

Knowledge Base Article: Article 235

How to Schedule a Task Exporting Data to a Database

Date: May 4th, 2012

Description:

Click&DECiDE Builder can export data to any database, if the Data Source has been created for this database. The target of this document is to explain how to create a task, and then schedule this task to export data from a query to this database automatically.

1. Check or create the data source for this database:

If you wish to export data to an iSeries for example (or other database) you first need to create a data source connecting to this database. If you are using Builder not connected to Administration Manager refer the Query User Guide and see page 7 how to create a data source:

http://www.clickndecide.com/sites/default/files/assets/files/resources/clickndecide_bai_query_user_guide_1.pdf

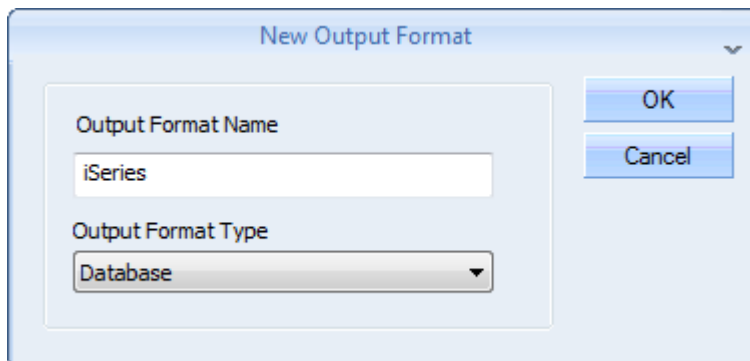
If you are using Builder connected to Administration Manager refer the Administration Manager User Guide and see page 11 how to create a data source:

http://www.clickndecide.com/sites/default/files/assets/files/resources/clickndecide_bai_administration_manager_user_guide_0.pdf

Note: you cannot export data to a data source secured by Click&DECiDE in Administration Manager, for security reasons.

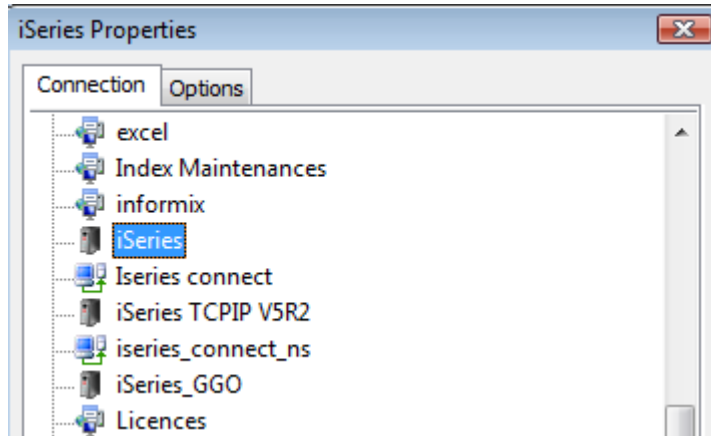
2. Create an output format for this database

Start Click&DECiDE Builder then use the command Tools> Output Configuration to open the Output format configurator. Add a new output format using the Database Type as in the following example:

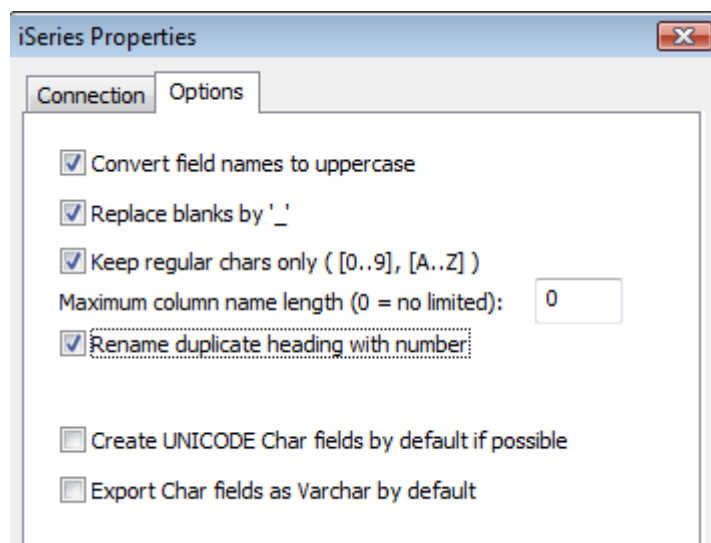


Click OK, and then make a right mouse click on the new icon created to go to the Properties:

