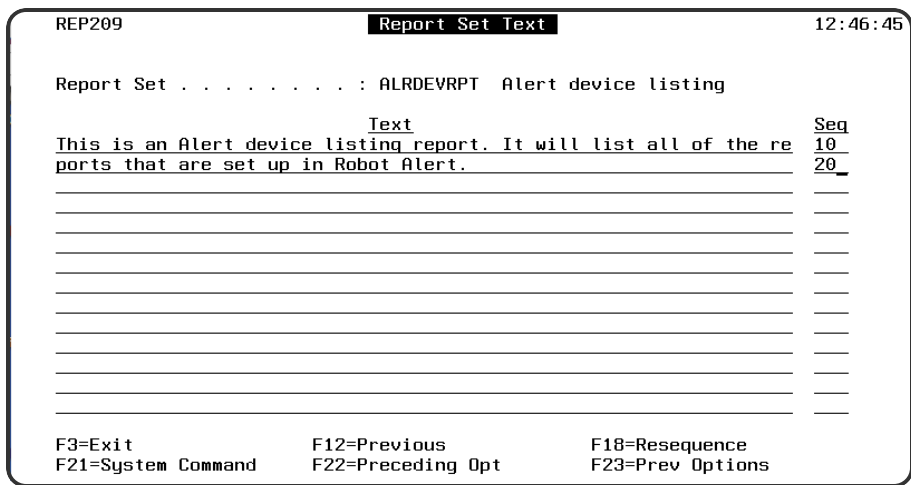
If you are short of disk storage space, you may want to skip over shortterm storage because report recipients should be able to restore reports from short-term storage unattended. This usually requires disk or optical disk storage space, although a dedicated tape drive or tape librarian may be used. To move to a tape that requires attended restoration directly from online storage, you can skip short-term storage by entering the number of days of online storage, followed by zero days short-term, and then the number of days for long-term storage. When REPARCHIVE is run, Robot Reports checks to see if online storage has expired. If it has, it moves the report to the long-term storage.

Report Set Text

To access the Report Set Text panel for a report set, select option 2 next to a report set on the Maintain Report Sets panel. Report set text is optional.

The Report Set Text panel allows you to enter text to document the purpose of the report set and any other pertinent information about it.

Enter free-form text describing the purpose of this report set and any other pertinent information about it.



Maintain Report Names Panel

To access the Maintain Report Names panel, enter option **3**, Report Names, in front of your report set on the Maintain Report Sets panel. Your report program can generate multiple reports. Each report that your program generates must be identified to Robot Reports with a separate report name entry.

The Maintain Report Names panel lists the report names you have defined for this report set including the file name, library, and description.

```

REP207                               Maintain Report Names                               14:15:57

Report Set . . . . . : ALRDEVRPT  Alert device listing
Start at Report Name . . . : _____
Search Description for . . . : _____
Options
A=Add/Copy/Delete      1=Select      ?=More Options

Opt  Report Name      Description
__  RBA406P          Alert device listing

F3=Exit      F4=Prompt      F6=Add Record
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options

```

- To work with a report name, enter a **1** in the Opt field next to it.
- To add a report name to the list, press **F6**.
- To see the pop-up menu of additional options, press **F4** in the Opt field next to the report name.
- Sort and search options are provided for report sets with many report names.

Report Name Panel

To access the Report Name panel, enter option **1** in front of the report from the Maintain Report Names panel.

On the Report Name panel, enter the name, description, OPAL processing type, and spooled file comparison for your report.

Most users of Robot Reports have one spooled file per report, and it is very easy for Robot Reports to determine which spooled files should be processed. However, there are some

instances, when reports are old or have been brought over from another system, where all of the reports have the same spooled file information. In this case, you must use Comparison Information to determine which spooled files you want to process.

The Report Name panel contains several fields under the heading Comparison Information. The information in these fields is very important because it is used by Robot Reports to determine which spooled files to process. A spooled file name must be entered. All of the other fields are optional.

```

REP223                               Report Name                               14:21:55

Report Set . . . . . : ALRDEV RPT  Alert device listing

Report Name Information:
Report Name . . . . . : RBA406P
Description . . . . . : Alert device listing
Remove Spool File After Running Report : N (Y=Yes,N=No)
Limited Functions (Print/Archive) . . : N (Y=Yes,N=No)
OPAL Processing Type . . . . . : 1 (F4=Prompt)

Comparison Information: (leave blank to default)
Spool File Attributes:
Spool Name . . . . . : RBA406P      User Data . . . . . : bakery
Job Name . . . . . : RBA406       Output Queue . . . . : KRISTIBAKE
User . . . . . : KRISTI          Form type . . . . . : kristitype

Report Title:
Heading Page . . : 1   Heading Line . . : 5   Column Range . . : 10 to 30
Comparison Value . . . . : FOOD S

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=Next
F12=Previous F14=Check Input  F21=System Command F24=More keys

```

Options

Report Name

If you do not want Robot Reports to do print file overrides, you can name the report any unique logical name up to 10 characters long. If you want Robot Reports to do print file overrides, enter the actual report name from your report program and its associated library.

Description

Enter a description of the report that this report name produces.

Remove Spool File After Running Report

Robot Reports gives you the option to remove or to save the spooled file. This defaults to **N**. Enter **Y** if you want Robot Reports to remove the file after it has completed its processing.

Limited Functions (Print/Archive)

Robot Reports gives you the option to use its full range of features or only a limited set. Enter **N** to use the full range of features. Enter

Y to use Robot Reports only for report distribution, printing, and archiving. By choosing to use a limited set of functions, you can greatly increase the speed of your processing.

OPAL Processing Type

Enter the OPAL processing type. See Opal Processing Types below for more information.

Spool File Attributes

Use the comparison information to identify which spooled files should be processed.

Comparison information can be entered for many external attributes of the spooled file. Fill out as much of this information as possible.

The more information entered, the faster the processing will be.

Spool name

Enter the Spool Name for this report name (required). The default for the spooled file name is the report name. You can enter a different name (if, for example, you didn't use the actual report name as the Robot Reports report name). You can enter a generic spooled name. You can also enter *ALL to have Robot Reports process all spooled files.

Job Name

Enter the name of the job that is creating the spooled file. You can use generic identifiers in your job name.

User

Enter the user profile that is creating the spooled file. You can use generic identifiers in your user.

User Data

Enter the user data of the spooled file. You can use generic identifiers in your user data.

Output Queue

Enter the output queue where the spooled file is. You cannot use generic identifiers in this field.

Form Type

Enter the form type of the spooled file. You cannot use generic identifiers in this field.

Report Title

Report Title Search should be used when all of the external data for the report is the same. This feature makes report processing faster by using comparison information from inside the report. A Report Title Search can be used only with Search type Report Sets. The report title, or string of characters that you enter, must be in the first five pages of the report and are case sensitive, so they must be entered exactly as they appear in the report. If the title information is found, the report begins processing immediately. By using this technique, you can have a one to one relationship for every report on your system, even though externally there is no difference.

Heading Page • Heading Line • Column Range

Enter the page number, line number, and column range where the report title appears.

Comparison Value

Enter up to 30 characters to represent the report title. The report title must be within the first 5 pages of your report, and is case sensitive. These fields are optional, but if you fill in one field, you must fill in all of them.

Opal Processing Types

Robot Reports allows you to choose an OPAL processing type. If you are using OPAL Report Segments, choose a processing type based on the table below. If you are using Bursting Instructions to segment your report, the OPAL processing type defaults to 2, and cannot be changed.

The processing type you choose will affect how quickly your OPAL is processed, by telling Robot Reports when to go to the next segment. By using the correct processing type, you can greatly increase the speed of your processing.

Processing type 1 is shared processing. In processing type 2, Robot Reports will scroll through your list of segments until it has processed all of the segments. In processing type 3, Robot Reports will go through your list of segments from top to bottom and then stop. The following table gives recommended uses of OPAL processing types and segmentation.

Recommended Report Processing

Report Description	Processing Type	Segmenting
<u>Random Lines:</u> Lines that occur in random areas of the report. For example: <ul style="list-style-type: none"> • Item numbers • Totals, subtotals • Dollar amounts over a certain value 	1	OPAL Segments
<u>Section of Lines:</u> Several lines of continuous data that may or may not span several pages. The data does not necessarily end at the end of a page. For example: <ul style="list-style-type: none"> • Customer information • Sales Data 	3	OPAL Segments
<u>Sample Random Pages:</u> Pages that occur in random areas of the report. Simple segmentation is all that is necessary. For example: A report is sorted by customer number and you want to obtain divisional information.	2	Bursting Instructions
<u>Complex Random Pages:</u> Pages that occur in random areas of the report. Complex segmentation is necessary.	1	OPAL Segments

<u>Simple Section of Pages:</u> Several pages of continuous data. Simple segmentation is all that is necessary. For example: <ul style="list-style-type: none"> • Ranges of departments • Division data 	2	Bursting Instructions
<u>Complex Section of Pages:</u> Several pages of continuous data. Complex segmentation is necessary.	3	OPAL Segments
<u>Shared Lines and Pages:</u> Lines and pages that occur randomly throughout the report. For example: When data is used by more than one segment.	1 *Required	OPAL Segments

Generic Identifiers

If you cannot identify a spooled file by using the Spool File Attributes Comparison Information, use generic identifiers in these fields. Robot Reports allows you to use generic identifiers in the Spool File Attributes fields: Spool Name, User, Job Name, and User Data. Generic identifier are not allowed for the Spool File Attributes fields: Output Queue, Form Type.

Generic identifiers refer to a group that has one or more common characters in the character strings that identify it. A generic is identified by an asterisk (*) as the first character, the last character, or both. The asterisk can represent a whole word or a group of characters.

Restrictions: The Spool Name field will accept any character string ending in an asterisk and the special value *ALL. The User Data field will accept embedded asterisks (asterisks in the middle of a string) and treat them as part of the string.

For example, suppose you have several report programs that generate output with the spooled name QSYSPRT. You have differentiated these programs on your system by entries in the User Data field. All the accounting report programs have User Data that begins ACT followed by a two digit number. If you want Robot Reports to process all of the accounting reports, enter QSYSPRT as the Spool Name and enter the generic name ACT* in the User Data field.

The opposite is also true. If all of the report programs that update database files end with UPD, you could enter the generic *UPD in the User Data field. Robot Reports will then process all the QSYSPRT files that have User Data ending in UPD. Perhaps the common part of the character string is in the middle. You want to process all the reports submitted by your operators. You have set up your operator user profile names in the format: shift number, OPR, and operator initials. In this case, you could enter *OPR* in the User field to process all reports submitted by operators.

The following are valid formats for entries in the Spool Name, User, Job Name, and User Data fields on the Report Name panel:

- The specific value (ABC).
- The character string beginning ABC (ABC*).
- Only the Spool Name field allows the special entry *ALL.

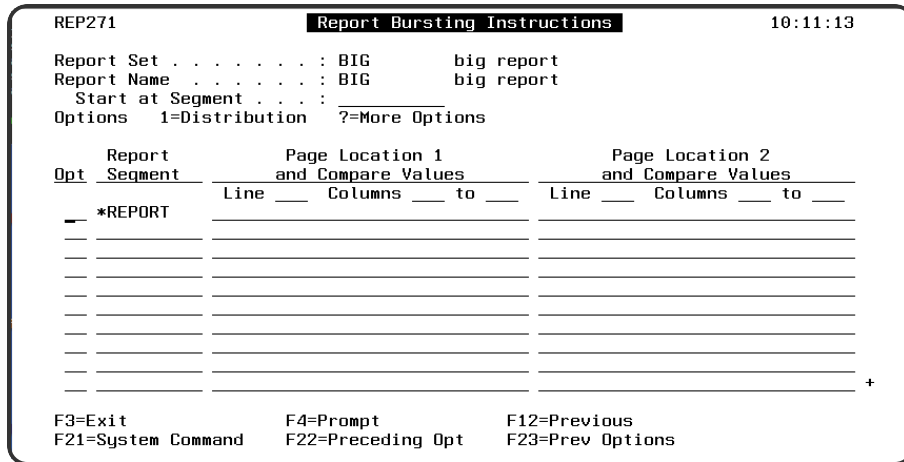
The following are valid formats for entries in the User, Job Name, and User Data fields on the Report Name panel:

- The character string ending in ABC (*ABC).
- The character string containing ABC (*ABC*).
- Only the User Data field allows embedded asterisks like AB*C. Robot Reports treats an asterisk in the middle of a name as part of the name. AB*C will match only AB*C and nothing else.

Bursting Instructions

To access the Report Bursting Instructions panel, from the Maintain Report Names panel, enter option **2** (Bursting Instructions) in the opt column next to the report you want to set bursting instructions for. If you want to print out the bursting instructions, select option **3**.

Bursting can only be used with Opal Processing Type 2 defined on the Report Name panel.



Report Segments

On the Report Bursting Instructions panel, you enter the names of report segments. Robot Reports has two special report segments you should know about, *REPORT and

*REMAINDER. The Report Bursting Instruction panel lists the segments defined for this report name. When you access this panel for the first time, *REPORT will be the only segment listed.

- When you define a report name for a report set, Robot Reports generates a report segment that contains the entire report called *REPORT. If you do not want to create other segments, simply leave it alone. A report name must have at least one report segment – either *REPORT or another named segment that you define.
- If you want to create additional segments, enter the name you want to use for the report segment. The name you choose must be 10 characters or less.
- If you decide to create report segments other than *REPORT, you may want to take advantage of the other special segment, *REMAINDER. You create *REMAINDER just as you would any other segment, except that you do not have a compare value. *REMAINDER works like a scrap bucket, collecting all the pages of a report that you did NOT select for your named segments. For example, if all the pages of a report should be included in various named segments, *REMAINDER should end up being empty. So, you can use it to verify that you've set up your segments properly. If there is any report overflow ending up in *REMAINDER, you have not set up your segments correctly. After you have run your report a few times and are confident that your segments are correct, you can delete *REMAINDER to save processing time. Remember—you can create *REMAINDER at any time to help you define segments.

Compare Values

To burst your report into segments, you must enter a segment name and a comparison value name and location. If you want, you can enter two comparison values to define each bursting instruction. When the report is processed and a comparison value is found, the entire page will be included in the segment. If you need to have more comparison values than two, you will have to use Segment OPAL to create your report segments.

You can enter up to 2 comparisons per segment. You can enter any value for a comparison value and there are two special values that can be entered for comparison: BLANK and '' (spaces). These values let you compare spaces in a particular location of the report. The second comparison value field follows the same rules as the first comparison. The comparisons follow the order in which you enter them. In other words, Robot Reports will check for the first comparison value and then check for the second comparison value. If it finds both comparisons, the page is included.

```
REP271                                     Report Bursting Instructions                          15:33:47
Report Set . . . . . : BIG            big report
Report Name . . . . . : BIG            big report
Start at Segment . . . :
Options 1=Distribution  ?=More Options

  Report           Page Location 1           Page Location 2
Opt Segment       and Compare Values      and Compare Values
   Line  8  Columns 58  to 94  Line  __  Columns  __  to  __
-- *REPORT
-- CENTRAL       Little Falls
-- EASTERN       Newark
-- NORTHWEST     Seattle
-- SOUTH         Atlanta
--
--
--
--
--
--
--
--
F3=Exit          F4=Prompt          F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options
```

Example

In this example, you will see how to define bursting instructions for a report. You will see what the output will be by using Bursting Instructions.

1. The report that you want to burst into segments is five pages long. You want to burst the report into segments based on regions. Your comparison values are the location of the customer. From viewing the report, you know that the comparison data is on line 8 and is in the column range 58 to 94.

5/13/23 2:53:53 Sales Statistics for 05/23 PAGE 5 ACT403

Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number Paid
5/8/23	27304	Cole Farnes Instrument Co.	Phoenix	282.00	37135
5/8/23			Las Cruces	598.00	37137

5/13/23 2:53:53 Sales Statistics for 05/23 PAGE 4 ACT403

Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number Paid
4/23/23			Atlanta	1,578.00	38762
4/23/23			Dallas	1,578.00	38744

5/13/23 2:53:53 Sales Statistics for 05/23 PAGE 3 ACT403

Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number Paid
5/18/23			Seattle	2,690.00	39190
5/8/23	11333	Cocotec Inc	Portland	110.00	39267

5/13/23 2:53:53 Sales Statistics for 05/23 PAGE 2 ACT403

Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number Paid
5/18/23			Little Falls	205.00	38096
5/18/23			Des Moines	205.00	38351

5/13/23 2:53:53 Sales Statistics for 05/23 PAGE 1 ACT403

Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number Paid
5/8/23	10265	Hilling Cong Inc.	Newark	618.00	39265
5/8/23	10200	Access Network	Boston	1,000.00	38952
4/26/23	10551	fl Company	Baltimore	2,300.00	38846
5/18/23			Baltimore	265.00	38847
5/8/23	10573	Basic Vegetable Foods	New Haven	335.00	38725
5/18/23	10882	JHS France	New Haven	93.75	38588

- Fill in the Report Bursting Instruction panel with the report segment names and comparison information. In this case, our comparison value is on line 8 in the column range of 58 to 94. If you need to see the report to decide what column numbers you need, press **F4** to view the report online.

```

REP271          Report Bursting Instructions          15:33:47
Report Set . . . . . : BIG          big report
Report Name . . . . . : BIG          big report
Start at Segment . . . . . :
Options 1=Distribution  ?=More Options

  Report      Page Location 1      Page Location 2
  Opt Segment      and Compare Values      and Compare Values
  Line 8      Columns 58 to 94      Line      Columns      to
*REPORT
CENTRAL      Little Falls
EASTERN      Newark
NORTHWEST    Seattle
SOUTH        Atlanta
+

F3=Exit      F4=Prompt      F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

- The following shows the report output you receive when using Bursting Instructions. When a comparison value is found from the Bursting Instruction panel, the page is included in the segment. The segments are processed in the order they are found in the report.

Eastern Segment

Sales Statistics for 05/23					PAGE 1 ACT103	
Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number	Number Paid
5/03/23	10205	Alling Corp Inc.	Newark	610.00	39265	
5/05/23	10286	Access Network	Boston	1,000.00	38952	
4/26/23	10551	A Company	Baltimore	2,300.00	38016	
5/10/23			Baltimore	285.00	38047	
5/03/23	10573	Basic Vegetable Foods	New Haven	335.00	36725	
5/10/23	10892	JMS France	New Haven	93.75	35588	

Central Segment

Sales Statistics for 05/23					PAGE 2 ACT103	
Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number	Number Paid
5/10/23			Little Falls	205.00	38596	
5/10/23			Des Moines	205.00	38351	
5/10/23			Peoria	205.00	38597	
5/10/23			Des Moines	167.50	38352	
5/10/23			Des Moines	302.50	38590	
5/10/23			St. Louis	302.50	38599	

Northwestern Segment

Sales Statistics for 05/23					PAGE 3 ACT103	
Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number	Number Paid
5/10/23			Seattle	2,890.00	39190	
5/05/23	11330	Comcast Inc	Portland	410.00	39257	
5/10/23	11466	ATG Aviation	Reno	410.00	39250	
4/27/23	11567	Crist Mills	San Francisco	2,982.00	39177	
4/30/23	11624	AKZO	Reno	610.00	36548	
4/22/23	11910	Coca-Cola Enterprises	Seattle	6,105.00	37007	

Southern Segment

Sales Statistics for 05/23					PAGE 4 ACT103	
Date Received	Customer Number	Customer Name	Location	Amount Received	Invoice Number	Number Paid
4/23/23			Atlanta	1,570.00	38762	
4/23/23			Dallas	1,570.00	38744	
5/03/23	17211	Bountiful City Corporation	Miami	90.00	39302	
5/10/23	17374	Banfield Inc.	New Orleans	295.00	39305	
5/11/23	19396	Blackhawk Loather	Dallas	90.00	38956	
5/03/23	19073	Boehringer Mannheim	New Orleans	410.00	38386	

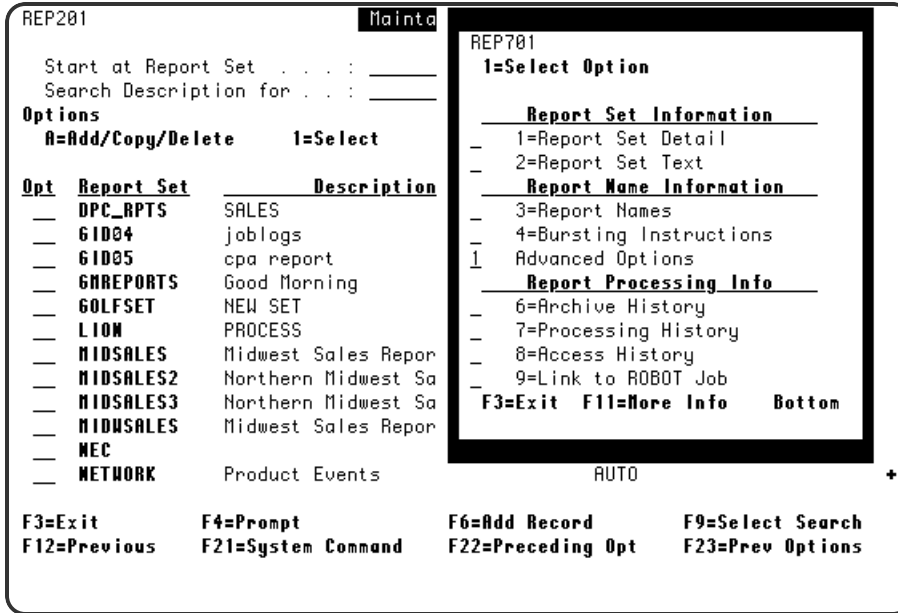
Advanced Report Options

Robot Reports contains advanced features that you can use to customize your reports. All of the report set functions that you need to set up a basic report were discussed in the Report Sets section. This section explains how to use the advanced report set functions.

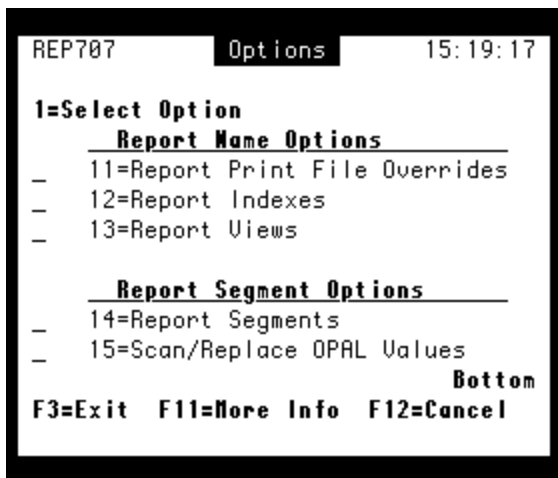
To display the Advanced Options menu:

1. On the Report Sets menu, take option 2..
2. On the Maintain Report Sets panel, press **F4** in front of the report set you want to work with.

3. Enter a **1** next to Advanced Options on the options menu.



The Robot Reports Advanced Report Options component includes the following features:



- **Print File Overrides**

Allow you to override print file attributes of the spooled file without having to change the report program that generated the spooled file.

- **Report Indexes**

Allow you to define indexes that span the entire Robot Reports archive and let your users retrieve documents fast.

- **Report Views**

Layouts of the report that can be customized by the report recipient. The report view determines what report columns a recipient will see.

- **OPAL Report Segments**

Like bursting instructions, these are the pages or lines that will be included in a portion of a report called a report segment. OPAL Report segments have OPAL code associated with them to define what pages or lines go into the segment. OPAL report segments allow you to define distribution for each segment.

- **Scan/Replace OPAL Value**

This panel allows you to look for values in all your OPAL code that relates to this report name (all segments and all views) and globally change them.

Report Print File Overrides

Select option **11** (Report Print File Overrides) from the Advanced options menu to change the print attributes for a report without changing the report program. Certain print attributes can be overridden at the segment, distribution, and recipient level.