In the Connection Tab select the iSeries data source you have created (without Security if under Administration Manager):



Then in the Options Tab select the required options if needed:

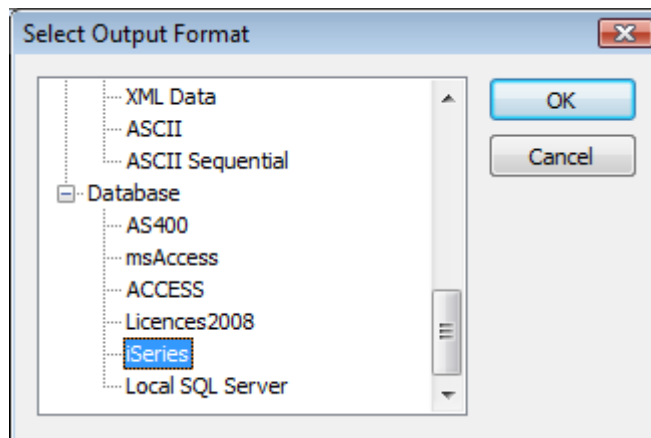


Click OK and Save and Quit the Output format configurator.

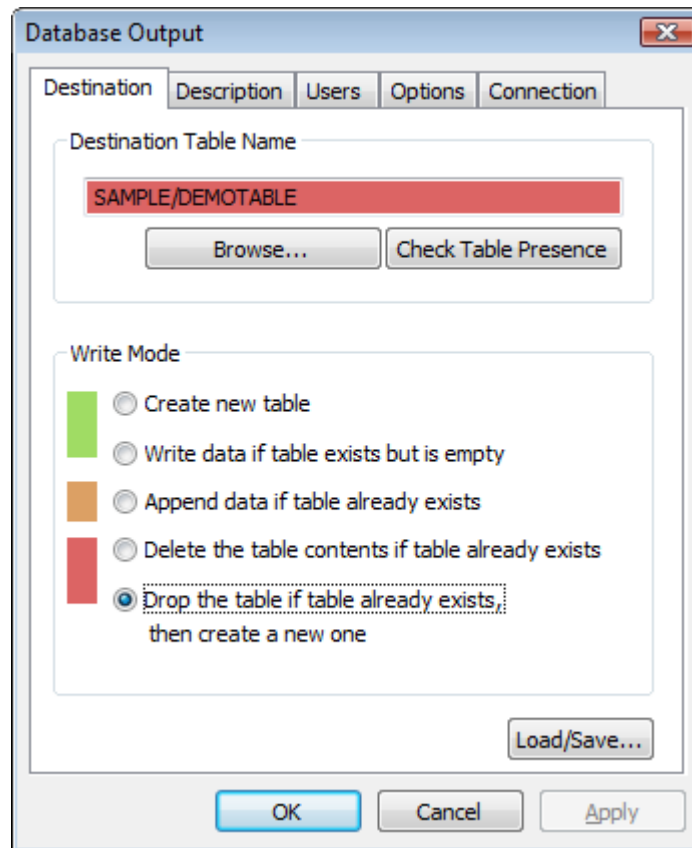
3. Optional but recommended: create from Builder an output format file (*.fmt):

Start Builder and open a query that you want to export to the iSeries (or your new Output format to Database). In the following example we will use the demo_multicriteria query from SQL Server and send the data to the iSeries:

From Builder open this query and click the Export Data icon, you get the output format list:



Select the required output format, iSeries in this example and click OK. Enter, if needed the parameters required by the query then click OK: you will get this dialog:



In the **Destination Table** you can enter (or browse to search) the Library and Table destination names (example Library/Table for an iSeries).

The **Write Mode** should be the one used later when the table will already exist (if the table does not exist, it will be created the first time). In the above example we have chosen to drop the table and create it again each time because it is faster than delete the table content and send the new data inside.