```

REP325                               Report Print File Overrides                               13:05:13

Report Set . . . . . : SALESTATS Sales Statistics
Report Name . . . . . : SALLIB Sales Statistics Detail

Enter Report Print File Override Information:
Print File . . . . . : SALLIB
Library . . . . . : *LIBL
Text . . . . . : _____
Laser Command Name . . . . . : _____ (F4=Prompt)
Page Length . . . . . : _____ (1-255)
Overflow Line Number . . . . . : _____ (1-255)
Page Width . . . . . : _____ (1-378)
Form Type . . . . . : _____
Characters Per Inch . . . . . : _____ (5, 10, 12, 13.3, 15, 16.7, 18, 20)
Lines Per Inch . . . . . : _____ (3, 4, 6, 7.5, 8, 9, 12)
Hold Spool File . . . . . : _____ (Y=Yes, N=No)
User Data . . . . . : _____

F3=Exit                F4=Prompt                F12=Previous
F21=System Command   F22=Preceding Opt   F23=Prev Options

```

Options

Text

You can enter up to 30 characters of text that will print at the bottom of each page of the report.

Laser Command Name

Enter the name of the Robot Reports laser command you want to use for this report. A laser command contains the usual attribute overrides associated with laser printers and can also contain special print commands your laser printer uses. See the Report Set Objects section for more information.

Print Attributes

Enter the print attributes you want Robot Reports to change when it prints the report. For SEARCH-type report sets where Robot Reports is repaginating the report, you can specify print file overrides on the Report Segment panel.

Report Indexes

To access the Maintain Report Indexes panel, select option **12** on the Advanced Options menu.

The Maintain Report Indexes panel lists the report indexes defined for this report name. A report index provides an additional way for you to retrieve specific, commonly needed documents from your archived spooled files. For example, you might index documents like sales invoices, purchase orders, sales orders, or customer statements. Indexes span all the runs of a report and thus provide an access point to any page in the entire Robot Reports archive.

```

REP320          Maintain Report Indexes          15:39:29

Report Set . . . . . : MIDSAL2 Northern Midwest Sales
Report Name . . . . . : MIDSAL2 Northern Midwest Sales
Start at Index . . . . : _____
Search Description for . : _____

Options
  A=Add/Copy/Delete    1=Select

Opt  Index          Description
---  ---          ---
  --- ACTNUM        CUSTOMER ACCOUNT NUMBER
  --- INUNUM        CUSTOMER INVOICE NUMBER

F3=Exit          F6=Add Record      F12=Previous
F21=System Command  F22=Preceding Opt   F23=Prev Options

```

Options

- A** Enter an **A** in the Opt field to add, copy, or delete an existing index.
- 1** Enter a **1** in the Opt field to access the Report Index Detail panel.
- F6** Press **F6** to add a new index to the list.

Report Index Detail

The Report Index panel allows you to name and describe the index. You need to define an index before you can refer to it in your OPAL code.

```

REP321                               Report Index                               15:42:15

Report Set . . . . . : MIDSALLES2   Northern Midwest Sales
Report Name . . . . . : MIDSALLES2   Northern Midwest Sales

Enter Report Index Information:
Report Index . . . . . : INUNUM_____
Description . . . . . : CUSTOMER INVOICE NUMBER_____

F3=Exit           F6=Add/Copy/Delete   F12=Previous
F21=System Command F22=Preceding Opt   F23=Prev Options

```

Options

Report Index

Enter a logical name up to 10 characters in length for the index.

Description

Enter a description of the index.

Report Views

To access the Maintain Report Views panel, select option **13** on the Advanced Options menu.

The Maintain Report Views panel lists the report views defined for this report name. A report view customizes the report layout for individual report recipients. It can also be used to customize report highlight lines. Authorized recipients can create their own report views when they view their reports. This display is used by the report administrator to manage report views to be used by recipients, to add security to report views, and to create report views for general use.

Robot Reports automatically creates a report view named *STANDARD. The *STANDARD view is the original report layout. The report administrator can change this view or exclude everyone from using it.

```

REP238                               Maintain Report Views                               15:46:31

Report Set . . . . . : MIDSAL2 Northern Midwest Sales
Report Name . . . . . : MIDSAL2 Northern Midwest Sales
Start at Report View . . . : _____
Search Description for . . : _____

Options
  A=Add/Copy/Delete      1=Select      ?=More Options

Opt  Report View      Description
---  *STANDARD        *STANDARD
---  MINNESOTA        Northern Midwest Sales
---  WISCONSIN        Northern Midwest Sales

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

```

Options

- A** Enter an **A** in the Opt field to add, copy, or delete a report view.
- 1** Enter a **1** in the Opt field to see the Report View detail panel.
- F6** Press **F6** to add a new view to the list.
- F4** Press **F4** in the Opt field to see more [Report View options](#).

```

REP701
  1=Select Option

  Report View Information
  ---
  1=Report View Description
  2=Display Report Using View
  3=OPAL To Create View
  4=OPAL To Create View HILITE
  5=Add Report View Security
  6=Print View OPAL Code
  7=Print Hilite OPAL Code
  F3=Exit  F11=More Info  Bottom

```

- F9** Press **F9** to see the search menu. The Report View option allows you to search for a view by its name. The Search OPAL option allows you to scan your OPAL code to determine which views contain the same code. This is useful when changes to your report program require global changes to report views.

```
REP702
 1=Select Option
- Report View
- Search OPAL
  F3=Exit
```

Report Segments

To access the Maintain Report Segments panel, select option **14** on the Advanced Options menu. Report Segment OPAL must be set up for each of the segments you create using this method.

Robot Reports offers two types of segmentation to allow you to have the most efficient and versatile processing possible. The two ways of segmenting are [Bursting Instructions](#) and OPAL Report Segments.

Under normal circumstances, segmentation will be based on one or two comparison values. In this case, you should use Bursting Instructions as a quick and easy way to create multiple segments based on one or two comparison values.

There may be times when you want to segment your report based on three or more comparison values. Or, you may want to segment your report based on conditions other than comparison values. In this case, you should use the more versatile way of segmenting, OPAL Report Segments.

OPAL Report Segments let you set up your own OPAL code for each segment. You can create report segments based on any criteria imaginable. Because of the increased flexibility of OPAL Report Segments, this type of processing is not as efficient as Bursting Instructions. However, if you want to segment based on complex criteria, OPAL Report Segments are a very versatile and sophisticated.

You can also set up distribution and banner pages for OPAL Report Segments, just as you would for Bursting Instructions.

```

REP224          Maintain Report Segments          15:51:46

Report Set . . . . . : ALRDEVPT  Alert device listing
Report Name . . . . . : RBA406P  Alert device listing
  Start at Report Segment . . : _____
  Search Description for . . . : _____
Options
  A=Add/Copy/Delete      1=Select      ?=More Options
Processing
Opt  Report Segment  Description          Sequence
--  *REPORT          Alert device listing      10
--  NOPAGE1          no header page          10

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options

```

Options

- A** Enter an **A** in the Opt field to add, copy, or delete an existing report segment.
- 1** Enter a **1** in the Opt field to see the Report Segment detail panel.
- F6** Press **F6** to create a new segment.
- F4** Press **F4** in the Opt field to see more [Report Segment Options](#).

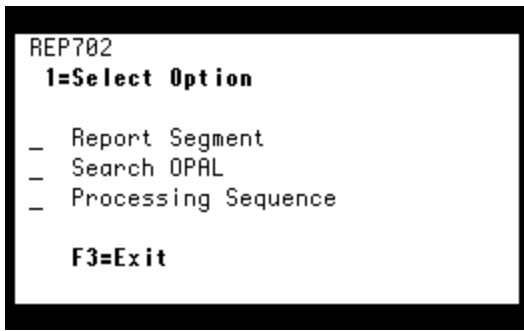
```

REP701          SYBIL5
  1=Select Option

  Report Segment Information
  -- 1=Report Segment Detail
  -- 2=Segment OPAL
  -- 3=Add Report Segment Security
  -- 4=Print OPAL Code
  -- 5=Report Distribution
  -- 6=Enter Banner Instructions
  -- 7=Delete Banner Instructions
  -- 8=Resegment this Report
  -- 9=Extended E-Mail Subject
  F3=Exit  F11=More Info  Bottom

```

- F9** Press **F9** to see the search menu. The Report Segment option lets you search for a segment by name. The Processing Sequence option lets you search for a segment by the order in which it is processed. The Search OPAL option lets you scan your OPAL code to determine which segments contain the same code. This is useful when changes to your report program require global changes to report segments.



Scan/Replace OPAL Values

Select option **15** from the Advanced Option Menu to access the Scan/Replace OPAL Values panel. This panel allows you to look for values in all your OPAL code that relates to this report name (all segments and all views) and globally change them. This is especially useful when something about your report program changes and you don't want to edit each segment and view individually.

Scan and replace works similarly to search and replace in a word processing program. You enter the information Robot Reports should look for in the Scan Information fields. Robot Reports tries to match all items entered in these fields. Therefore, the more fields in which you make an entry the more restrictive the search becomes. When Robot Reports finds a match, it replaces the scan values with the replace values.

The Scan/Replace OPAL Values panel also allows you to shift your OPAL references when your report layout changes.

REP247 Scan/Replace OPAL Values 16:38:54

Report Set : MIDSales2 Northern Midwest Sales
Report Name : MIDSales2 Northern Midwest Sales

Scan Information:

Variable : _____
Line : _____
Begin Column : 65
End Column : 74
Operation : _____
Operation Value : _____

Replace Values:

Line : _____
Begin Column : 65
End Column : 75
Operation Value : _____

Column Shifts:

Begin Column : _____
End Column : _____
Amount to Shift : _____

F3=Exit F12=Previous

Options

Scan Information

Enter the information that you want Robot Reports to use for the search.

Replace Values

Enter the replacement values in these fields. Whatever you enter in the Replace Values fields is substituted for the corresponding Scan Information value. If you leave Replace Values fields blank, Robot Reports substitutes zeroes (0) for numerical fields and blanks for alpha fields.

Column Shifts

Enter the number of the first and last columns you want to move. Then enter the number of columns to shift left or right. Positive numbers move the columns to the right. Negative numbers move the columns to the left.

EXAMPLE:

- Suppose you made a mistake setting up a field. When you marked and bounded a column, you did not realize that negative numbers would have an extra character to the right of the number. You set up several report segments this way and now negative numbers are not recognized as negative by your code. To fix this problem, enter the old column numbers in the Scan Information fields. Then, enter the same begin column and the new end column (the old end column plus one) in the Replace Information fields. Robot Reports will change all references to those columns. References to columns 65-74 will be replaced by references to columns 65-75.
- Imagine a new 15 character-wide column is inserted in a report layout. You can use this panel to shift all your column references over by 15 columns in a single step. If your report has data in columns 35-40 and 50-60 and you want to shift all your references 15 characters to the right, first you enter the total width of all the columns you want to move. In this case you would enter 35 as your beginning column and 60 as your ending column. Then, you enter the shift amount (15) in the Amount to Shift field. References to begin column 35 and end column 40 will be changed to begin column 50 and end column 55. References to begin column 50 and end column 60 will be changed to columns 65 and 75, respectively.

Report View Options

To access the options for report views, press **F4** in the Opt field on the Maintain Report Views panel.

```

REP701
1=Select Option

  Report View Information
  _ 1=Report View Description
  _ 2=Display Report Using View
  _ 3=OPAL To Create View
  _ 4=OPAL To Create View HILITE
  _ 5=Add Report View Security
  _ 6=Print View OPAL Code
  _ 7=Print Hilite OPAL Code
F3=Exit F11=More Info Bottom

```

Report View Description

Select option **1** from the Maintain Report Views panel to open the Report View panel. The Report View panel names and describes the report view.

```

REP264          Report View          16:33:21

Report Set . . . . . : MIDSales2  Northern Midwest Sales
Report Name . . . . . : MIDSales2  Northern Midwest Sales

Enter Report View Information:
Report View . . . . . : MINNESOTA
Description . . . . . : Northern Midwest Sales

F3=Exit          F6=Add/Copy/Delete  F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Display Report Using View

Once you have processed your report through Robot Reports, you can select option **2** from the Maintain Report Views panel to display the report in the format specialized by the view you have chosen. You can then manipulate the view and update it or create a whole new view.

NOTE: Overstrikes will not display when you view the report. This includes doublestrikes used to create underlining or "boldface" type on impact printers and other fields that may overlap each other.

REP250 **View a Report** Sales Statistics 10:32:43
 Relative Page 1 Line 1 Column 1 View: *STANDARD
Options: ?=More Options

5/13/93 Cash Receipts Listin
 2:53:53

Date Received	Customer Number	Customer Name	Location
5/03/93	10265	All	1
5/05/93	10200	Acc	1
4/26/93	10551	A Company	1
5/10/93			
5/03/93	10573	Basic	5
5/10/93	10882	France	7

F3=Exit F4=Prompt F5=Refresh F7=Scan Window F8=Scan Again
F9=Actual Page F12=Previous F14=Services F19=Left F20=Right

OPAL To Create View

Select option **3** from the Maintain Report Views panel to open the OPAL Report View panel. When you or a recipient save a view, Robot Reports uses report view OPAL to store the resulting layout instructions. You can display and edit these instructions on the OPAL Report View panel.

REP242 **OPAL Report View** 16:42:35

Report Set : MIDSALES2 Northern Midwest Sales
 Report Name : MIDSALES2 Northern Midwest Sales
 Report View : MINNESOTA Northern Midwest Sales
 Start at Sequence : _____

Logic Operand	Variable	Line	Column Beg	Column End	Operation	Operation Values	Seq
		1			TITLE		10
		2			FREEZE		20
		3			FREEZE		30
		4			FREEZE		40
		1	32		FREEZE		50
							60
							70
							80
							90
							100
							110
							1 +

F3=Exit F4=Prompt F12=Previous
F18=Resequenece F22=Preceding Opt F23=Prev Options

Statement Options

Logic Operand

Used to set up powerful data conditions with IF-THEN logic.

Variable

Specifies the named OPAL variable to be tested or changed.

Line/Column

Specifies the lines or columns to be tested or changed.

Operation

Specifies the operation to be performed or the comparison to be made.

Operation Values

Provides the value to be used by the comparison or operation.

- **EXCLUDE** Excludes the specified columns from the view.
- **COPY** Copies the column described in the Column Begin/End field to the column entered in the Operation Value field.
- **MOVE** Moves the column described in the Column Begin/End field to the column number entered in the Operation Value field.
- **FREEZE** Retains specified lines or columns of the current page of the report in a view. Frozen lines are positioned at the top of the display. Frozen columns are positioned at the left edge of the display.
- **TITLE** Retains the specified lines of the first page of the report on

For more information on setting up OPAL code for report segments, see the *Robot Reports OPAL Reference Guide*.

Opal to Create a Spreadsheet View

Report recipients can manipulate the report layout to put the report in column-delimited format without the assistance of the report administrator. The report administrator may occasionally need to enter the special operations—ALPHACOL and NUMBERCOL—to format a view that puts columnar data in column-delimited format. In general, only columns that have been designated as alpha or numeric information are downloaded. If no columns have been marked, the entire report is transferred as a single alpha column. Titles and frozen lines are NOT transferred.

Logic		Column		Operation	Operation Values	Seq
Operand	Variable	Line	Beg End			
			2 6	NUMBERCOL		10
			8 32	ALPHACOL		20
			34 46	NUMBERCOL		30
			48 60	NUMBERCOL		40
			62 74	NUMBERCOL		50
						60
						70
						80
						90
						100
						110
						1 +

F3=Exit F4=Prompt F12=Previous
F18=Resequence F22=Preceding Opt F23=Prev Options

Statement Options

Line/Column

Specifies the lines or columns to be tested or changed.

Operation

Specifies the operation to be performed or the comparison to be made.

- **ALPHACOL** Designates the columns listed in the Column Begin End field as alphabetic information for downloading.
- **NUMBERCOL** Designates the columns listed in the Column Begin End field as numeric information for downloading. Columns designated as numeric are automatically edited to retain only numbers, sign (positive or negative), and decimal point information.

OPAL To Create View HILITE

Select option **4** from the Maintain Report Views panel to open the OPAL Report View HILITE panel. The HILITE operation lets you select a line to be highlighted based on data contained in the report. Your OPAL code tells Robot Reports the rules you want used for highlighting lines. As Robot Reports processes the report, it compares the report data to your highlighting rules and highlights just the lines you want highlighted. This highlighting is view-specific, which means the highlighting is visible only when the report is viewed or printed using the specific view format for which the highlighting is defined. Authorized report recipients can choose what items to highlight for their own views.

For example, suppose one of your reports contains the aging trial balance of customer accounts. You want to highlight accounts that are 60 days old and owe \$15,000 or more in green reverse-image, and accounts that are 90 days old and owe \$10,000 or more in green.

This is easy—you just need to know the column numbers where 60-day and 90-day balances appear and then enter OPAL code similar to what is shown below.

After entering HILITE in the operation field, tab to the Operation Values field and press **F4** to see a color finder that includes 26 options. Colors must be selected from the finder. Some options such as flash, reverse, and underline are as effective on monochrome terminals as on color ones. If the report is printed, the highlighted lines print bold.

Logic		Column		Operation	Operation Values	Seq
Operand	Variable Line	Beg	End			
IF		70	80	GE	15,000	10
				HILITE	Green/Reverse Image	20
END						30
IF		85	95	GE	10,000	40
				HILITE	Green	50
END						60
						70
						80
						90
						100
						110
						1 *

F3=Exit F4=Prompt F7=ROBOT Variables F12=Previous F14=Services
 F18=Resequene F19=Logic Check F22=Preceding Opt F23=Prev Options

Add Report View Security

Select option **5** from the Maintain Report Views panel to open the Edit Profiles for Object Authority. After a confirmation window displays, the Edit Profiles for Object Authority panel displays. Robot Reports automatically creates a security record for the view.

All users listed on a report distribution for this segment are included in the user profile *RECIPIENT. These users are automatically authorized to use a view and to add their own views. When users create new views, they are automatically granted the authority to change those views. You can edit the authorizations on this panel to restrict authority to certain functions or to exclude users. You can list specific users and relate object authority to an authorization list. For more information, see the System Setup and Security section later in this Guide.

REP611 Edit Profiles for Object Authority 17:22:11

Object: REPORT VIEWS Report View Records
MIDSALES2 MIDSALES2 MINNESOTA
Object secured by authorization list : _____

User	Exclude	Use	Change
*RECIPIENT	X	-	-
BOB	-	X	X
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-
_____	-	-	-

F3=Exit F12=Previous +

Users listed on report distribution lists are automatically authorized to use a view and to add views. When users create new views, they are automatically granted the authority to change those views.

Print View OPAL Code

Select option **6** from the Maintain Report Views panel to print the Report View OPAL code for the current view.

Print HILITE OPAL Code

Select option **7** from the Maintain Report Views panel to print the Report View HILITE OPAL code for the current view.

Report Segment Options

To access the options for report segments, press **F4** in the Opt field on the Maintain Report Segments panel.

```

REP701                                SYBIL5
1=Select Option

  Report Segment Information
  - 1=Report Segment Detail
  - 2=Segment OPAL
  - 3=Add Report Segment Security
  - 4=Print OPAL Code
  - 5=Report Distribution
  - 6=Enter Banner Instructions
  - 7=Delete Banner Instructions
  - 8=Resegment this Report
  - 9=Extended E-Mail Subject
F3=Exit F11=More Info Bottom

```

Report Segment Detail

Select option **1** from the Maintain Report Segments panel to open the Report Segment panel. On the Report Segment panel, you enter information describing a report segment. Robot Reports has two special report segments you should know about. When you define a report name for a report set, Robot Reports generates a report segment that contains the entire report called ***REPORT**. If you do not want to create other segments, simply leave it alone. A report name must have at least one report segment, either ***REPORT**, or another named segment that you define.

If you want to create report segments other than ***REPORT**, you may want to take advantage of the other special segment Robot Reports provides, ***REMAINDER**. You create ***REMAINDER** just as any other segment, but ***REMAINDER** functions like a scrap bucket, collecting all the pages or lines of a report that you did not select for your named segments.

For example, if all the lines of a report should be included in several named segments, you want ***REMAINDER** to end up empty. ***REMAINDER** can be used to audit your work so that you're sure you've set up the segments properly. After you have run your segmented report a few times and are confident that your segments are correct, you can delete ***REMAINDER** to save processing time when you run your reports. ***REMAINDER** can be created anytime you need help defining segments.

In creating a segment that contains only selected lines of a report, you have the option of retaining the original pagination scheme. If you are defining a report segment that excludes only certain lines, you should retain the existing report pagination. If the segment will include only certain lines, you should have Robot Reports repaginate the report.

When Robot Reports repaginates, it formats a new report retaining the page headings as you specify on this panel. The new report will contain only the selected lines and use the

print attributes from the original report. If desired, you can override the print attributes of the original report on this panel.

```

REP239                               Report Segment                               16:03:01

Report Set . . . . . : MDSALES2 Northern Midwest Sales
Report Name . . . . . : MDSALES2 Northern Midwest Sales
Report Segment Information:
  Report Segment . . . . . : MPLS
  Description . . . . . : Northern Midwest Sales
  Processing Sequence . . . . . : 10

Report Paging Options
  Retain Paging . . . . . : Y      (Y=Yes, N=No)
  Last heading line . . . . . :       (1 - 255)
Report Segment Overrides (leave blank to default)
  Overflow line number . . . . . :      (1 - 255)
  Page length . . . . . :           (1 - 255)
  Page width . . . . . :           (1 - 378)
  Characters per inch . . . . . :      (5, 10, 12, 13.3, 15, 16.7, 18, 20)
  Lines per inch . . . . . :        (3, 4, 6, 7.5, 8, 9, 12)
  Laser Command Name . . . . . :      (F4=Prompt)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=Next
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options

```

Options

Report Segment

Enter a logical name for the segment, up to 10 characters in length.