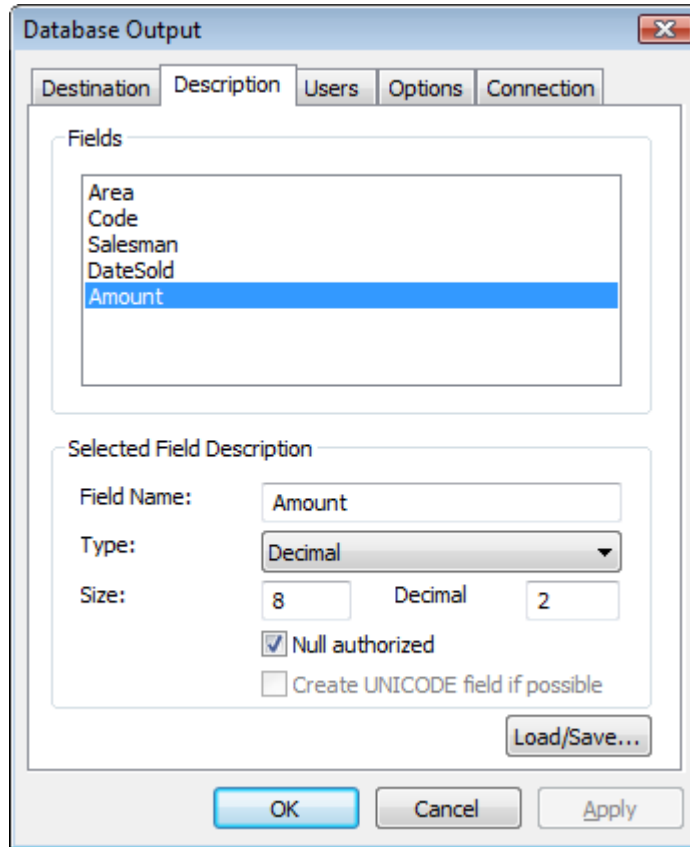
Optional: you can access the **Description Tab** to modify and specify column names, column types, length and numeric decimals, such as this example:

The Code field has been changed to Integer type.

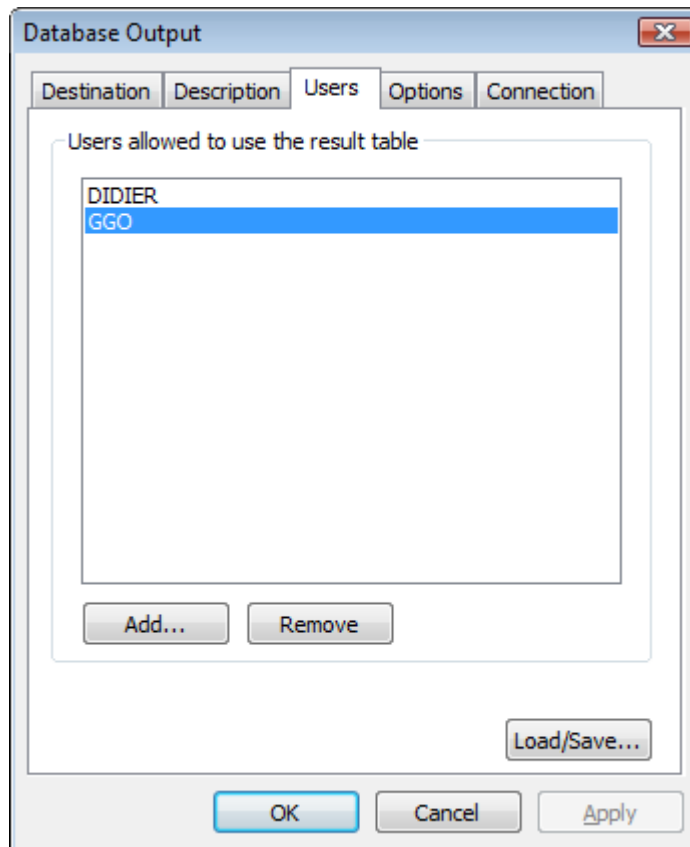
The "Salesman Name" field name has been changed to "Salesman"

The Date field has been changed from TimeStamp Type to Date Type format

The Amount field has been changed from Float Type to Decimal Type Length 8 and 2 decimals.