Description

Enter an accurate description of the report. This is the information report recipients see on their report lists and use to select a report to view or print.

Processing Sequence

You can tell Robot Reports which segments you want to process first. Enter a number to define the order in which you want this segment processed. You use sequence numbers when you have entered processing type 2 or 3 on the Report Name panel. This number overrides the normal alphabetical processing. If two segments have the same processing sequence, they are processed in alphabetical order.

Report Paging Options

When you create a segment that contains only selected lines of a report, you can retain the original pagination scheme or repaginate the report. If the report segment excludes only certain lines, you should retain the existing report pagination. If the segment includes only certain lines, you should have Robot Reports repaginate the report. If you prefer to repaginate the report based on the lines selected, enter an **N** in the Retain Paging field. If you enter an N, consider supplying a value in the last heading line field to retain page headings. If your report has page headings on the first four lines of each page, you would enter a 4 as the last heading line.

Report Segment Overrides

If you entered N in the Retain Paging field, you can specify report segment overrides. Leave the fields blank to use the defaults.

Segment OPAL

Select option **2** from the Maintain Report Segments panel to open the OPAL Report Segment panel. This panel lets you enter the OPAL code that defines the report segment. The OPAL language lets you specify operations to be performed when certain conditions are met. Enter an OPAL statement by filling in one or more fields on a line.

REP240		OPAL Report Segment		17:04:55			
Report Set	:	ALRDEVPT	:	Alert device listing			
Report Name	:	RBA406P	:	Alert device listing			
Report Segment	:	NOPAGE1	:	no header page			
Start at Sequence	:		:				
Logic		Column					
Operand	Variable	Line	Beg	End	Operation	Operation Values	Seq
IF	PAGENBR				EQ	1	10
					EXCPAG		20
END							30
							40
							50
							60
							70
							80
							90
							100
							110
							1 +
F3=Exit F4=Prompt F7=ROBOT Variables F12=Previous F14=Services F18=Resequenece F19=Logic Check F22=Preceding Opt F23=Prev Options							

Statement Options

Logic Operand

Used to set up powerful data conditions with IF-THEN logic.

Variable

Specifies the named OPAL variable to be tested or changed.

Line/Column

Specifies the lines or columns to be tested or changed.

Operation

Specifies the operation to be performed or the comparison to be made.

Operation Values

Provides the value to be used by the comparison or operation.

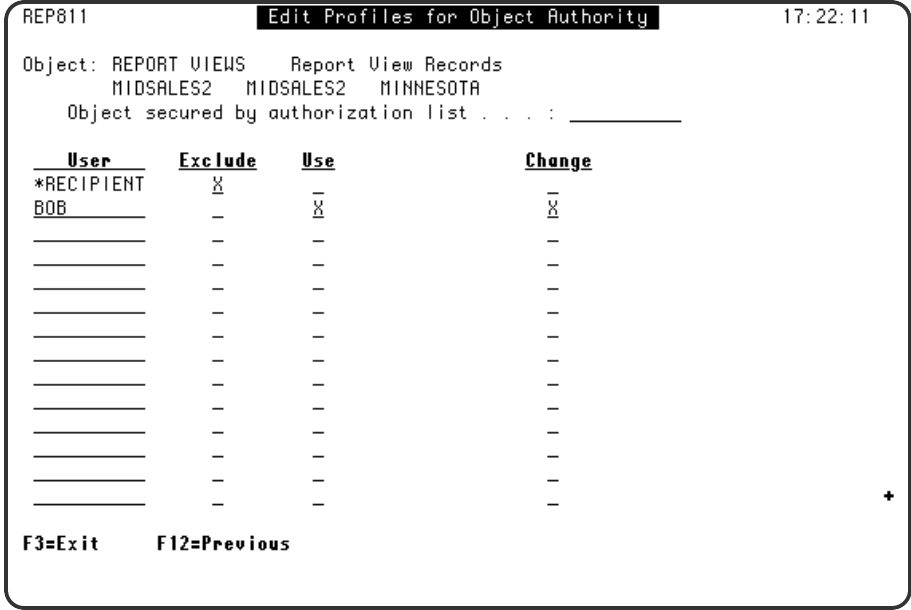
For more information on setting up OPAL code for report segments, see the *Robot Reports OPAL Reference Guide*.

Add Report Segment Security

Select option **3** from the Maintain Report Segments panel to add security to the report segment you are working with. A confirmation window displays. If you continue, the Edit Profiles for Object Authority panel displays and Robot Reports automatically creates a security record for the segment.

All users listed on a report distribution for this segment are included in the user profile *RECIPIENT. These users are automatically authorized to view, print, and restore the report segment. You can edit these authorizations on this panel to restrict authority to certain functions or to exclude users. Not only can specific users be listed, but object authority can be related to an authorization list. For more information, see the System Setup and Security section later in this User Guide.

Any security records you create with option 3 are not used if security is not selected on the General System Defaults panel.



When users are entered on a report distribution list, they are automatically included in the *RECIPIENT user profile.

These users can view, print, and restore the report segment unless you restrict their authority on this panel using exclude.

Print OPAL

Select option 4 from the Maintain Report Segments panel to print the OPAL code for the current segment. This option will create the spooled file REP419P.

Report Distribution

Select option 5 from the Maintain Report Segments panel to access the Maintain Report Distributions panel.

See [Report Distribution](#) for more information.

```

REP241                Maintain Report Distributions                16:28:06
Report Set . . . . . : MIDSALLES2 Northern Midwest Sales
Report Name . . . . . : MIDSALLES2 Northern Midwest Sales
Report Segment . . . : MPLS Northern Midwest Sales
Start at Distributed To . . : _____
Options
  A=Add/Copy/Delete      I=Select      ?=More Options

  Opt  Distributed To      Output Code  Bundle Code  Mbr of  Report
  ---  ---                ---         ---         ---     ---
  ---  ANGIE DEVALK        PDF         N           N         *STANDARD
  ---  BOB BUCKS           VIEW        N           N         *STANDARD
  ---  BRIAN JOHNSON       BOTH        N           1         *STANDARD
  ---  CHRIS DUNBAR        FICHE       N           N         *STANDARD
  ---  DAVE JOHNSON        HTML        N           N         *STANDARD
  ---  PAT CURRIE          PRINT       N           1         *STANDARD
  ---  PAUL CARR           CLIENT       N           N         *STANDARD

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

Enter/Delete Banner Instructions

Select option **6** from the Maintain Report Segments panel to open the Banner Page panel. Select option **7** from the Maintain Report Segments panel to delete banner instructions. See [Banner Page](#) for more information.

```

REP216                Banner Page                16:36:04
Report Set . . . . . : BIG big report
Report Name . . . . . : BIG big report
Report Segment . . . . . : *REPORT
Segment Information:
  Description . . . . . : Sales Statistics
  Processing Sequence . . . : 10
Banner Page Information:
  Print Banner Page . . . . . : A (A=Always,N=Never,P=Print w/report only)
  Print Recipient List . . . . . : A (A=Always,N=Never,P=Print w/report only)
  Laser Command . . . . . : SALES (F4=Prompt)
  Title Lines . . . . . : MONTHLY SALES
  STATISTICS
Instructions . . . . . : Deliver to Julie, Eastern Regional Headquarters
_____
_____
F3=Exit      F4=Prompt      F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

Resegment this Report

Select option **8** from the Maintain Report Segments panel to rerun report segmentation.

Occasionally you may want to resegment a report. For example, if you are refining your OPAL code for a segment, you may not get the result you wanted for a particular segment when Robot Reports processes the report. The REPSEGMENT command lets you revise your

OPAL code and rerun report segmentation for the last run of the report. Another use is to add indexing to a report—you might resegment the archived runs to add indexing to them.

When you select to resegment from the Maintain Report Segments Option Menu, Robot Reports prompts you for parameters and submits the command to batch. After a report has been resegmented, you should run REPARCHIVE to move the report to its correct archive status. Running REPSEGMENT does not affect the original run date or the archive dates that have been calculated for the report. You can also call this command from a command line. If you do, it is strongly recommended that you submit it to batch.

CAUTION: Resegmenting a report reprocesses the file. Therefore, if it took an hour to run originally, it may take an hour to run REPSEGMENT. options menu.

```

Re-segment a Report Segment (REPSEGMENT)

Type choices, press Enter.

Report Set . . . . . > 'NIDSALES2.' Character value
Report Name . . . . . > 'NIDSALES2.' Character value
Report Segment . . . . . > 'NPLS' Character value
Begin Date . . . . . *LASTRUN Number, *TODAY, *LASTRUN
Begin Time . . . . . 0 0000-2359
End Date . . . . . *TODAY Number, *TODAY
End Time . . . . . 2359 0000-2359
Restrict to Status . . . . . *ALL *ALL, *ONLINE, *SHORT, *LONG
Run Distribution . . . . . *NO *YES, *NO

Bottom
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys

```

Options

Report Set/Name/Segment

When you select option **8** from the menu, Robot Reports fills in the names of the Report Set, Report Name, and Report Segment. If you enter this command from a command line, you must supply these names.

Begin/End Date/Time

Enter the date and time range to search for reports to rerun.

- Enter the date in system date format, or enter the special values *TODAY or *LASTRUN.
- Enter the time as a four-digit number between 0000 (midnight) and 2359.

NOTE: You should keep the range small because it can take as much time to resegment a report as it took to run it originally, which can tie up your system.

Restrict to Status

You can further restrict the search to only a particular archive status. Enter ***ALL** to search all statuses or the name of a status as shown in the prompt to restrict the search.

Run Distribution

Enter ***YES** to rerun report distribution; enter ***NO** to not rerun it.

Extend Email Subject

Select option **9** from the Maintain Report Segments panel to extend the subject line of an emailed report segment.

```

REP230          E-Mail Subject          13:31:02

Report Set . . . . . : DAN             extended email subject
Report Name . . . . . : ACTJOB          extended email subject
Report Segment . . . . : BURST          extended email subject

Extended E-Mail Subject:
The attached report is the Midwest Sales Report for the Minneapolis region.

-----
-----

F3=Exit          F12=Previous          F21=System Command
F22=Preceding Opt  F23=Prev Options

```

You can enter an extended description (up to 256 characters) of the subject of the emailed report. This description will display in the Subject line of the recipients email software. Extended descriptions allow recipients to determine the contents of the email at a glance, without having to open the attached report file.

Report Distribution

The Maintain Report Distributions panel lists the recipients who will receive the segment and what their output format will be. The Distributed To field contains the names of individual recipients and/or the names of distribution lists.

NOTE: Note: If there are no distributions listed on this panel, the report will not print.

To access the Report Distribution panel, it depends on what type of report OPAL processing you are using.

- If you are using Bursting (Processing type 2), take option **1** in front of your segment on the Report Bursting Instructions panel.
- If you are using OPAL segments (Processing type 1 or 3), take option **5** in front of your segment on the Maintain Report Segments panel.

```

REP241                               Maintain Report Distributions                               16:49:27

Report Set . . . : BPSET           My first set
Report Name . . . : QPDSPSTS      WRKSYSSTS
Report Segment . . : *REPORT      WRKSYSSTS
Start at Distributed To . . : _____

Options
  A=Add/Copy/Delete    1=Select    ?=More Options

Opt  _____  Distributed To _____  Output  Bundle  Nbr of  Report
      _____  _____              Code   Code   Copies  View
  —  BRENDA      _____              PRINT   N     1     *STANDARD
  —  CHRISTY     _____              BOTH    Y     1     *STANDARD
  —  KELLY       _____              VIEW    N     1     *STANDARD

F3=Exit      F4=Prompt      F6=Add Record    F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

```

Fields

Distributed To

This field contains the names of individual recipients and the names of distribution lists.

Output Code

This field contains the output format for the recipient or distribution list. Robot Reports supports eight output formats:

BOTH Distributes a printed report to recipients and allows them to view the report at their workstation.

CLIENT Distributes the report to a directory or library for transfer to a client.

FICHE Formats the report into a microfiche file that can be processed into microfiche output.

HTML Formats the report in HyperText Markup Language (HTML) for use on the Internet.

PDF Formats the report in Portable Document Format (PDF), which can be viewed and printed by any computer that has the free Adobe Acrobat Reader installed.

PRINT Distributes hard copy only.

TRN Sends the report to an IFS directory as part of a report set to be formatted in Portable Document Format (PDF) by Robot Transform. This formatting includes all embedded graphics, and preserves, in full color, logos, images, fonts, and barcodes created by electronic forms packages that generate PCL, AFP, or SCS output. The PDF file can be viewed and printed by any computer that has the free Adobe Acrobat Reader installed.

VIEW Allows recipients to view the report at their workstation. Authorized recipients may print the report on demand.

Bundle Code

This field tells Robot Reports whether the report should be bundled into a recipient's report packet.

Nbr of Copies

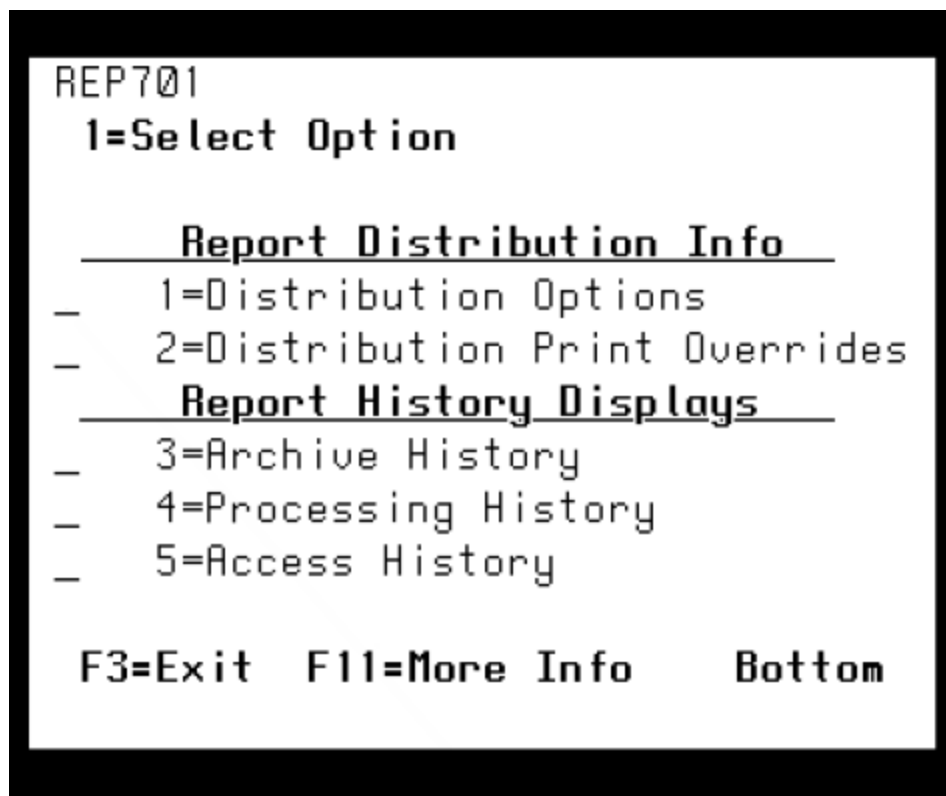
This field shows the number of copies each person will receive. If the **Distributed To** field contains the name of a distribution list, this field contains the number of copies each person on the list will receive.

Report View

This field lists the default report view for the recipient.

Options

The Maintain Report Distributions panel also provides an options menu. You can access this menu by pressing **F4** in the Opt field next to the record with which you want to work.



A

Displays a window from which you can add, copy, or delete distribution lists.

- ? Displays a window from which you can select an option.
- 1 Displays the [Report Distribution Output Options](#) panel, on which you can enter output and bundle codes for each recipient or distribution list.
- 2 Displays the [Report Distribution Control Options](#) panel, on which you can enter distribution override information and exception distribution options.
- 3 Displays the Report Archive Status Information panel, which provides detailed information about the archive status of the report.
- 4 Displays the Report Processing History Information panel, which provides a detailed record of the processing for the report.
- 5 Displays the Report Access History Information panel, which provides detailed information about the access history of the report.

Report Distribution Output Options

This panel allows you to enter output and bundle codes (and related information) for each recipient or distribution list. Each distribution option is explained in detail on the following pages.

You can access the Report Distribution Output Options panel by entering a **1** in the Opt field of the Maintain Report Distributions panel.

The panel will contain different options depending on the Output code you select. The fields that remain the same are:

Distributed To

Enter the name of a recipient or the name of a distribution list. Press **F4** to display the Recipient/Distribution List Finder panel, to select a recipient or distribution list.

Report View

Enter the name of a report view. Press **F4** to display the Reports Finder panel, from which you can select a report view. The view defaults to *STANDARD. If you enter the name of a view, that becomes the recipient's default view.

Output Code

Enter the output code. See more information on output codes below.

Bundle Code

Enter **Y** to bundle reports into a recipient's packet. Enter **N** to print reports immediately. If the bundle code is Y, reports are distributed to the output queue specified on the Recipient Bundling Options panel and printed after the REPBUNDLE command is run.

Robot Reports Output Options

To Do This	Use Output Code	Use Bundle Code	Notes
Print report immediately.	Print (P)	N	
Bundle report into the recipient's report packet.	Print (P) or Both (B)	Y	Bundling applies only to printed output.
Provide recipients with printed output and allow report to be viewed.	Both (B)	Y or N	Can be a transitional stage for moving to a paperless environment.
Allow report to be viewed and authorize recipients to print on demand.	View (V)	N	Give recipients authority to print on the Edit Profiles for Object Authority panel for the report segment (see Security).
Allow report to be viewed only.	View (V)	N	Report viewing saves printing expenses.
Put report into a microfiche file for processing into microfiche output.	Microfiche (M)	N	Useful for moving reports into compact, long-term storage.
Download report to a workstation.	Client (C)	N	Create a view that puts data into columndelimited format. Output Code distributes report data to a directory or file/library on the iSeries. Workstation applications can access the iSeries and open the document or import the data.

Convert report to PDF file.	PDF (D)	N	Can be viewed and printed by any computer that has the free Adobe Acrobat Reader installed. The PDF file is stored in a directory, which can be accessed by a client.
Convert report to HTML file.	HTML (H)	N	Can be placed on the Internet and accessed by a web browser. The HTML file is stored in a directory, which can be accessed by a client.
Email the report.	PDF (D), HTML (H), or Client (C)	N	Email the report to the recipient's PC mailbox or any other PC mailbox defined to your system. You must have Robot ALERT installed.
Convert report to enhanced PDF.	TRN (T)	N	You must have Robot TRANSFORM installed and active on your iSeries system. Robot TRANSFORM creates a compressed Portable Document Format (PDF) file from the file that Robot Reports send to it, and places it in an IFS directory on the iSeries that you set up using Robot TRANSFORM. Robot TRANSFORM converts graphic spooled files and IFS files—with or without embedded graphics—to PDF, preserving, in full color, all logos, images, fonts, and barcodes created by electronic forms packages that generate PCL, AFP, and SCS output.

V - View

Recipient may only view the report. The bundle code is not used and remains N (no). There are no additional options.

```

REP225          Report Distribution Output Options          17:46:38

Report Set . . . . . : BPSET      My first set
Report Name . . . . . : QPDSPSTS  WRKSYSSTS
Report Segment . . . . . : *REPORT  WRKSYSSTS

Enter Output Options:
Distributed To . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD  (F4=Prompt)
Output Code . . . . . : V (V=View, P=Print, B=Both, M=Fiche, C=Client,
                        D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes,N=No)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

P - Print

Recipients receive printed output only.

```

REP225          Report Distribution Output Options          10:51:08

Report Set . . . . . : BPSET      My first set
Report Name . . . . . : QPDSPSTS  WRKSYSSTS
Report Segment . . . . . : *REPORT  WRKSYSSTS

Enter Output Options:
Distributed To . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD  (F4=Prompt)
Output Code . . . . . : P (V=View, P=Print, B=Both, M=Fiche, C=Client,
                        D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes,N=No)
Use Report View for Print . . : N (Y=Yes,N=No)
Number of Copies . . . . . : 1
Output Queue . . . . . : HSDEMO      (F4=Prompt)
Library . . . . . : QGPL          (F4=Prompt)
Remote Printing:
User ID . . . . . :
System Name . . . . . : (F4=Prompt)
Is System an AS/400 . . . . : Y (Y=Yes,N=No)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

Additional Options

Use Report View for Print

Enter **Y** to use the report view format for printing. Enter **N** if you do not want to use the report view format for printing.

Number of Copies

Enter number of copies to be printed. A 1 prints a copy for the individual recipient or one copy for each recipient on the distribution list.

Output Queue

If the bundle code is N, this field displays. Enter the output queue for the spool file Robot Reports generates. Leave this field blank if the report will be printed on a remote system. Press **F4** to select from a list of output queues.

Library

Enter the library with which the output queue is associated. Press **F4** to select from a list of libraries.

User ID

If the bundle code is N, this field displays. Enter the user profile name for remote printing.

System Name

If the bundle code is N, this field displays. Enter the system name for remote printing. If Robot Network is installed, you can press **F4** to display a list from which you can select a system name.

Is System an AS/400

If the bundle code is N, this field displays. If the remote system is an AS/400, enter **Y**. Otherwise enter **N**.

B - Both

Recipients receive a printed report and can view the report.

```

REP225          Report Distribution Output Options          10:51:57

Report Set . . . . . : BPSET      My first set
Report Name . . . . . : QPDSPTS   WRKSYSSTS
Report Segment . . . . . : *REPORT  WRKSYSSTS

Enter Output Options:
Distributed To . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD   (F4=Prompt)
Output Code . . . . . : B (V=View, P=Print, B=Both, M=Fiche, C=Client,
                        D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes, N=No)
Use Report View for Print . . . : N (Y=Yes, N=No)
Number of Copies . . . . . : 1
Output Queue . . . . . : HSOUT        (F4=Prompt)
Library . . . . . : QGPL             (F4=Prompt)
Remote Printing:
User ID . . . . . :
System Name . . . . . :              (F4=Prompt)
Is System an AS/400 . . . . . : Y (Y=Yes, N=No)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete   F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt   F23=Prev Options

```

Additional Options

Use Report View for Print

Enter **Y** to use the report view format for printing. Enter **N** if you do not want to use the report view format for printing.

Number of Copies

Enter number of copies to be printed. A 1 prints a copy for the individual recipient or one copy for each recipient on the distribution list.

Output Queue

If the bundle code is N, this field displays. Enter the output queue for the spool file Robot Reports generates. Leave this field blank if the report will be printed on a remote system. Press **F4** to select from a list of output queues.

Library

Enter the library with which the output queue is associated. Press **F4** to select from a list of libraries.

User ID

If the bundle code is N, this field displays. Enter the user profile name for remote printing.

System Name

If the bundle code is N, this field displays. Enter the system name for remote printing. If Robot Network is installed, you can press **F4** to display a list from which you can select a system name.

Is System an AS/400

If the bundle code is N, this field displays. If the remote system is an AS/400, enter **Y**. Otherwise enter **N**.

M - Fiche

The output is formatted so a microfiche service can convert the data file into microfiche. You must set up your microfiche output file before you can use the microfiche output code. In this file, the record size should be the width of the report plus three columns to allow room for control characters used in microfiche output. For example, if the report is 80 columns wide, set up your record to be 83 columns wide. This file can be readily copied to tape, sent to your microfiche service provider, and returned as microfiche.

```

REP225          Report Distribution Output Options          10:54:18

Report Set . . . . . : BPSET          My first set
Report Name . . . . . : QPDSPSTS      WRKSYSSTS
Report Segment . . . . . : *REPORT     WRKSYSSTS

Enter Output Options:
Distributed To . . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD      (F4=Prompt)
Output Code . . . . . : M (V=View, P=Print, B=Both, M=Fiche, C=Client,
                        D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes, N=No)

Microfiche Options:
File . . . . . : HELP          (F4=Prompt)
Library . . . . . : QGPL          (F4=Prompt)
File Updates . . . . . : A (A=Add Records, R=Replace Records)
Control Character . . . . : 1 (1=*PRTCTL, 2=*FCFC)

F3=Exit          F4=Prompt          F6=Add/Copy/Delete    F10=End Navigator
F12=Previous     F21=System Command  F22=Preceding Opt    F23=Prev Options

```

Additional Options

File

Enter the name of the microfiche file. Press **F4** to display a list from which you can select a file.

Library

Enter the library with which the microfiche file is associated. Press **F4** to display a list from which you can select a library.

File Updates

Enter an **A** in this field if you want Robot Reports to append these records to what is already in the file. Enter an **R** if you want Robot Reports to clear the file before it puts the records for the report into it.

Control Character

Specify whether your microfiche file requires print control characters (option **1**, *PRTCTL) or form control characters (option **2**, *FCFC). This depends on your microfiche vendor.

C - Client

The output is placed in a directory or file where it can be downloaded. Use this output code when you want the recipient to be able to work with the report in a spreadsheet program. Recipients who want to be able to work with report output in a spreadsheet format should set up a special view for downloading.

If you have Robot Alert, you can email the report to the recipient automatically.

```

REP225          Report Distribution Output Options          10:55:19

Report Set . . . . . : BPSET           My first set
Report Name . . . . . : QPDSPSTS      WRKSYSSTS
Report Segment . . . . . : *REPORT    WRKSYSSTS

Enter Output Options:
Distributed To . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD      (F4=Prompt)
Output Code . . . . . : C (V=View, P=Print, B=Both, M=Fiche, C=Client,
                          D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes,N=No)
Client Target:
Directory . . . : LINDSEY
File Name . . . : BPSET
E-Mail Upon Completion: N (Y=Yes,N=No,D=Dynamic)
CC Address: _____
File . . . . . : _____
Library . . . . . : _____

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options

```

Additional Options

Directory

Enter the IBM i directory where you want the reports stored. The directory must already exist. You can enter *RECIPIENT to use the directory specified on the Recipient panel.

File Name

Enter a name for the report

Email Upon Completion

Enter **Y** to email the report to the recipient's email. The report is emailed to the address specified on the Recipient panel. You must have Robot Alert version 5.0, or higher, to use this feature.

Enter **D** to have Robot Reports create dynamic email addresses. Robot Reports will email the file to the recipient e-mail address contained in the variable specified in the Dynamic Email Variable field. This option is only valid if you specified R (Recipient Email) for the Report Email Distribution Option on the Robot Reports System Defaults panel.

Dynamic E-mail Address

Enter the name of the email variable containing the email address to use to email the report. This field can contain one or more variables and text. Robot Reports will dynamically generate an email address using the variables and text here.

CC Address

Enter the email address to copy on the email.

File/Library

If you have a workstation that does not work with the directory/file name system, you can enter the names of a target file and library. Workstations with appropriate file transfer utility software can access information in IBM i files/libraries.

D - PDF

The output is converted to Portable Document Format (PDF) and placed in a directory that can be accessed by a client.

REP225	Report Distribution Output Options	10:55:45
Report Set	BPSET	My first set
Report Name	QPDSPSTS	WRKSYSSTS
Report Segment	*REPORT	WRKSYSSTS
Enter Output Options:		
Distributed To . . .	LINDSEY	(F4=Prompt)
Report View	*STANDARD	(F4=Prompt)
Output Code	D (V=View, P=Print, B=Both, M=Fiche, C=Client, D=PDF, H=HTML, T=Transform)	
Bundle Code	N (Y=Yes, N=No)	
PDF Target:		
Directory . . .	QDLS/REPORTS	
File Name . . .	BPSET	
E-Mail Upon Completion:	N (Y=Yes, N=No, D=Dynamic)	
CC Address:		
Auto-Increment PDF Name	N	
F3=Exit	F4=Prompt	F6=Add/Copy/Delete
F12=Previous	F21=System Command	F22=Preceding Opt
		F10=End Navigator
		F23=Prev Options

Additional Options

Directory

Enter the IBM i directory where you want the PDF stored. The directory must already exist. You can enter *RECIPIENT to use the directory specified on the Recipient panel.

File Name

Enter a name for the report. Robot Reports adds the .PDF extension automatically. You can overwrite it if your file name is 8 characters or longer.

Email Upon Completion

Enter **Y** to email the report to the recipient's email. The report is mailed to the address specified on the Recipient panel. You must have Robot Alert version 5.0, or higher, to use this feature.

Enter **D** to have Robot Reports create dynamic email addresses. Robot Reports will email the file to the recipient email address contained in the variable specified in the Dynamic Email Variable field. This option is only valid if you specified R (Recipient Email) for the Report Email Distribution Option on the Robot Reports System Defaults panel.

Dynamic E-mail Address

Enter the name of the email variable containing the email address to use to email the report. This field can contain one or more variables and text. Robot Reports will dynamically generate an email address using the variables and text here.

CC Address

Enter the email address to copy on the email.

Auto-Increment PDF Name

Enter **N** to have the new PDF overwrite an existing PDF file with the same name. If you enter **Y**, Robot Reports increments the name of the PDF file and does not overwrite the existing file.

H- HTML

The output is converted to HyperText Markup Language(HTML) and placed in a directory that can be accessed by a client.

```

REP225          Report Distribution Output Options          10:56:32

Report Set . . . . . : BPSET           My first set
Report Name . . . . . : QPDSPSTS       WRKSYSSTS
Report Segment . . . . . : *REPORT     WRKSYSSTS

Enter Output Options:
Distributed To . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD      (F4=Prompt)
Output Code . . . . . : H (V=View, P=Print, B=Both, M=Fiche, C=Client,
                        D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes,N=No)
HTML Target:
Directory . . . : QDLS/REPORTS
File Name . . . : BPSET.HTM
E-Mail Upon Completion: N (Y=Yes,N=No,D=Dynamic)
CC Address:
Auto-Increment HTML Name . . . : N

F3=Exit          F4=Prompt          F6=Add/Copy/Delete  F10=End Navigator
F12=Previous     F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Additional Options

Directory

Enter the IBM i directory where you want the HTML file stored. The directory must already exist. You can enter *RECIPIENT to use the directory specified on the Recipient panel.

File Name

Enter a name for the report. Robot Reports adds the .HTML extension automatically. You can overwrite it if your file name is 8 characters or longer.

Email Upon Completion

Enter **Y** to email the report to the recipient's email. The report is mailed to the address specified on the Recipient panel. You must have Robot Alert version 5.0, or higher, to use this feature.

Enter **D** to have Robot Reports create dynamic email addresses. Robot Reports will email the file to the recipient email address contained in the variable specified in the Dynamic Email Variable field. This option is only valid if you specified R (Recipient Email) for the Report Email Distribution Option on the Robot Reports System Defaults panel.

Dynamic E-mail Address

Enter the name of the email variable containing the email address to use to email the report. This field can contain one or more variables and text. Robot Reports will dynamically generate an email address using the variables and text here.

CC Address

Enter the email address to copy on the email.

Auto-Increment HTML Name

Enter **N** to have the new HTML overwrite an existing HTML file with the same name. If you enter **Y**, Robot Reports increments the name of the HTML file and does not overwrite the existing file.

T - Transform

The output is placed in a directory where it can be accessed for processing by Robot Transform and output as enhanced PDF. You must have Robot Transform installed to use this option.

Robot Reports sends Robot Transform graphic spooled files and IFS files—with or without embedded graphics. Robot Transform converts these files to PDF, preserving, in full color, all logos, images, fonts, and barcodes created by electronic forms packages that generate the following output: PCL, AFP, and SCS. The PDF files are stored in an IFS directory as part of a Robot Transform report set. The converted files can be indexed using Adobe Acrobat for full text searching capability.

Robot Transform distributes the PDF files to the IFS, or uses Robot Alert to email them to users with PCs, laptops, or smart phones. If you have Robot Alert, you can email the PDF file automatically from the IBM i to non-IBM i recipients.


```

REP225          Report Distribution Output Options          10:57:12

Report Set . . . . . : BPSET      My first set
Report Name . . . . . : QPDSPSTS  WRKSYSSTS
Report Segment . . . . . : *REPORT  WRKSYSSTS

Enter Output Options:
Distributed To . . . : LINDSEY          (F4=Prompt)
Report View . . . . . : *STANDARD      (F4=Prompt)
Output Code . . . . . : T (V=View, P=Print, B=Both, M=Fiche, C=Client,
                          D=PDF, H=HTML, T=Transform)
Bundle Code . . . . . : N (Y=Yes, N=No)
Transform File Set : RBA406          (F4=Prompt)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options

```

Additional Options

Transform File Set

Enter the name of the file set you created using Robot Transform. You need to have Robot Transform installed to use this feature.

Report Distribution Control Options

The Report Distribution Control Options panel allows you to enter distribution override information and exception distribution options.

You can access the Report Distribution Control Options panel by entering a **2** in the Opt field of the Maintain Report Distributions panel.

```

REP253          Report Distribution Control Options          13:44:07

Report Set . . . . . : BPSET      My first set
Report Name . . . . . : QPDSPSTS  WRKSYSSTS
Report Segment . . . . : *REPORT  WRKSYSSTS
Distributed To . . . . . : LINDSEY
Output Code . . . . . : VIEW

Distribution Overrides:
  Hold Spool File . . . . : _      (Y=Yes,N=No)
  Save Spool File . . . . : _      (Y=Yes,N=No)
  Laser Command Name . . . : _____ (F4=Prompt)
  Form Type . . . . . : _____
  User Data . . . . . : _____ Output Priority . . . . : _
  Print Text . . . . . : _____

Exception Distribution Options:
  Execute Exception Distribution Object . . . . . : _____ (F4=Prompt)
  Don't distribute on dates listed in ROBOT Date Object: _____ (F4=Prompt)

F3=Exit          F4=Prompt          F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Distribution Overrides

Use distribution overrides when you want to customize the way in which you distribute your reports.

Hold Spool File

Enter **Y** if the spooled files should be held on the output queue until released. Otherwise, enter **N**.

Save Spool File

Enter **Y** if the spooled files should be kept on the output queue until deleted. Otherwise, enter **N**.

Laser Command Name

Enter the name of any special laser commands you have defined.

Form Type/User Data/Print Text

These are fields in which you can enter overwrite print file information. For allowable values for each attribute, refer to the override with printer file command in the CL Programmer's Reference Manual.

Exception Distribution Options

When normal distribution is set up, a recipient receives a report every time it is run. Exception distribution is useful when you have recipients who want to receive only specific runs of the report. Exception distribution works only with printed output.

There are two different ways to set up exception distribution. These are both optional and interdependent—you cannot have an entry in both the Exception Distribution Objects field and the Robot Date Objects field.

1. Robot Reports Exception Distribution Objects

With this option, you can use OPAL code to determine what day it is whether to deliver or skip distribution for that day. Exception Distribution is useful for the following (and other) situations:

- A recipient only wants the report on the last day of the month
- A recipient only wants the report on the last Friday of the month
- A recipient wants the report on the 15th and the 30th of the month
- A recipient wants to receive the report on the first Monday of the month
- A recipient doesn't want to receive the report on Fridays

See the [Report Set Objects](#) section for information on setting up Exception Distribution Objects.

2. Robot Date Objects

To use Robot Date Objects, you must have Robot Schedule on your system. Robot Reports uses Robot Date Objects for exception scheduling as you pick the days on the calendar that you do not want distribution to occur. Robot Date Objects can be useful in the following situations:

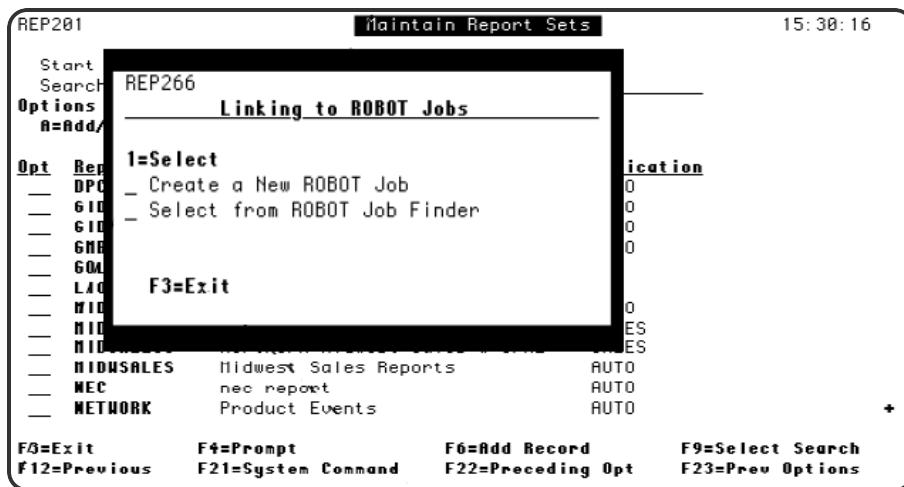
- To stop distribution for all recipients on holidays
- To stop distribution when a recipient will be on vacation
- When a recipient wants to receive the report on the last day of the quarter or the year. (You will have to select every day of the year on the calendar except the last day of the quarter or the year.)

See the Robot Schedule User Guide for information on setting up ROBOT Date Objects.

Scheduling Robot Jobs

If you have Robot Schedule installed, you can easily schedule your Robot Reports set processing on Robot Schedule.

To schedule a Robot Schedule job select option 9 in front of the report set. A second window will appear, titled Linking to ROBOT Jobs. This link applies only to those sets that you have defined as using the ROBOT method of report processing on the [Report Set panel](#).



The first time you take option 9 from the Maintain Reports Sets option menu, you are given the option of Create a New ROBOT Job and Select from ROBOT Job Finder. When you select a job on the finder panel, ROBOT takes you to the Initial Job Setup panel so you can edit the run schedule for the job. If you select this option a second time, Robot Reports has learned which ROBOT job this set is linked to. It gives you the options of Work with ROBOT Job and Unlink.

- Choose Create a New ROBOT Job to set up a new record in Robot Schedule. This option takes you to the Initial Job Setup panel in Robot Schedule.
- Choose Select from ROBOT Job Finder to connect your Robot Reports set processing to an existing Robot Schedule job. The Robot Schedule Job Finder displays so you can select a job. Use this choice to override an existing link.

Scheduling Robot Reports Set in Robot Schedule

Once you have established a link to Robot Schedule by selecting one of the choices in the Linking to ROBOT Jobs window, you will gain access to Robot Schedule. Depending on the choice you made, you may see the Robot Schedule Job Finder panel first, then the Robot Schedule Initial Job Setup panel will display.

If you are connecting to an existing ROBOT job, Robot Schedule will have filled in the job description information from the Robot Reports report set definition. You can change the run schedule on this panel.

If a Robot Schedule job does not already exist, you will have to set one up. You will need to enter Initial Job Setup, Job Control, and Output Options. The Output Options panel is described on the next page. If it is a command job, you will also have to enter the command to be run on the Command Entry panel. For more detailed information about scheduling jobs on Robot Schedule, refer to the Robot Schedule User Guide.

```

RBT201          Initial Job Setup for Job Number 00000000028          15:34:34

                DESCRIBE YOUR JOB
                (F4=Prompt)
Job Type: C Command
Job Name: REP00028  Desc: Morning Tran Cycle  Application: REP
Notes: MIDSALLES3

                RUN INFORMATION

Run Times: 2300

Run Days: Y=Every week, WK=Week number, L=Last week of the month
Y/WK/L Day Started Ended Run Time Status Last day completed
- Monday Last start time
- Tuesday Last end time
- Wednesday Last run time
- Thursday Last job status
Y Friday
- Saturday
- Sunday
Schedule Override Code: _ (F4=Prompt)

F3=Exit          F4=Prompt          F10=Next Option
F12=Previous     F21=Command Line     F23=More Options

```

1. Enter a **Y** next to the days you want the job to run.
2. For more scheduling options, press **F10** until the Advanced Scheduling panel displays.
3. Enter the time you want the job to run.
4. Press **F10** until the Output Options panel displays.
5. Selecting any option listed in the Linking to ROBOT Jobs window changes the "Use Report Distribution List?" flag on the Output Options panel in Robot Schedule. The flag changes from Y or N to R. The R visually shows you in Robot Schedule that there is an existing link to Robot Reports. If you see an R in this field, you know that ROBOT is using Robot Reports for the report distribution.
6. Robot Schedule submits the job that does the report distribution after it submits the report set processing job. You can submit the report distribution job to another job queue. Submitting the distribution job to a different job queue allows your night processing to finish sooner. Enter the job queue where the report distribution job should be submitted.

```

RBT203                               Output Options                               15:35:55
Job name . . . : REP00026   Morning Tran Cycle   Command

Printer output control
Output Queue . . . . . : *CURRENT   F4
Library . . . . . : _____
Print text . . . . . : _____
Number of copies . . . . . : ___ (1 - 255)
Output priority . . . . . : _ (1 - 9)

Job date calculator (to have job date different than system date)
Start with date type . . . . . : 1   F4   System Date
Date, Day Nbr, + or - Days . . . . . : _____
Equals the job date . . . . . : 4/05/03 (Date used if job ran today)

Report distribution control
Use Report Distribution? . . . . . : R   (V=Yes, N=No, R=Robot/REPORTS)
Submit distribution to job queue : _____ F4
Library . . . . . : _____

F3=Exit           F4=Prompt           F10=Next Option   F12=Previous
F15=Select PreReq F21=Command Line  F23=More Options

```

Banner Page

If you print a banner page with the segment, you need to enter banner page instructions on this panel. On the laser command line, you can enter the name of any special laser command you have defined. For instance, you might want to define a command to access a second paper drawer in the printer to allow the banner page to be printed on different color paper. Or, you might want to program an offset in the paper stacker to help separate reports for distribution.

To access the Report Banner Page panel, it depends on what type of report OPAL processing you are using.

- If you are using Bursting (Processing type 2), take option **2** in front of your segment on the Report Bursting Instructions panel.
- If you are using OPAL segments (Processing type 1 or 3), take option **6** in front of your segment on the Maintain Report Segments panel.

```

REP216                               Banner Page                               16:36:04

Report Set . . . . . : BIG          big report
Report Name . . . . . : BIG          big report
Report Segment . . . . . : *REPORT
Segment Information:
  Description . . . . . : Sales Statistics
  Processing Sequence . . . . . : 10
Banner Page Information:
  Print Banner Page . . . . . : A (A=Always,N=Never,P=Print w/report only)
  Print Recipient List . . . . . : A (A=Always,N=Never,P=Print w/report only)
  Laser Command . . . . . : SALES (F4=Prompt)
  Title Lines . . . . . : MONTHLY SALES
                          STATISTICS

  Instructions . . . . . : Deliver to Julie, Eastern Regional Headquarters

-----
F3=Exit          F4=Prompt          F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Options

The banner information entered will print as the first page of the report and the recipient list will print as the second page.

Description

A default description of the report segment is displayed here. If you want to change it, type over the description. This is the information report recipients see on their report lists and use to select a report to view or print.

Processing Sequence

You can tell Robot Reports the segments you want to process first. Enter a number to define the order in which you want the segment processed. This number overrides the normal alphabetic processing.

- If you add sequence numbers, you can add them to some segments or all segments.
- If two segments have the same processing sequence, they are processed alphabetically.

Print Banner Page

- **A** You always want a banner page to be printed with the segment.
- **N** You never want a banner page to be printed with the segment (the default)
- **P** You want a banner page to print conditionally. This option prints banner pages for segments that are printed on demand by a recipient, or that are not being bundled and have an output code of PRINT or BOTH. If you are bundling reports into packets, the P option does not apply and you may want to print a packet index instead of a banner page (see the topics Recipient Bundling Options and Packet Index).

Print Recipient List

- **A** You always want a recipient list to be printed with the segment.
- **N** You never want a recipient list to be printed with the segment (the default)

- **P** You want a recipient list to print conditionally. This option prints banner pages for segments that are printed on demand by a recipient, or that are not being bundled and have an output code of PRINT or BOTH.

Laser Command

Enter the name of a special laser command (if desired) for the banner page. This laser command will be used only for the banner page. It does not affect the rest of the report.

Title Lines

Enter up to three 15-character lines of text to be printed inside a box on the banner page. The default title lists the set name and the report name.

Instructions

Enter up to 500 characters to be printed below the title box on the banner page. For example, you might enter distribution instructions.

Copy Report Set

The Report Set Copy panel allows you to easily copy report set attributes. Select Option **3** on the Report Set Menu to access the Report Set Copy panel.

This display is set up in a hierarchy. You have to supply a specific value (name) or *ALL on an upper line to copy a lower one. For example, if you want to copy a report segment, you must supply the names of the report set and report name that own that segment. If there is OPAL code associated with the segment, it is automatically copied. Report Set Copy creates destination files for you. If the destination file name already exists, it will ask you if you want to replace the file. When you use this panel, a report of what was copied is generated automatically.

Copy From Options: (*NONE, *ALL, F4, Value)		Copy To Options: (*SAME, F4, Value)	
Report Set	_____		*SAME _____
Report Name	*NONE _____		*SAME _____
Bursting Instructions . . .	Y (Y=Yes, N=No)		
Report Segment	*NONE _____		*SAME _____
Banner Page Text	Y (Y=Yes, N=No)		
Distributed To	From *NONE _____		To *SAME _____
Report View	*NONE _____		*SAME _____
Text	Y (Y=Yes, N=No)		

F3=Exit **F4=Prompt** **F12=Previous** **F15=Process Copy**
F21=System Command **F22=Preceding Opt** **F23=Prev Options**

Options

Enter the names of the source files you want to copy in the first column (a report set name is required). You can fill in other lines using the following options:

***NONE**

Don't copy this attribute.

***ALL**

Copy all records for this attribute. For example, if a report has four segments, use *ALL to copy all four in a single copy operation.

F4

Display a finder so I can select the name of the attribute I want copied.

Value

Enter the name of the attribute to be copied. For example, if a report has four segments and you want to copy just one, enter the name of that segment.

Enter the names of the destination files in the second column using the following options:

***SAME**

Copy the attribute from the source file and give it the same name in the destination file.

F4

Display a finder so I can select the name of the file where the copy should go. Normally, the copy program creates the destination files for you. If you select an existing file, you are asked if you want to overwrite it.

Value

Enter the name of the destination file. If the file exists, you are asked if you want to overwrite it.

Bursting Instructions

Enter a Y to copy the Bursting Instructions.

Report Segment

Enter the Report Segment.

Banner Page Text

Enter a Y to copy the banner page text panel.

Distributed To

Enter a source value to copy such as a recipient name, a distribution list name, or *ALL.

Report View

Enter the report view.

Text

Enter a Y to copy the report set text panel.

Report Set Objects

This section describes other features of Robot Reports Report Sets that help you organize report set information.