Optional: you can access the **Users Tab** to specify other UserID so that other people can use the created table, such as this example:



Save your configuration using the **Load/Save** button, the file will be saved in the directory C:\Program Files\Click and DECiDE\BAI\Templates\Database Output with the *.fmt extension:

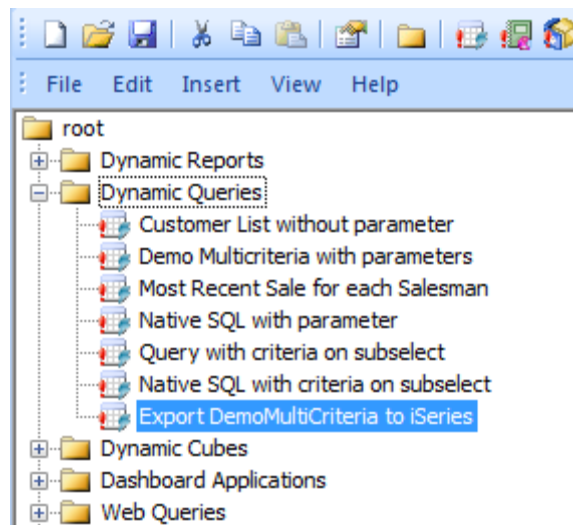
Click **“Save Settings”** and enter a file name, for example demo_multicriteria_for_iSeries.fmt.

Note that later, when exporting again the same query to iSeries, you can quickly load the same “fmt” file to retrieve your output configuration.

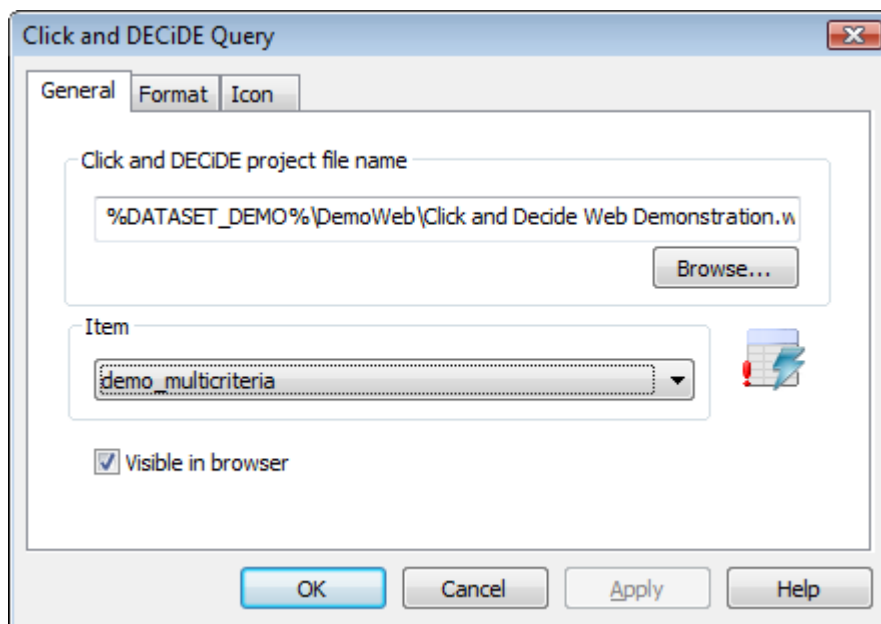
Then click **Cancel** if you don’t want to create the table now, or click **OK** if you wish to test the exportation of this query to the iSeries.