```

REP291                               Report Sets Menu                               14:26:29

Maintain Report Set Objects
  1. Robot GUIDE for Automated Report Setup
  2. Maintain Report Sets
  3. Copy Report Set

Maintain Other Report Objects
  4. Maintain Laser Command Names
  5. Maintain Exception Distribution Objects
  6. Maintain OPAL Tables
  7. Report Programs Changed Listing

Select Option:  _

F3=Exit      F12=Previous      F21=System Command

```

Maintain Laser Command Name

From this panel you can add, change, or delete the laser commands to use with Robot Reports. All laser commands and overrides are sent to the printer before any banner pages or report output. They instruct the printer to print the report in the proper format.

To access this panel, enter option **4** on the Report Sets Menu.

```

REP214                               Maintain Laser Command Names                               16:14:46

Start at Laser Command Name: _____
Search Description for . . . : _____

Options
  A=Add/Copy/Delete      1=Select      2=Commands      3=Advanced Options

Laser Command
Opt  Name                Description
---  ---                ---
---  ACCOUNT             accounting department prints
---  BOLD                 special function reports
---  DRAWER2              Automatic drawer 2 selection
---  SALES                Sales Report Format

F3=Exit      F6=Add Record      F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Options

- To add new names and descriptions to the list, press **F6**.
- To access the Laser Command Name panel and work with a command that is already defined , enter a **1** in the Opt field next to it.
- To access the Laser Command entry panel, enter a **2** in the Opt field next to a command.
- To access the IBM Override with Printer File (OVRPRTF) panel for additional options, enter a **3** in the Opt field next to a command. Any parameters entered on the IBM OVRPRTF panel override the parameters on the Laser Command Name panel.
- Search options are provided for working with long lists of laser command names.

Laser Command Name panel

The Laser Command Name panel lets you enter or edit information about laser command names and options.

To access this panel, enter option **1** in the Opt field next to a command on the Maintain Laser Command Names panel.

```

REP218                               Laser Command Name                               16:15:26
Laser Command Name Information:
Laser Command Name . . . . . : SALES
Description . . . . . : Sales Report Format

Laser Options:
Drawer . . . . . : 1 (1, 2, 3, 4, 5, *E1)
Font . . . . . : *DEVD (*CPI, *DEVD)
Font Point Size . . . . . : (0.1 - 999.9, *NONE)
Page Rotation Degree . . . : (*AUTO, *DEVD, *COR, 0, 90, 180,270)

F3=Exit           F6=Add/Copy/Delete       F12=Previous
F21=System Command F22=Preceding Opt       F23=Prev Options

```

Options

Laser Command Name

Enter a meaningful 10-character name for the laser command. This name should help you remember the purpose of the command.

Description

Describe the command name.

Laser Options

The Maintain Exception Distribution Objects panel displays a list of all of the exception distribution objects that have been set up in Robot Reports. Exception Distribution Objects are the OPAL code that is used when you do not want distribution to occur. You can set up Exception Distribution in Robot Reports on the Report Distributions Override panel.

To access this panel, enter option **5** on the Report Sets Menu.

```

REP272          Maintain Exception Distribution Objects          10:42:31
Start list at Object: _____

Options
A=Add/Copy/Delete      1=Select      ?=More Options
Exception
Opt  Objects          Description          OPAL Status  Run Status
--  -
_   P_SYSDATE        USING SYSDATE
_   P_SYSTEM         USING SYSTEM
_   P_SYSTIME        USING SYSTIME
_   P_USER           USING USER
_   P_WEEKNO         USING WEEK
_   P_WORKDAY        USING WORKDAY
_   PAULOTHER        OTHER EXCEPTIONS
_   PMC              PAUL
_   REPORTSVU7       EXCEPTION TO TEST
_   TEST             Testing                      New

F3=Exit  F4=Prompt  F6=Add Object  F21=System Command          Bottom

```

Options

A

Enter an **A** in the Opt field to add, copy, or delete an exception distribution object.

1

Enter a **1** in the Opt field to open the Exception Distribution Object Maintenance panel.

F6

Press **F6** to add a new exception distribution object.

F4

Press **F4** in the Opt field to see more exception distribution options.

```

REP701
  1=Select Option
_   1=Exception Object Maintenance
_   2=Exception OPAL Detail
_   3=Scan/Replace OPAL
_   6=Print OPAL information
F3=Exit  F11=More Info  Bottom

```

Exception Distribution Object Maintenance

To access this panel, enter option **1** in the Opt field next to an exception distribution object on the Maintain Exception Distribution Objects panel.

```
REP273      Exception Distribution Object Maintenance      10:45:03

Exception Object Name . . : P_WORKDAY
Description . . . . . : USING WORKDAY EXCEPTIONS
Make Inactive . . . . . : N (Y=Yes, N=No)

F3=Exit      F12=Previous      F21=Command Line
```

Options

Exception Object Name

Enter the name of the Exception Distribution object.

Description

Enter a description of the Exception Distribution object.

Make Inactive

Enter Y to make the Exception Distribution Object inactive. Enter N to keep the Exception Distribution object active.

Exception OPAL Detail

To access this panel, enter option **2** in the Opt field next to an exception distribution object on the Maintain Exception Distribution Objects panel.

```

REP240          0Perator Assistance Language          13:31:42

Exception Object Name . . : KG                      test
Start at Sequence . . . : ___

Logic          Column
Operand  Variable Line Beg End  Operation  Operation Values  Seq
IF      DAY      _____  EQ      3                10
        _____  SKIP                20
END     _____                30
        _____                40
        _____                50
        _____                60
        _____                70
        _____                80
        _____                90
        _____               100
        _____               110
        _____               120
        _____               1 +

F3=Exit          F4=Prompt          F7=ROBOT Variables  F12=Previous
F18=Resequence  F19=Logic Check  F22=Preceding Opt  F23=Prev Options

```

- Enter the code for your Exception Distribution Object. If you need assistance, press F4 to prompt for values, or see the *Robot Reports OPAL Reference Guide*.
- When you have entered your code, press F19 for a logic check. Robot Reports will notify you if it is not able to process your code.

Scan/Replace OPAL

To access this panel, enter option **3** in the Opt field next to an exception distribution object on the Maintain Exception Distribution Objects panel.

This function is very useful if you have entered a number of Exception Distribution Objects and then need to change something. The scan/replace function will be performed without checking syntax. Make sure that the changes you want to make will be valid within the code.

REP279	Scan/Replace OPAL Values	10:47:55
Exception Object : <u>P_WORKDAY</u> (Name, *ALL)		
Scan Information:		
Variable :	_____	
Operation Value :	_____	
Replace Values:		
Variable :	_____	
Operation Value :	_____	
NOTE: Scan/Replace will be processed WITHOUT Syntax checking		
F3=Exit	F12=Previous	

Options

Scan Information

Enter the Variable and Operation Value that you want to scan for.

Replace Values

Enter the Variable and Operation Value that you want to replace your current values with.

Print OPAL Information

To access this panel, enter option **6** in the Opt field next to an exception distribution object on the Maintain Exception Distribution Objects panel.

Enter option **6** in the Opt field next to an exception distribution object on the Maintain Exception Distribution Objects panel to print the OPAL code. This option will create the spooled file REP472P.

Maintain Opal Tables

OPAL tables are used to store lists of values used with the OPAL keywords INTABLE and NOTINTABLE. For more information about the OPAL language, please refer to the *Robot Reports OPAL Reference Guide*. The Maintain OPAL Tables panel lists the names and descriptions of the tables you have defined for Robot Reports.

From this panel you can list, maintain, and create OPAL tables. To access this panel, enter option **6** on the Report Sets Menu.


```

REP203                               Maintain OPAL Tables                               16:19:47
Start at Table . . . . . : _____
Search Description for . . . : _____
Options
  A=Add/Copy/Delete      1=Select      2=Elements

Opt  OPAL Table      Description
---  ACCTTABLE      Accounting Table
---  APTABLE         Accounts Payable Table
---  ARTABLE         Accounts Receivable Table
---  INVTABLE        Inventory Table

F3=Exit      F6=Add Record      F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Options

- A** Enter an **A** in the Opt field to add, copy, or delete an Opal Table.
- 1** Enter a **1** in the Opt field to review or edit OPAL Table details.
- 2** Enter a **2** in the Opt field to review or edit table elements.
- F6** Press **F6** to add a new OPAL table.

OPAL Table Details

The OPAL Table panel allows you to enter a name and description for the table.

To access this panel, enter option **1** in the Opt field next to an OPAL table on the Maintain OPAL Tables panel.

```

REP217                OPAL Table                16:28:22

Enter OPAL Table Information:
OPAL Table . . . . . : ARTABLE
Description . . . . . : Accounts Receivable Table

F3=Exit                F6=Add/Copy/Delete    F12=Previous
F21=System Command    F22=Preceding Opt    F23=Prev Options

```

Enter a 10 character logical name and a description for the table.

Opal Table Elements

This panel allows you to enter the elements that make up the OPAL table. An OPAL table name is the operation value for the OPAL comparison operation INTABLE or NOTINTABLE. Table elements can be any alphanumeric characters.

The normal use for elements in an OPAL table in Robot Reports is to obtain an exact match for information in a report. Table elements are assumed to be left justified. Therefore, if the information is not left justified, you must enter leading blanks. Trailing blanks of the element are ignored. There is a limit of 66 characters in a table element.

To access this panel, enter option **2** in the Opt field next to an OPAL table on the Maintain OPAL Tables panel.

```

REP222                OPAL Table Elements                14:27:10

OPAL Table . . . . . : LOC_TABLE  Location Table

                Elements                Seq
Minneapolis _____ 10
Chicago _____ 20
Tampa _____ 30
San Francisco_ _____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

F3=Exit          F12=Previous      F18=Resequence
F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

Example:

Suppose someone asked you to create a report segment to track the records about four branch locations listed in the table shown above. Your OPAL code might look like this:

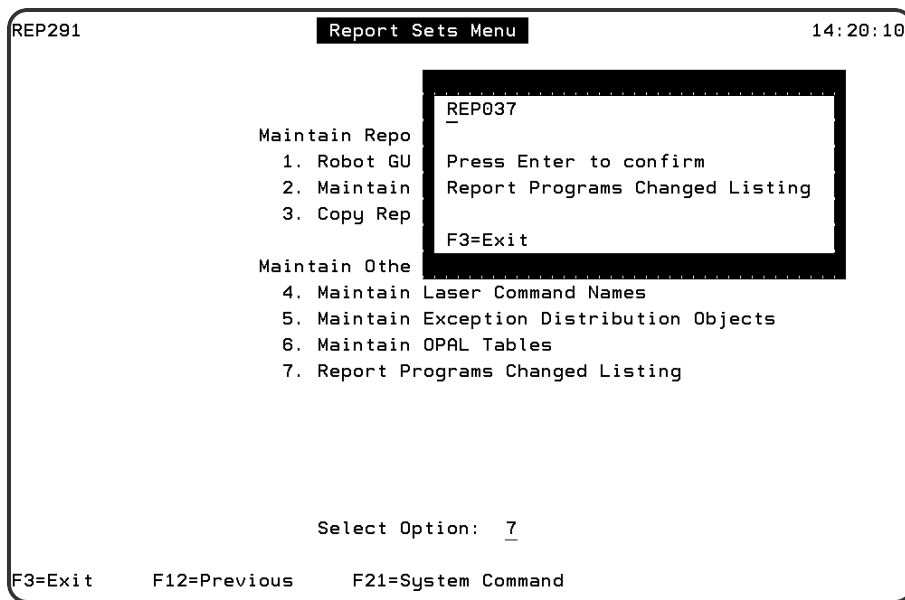
```

Logic Operand      Variable      Line      Column      Operation      Operation
                    Value          Seq. End          Value
If                    1          25          INTABLE      LOC_TABLE
                    INCLIN
END
    
```

Report Programs Changed Listing

Robot Reports can check the creation date of your report program against its record of the previous creation date. This is the same as entering the command, REPCHKDATE, on a command line. To perform this check, the report program name and library information must be filled in on the Report Set panel.

To have Robot Reports check for report programs that have changed, enter **7** on the Report Sets Menu. A confirmation window displays before Robot Reports runs the command. If the dates do not match, Robot Reports warns you to investigate the report to see whether the report layout has changed. If the layout has changed, you may need to update your OPAL code to work with the new layout.



Recipient and Distribution Lists

To access the Recipients and Distribution Lists menu, take option **2** from the Robot Reports Main Menu.

You use the options of the Recipient and Distribution Lists menu to create and maintain recipient records and distribution lists.

Recipients are defined as the individuals who are allowed to view or receive report output. The recipient records you enter establish a profile for the recipient. This profile includes the recipient's location or address, the printer to receive the report output for the recipient, and information about bundling the reports a recipient receives. The profile follows the recipient to wherever they receive output, even if they are promoted or change departments. Therefore, once you have entered the records for each recipient, you never have to enter the records again. Once you tell Robot Reports where a recipient is located, Robot Reports will deliver the reports to the IBM i associated with that recipient, including any IBM i in your network.

Distribution lists are lists of recipients who normally receive the same reports. A distribution list makes it easier to enter information about who receives a certain report and the corresponding distribution instructions. You may create unlimited distribution lists—there is no limit to the number of distribution lists on which a recipient's name can be listed.

```

REP292      Recipient and Distribution List Menu      14:03:32

          1. Maintain Recipients
          2. Maintain Distribution Lists

          Select Option: 1

F3=Exit      F12=Previous      F21=System Command

```

Maintain Recipients

To access the Maintain Recipients panel, select option 1 on the Recipient and Distribution Lists menu. The Maintain Recipients panel lists the recipient profiles you have created for Robot Reports.

```

REP208      Maintain Recipients      11:15:12

Start at Recipient . . . . . : _____
Search Recipient for . . . . . : _____

Options
A=Add/Copy/Delete      1=Select      ?=More Options

Opt  Recipient      Location      Department
---  ---
*GROUP PROFILE FOR REPORTS
*YVONNE
ALLOW REMOTE LPR REQUESTERS
ANGIE
BEN 1      Ben's location      Ben's Department
BEN1      Ben's location      Ben's Department
BEN3      Ben's location      Ben's Department
BILL B
BOB      North Office      Northstar Sales
BRIAN .
BUNDLE      Bundling Headquarter Dept 1      +

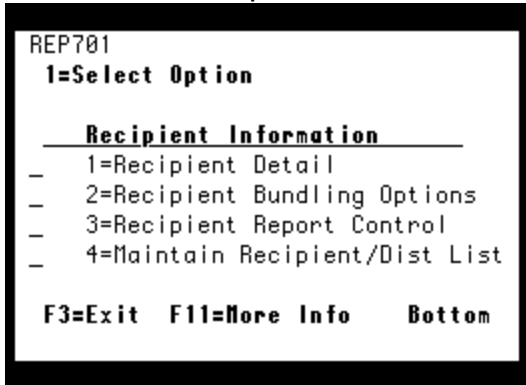
F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous      F21=System Command      F22=Preceding Opt      F23=Prev Options

```

Options

- A** Enter an **A** in the Opt field to add, copy, or delete an existing recipient.
- 1** Enter a **1** in the Opt field to open the Recipient Detail panel.
- 2**

- 3** Enter a **2** in the Opt field to open the Recipient Bundling Options panel.
- 4** Enter a **3** in the Opt field to open the Recipient Report Control panel.
- F6** Enter a **4** in the Opt field to open the Maintain Recipient/Distribution List panel.
- F6** Press **F6** to create a new recipient record.
- F4** Press **F4** in the Opt field to see more recipient options.



Recipient Details

To access the Recipient panel, enter a **1** in the Opt field on the Maintain Recipients panel. You use the Recipient panel to enter information about the recipient.

This panel is useful for processing new employees. If an employee leaves and a new employee is hired who should receive the same reports, just type the new employee's name and user profile over the old one to update all report distribution and security authorizations. For example, if Joe replaces Nancy and should receive the same reports that Nancy did, you just type Joe's name over Nancy's to update all your recipient records at once. This change does not affect report access history. Access history will reflect that Nancy accessed reports until her replacement date; Joe accessed the reports thereafter.

REP227	Recipient	14:11:37
Recipient Information:		
Name	: BOB	_____
Title	:	_____
User Profile	: BOB	(F4=Prompt)
Recipient Address:		
Location	: New York	_____
Department	: Development	_____
Address	:	_____
IFS Report Storage:		
Directory	:	_____
Report Processing Notification:		
E-Mail Address:	:	_____
F3=Exit	F4=Prompt	F6=Add/Copy/Delete
F12=Previous	F21=System Command	F22=Preceding Opt
		F23=Prev Options

Options

Recipient Information

- Enter, or change, the recipient's name and title.
- Enter the name of the user profile the recipient uses for viewing the report. Security authorizations are tied to this profile name. Press F4 to access the user profile finder. If the user does not sign on to the IBM i, you can also enter the profile name *NONE. *NONE can be used for recipients who receive printed output only.

Recipient Address

The address fields are optional and are for documentation purposes. If you print a banner page, the address information prints on the banner page to make report delivery easier.

IFS Report Storage

Enter the name of an existing IBM i directory. On the Report Distribution Output Options panel, if you specify *RECIPIENT in the Directory field and an output code of CLIENT, PDF, or HTML, this IBM i directory receives the recipient's reports. It is also used when the recipient creates client files to download on an ad hoc basis.

Report Processing Notification

- Robot Alert Device Name - If you are using Robot Alert to email reports, enter the name of the device where the report should be sent. Press **F4** for a list of devices.
- Email Address - If you are using recipient information to email reports, enter the email address where the report should be sent.

Recipient Bundling Options

To access the Recipient Bundling Options panel, enter a **2** in the Opt field on the Maintain Recipients panel. Robot Reports lets you bundle all the reports for an individual recipient into a packet. The packet consists of all the reports generated for that recipient since the last time the REPBUNDLE command was executed.

```

REP234                               Recipient Bundling Options                               14:05:15

Recipient Name . . . . . : BOB
Packet Printing Information:
Laser Command Name . . . . . : _____ (F4=Prompt)
Output Queue . . . . . : OUT1USR (F4=Prompt)
Library . . . . . : OUTUSR (F4=Prompt)
Remote Printing:
User ID . . . . . : _____
System Name . . . . . : _____ (F4=Prompt)
Is System an AS/400 . . . . . : - (Y=Yes, N=No)
Packet Index Information:
Print Packet Index . . . . . : Y (Y=Yes, N=No)
Print Page Number . . . . . : Y (Y=Yes, N=No)
Print Separator Pages . . . . . : N (Y=Yes, N=No)
Laser Command Name . . . . . : _____ (F4=Prompt)
Other Information:
Stop Reports . . . . . : N (Y=Yes, N=No)
Bundling Priority . . . . . : 5

F3=Exit          F4=Prompt          F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Options

Packet Printing Information

- Enter the name of any special laser command you may have defined to print these reports. Press **F4** to select from the list of laser command names.
- Enter the output queue for the recipient report bundle. Leave this field blank if the report will be printed on a remote system. Press **F4** to select from a list of output queues.

Remote Printing

- If you want to distribute the bundle to a remote site, leave this field blank to use the remote system information specified on the Report Distribution Output Options panel or enter the user profile name and system name for remote printing. If Robot Network is installed, press **F4** to choose from a list of system names.
- Enter a **Y** if the remote system is an IBM i. If it is an IBM i, all print attributes will be preserved.

Packet Index Information

- Enter a **Y** for Print Packet Index to generate a cover page listing all the reports in the packet and page number information.
- Enter a **Y** for Print Page Number to number each page in the packet. All pages in the packet have both an actual report page number and a packet page number.

- Enter a **Y** for Print Separator Pages to insert a blank separator page between each report in the packet.
- Enter a laser command name if you need special printer characteristics to print the packet index.

Other Information

- Enter a **Y** for Stop Reports to stop producing reports for a recipient.
- Enter the priority of this recipient's packet on the output queue. Allowable bundling priorities are 1-999 with 1 being the highest priority.

Recipient Reports

To access the Recipient Reports panel, enter a **3** in the Opt field on the Maintain Recipients panel.

The Recipient Reports panel lists the report segments for which the named recipient is listed in a distribution record. Only the most recent version of each report is accessible on this panel. How you have defined security for the report segment determines whether the recipient can access report segments on this list. Recipients can only work with the reports they are authorized to see. Only the most recent version of the report is accessible on this panel.

```

REP211                               Recipient Reports                               14:16:28
Recipient . . . . . : BOB
Start at Report Set . . . : _____
Search Descriptions for . . : _____
Options:      1=View Report      ?=More Options

Opt  Segment Description      Set Description      Output  Last Run
   |      |                  |                  |   Code  |   Date   |   Time
---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
  |  Month end accounting reports  Month end accounting  BOTH   0/00/00   :00
  |  first selected                first selected        BOTH   0/00/00   :00
  |  410                            Third selected        BOTH   2/19/03  16:46
  |  Midwest Sales Reports          Midwest Sales Report  BOTH   0/00/00   :00
  |  Northern Midwest Sales         Northern Midwest Sal  VIEW   3/14/03  14:41
  |  Northern Midwest Sales         Northern Midwest Sal  VIEW   0/00/00   :00
  |  Midwest Sales Reports          Midwest Sales Report  BOTH   3/11/03   9:30
  |  OPERATORS STARTING WITH A-I    report                PRINT   3/18/03  16:41
  |  Packet History                 Product Events        BOTH   0/00/00   :00

F3=Exit      F4=Prompt      F6=Add Record  F9=Select Search
F11=More Info  F12=Previous  F15=My Info   F22=Preceding Opt  F23=Prev Options
    
```

Options

- 1 Enter a **1** in the Opt field to view the most recent version of the report.
- 2

Enter a **2** in the Opt field to display the Recipient Archived Reports panel, which lists earlier versions of the report.

3

If a single index is defined, this option displays the Report Index Entries panel, from which you can select an entry to be retrieved. If more than one index is defined, this option displays the Report Index Finder panel, from which you can select an index to work with. If no indexes are defined for the this report, this option displays the Report Index Finder panel with the message, "No records exist to display."

4

Enter a **4** in the Opt field to display the Print Report panel, from which you can print the most recent version of the report.

5

Enter a **5** in the Opt field to display the Recipient Report Access panel, from which you can change report access information.

6

Enter a **6** in the Opt field to display the Report Access History panel, which displays the report access history.

F6

Press **F6** to add report segments to this list. The Report Set Finder displays to select a report set. After you have selected the segment you want to add to the recipient list, the [Report Distribution Output Options](#) panel displays.

F4

Press **F4** in the Opt field to see more recipient options.

```

REP701
  1=Select Option

  Report Viewing Options
  -----
  1=View Last Report Version Run
  2=Archived Report Versions
  Other Report Options
  -----
  3=Report Indexes
  4=Print Last Report Version
  5=Change Report Access Info
  6=Display Access History
  F3=Exit  F11=More Info  Bottom

```

Copy a Recipient's Reports

You can use the REPCPYDST command to distribute one recipient's reports to another recipient. This command has three parameters you use to indicate the From Recipient (source), the To Recipient (target), and whether to include the reports distributed from distribution lists. The REPCPYDST command also generates a report listing all of the reports that will be distributed to the target recipient.

Enter the REPCPYDST command from an IBM i command prompt and press **F4** to prompt it. Enter the To recipient's name, the From recipient's name, and indicate whether to include reports from distribution lists.

Maintain Recipient on Distribution Lists

To access the Maintain Recipient on Distribution Lists panel, enter a **4** in the Opt field on the Maintain Recipients panel.

Robot Reports offers two ways to maintain a recipient on a distribution list. The first way is to go to the [distribution list](#) and add the recipient's name. The second way, especially useful for new employees, is to use this panel to add the recipient to multiple lists.

```

REP261          Maintain Recipient on Distribution Lists          15:39:27

Recipient . . . . . : LINDSEY
Start at Distribution List . . . : _____
Options
A=Add/Copy/Delete

Opt  Distribution List      Location      Department
---  -
DDREPLIST
KMLIST                      ep          ts
SALESTEAM
    
```

F3=Exit F6=Add Record F12=Previous
F21=System Command F22=Preceding Opt F23=Prev Options

Options

- Press **F6** to access the Distribution List Finder panel. On this panel, enter a **1** next to each list that should contain the recipient's name. When you exit the finder, the lists you selected are listed in the distribution list field.
- You can also use the Add/Copy/Delete window to delete a recipient's name from multiple distribution lists.

Maintain Distribution Lists

To access the Maintain Distribution Lists panel, select option **2** on the Recipient and Distribution Lists menu. The Maintain Distribution Lists panel lists the distribution lists you have defined to Robot Reports

```

REP206                               Maintain Distribution Lists                               15:16:55

Start at Distribution List . . . : _____
Search Distribution List for . . : _____
Options
A=Add/Copy/Delete    1=Select    2=Recipients

Opt  Distribution List      Location      Department
--  LIST1                  Winter Park   Williams Arena
--  LIST2                  Xcel         Metro Dome
--  MANAGER LIST           ALL
--  PAUL                   West Minnetonka  Development
--  REPORTS                HERE AND     THERE

F3=Exit      F6=Add Record    F9=Select Search    F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Options

- A** Enter an **A** in the Opt field to add, copy, or delete an existing distribution list.
- 1** Enter a **1** in the Opt field to open the Distribution List Detail panel.
- 2** Enter a **2** in the Opt field to open the Maintain Distribution List Recipients panel.
- F6** Press **F6** to create a new distribution list.

Distribution List

To access the Distribution List panel for an existing list, enter a **1** in the Opt field on the Maintain Distribution Lists panel. To access the Distribution List panel to create a new distribution list, Press **F6** on the Maintain Distribution Lists panel.

```

REP262          Distribution List          15:51:05

Enter Distribution List Information:
Distribution List . . . . . : _____
Location . . . . . : _____
Department . . . . . : _____

F3=Exit          F6=Add/Copy/Delete      F12=Previous
F21=System Command  F22=Preceding Opt      F23=Prev Options
    
```

Options

- Enter a name for the distribution list.
- Enter an optional location and department.

Maintain Distribution List Recipients

To access the Maintain Distribution List Recipient panel, enter a **2** in the Opt field on the Maintain Distribution Lists panel. Use the Maintain Distribution List Recipients panel to add or delete recipient names on a distribution list.

```

REP257          Maintain Distribution List Recipients  15:58:01

Distribution List . . . . : DDREPLIST
Start at Recipient . . . : _____
Options
A=Add/Copy/Delete

Opt  _____  Recipient _____  Recipient Title _____
---  BOBBY          Tech Support
---  CHRISTY        Exchange
---  DANA
---  JEFF
    
```

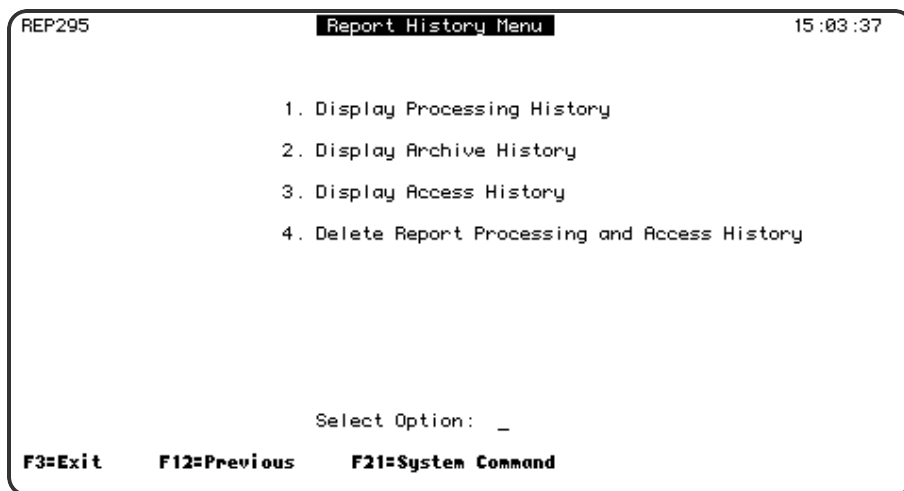
F3=Exit F6=Add Record F12=Previous
F21=System Command F22=Preceding Opt F23=Prev Options

Options

- Press **F6** to access the Recipient Finder panel to add multiple names to the list. On this panel, enter a **1** next to each recipient that should be added to the distribution list. When you exit the finder, the recipients you selected are listed in the recipient field.
- You can also use the Add/Copy/Delete window to delete a recipient from the distribution list. If you delete a recipient from a list, you automatically delete the recipient's authorization to all reports that use the distribution list.

Report History

To access the Report History menu, take option **3** from the Robot Reports Main Menu. There are three different types of history that Robot Reports keeps: Processing History, Archive History, and Access History.



Options

1. [Display Processing History](#)
2. [Display Archive History](#)
3. [Display Access History](#)
4. **Delete Report Processing and Access History**

You can delete report processing and access history periodically to clean up your history files using the REPCLR HIST command and its parameters (or by selecting Option 4 on the Report History menu). This command allows you to remove report

access history, or both report processing and report access history records beyond a certain number of days old. Report processing and access history records remain on the system until you run REPCLRHIST.

- **Report access history**

REPCLRHIST deletes all access history records older than the number of days you specify. It also deletes all ERROR status records.

- **Report processing history**

REPCLRHIST deletes all processing history records older than the number of days you specify that are not linked to a report archive record. Report processing history records for archived reports are retained until the report retention period expires. After the retention period ends, report processing history records that are older than the number of days you specify are automatically deleted the next time REPCLRHIST is run.

- **Report archive history**

The REPCLRHIST command does not affect report archive history. After the end of the report retention period, report archive history records are automatically deleted the next time the REPARCHIVE command is run.

TIP: Once you've decided on a purging scheme, the easiest way to keep your files clean is to set up a Robot Schedule job to run the REPCLRHIST command on your schedule.

```

Clear the History Records (REPCLRHIST)

Type choices, press Enter.

Only Remove Access Records . . . . . Y          Y, N
Days Old to Purge . . . . . 30          Number

F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More Keys
Bottom

```

- Enter **Y** to purge access records only. Enter **N** to purge both access and processing records.
- Enter how many days old that a record needs to be in order to be purged.

Report Processing History

To access the Report Processing History panel, take option **1** on the Report History Menu.

The Report Processing History panel lists all the report names Robot Reports has processed or currently is processing.

```

REP231          Report Processing History          15:59:16

Start at Run Date . . . . . : 0/00/00
Options
  1=Select      ?=More Options

  Opts Report Set Report Name Status User Changed Run
  ---  ---      ---      ---      ---      ---      ---      ---
  ___  VIKING    VIKING    COMPLETED PAUL    4/14/03  8:09  4/14/03  8:09
  ___  VIKING    VIKING    COMPLETED PAUL    4/14/03  8:06  4/14/03  8:06
  ___  VIKING    VIKING    COMPLETED PAUL    4/14/03  8:02  4/14/03  8:02
  ___  GOLFSET   GOLF1     COMPLETED PAUL    4/14/03  7:54  4/14/03  7:54
  ___  GOLFSET   GOLF2     COMPLETED PAUL    4/14/03  7:54  4/14/03  7:54
  ___  GOLFSET   GOLF3     COMPLETED PAUL    4/14/03  7:55  4/14/03  7:54
  ___  LION     LION      COMPLETED PAUL    4/14/03  7:53  4/14/03  7:52
  ___  LION     LION      COMPLETED PAUL    4/11/03  17:03  4/11/03  17:02
  ___  LION     LION      COMPLETED PAUL    4/11/03  17:02  4/11/03  17:0 +

F3=Exit      F4=Prompt      F9=Select Search  F11=More Info
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

Press **F11** for additional information and fields

```

REP231          Report Processing History          15:59:16
                                     SYBIL3

Start at Run Date . . . . . : 0/00/00
Options
  1=Select      ?=More Options

  Opts Report Set Report Name Status User Changed Run
  ---  ---      ---      ---      ---      ---      ---      ---
  ___  VIKING    VIKING    COMPLETED PAUL    4/14/03  8:09  4/14/03  8:09
  RUN#:      468      Outq: PAULOUTQ  Number of Pages:      8
  ___  VIKING    VIKING    COMPLETED PAUL    4/14/03  8:06  4/14/03  8:06
  RUN#:      467      Outq: PAULOUTQ  Number of Pages:      8
  ___  VIKING    VIKING    COMPLETED PAUL    4/14/03  8:02  4/14/03  8:02
  RUN#:      466      Outq: PAULOUTQ  Number of Pages:      24
  +

F3=Exit      F4=Prompt      F9=Select Search  F11=More Info
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

Fields

Report Set

The name of the Report Set that Reports has processed or is processing

Report Name

The name of the Report that Reports has processed or is processing

Status

The status column may show any of the following code:

- **Processing** - All of the steps for processing the report name are not complete.
- **Completed** - The processing of the report name has completed. If the file output is to be bundled, bundling may not have completed. Display the report access history for the report name to see whether the report has been bundled.
- **Reprocess** - The resegmenting command, REPSEGMENT, is currently being run for this report name.

User

The user who ran the job.

Changed Date and Time

The last date and time the status of the report name changed.

Run Date and Time

The date and time Robot Reports processed the report program spooled file.

Run #

The run number of the job.

Outq

the output queue from which the spooled file was read.

Number of Pages

The number of pages in the report.

Search Options

The Report Processing History panel offers three criteria for searching through its records. Press **F9** to display the Search Options Window.

```

REP702
  1=Select Option

  _  Set, Rpt Name, Date
  _  Set, Run Date
  _  Run Date
  _  Run Number
  _  F3=Exit

```

Enter a **1** to select a search option. The Start at fields change to match the search option you select.

Options

1

Enter a **1** in front of a processing entry to view the Processing Detail.

```

REP213          Report Processing History Information          16:17:52

Report Set      : UIKING      UIKING REPORT
Report Name    : UIKING      UIKING REPORT
Status         : COMPLETED
Date Changed   : 4/14/03
Time Changed   : 8:09
User Who Ran Report : PAUL
Program Name   :
Library       :
Output Queue   : PAULOUTQ
Library       : PAUL
Splf Create Date : 4/14/03
Splf Create Time : 8:09
Spool File Number : 000030
Report Run Number : 468
Report Size:
Number of Pages : 8
Number of Lines : 528

F3=Exit      F12=Previous      F21=System Command
F22=Preceding Opt  F23=Prev Options

```

2

Enter a **2** in front of a processing entry to view the [Archive Status](#).

3

Enter a **3** in front of a processing entry to view the [Access History](#).

F4

Press **F4** in front of a processing entry to see the options menu.

```

REP701
  1=Select Option

  Display Report History
  1=Processing Detail
  2=Archive Status
  3=Access History
  F3=Exit  F11=More Info  Bottom

```

Report Archive History

To access the Report Archive History panel, take option **2** on the Report History Menu.

The Report Archive History panel lists the reports that Robot Reports has archived and their status.

REP232		Report Archive History				16:20:54	
Start at Report Set :							
Start at Splf Create Date . . : <u>0/00/00</u>							
Options							
1=Select ?=More Options							
Opt	Report Set	Splf Create		Status	Changed		Mbr of Pages
		Date	Time		Date	Time	
—	LION	4/08/03	11:46	ON-LINE	4/08/03	11:46	16
—	LION	3/31/03	9:06	ON-LINE	3/31/03	10:05	160,000
—	LION	3/31/03	9:05	ON-LINE	3/31/03	9:05	8
—	NIDSALES2	3/14/03	14:35	SHORTTERM	3/25/03	15:10	9
—	NIDSALES	1/30/03	8:37	SHORTTERM	3/25/03	15:10	2
—	NEC	3/18/03	16:40	SHORTTERM	3/25/03	15:12	157
—	NEC	3/18/03	16:33	SHORTTERM	3/25/03	15:11	25
—	NEC	3/18/03	16:32	SHORTTERM	3/25/03	15:11	13
—	NEC	3/18/03	16:30	SHORTTERM	3/25/03	15:11	25
—	NEC	3/18/03	16:17	SHORTTERM	3/25/03	15:11	49
—	NEC	3/18/03	16:05	SHORTTERM	3/25/03	15:11	145 +
F3=Exit F4=Prompt F9=Select Search							
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options							

Fields

Report Set

The name of the report set that Robot Reports has processed into archive. When the set name is blank and the status is Expired, it indicates you have a volume that can be reinitialized.

Splf Create Date and Time

The date and time the files were archived

Status

The archive status of the report

- **Run** - Processing has begun
- **Running** - Segmenting the report
- **Processing** - Distributing the report
- **On-line** - Report is available online
- **Shortterm** - Report is archived in short-term storage
- **Longterm** - Report is archived in long-term storage
- **Restored** - Report has been restored from short- or long-term storage
- **Expired** - Archive period for all reports on the volume have expired. Expired volumes should be reinitialized and the expired record deleted.

Changed Date and Time

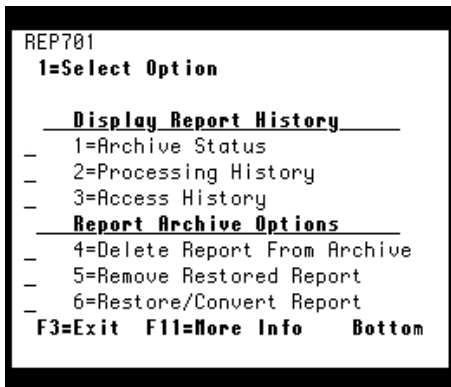
The last date and time the status of the file was changed.

Nbr of Pages

The number of pages in the report.

Options

- 1 Enter a **1** to view the Report Archive Status Information panel.
- 2 Enter a **2** to view the [Processing History](#).
- 3 Enter a **3** to view the [Access History](#).
- 4 Enter a **4** to delete the report from and its associated archive records from archive.
Use this option to remove a report from the system before its archive dates have expired or to remove reports with a status of Expired. Robot Reports automatically removes expired reports and their associated records during the archiving process.
- 5 Enter a **5** to remove the restored report from online access and update the report's archive status.
- 6 Enter a **6** to restore a short-term or long-term report.
- F4 Press **F4** next to a record to see the options menu.



Report Archive Status Information

To access the Report Archive Status Information panel, enter a **1** in the Opt field on the Report Archive History panel.

```

REP249          Report Archive Status Information          16:31:28

Report Set . . . . . : MIDSALLES2 Northern Midwest Sales
Status . . . . . : SHORTTERM
Date Changed . . . . . : 3/25/03      Splf Create Date . . . : 3/14/03
Time Changed . . . . . : 15:10       Splf Create Time . . . : 14:35
Date Restored . . . . . : 0/00/00
Report Run Number . . . . . : 11
Report Size:
  Number of Pages . . . . . : 9
  Number of Lines . . . . . : 594
  Archive Size . . . . . : 217,088
Report Remains in Archive Until:
  Online . . . . . : 3/19/03
  Short Term Storage . . . . . : 4/08/03
  Long Term Storage . . . . . : 5/08/03

F3=Exit          F12=Previous       F14=Restore Report
F21=System Command F22=Preceding Opt F23=Prev Options

```

Restoring a Report from Archive

You can restore an archived report from the Report Archive Status Information panel. When you set up Robot Reports (see System Setup), you have the option of using Robot Save for archive. Using Robot Save for archive has several benefits. First, if you are using Robot Save for archive you see more detailed information about the volume and location of the tapes on this panel. You can take advantage of Robot Save's tape management system to track the location of your short-term and long-term storage tapes. Plus, if you have an automated tape librarian, Robot Save provides the interface to use it for your Robot Reports archive.

If you don't have Robot Save, tape management and report restoration procedures are less automated. For example, to restore a report, you'll have to remember which volume to mount from this panel. The following table summarizes how report restoration works, both with and without Robot Save.

- Only reports with statuses of short-term or long-term can be restored.
- Press **F14** to start report restoration.
- After you have finished using the restored report, press **F15** to remove it from online access and update its status record.

System Setup		Report Archive Status Information Panel		
System Defaults Panel		Function Key 14	If report restoration is from:	
Use Robot Save for Archive	Submit Restoration to Batch	When you press it, Robot Reports does this:	Disk or Optical Disk	Tape
			Report restoration is:	This happens:
No	No	Immediately executes an interactive IBM i restore object command.	Automatic	Robot Reports sends a mount tape message to the message queue associated with the save device.
No	Yes	Submits an IBM i restore object command to batch for execution.	Automatic	Robot Reports sends a mount tape message to the message queue associated with the save device
Yes	No	Executes an interactive Robot Save command to restore report	Automatic	If you have an automated tape librarian, Robot Save automatically restores the report. Otherwise, if the right tape happens to be mounted, it will also be restored. If you need to mount a different volume or if there is no tape in the drive, you will receive a message.
Yes	Yes	Submits a Robot Save command to restore the report.	Automatic	If you have an automated tape librarian, Robot Save automatically restores the report. Otherwise, if the right tape happens to be mounted, it will also be restored. If you need to mount a different volume or there is no tape in the drive, Robot Save sends a message to the message queue associated with the save device.

Report Access History

To access the Report Access History panel, take option **3** on the Report History Menu. When you enter a **3**, the Report Set Finder will appear. Enter a **1** in the Opt field to select the report set whose access history you would like to view.

The Report Access History panel lists the recipients who have accessed the report, including the time and date of access, and the action they took. You can use this panel for security purposes to find out who is using and printing reports. This allows you to make sure your authorizations are up to date and that no unexpected people are using the report.

You also can use this panel to watch for trends, such as people switching from report printing to report viewing. When the majority of recipients are viewing rather than printing, you can make viewing the standard output option and allow those recipients who still want printed output to print on demand. You can even use this panel to answer the question, "Does anyone use this report?" It could be that you are running a report that no one ever looks at. If so, this report is a candidate for elimination, which will save processing time and resources.

REP237		Report Access History for Report Set			14:18:45	
Report Set : MIDWEST MIDWEST SALES						
Start at Date : <u>0/00/00</u>						
Options						
1=Select 2=Report Archive Status 3=Report Processing History						
Opt	Report Name	Segment	Recipient	Action	Changed Date Time	
—	MIDWEST	CLOTHES	BEN P	VIEWED	6/09/03	8:22
—	MIDWEST	CLOTHES	BEN P	VIEWED	6/09/03	8:21
—	MIDWEST	*REPORT	BEN P	VIEWED	6/06/03	11:05
—	MIDWEST	CLOTHES	BEN P	VIEWED	6/06/03	10:47
—	MIDWEST	CLOTHES	BEN P	VIEWED	6/06/03	10:41
—	MIDWEST	*REPORT	BEN P	VIEWED	6/06/03	10:40
—	MIDWEST	CLOTHES	BEN P	VIEWED	6/06/03	10:35
—	MIDWEST	*REPORT	BOB B	VIEWED	6/05/03	11:04
—	MIDWEST	*REPORT	BOB B	VIEWED	6/05/03	11:02
—	MIDWEST	*REPORT	BOB B	VIEWED	6/05/03	11:01
—	MIDWEST	ACCESSORY	BOB B	VIEWED	6/05/03	11: +
F3=Exit F9=Select Search F12=Previous						
F21=System Command F22=Preceding Opt F23=Prev Options						

Options

1

Enter a 1 in the Opt field to access the Report Access History Information panel for that record.

2

Enter a 2 to view the [Report Archive Status](#).

3

Enter a 3 to view the [Report Processing History](#).

Report Access History Information

The Report Access History panel provides additional information about each individual access record.

```

REP248          Report Access History Information          14:21:13

Recipient . . . . . : BOB B
Report Set . . . . . : MIDWEST   MIDWEST SALES
Report Name . . . . . : MIDWEST   MIDWEST SALES
Report Segment . . . . : *REPORT   MIDWEST SALES
Action . . . . . : VIEWED
Date Changed . . . . . : 6/05/03
Time Changed . . . . . : 11:04
Viewed on Workstation . . : RSL816
Report View . . . . . : 1ST-QTR   1st Quarter Sales
Bundle Order . . . . . :
Output Queue . . . . . :
  Library . . . . . :
Spool File Number . . . . : 000063
Report Run Number . . . . :      402
Report Size:
  Number of Pages . . . . :
  Number of Copies . . . . :

F3=Exit          F12=Previous      F21=System Command
F22=Preceding Opt F23=Prev Options

```

Robot Reports keeps track of six actions:

Viewed

The recipient viewed the report from a workstation

Printed

The report was sent to an output queue for printing

Restored

The recipient copied a report from short- or long-term storage for online access. The report name and report segment fields are blank for restored reports.