4. Add the output format for this database to the concerned query in a Menu

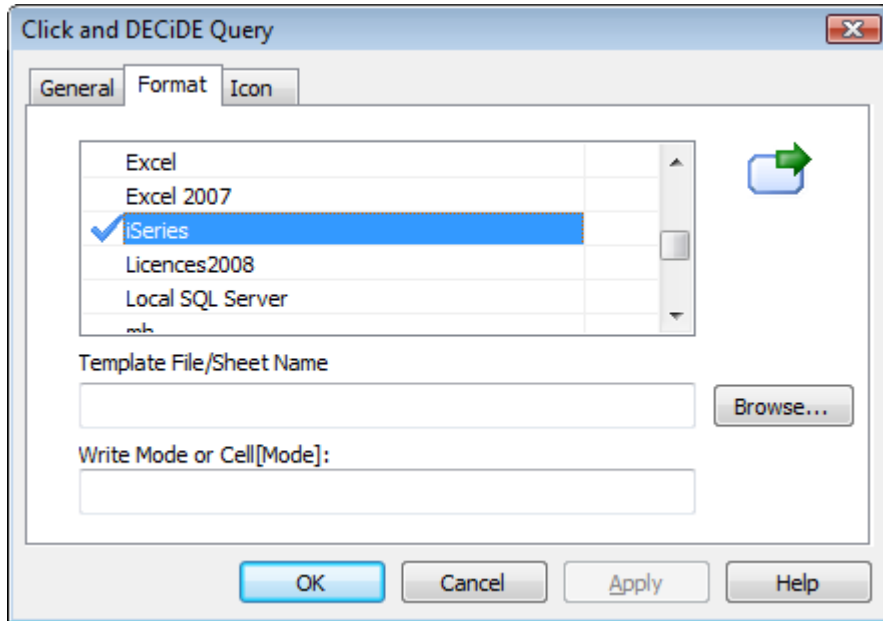
Now open the Menu in Administration Manager that will contain the branch to the query to be run and send data to the iSeries: example, we will add a branch in the BAI Demonstration Menu:



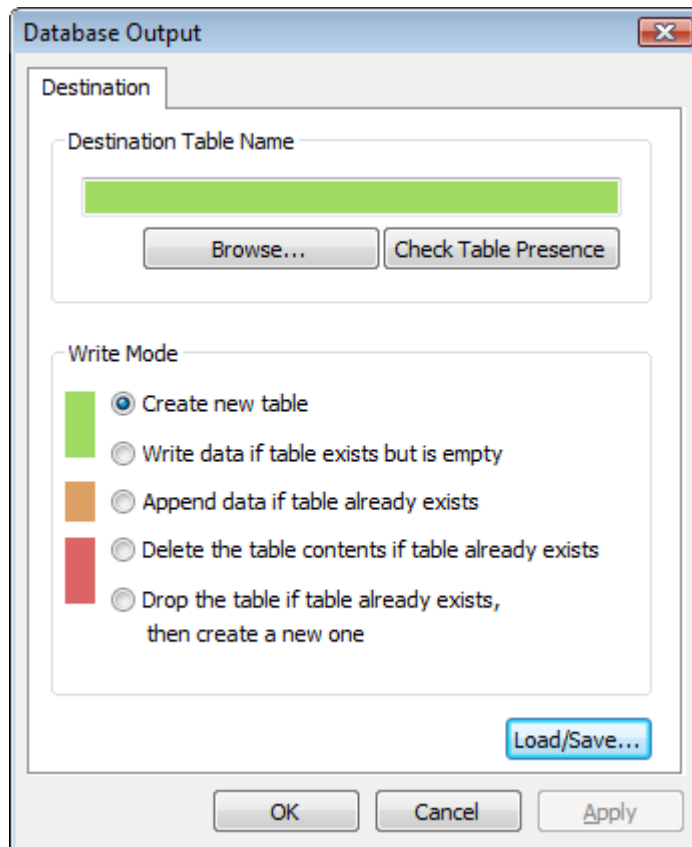
Insert a dynamic query and give a name such as “Export QueryName to iSeries” then double-click to open the properties: specify the query to be run (here demo_multicriteria)



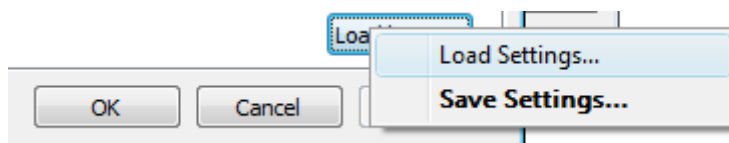
Then go to the **Format Tab** and add the Output Format to the required Database: iSeries in our example.