Removed

A recipient removed a restored report from online access.

Bundlerdy

The specified report is ready to be bundled. This report will be bundled and printed when the bundling command, REPBUNDLE, is executed.

Error

An error occurred during processing that prevented the report from being bundled.

Report Control

To access the Control Menu, take option **4** from the Robot Reports Main Menu. The Control Menu allows you to start and stop output queue monitoring, display the Robot Reports subsystem, display a list of the output queues being monitored, move reports to the next archive stage, and bundle your reports into packets.


```
REP296                               Control Menu                               22:52:49
                                     Robot REPORTS is: ACTIVE
Output Queue Monitoring
  1. Start Output Queue Monitoring
  2. End Output Queue Monitoring
  3. Display Robot REPORTS Subsystem
  4. Work With Output Queue Status
Archiving
  5. Move Reports to Next Archive Stage
Bundling Options
  6. Bundle all Reports Processed
  7. Bundle Reports Processed for a Recipient

Select Option: _

F3=Exit    F21=System Command
```

[Output Queue Monitoring options](#)

[Archiving options](#)

[Bundling Options](#)

Control Processing and Commands

Robot Reports lets you select one of three ways to process a report on the Report Set panel. The EXECUTE method works in conjunction with the REPRUNSET command. The ROBOT method uses Robot Schedule to run the report set. The SEARCH method monitors output queues to find spooled files to process. The REPPRCSET command is used by all these methods, as explained in the table below, to process the spooled files.

Report Processing	
Method (selected on Report Set panel)	How the different methods create spooled files for Robot Reports to process
EXECUTE	1. The report administrator arranged for the command REPRUNSET to be run (submitted from a command line, called by a program, or scheduled in Robot Schedule).
	2. REPRUNSET performs the print file overrides as instructed by the report set and then executes the command listed on the Report Set panel to run the report program
	3. When the report program output is placed in a spooled file, REPRUNSET calls REPPRCSET to process the file.
ROBOT	1. ROBOT performs the necessary print file overrides and runs the report program as scheduled.
	2. ROBOT diverts the resulting spooled file to Robot Reports
	3. ROBOT automatically calls REPPRCSET to process the file.
SEARCH	1. The report administrator sets up output queues for Robot Reports to monitor and arranges for the report program spooled files to go to a monitored output queue.
	2. The administrator runs the report program.
	3. Robot Reports finds the resulting file on the queue and automatically executes the REPPRCSET command to process it.
Any of the Above	1. The report administrator overrides the print files to put the spooled files on hold or on a special holding output queue.
	2. The report administrator runs the report program.
	3. After the report program finishes running, the administrator executes REPPRCSET with the proper report set as the parameter. Tip: REPPRCSET can be incorporated into the report program or a CL driver program as long as it's called after the report program finishes. REPPRCSET can also be scheduled in Robot Schedule

Choosing a Method

The ROBOT method is the easiest way to have Robot Reports process your reports. Schedule the command to run the report program as a Robot Schedule job and designate it as a Robot Reports job. Robot Reports puts the spooled files into archive or distributes them as instructed.

The EXECUTE method is the quickest way to create a report if you are not using Robot Schedule.

The SEARCH method is a little more complicated in its initial setup. If you have chosen to use this method of report processing for one or more of your report sets, Robot Reports needs more information about which output queues to search. For more information about setting up and monitoring output queues for SEARCH-type processing, see [Output Queue Monitoring](#).

REPRUNSET - Run Users Set

REPRUNSET is used with report sets that use the EXECUTE method of report processing. The EXECUTE method is the quickest way to create a report if you are not using Robot Schedule. To use this method, enter the command to run the report on the Report Set panel. When you run the command REPRUNSET, Robot Reports does the following:

- Performs the print file overrides as instructed by the report set.
- Executes your report command.
- Diverts the spooled file, processes it, and then puts the report into archive or distributes it as instructed.

If you enter the command on a command line and press **F4**, you will see the Run Users Set panel. If you do not prompt the command, or want to call it in a program, or use it in a Robot Schedule job, use the following command format:

REPRUNSET SET(*report set name*)

Names must be entered in uppercase. Names that contain embedded blanks must be enclosed by single quotation marks within the parentheses.

REPPRCSET - Process Set Command

All the report processing methods in Robot Reports S use the REPPRCSET command to automatically process the spooled files from the set and put the reports into archive, or distribute them as required. Although most report administrators never use the REPPRCSET command, you can use it in your report program or a CL driver program.

REPPRCSET should be run after the report program has finished running. It finds all the spooled files from the report set that executed the command to run the report program and processes the spooled files that match the report names in the report set. To use this command, follow these steps:

1. Override the print files to put the spooled files on hold or use a holding output queue.
2. Execute your report program.
3. Execute REPPRCSET with the proper report set as a parameter.

If you enter the REPPRCSET command on a command line and press **F4**, you see Process Set Command panel. If you do not prompt the command, or want to call it in a program, or use it in a Robot Schedule job, use the following command format:

REPPRCSET SET(*report set name*)

Names must be entered in uppercase. Names that contain embedded blanks must be enclosed by single quotation marks within the parentheses.

REPHLDSET - Holding a Report Set

Robot Reports provides a command you can use to put a report set on hold and release it. For example, if your monthly close is a SEARCH-type report set and your daily invoices have not finished printing, you might want to put the closing report set on hold and release it when resources are ready.

Enter the command **REPHLDSET** on a a command line and press **F4** to prompt it.

Hold Report SET Command (REPHLDSET)

Type choices, press Enter.

Report Set	<u>ANTRANCYCL</u>	Character value
Hold Report Set?	<u>*YES</u>	(*YES, *NO)

Bottom

F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys

Options

Report Set

Enter the name of the report set you want to hold or release.

Hold Report Set?

Enter *YES to hold the set or *NO to release it.

Output Queue Monitoring

The Output Queue Monitoring options are access from the Control Menu.

```

REP296                               Control Menu                               22:52:49
                                     Robot REPORTS is: ACTIVE

Output Queue Monitoring
  1. Start Output Queue Monitoring
  2. End Output Queue Monitoring
  3. Display Robot REPORTS Subsystem
  4. Work With Output Queue Status
Archiving
  5. Move Reports to Next Archive Stage
Bundling Options
  6. Bundle all Reports Processed
  7. Bundle Reports Processed for a Recipient

Select Option: _

F3=Exit    F21=System Command

```

Options

1. Start Output Queue Monitoring

- Select Option **1** on the Control Menu or enter the command **REPSTRQMON** to start output queue monitoring
- To restart output queue monitoring after a significant period of no monitoring, you may want to use the command rather than the menu option because you can specify whether to clear the data queues. Enter the command **REPSTRQMON** and press **F4** to display a command prompt.

2. End Output Queue Monitoring

Select Option **2** on the Control Menu or enter the command **REPENDQMON** to stop output queue monitoring.

3. Display Robot Reports Subsystem

Select Option **3** to see the Work with Subsystem Jobs display for RBTSLEEPER, the subsystem in which Robot Reports and other Fortra products run. To see whether Robot Reports is monitoring output queues, check to see that the REPQWATCH job is active. If REPQWATCH is active, Robot Reports is monitoring.

4. Work with Output Queue Status

Select Option **4** on the Control Menu to display the Maintain Output Queue Listing panel. From this panel you can set up the output queues that you want Robot Reports to monitor and you can also start and stop output queue monitoring. You can also use the **REPOUTQMON** (Change Monitoring Status) command to start or stop monitoring an output queue.

```

REP778          Maintain Output Queue List          12:19:48

Start at Output Queue . . . : _____

Options
A=Add/Copy/Delete   1=Select   2=Start Monitoring   3=Stop Monitoring

  Output      Data
  Queue      Queue      Description
Opt  _____  _____  _____
---  JYOUTQ      QGPL      STARTED
---  KEVIN       QGPL      STARTED KEVIN
---  KRISSEARCH  KRISTI    STARTED KRISTI
---  ROXSEARCH   ROXY      STARTED ROXANNE CALLAN
---  SEARCH      CHRISTY   STARTED TEST
---  SEARCH      DD        STARTED DANA
---  SEARCH      EMILY    STARTED EMILY
---  SEARCH      MARIE    STARTED MARIE
---  SEARCH      MONICA   STARTED
---  SEARCH      VIVIAN   STARTED VIVIAN      +

F3=Exit           F5=Refresh       F6=Add OUTQ      F7=Add Started OQs
F12=Previous      F21=System Command  F22=Preceding Opt  F23=Prev Options

```

Archiving

When reports are processed, they are placed in online storage automatically. The command **REPARCHIVE** must be executed to move the reports to subsequent archive stages.

You can select Option **5**, Move Reports to Next Archive Stage, on the Control Menu or enter the **REPARCHIVE** command on a command line. The **REPARCHIVE** command has one parameter. **REPARCHIVE** examines the date each report job is scheduled to move to the next archive stage. If the date is less than or equal to the date you execute the command, the report is moved to the next stage.

When you select Option **5** on the menu, or enter the command and press **F4** to prompt, Move Reports to Next Archive Stage panel opens.

Whether you use the menu option or the command, Robot Reports examines the date each report set is scheduled to move to the next archive stage. If the date is less-than-or-equal-to the date you execute the command, the report is moved to the next stage.

```

Move Rpts to Nxt Archive Stage (REPARCHIVE)

Type choices, press Enter.

Archive Reports to . . . . . BOTH      BOTH, SHORTTERM, LONGTERM, ...

Bottom
F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys

```

How Archiving Works

If a report was online and should now be moved to short-term storage on a disk or ASP, Robot Reports compresses the report, writes it to disk, and updates the status from online to short-term. We recommend using optical disk or ASP devices for short-term storage. If you are using a magnetic disk drive or ASP for short-term storage, all of the reports are in the library REPSHTRMLB. Back up the REPSHTRMLB library as soon as the archiving process is finished (see the Operations Checklist topic later in this section).

If the next archive stage involves moving the report from disk storage to an external media like tape, Robot Reports requests a tape be mounted, writes the report and associated indexes to the tape, updates the status record, and removes the report from the disk or ASP. If the change in archive stage involves moving the report from one save device to another (such as short-term storage on optical to long-term storage on tape), Robot Reports temporarily restores the report and associated indexes to the system from the short-term optical disk, requests the long-term storage tape be mounted, writes the report and associated indexes to tape, and updates the status record. Robot Reports automatically checks that there is room on the system to restore reports to be moved. If there is not enough room, it writes a message to the job log. You can try again when there is enough space to resume the process.

There are advantages and disadvantages to short-term versus long-term archive operations.

- The advantage of short-term operations is recovery. Short-term operations save data on an object-by-object basis (SAVOBJ command). If an interruption causes a short-term operation to fail, you can restart at the point of failure, after the last object saved. Long-term operations save data on a library-by-library basis (SAVLIB command). If an interruption causes a long-term operation to fail, you must restart at the beginning— you cannot restart at the point of interruption.

- The advantage of long-term operations is speed. Long-term storage operations process data about three times faster than short-term storage operations. Generally, we recommend that you use short-term storage operations to save report data to disk; long-term storage operations to save report data to tape or an optical device.

Generally, we recommend that you use short-term storage operations to save report data to disk; long-term storage operations to save report data to tape or an optical device.

You can use the Robot Reports REPMVTODSK command to move reports in long-term status on tape or an optical device to short-term status on disk. This command is useful when you want to switch from long-term storage to short-term storage, or when you want to change the type of device on which your long-term reports are stored.

Archiving to Tape

If you are archiving to tape, Robot Reports needs a dedicated pool of tapes for its exclusive use. When you run the REPARCHIVE command and some reports are to be written to tape, Robot Reports requests that you mount a tape.

- If you mount a tape that Robot Reports has used before, it recognizes the tape. It can tell whether this tape is for short-term or long-term archive and will not allow you to save a short-term archive to a long-term tape and vice-versa. If you have the right kind of tape mounted (for example, you are saving a short-term archive to a short-term tape), Robot Reports archives the report to the next available sequence position on the tape.
- If the tape you mount has not been used by Robot Reports before, Robot Reports tries to save information to the first sequence position on the tape. If the tape you mount contains non-Robot Reports data, Robot Reports sends another message to the operator. The operator can mount a different volume and either retry or cancel the REPARCHIVE operation.
- If you cancel a short-term archive, the cancel operation stops the REPARCHIVE operation at the last SAVOBJ command it completed.
- If you cancel a long-term archive, you must restart the process from the beginning.

If you are using tape with an automated tape librarian (ATL), you will need to use Robot Save. Robot Save interfaces the most popular ATLs. Treat your ATL like any tape drive. If you use Robot Save to archive your reports, always check the REPARCHIVE job log to verify that the process completed normally.

If you are using optical disks as your storage medium, you should be aware that Robot Reports needs a dedicated group of optical volumes for its exclusive use. Rewritable optical volumes are well suited to act as a short-term storage archive for your reports. For long-term storage, tape is probably more economical, although Robot Reports can use optical

disk for long-term storage as well. If you are using optical disk volumes for both short- and long-term storage, set up two different volume groups (one for short-term storage and one for long-term) and keep your archives separate.

Report Archiving with Robot Save

The REPARCSAVE command is for use only with Robot Save. It is similar to the REPARCHIVE command, except that it checks to see whether the mounted volume was already being used in Robot Save.

When reports are processed, they are placed automatically in online storage. When you enter the REPARCSAVE command, Robot Reports examines the date each report set is scheduled to move to the next archive stage. If the date is earlier than the date you execute the command, the report is moved to the next stage. When the reports are archived to tape, Robot Reports can check to see whether the mounted volume has been used in Robot SAVE.

Enter the command REPARCSAVE on a command line and press **F4** to display the prompt panel.

```

Move Rpts to Nxt Archive Stage (REPARCSAVE)

Type choices, press Enter.

Archive Reports to . . . . . BOTH          BOTH, SHORTTERM, LONGTERM, ...
Robot SAVE Check Volume . . . . . *NO        *NO, *YES

```

Options

Archive Reports to

- Enter ***YES** to check to see whether the volume is used in Robot Save.
- Enter ***NO** if you do not want to check Robot Save

Robot Save Check Volume

- Enter **BOTH** to examine reports in both short- and long-term storage, and move those that are ready.
- Enter **SHORTTERM** to examine only reports in short-term storage.
- Enter **LONGTERM** to examine only reports in long-term storage.
- Enter **EXPIRED** to remove expired online records that will not be going to short- or long-term storage.

Bundling

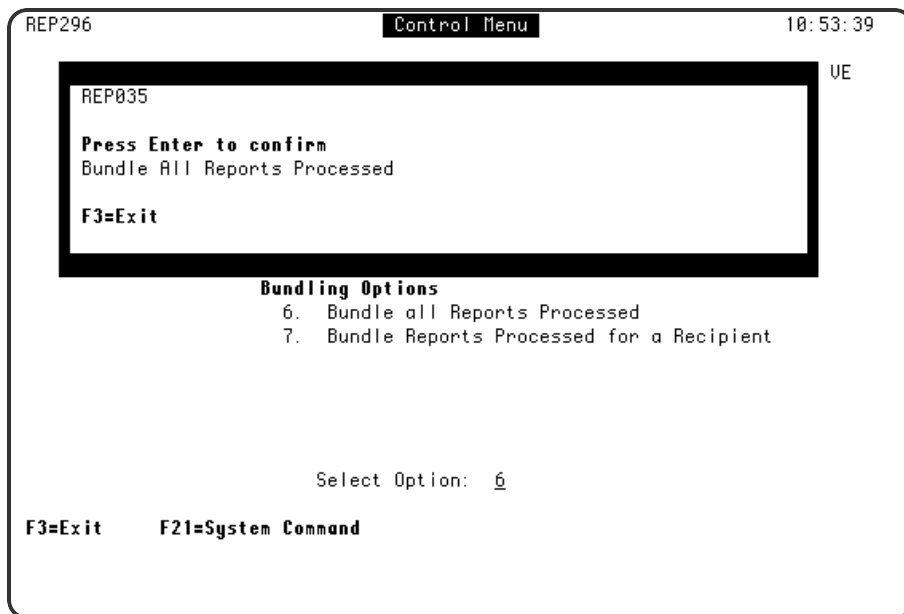
Whenever recipients receive more than one report, you should consider bundling their reports into packets for them. For example, delivering one packet containing five reports to a recipient is easier than making sure they get five different printouts. Robot Reports makes this easy with options on the Report Distribution Output Options panel. In addition, its Packet Index feature makes the reports easily accessible for the recipient.

REPBUNDLE performs the bundling according to the output priority entered on the Recipient Bundling Options panel. Give higher priority to people who arrive at work early to make sure their reports are ready for them when they arrive. The order of the reports in the packet is determined by the recipient. They enter this information in the report sequence field people who arrive at work early to make sure their reports are ready for them when they arrive. The order of the reports in the packet is determined by the recipient. They enter this information in the report sequence field of the Recipient Report Access panel.

Bundle All Reports Processed

You can select option **6** on the control menu or enter the command **REPBUNDLE** to have Robot Reports begin printing report bundles. When you use one of these options, Robot Reports bundles all the reports that have been processed and are waiting in bundle-ready (BUNDLERDY) status since the last time you selected this option. When you use the menu, the command is submitted to batch for processing.

The REPBUNDLE command bundles the reports into packets and prints them. The parameters for the command are explained later in this chapter. REPBUNDLE performs the bundling according to the output priority entered on the Recipient Bundling Options panel. For example, you should give higher priority to people who arrive at work early to make sure their reports are ready for them when they arrive. The order of the reports in the packet is determined by the recipient. They enter this information in the report sequence field of the Recipient Report Access panel.



Report Bundling by Recipient

Select Option **7** on the Control Menu to bundle reports for a specific recipient. The Recipient Finder displays and you can select the recipient. Robot Reports submits the command to batch that bundles and prints that recipient's reports immediately.

You generally use this option only when a recipient needs a printout immediately. If this happens often for the same recipients, consider giving them higher output priority on the Recipient Bundling Options panel. You might also find out if these recipients are open to the concept of report viewing. With viewing, as soon as reports finish processing they can be viewed—the wait for printing is eliminated.

Report Bundling by Command

Robot Reports provides a command you can use to bundle reports for recipients. Depending on the parameters you use, you can bundle reports for all recipients, for specific recipients, and for specific output queues. Enter the command **REPBUNDLE** on a command line and press **F4** to prompt it.

```

Bundle Reports (REPUNDLE)

Type choices, press Enter.

Recipient Name . . . . . *CURRENT
-----
Output Queue . . . . . *ALL      Name, *ALL
Library name . . . . . *ALL      Name, *ALL

Bottom
F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys

```

Options

Recipient Name

Enter the recipient name, *CURRENT, or *ALL. The recipient name must be entered in uppercase format. If the recipient name contains embedded blanks, enclose the name with single quotation marks.

Output Queue/Library name

To restrict bundling for a specific output queue, enter the name of the output queue and its library.

Checklists

Operations Checklist

Report processing is CPU- and disk-intensive. Therefore, we recommend that you schedule this processing for off hours if possible. On larger IBM i systems, the effect may be minimal.

For error-free, automatic operation of Robot Reports, we suggest that you schedule all the daily, weekly, and monthly procedures on Robot Schedule. Keep in mind that these are general frequency recommendations that you will need to tailor to your operations. Weekly and monthly procedures can be done more or less often, as required. If your IBM i has plenty of disk drive space, you may want to do these procedures less often. There are also procedures that should be done on an as-needed basis. These will have to be done manually using the Control Menu, or a command entry screen.

Daily Operations

- Have Robot Reports process your reports using the methods you specified on the Report Set panel:
 1. Schedule the report to be run on Robot Schedule with the Robot Reports option selected for report distribution.
 2. Enter the command REPRUNSET to execute your report program.
 3. Have Robot Reports monitor output queues to search for reports to process. When it finds a report to process, Robot Reports processes it automatically.
- Schedule the bundling command REPBUNDLE to run when all the night's report processing has finished.
- Schedule the archiving command REPARCHIVE (EXPIRED) to run when all the night's report processing has finished. This will remove reports from the system that have an online archive period that has expired and that do not have a short- or long-term archive period.
- Schedule the archiving command REPARCHIVE (SHORTTERM) to run when all the night's report processing has finished. This will move reports whose online archive period has expired to the short-term archive stage. It will also kick off the job REPDLTMON to remove expired records from their current status and change the status record. The result will be to keep the number of objects in the RBTREPLIB to a minimum.
- Save the changed objects in the Robot Reports library RBTREPLIB after the reports for the night have been processed.

Weekly Operations

- Schedule the archiving command REPARCHIVE (LONGTERM) to run.
- If you are using a disk drive or ASP for short-term storage, all of the reports are in the library REPSHTRMLB. Back up the library REPSHTRMLB as soon as the archiving process is finished. When you execute the SAVLIB command to perform the backup, make sure the save file data parameter SAVFDTA is *YES or the report data will NOT be saved. If you are using Robot SAVE to perform the backup, answer yes to the save file data option on the Backup Set.
- Reinitialize any expired volumes, go to the Report Archive History panel, and remove the expired record.

Monthly Operation

- Schedule the command REPCLR HIST to delete report processing and access history records over 30 days old.

As-needed Operations

- Add or change recipients.
- Change report distribution instructions.
- Create new report sets for reports being added to Robot Reports.
- Create new report sets whenever you add a new report distribution, change report parameters, or change report retention requirements.
- Review the report access history for confidential reports. See if there is any unusual usage that might indicate a security breach.
- Also review the report access history to identify reports that are not being used at all. Target them for elimination.
- Run additional administrative reports.

Tape Management Checklist

Robot Reports needs a dedicated pool of tapes for its exclusive use. These tapes should never be used for other operations. Robot Reports archiving system depends on it being able to age its own reports off its own tapes. Use the following rules to manage Robot Reports tapes.

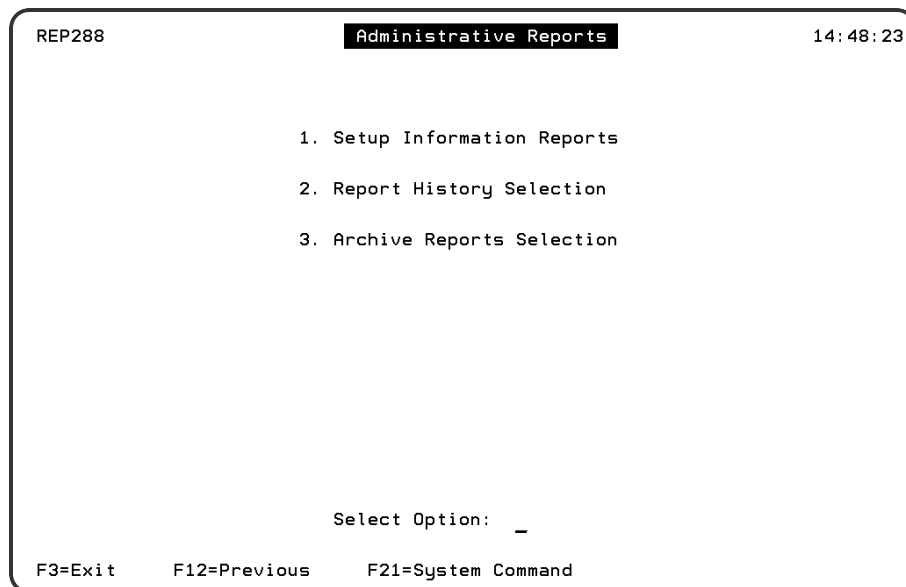
- Use a special, permanent set of tapes to store Robot Reports output. Keep your Robot Reports tapes separate from other tapes. Never mix Robot Reports data with non-Robot Reports data on a single tape or your non-Robot Reports data will be lost.
- Have separate sets of tapes dedicated to storing short- and long-term Robot Reports data. Never mix short- and long-term storage on the same volume. To make tape management simpler, use different naming conventions for short- and long-term storage.
- Give each tape volume a unique name. Never use duplicate volume names on tapes used to store reports.
- If you are using optical volumes for one archive stage and tape volumes for another, use different naming conventions for each form of storage.
- If you are using Robot Save for tape management, see [System Setup and Security](#).
- When you have expired volumes that you want to reuse, you can make the process easier. Before you run the command, run the Expired Volumes report. These reports can be submitted by selecting Option 3 of the Administrative Reports menu and then selecting Expired Volumes. You can use the report as a worksheet to see the expired volumes and then to check them off as you remove the expired records with the REPARCHIVE (expired) command and reinitialize each one.

Administrative Reports

To access the Administrative Reports Menu, select option **5** on the Robot Reports Main Menu.

Robot Reports provides three types of administrative reports. One type of report describes various elements of system setup. The second provides report history printouts of various kinds. Of special interest among the history reports is the Good Morning report. In this report, Robot Reports summarizes all its output activity for the prior day or whatever period you select. The third provide information about your report archive.

All reports can be submitted for printing immediately or, if you have Robot Schedule installed, scheduled on Robot Schedule. When you submit a job to print, a window appears to allow you to enter the output queue and library information.



Setup Information Reports

To access the Setup Information Reports panel, take option **1** on the Administrative Reports menu.

On the Setup Information Reports panel, enter a **1** next to each report you want to receive. This submits them to print immediately. Enter a **2** to schedule them on Robot Schedule.

For some reports you can enter selection criteria to limit the range of report information. You can get information about all report sets or a single report set. The Recipient Report can give you information about all recipients, or just the recipients in a specific location or department.

```

REP289          Setup Information Reports          10:57:24

Options
1=Submit Report  2=Schedule on ROBOT

Opt  Report to Run          Selection Criteria
 1 Report Set Information    Report Set . . . . : ACCOUNTING (F4=Prompt)
  _ Distribution Lists
  _ Recipient                Location : _____
                               Department: _____
  _ Reports by Recipient
  _ Recipients by Report
  _ System Default Information

F3=Exit  F4=Prompt  F12=Previous  F21=System Command
    
```

Report History Selection

To access the Report History Selection, select option **2** on the Administrative Reports Menu.

On the Report History Selection panel, enter a **1** next each report you want to receive. This submits them to print immediately. Enter a **2** to schedule the report on Robot Schedule. Some reports let you limit the records included in the report using a report set name or date range.

It is best to schedule the Good Morning report as a Robot Schedule reactive job that is run when the night processing is complete.

```

REP293          Report History Selection          10:58:00

Options
1=Submit Report  2=Schedule on ROBOT          Date Format: *MDY
                               (If Time fields are left Blank, the
                               Defaults are: AVAILABLE to CURRENT )

Opt  Report to Run          Selection Criteria
 1 Good Morning             Begin Date/Time . . : 04/20/03 900
                               End Date/Time . . . : 04/30/03 1000
  _ Reports Online
  _ Reports in Short Term Storage
  _ Reports in Long Term Storage
 1 Processing History       Report Set . . . . : ACCOUNTING (F4=Prompt)
                               Begin Date/Time . . : 04/01/03
                               End Date/Time . . . : 04/15/03
  _ Access History         Report Set . . . . : _____ (F4=Prompt)
                               Begin Date/Time . . : 0/00/00
                               End Date/Time . . . : 0/00/00
  _ Report Usage           Report Set . . . . : _____ (F4=Prompt)

F3=Exit  F4=Prompt  F12=Previous  F21=System Command
    
```


Archive Reports Selection

To access the Archive Reports Selection, select option **3** on the Administrative Reports Menu.

On the Archive Reports Selection panel, enter a **1** next to each report you want to receive. This will submit them to print immediately. Enter a **2** to schedule them on Robot Schedule. The Report Archive Status report allows you to limit the records included in the report by entering a report set name.

```

REP297                               Archive Reports Selection                               9:49:25
Options
1=Submit Report  2=Schedule on ROBOT

Opt  Report to Run                      Selection Criteria
 1 Report Archive Status                 Report Set . . . . . : AMTRANCYCL (F4=Prompt)

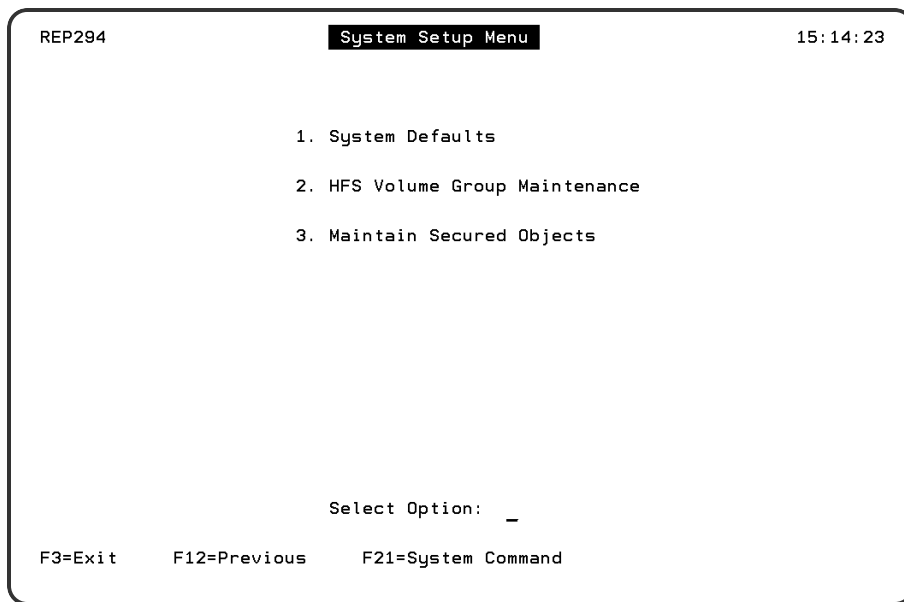
Volume Reports
_ Short Term Volumes
_ Long Term Volumes
1 Expired Volumes

F3=Exit  F4=Prompt  F12=Previous  F21=System Command

```

System Setup and Security

Select option **6** on the Main Menu to access the System Setup Menu. The System Setup menu allows you to work with system defaults, optical volumes, and secured objects.



System Defaults

You have several decisions to make when you do your system setup. Among the most important are decisions about archiving reports. Decisions like whether you will use Robot Save to manage tape volumes, and what storage media you will use for each archival stage. For additional information about how to make these decisions and perform the setup, see System Defaults.

HFS Volume Group Maintenance

If you have an optical disk drive, you may want to use it for short-term or long-term storage. There are two types of optical drives:

- One type of optical drives emulates tape drives. To set up your system for these drives, follow the instructions for setting up tape storage, including choosing a device code of TAPE.
- Other optical drives (like those from IBM) use the Hierarchical File System of the IBM i. If you have this type of drive, set it up according to the instructions for optical drives on the pages that follow.

Security

With Robot Reports you can provide excellent security for your report information because reports are stored in database files. The report administrator can secure information down to the individual lines or columns of a report. To further tighten the security of your business

information, you can allow report viewing, but no printing. Remember, with Robot Reports, users can't display or print a report if it's not on their authorized report list.

System Defaults

Select Option **1** on the System Setup Menu to access the System Defaults panel.

Use this panel to specify how you want to archive reports, the user profile your programmers normally use, and the name of the job queue and library to use to submit restorations.

```

REP202A                               System Defaults                               15:17:32

Robot SAVE Options:
  Use Robot SAVE for Archive . . . : N (Y=Yes,N=No)

Short Term Storage Options:
  Save Device Code . . . . . : DISK (F4=Prompt)
  Submit Restoration . . . . . : N (Y=Yes,N=No)
  ASP Number for Disk . . . . . :  

Long Term Storage Options:
  Save Device Code . . . . . : OPTICAL (F4=Prompt)
  Submit Restoration . . . . . : Y (Y=Yes,N=No)
  Volume Group . . . . . : BLAH (F4=Prompt)

Other Options:
  Default OPAL Owner . . . . . : RBTUSER Use Security? . . . . . : Y (Y,N)
  Job Queue for Restoration: QBATCH Job Queue Library . . . : QGPL
  Directory . . . . . :  
                                                                    More...

F3=Exit   F4=Prompt   F12=Previous   F22=Preceding Opt   F23=Prev Options

```

Options

There are three pages of options. Page down within the panel to view all options.

Robot Save Options

Use these fields to specify whether you want to use Robot Save for archiving and the backup class and sets to use.

Use Robot Save for Archive

To use Robot Save for archive, specify **Y**; otherwise, specify **N**.

Backup Class

This field displays if you specify **Y** in the Use Robot Save for Archive parameter. Enter the name of the backup class.

Backup Sets, Short Term, Long Term

These fields display if you specify **Y** in the Use Robot Save for Archive parameter.
Enter the short term and long term backup sets in the appropriate fields.

Short Term and Long Term Storage Options

Use these fields to specify short-term and long-term storage options.

Save Device Code

- Enter **DISK** for Disk
- Enter **TAPE** for tape or optical disk drives that emulate tape
- Enter **OPTICAL** for an IBM-type optical disk drive.
- Enter a **?** to display the Device Code Finder and select a device code.

Submit Restoration

- Enter **N** to execute the restore command immediately.
- Enter **Y** to submit the command to batch.

ASP Number for Disk

This parameter only appears if you set Save Device Code to DISK. If you are using an ASP disk other than the system ASP, enter its number. The number must be greater than 1.

Save Device Name

This parameter only appears if you set Save Device Code to TAPE. If you are using tape for storage, enter the name of the dedicated tape drive or tape librarian in this field.

Volume Group

This parameter only appears if you set Save Device Code to Optical. If you are using an optical disk drive for storage, enter the name of the volume group in this field.

Other Options

Use these fields to specify the default user profile and the name of the job queue and library to be used for restoration.

Default OPAL Owner

Enter the name of the user profile your programmers normally use. All the OPAL programs you create for Robot Reports will be owned by this profile

Use Security?

- Enter **Y** to use the optional Robot Reports security system.
- Enter **N** to turn off the security system.

Job Queue for Restoration

If you are submitting restorations, enter the name of the job queue to be used.

Job Queue Library

If you are submitting restorations, enter the name of the job queue library to be used

Directory

Enter the name of an existing IBM i directory where reports, in column-delimited format, can be placed. These reports can be imported into PC programs and manipulated.

Values

Allow *STANDARD View OPAL

Enter **Y** to allow the *STANDARD view to be changed.

Enter **N** to now allow the *STANDARD view to be changed.

Report Viewing Scan limit

Enter the limit you want for scanning. When this limit is reached, the user is given the option to scan again.

Archive Options

Unload Tape After Archive

Enter **Y** to force yourself to remove the tape after archiving. This helps you avoid accidentally reinitializing the tape and losing archived reports.

Enter **N** if you do not want to unload the tape after archiving.

Display Archive Delete Confirm Window

- Enter **Y** to display a confirmation window when you attempt to delete an archived report.
- Enter **N** to not have the confirmation window display.

Restoration Options

Unload Tape After Restore

- Enter **Y** to unload the tape after restoring. This helps you avoid accidentally reinitializing the tape and losing archived reports.
- Enter **N** if you do not want to unload the tape after restoring.

Print Options

Allow Edit of Index Print Page Range

- Enter **Y** to allow the Index Print page range to be edited.
- Enter **N** to not allow the Index Print page range to be edited.

Hold Spool File

- Enter **Y** if the spooled files should be held on the output queue until released.
- Enter **N** if the spooled files should not be held on the output queue until released.

Report E-Mail Distribution Option

- Enter **A** to use Robot Alert for email distribution. If you use this option, you must have a device defined in Robot Alert for the Recipient. Robot Alert uses this device to email reports to the recipient.
- Enter **R** to use the recipient's email address. To use this option, you must have specified the recipient's email address in the recipient setup information.

Robot Alert E-Mail Options

Robot Alert Default Device

This parameter only appears if you set Report E-mail Distribution Option to **R**. Enter the name of the default Robot Alert device. Robot Alert uses this device to email reports. Press **F4** to select from a list of devices.

Maintain Volume Groups

Select Option **2** on the System Setup Menu to access the Maintain Volume Groups panel.

The Maintain Volume Groups panel lists the volume groups you have defined for use by Robot Reports. A volume group is a user-defined set of optical volumes.

If you are using optical volumes for both short-term or long-term storage, set up two volume groups, one for short-term and one for long-term.

```

RSL735                               Maintain Volume Groups                               11:28:53
Start at Volume Group . . . : _____
Search Description for . . . : _____
Options
  A=Add/Copy/Delete      1=Select      2=Volumes within a Volume Group

Opt  Volume Group  Description
--  -
--  LONG           LONG TERM
--  SHORT          SHORT TERM

F3=Exit    F6=Add Record  F12=Previous  F21=System Command

```

Options

A

Enter an **A** in the Opt field to add, copy, or delete an existing volume group.

- 1** Enter a **1** in the Opt field to access the Volume Group detail panel.
- 2** Enter a **2** in the Opt field to see a list of volumes in the volume group.
- F6** Press **F6** to add a new Volume Group to the list.

Volume Group Detail

To access the Volume Group details panel, take option **1** in front of a volume group on the Maintain Volume Group panel.

The volume group panel allows you to name and describe the volume group and to select the number of volumes that you always want available for archiving

```

REP046                               Volume Group                               16:35:07
Volume Group Information:
Volume Group Name . . . . . : LONG
Description . . . . . : Reports Long Term
Warn if volume count falls below . . . : 5

F3=Exit      F6=Add/Copy/Delete      F12=Previous      F21=System Command

```

Volumes Within a Volume Group

To access the Volumes Within Volume Group panel, take option **2** in front of a volume group on the Maintain Volume Group panel.

The Volumes within a Volume Group panel let you maintain the volumes within a volume group.

RSL737 Volumes within a Volume Group 14:55:36

Volume Group . . . : SHORT Short Term Report Storage

Options
D=Delete

<u>Opt</u>	<u>Seq</u>	<u>Optical</u> <u>Volume</u>	<u>Volume</u> <u>Status</u>	<u>Opt</u>	<u>Seq</u>	<u>Optical</u> <u>Volume</u>	<u>Volume</u> <u>Status</u>
—	10	100007	FULL	—	140	100018	
—	20	100008	FULL	—	150	100020	
—	30	100009	FULL	—	160	100022	
—	40	100010	FULL				
—	50	100012	FULL				
—	60	100011	FULL				
—	70	100013	FULL				
—	80	100014	PARTIAL				
—	90	100015					
—	100	100017					
—	110	100019					
—	120	100021					
—	130	100016					

F3=Exit F6=Add Record F12=Previous F21=System Command

Options

Seq

When you select Optical Volumes from the Optical Volume Finder Panel, Robot Reports gives each volume a sequence number. The sequence number is the order the volumes will be used for storing your reports. To change the sequence number, type a new number over the existing one in the Seq field and the volumes will be re-sequenced.

Volume Status

There can be three different statuses in the Volume Status column. These are:

- **Full** The volume is full.
- **Partial** The volume is partly full.
- **Blank** The volume has not yet been examined by Robot Reports to determine its status. When Robot Reports attempts to archive

F6

Press **F6** to add volumes to this volume group. An Optical Volume Finder displays from which you can select volumes. (Only volumes with names of 6 characters or fewer are listed.) You can select one or more volumes. Enter a **1** in the Opt field of the finder next to each volume you want to add to the volume group.

Secured Objects

Choose Option **3** on the System Setup menu to work with secured objects. Robot Reports security lets you restrict functions for specific users. You can define separate security restrictions for each item listed on the Maintain Secured Objects panel.

Although Robot Reports security information is encrypted in the database files, you may want to restrict change rights to the security program and files. Do not restrict use rights. If you do, no one can use Robot Reports. To secure the security program and files, revoke authority to add, change, or delete the following objects: Program REP810 and the files REPQO, REPQR, REPQU, and REPSS.

```

REP810          Maintain Secured Objects          10:06:53
                                                    MICKEY

Start list at Secured Object: _____

Options
  1=Select

Opt  Secured Object  Description
---  -
  --- ADMIN REPORTS  Administrative Reports
  --- COPY SET INFO  Report Set Copy Program
  --- DIST LISTS     Maintain Distribution Lists
  --- DLT ARC HIST   Delete Report from Archive History
  --- HISTORY        Report History Menu
  --- LASER COMMANDS Laser Command Names
  --- OPAL TABLES   Maintain OPAL Tables
  --- RECIPIENT RPT  Recipient Report
  --- RECIPIENTS     Maintain Recipients
  --- REPDSPREC      Display Recipient Reports
  1  REPORT SEGMENTS Report Segment records
  --- REPORT SET     Report Set
  --- REPORT VIEWS   Report View Records          +

F3=Exit      F12=Previous

```

The following table describes the area secured by each secured object

Secured Object	Provides Security for...
Admin Reports	Administrative Reports Menu functions
Copy Set Info	Report Set Copy function
Dlt Arc Hist	The ability to delete reports from Archive History
History	History Menu functions
Laser Commands	Maintain Laser Commands functions
OPAL Tables	Maintain OPAL Tables functions
Recipient RPT	REPDSR command (blocks user's access to Robot Reports)
Recipients	The Maintain Recipients part of the Recipient and Distribution List menu
REPDSPREC	REPDSPREC command
Report Segments	Report Segment records
Report Set	The Maintain Report Sets part of the Report Sets menu
Report Views	Report view records
ROBOT Guide	The Robot GUIDE automated report setup

- The *PUBLIC line defines the authorizations for every user profile that is not listed
- Enter the user profile name on a blank line. Then enter an X in each column to enable each authorization. If the user profile belongs to user class *SECOFR, the user has every authority regardless of the entry here.
- Enter an X in a column to select that authorization
 - **Exclude** The user is denied all access.
 - **Use** The user has access.
 - **Add** The user can define new entries.
 - **Change** The user can change existing settings.
 - **Delete** The user can delete existing entries.

Appendix

Getting the Printed Output You Want

Robot Reports provides you with extensive capabilities for customizing your printed report output without changing your report program. As you work with Robot Reports, you notice that you can change the printed output on several different panels. The tables that follow will help you understand how print overrides work.

For example, if you are concerned about specifying a special form type for your report, look at the Print Attribute Overrides table on the next page. Find “Form type” in the first column. Read across to the first “Yes.” This indicates that Robot Reports looks for the form type to be specified on the Advanced Laser Options portion of the Maintain Laser Command Names panel first. If it doesn’t find an entry for form type on that panel, it checks the next column with a “Yes” (the Report Distribution Overrides panel). If there is no entry there, it looks at the form type specified on the Report Name panel. If there is no entry there, it looks at the original report program spooled file.

Robot Reports uses the value for the first entry it finds. So, if there were an entry on the Advanced Laser Options portion of the Maintain Laser Command Names panel, it would override an entry on the Report Distribution Overrides panel, the Report Name panel, or in the original spooled file.

The Effect of Processing Method on Print File Overrides

For ROBOT and EXECUTE-type processing, the print file overrides specified on the Report Name panel and on the Advanced Laser Options portion of the Maintain Laser Command Names panel are applied before the command to run report program is issued. Therefore, if

you specify print file overrides, the actual spooled file generated by the report program looks different than a pre-Robot Reports spooled file you may have saved.

For SEARCH-type processing report sets where you are not retaining the original pagination scheme, you can enter print file overrides at the segment level on the Report Segment panel.

Print Attribute Overrides Table

	Maintain Laser Command Names panel	Recipient Bundling Options panel	Report Distribution Output Options panel	Report Distribution Overrides panel	Report Segment panel	Report Name panel	Original Report Program Spool File Data
	Advanced Laser Options (OVRPRTF)						
Hold spool file?	Yes			Yes		Yes	Yes
Save spool file?	Yes			Yes			Yes
Remove spool file after running report?						Yes	
Form type	Yes			Yes		Yes	Yes
Number of copies	Yes		Yes				Yes
Output priority	Yes			Yes*			Yes
Output queue/library	Yes	Yes	Yes*				Yes
Print text	Yes			Yes		Yes	Yes
User data	Yes			Yes		Yes	Yes
System name/user profile for remote printing		Yes	Yes				
Bundle code			Yes				
Banner page instructions					Yes		
Packet index		Yes**					
Bundling priority		Yes**					

*Can only be yes if bundle code is no.

**Can only be yes if bundle code is yes.

Changing Page Size Attributes

Robot Reports lets you change page size attributes when you print. Read this table like the previous one. If you told Robot Reports to retain the pagination of the report program, you can override the page printing specifications by using the Advanced Laser Options from the Maintain Laser Command Names panel. However, this is not recommended.

You can also specify certain laser options on the Laser Command Name panel without using the Advanced Laser Options. These include selecting a drawer, a rotation, a font and point size for the report.

Changing Page Size Attributes

Robot Reports lets you change page size attributes when you print. Read this table like the previous one. If you told Robot Reports to retain the pagination of the report program, you can override the page printing specifications by using the Advanced Laser Options from the Maintain Laser Command Names panel. However, this is not recommended.

You can also specify certain laser options on the Laser Command Name panel without using the Advanced Laser Options. These include selecting a drawer, a rotation, a font and point size for the report.

	Maintain Laser Commands Names panel	Report Distribution Overrides panel	Recipient Bundling Options panel	Report Segment panel	Report Segment panel	Report Name panel	Original Report Program Spool File
	Advanced Laser Options (OVRPRTF)			Retain Paging = Y	Retain Paging = N		
Page Length	Yes			No	Yes	Yes	Yes
Page Width	Yes			No	Yes	Yes	Yes
Overflow line number	Yes			No	Yes	Yes	Yes
Characters per inch	Yes			No	Yes	Yes	Yes
Lines per inch	Yes			No	Yes	Yes	Yes
Laser print command name		Yes	Yes	No	Yes	Yes	