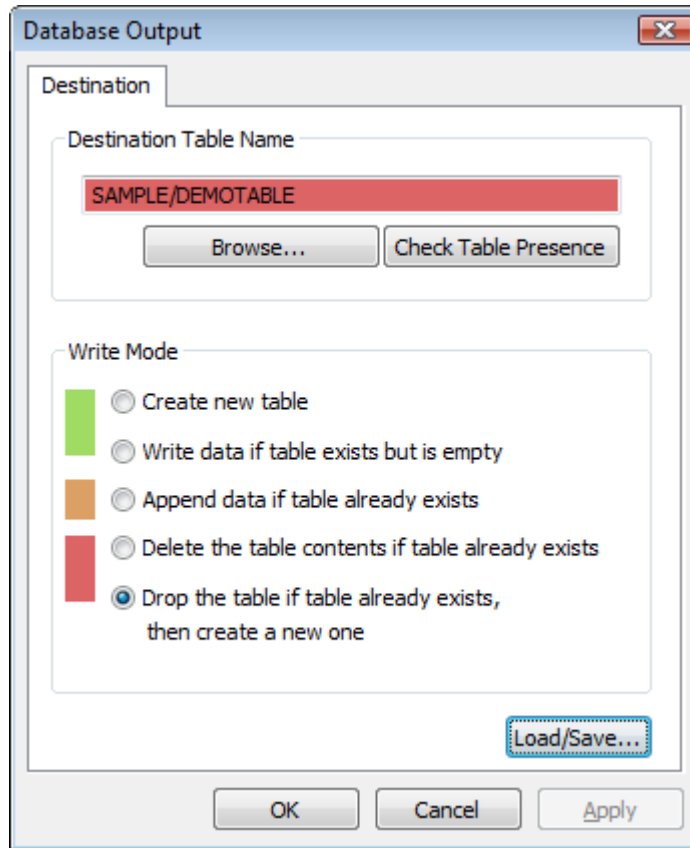
Now, click the **Browse** button to open the **Database Output** dialog box:



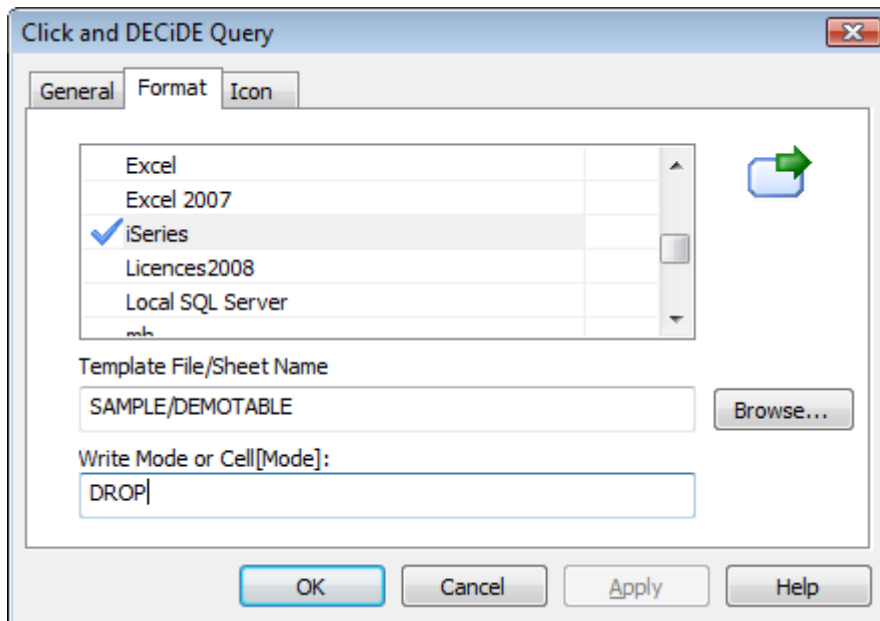
Click **Load/Save** to search for the file.fmt created for the query demo_multicriteria:



Select the file previously created, in our example demo_multicriteria_for_iSeries.fmt, that will retrieve the configuration, for the Library/Table name and the Write Mode:



Click OK to transfer the configuration into the Menu branch:



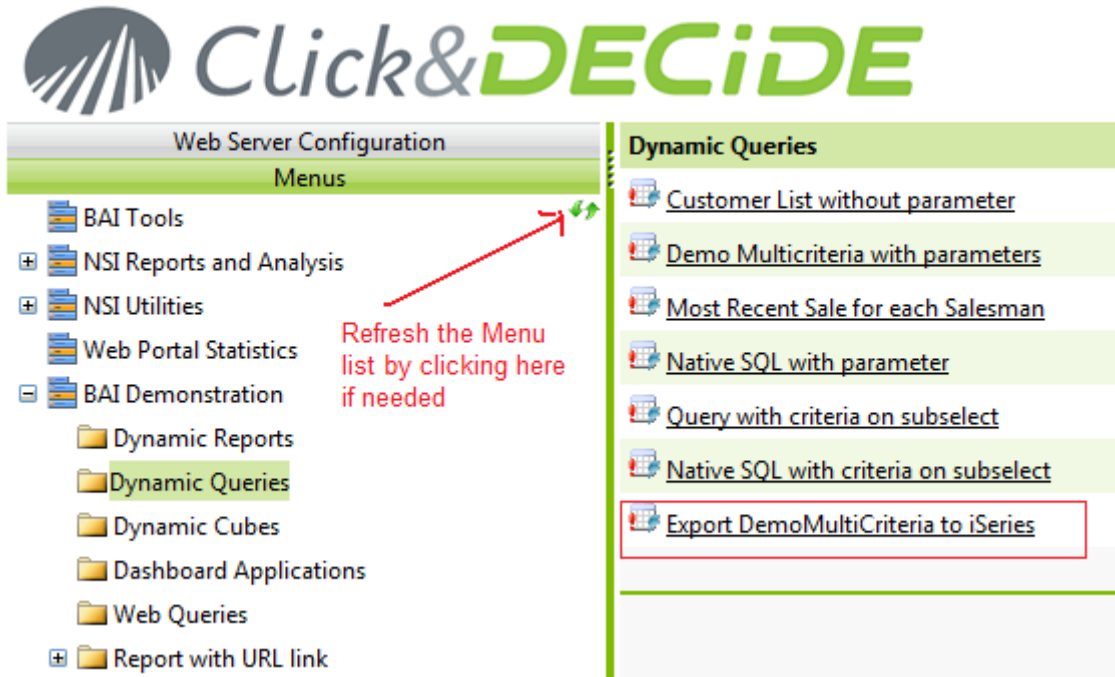
Note: if you don't wish to use a file.fmt, you can manually enter here in the Menu the LIBRARY/TABLE name and the Write Mode. The other parameters of the file.fmt are not saved in the Menu level (such as column names, column types, column length etc. but this can be done later when defining the task).

Click OK to validate and save the Menu.

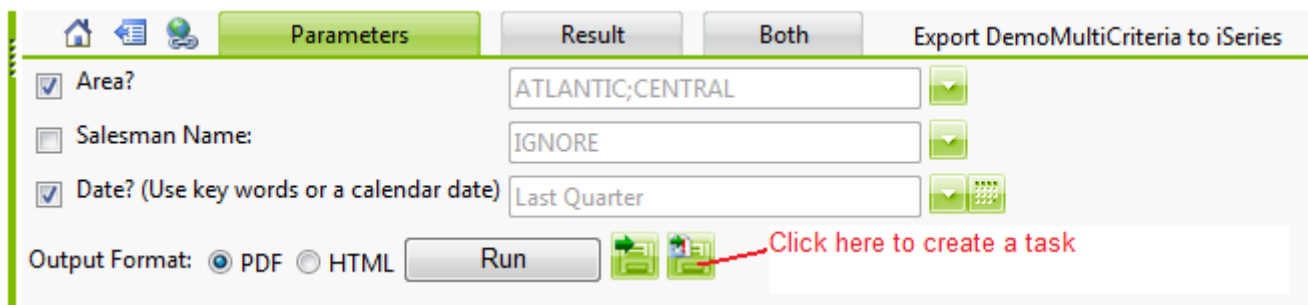
5. Creating the Task in the Web Portal

Now, start the Web Portal from any authorized location, Server or workstation, under a login that will give you access to this Menu (the Menu access is defined in Administration Manager for the concerned User Groups).

Select the query to be run, in the branch “Export DemoMultiCriteria to iSeries”:



The parameters and output format will appear, except the Output to Database that cannot be run from here, because reserved to users belonging to a Task Administrator Group, for security reasons:



Select, if needed, the criteria to be used, and click the right green icon to create the task: change the default Task Name and modify, if needed, the criteria you have defined.

As you can see the iSeries output format will appear, so you will be able now to activate it.

Create Task

Task Name

Source

Menu Alias: BAI Demonstration
 Menu Item: Export DemoMultiCriteria to iSeries

Parameters

Area?
 Salesman Name:
 Date? (Use key words or a calendar date)

Destination

Output Format: PDF HTML

Destination Directory

Destination File **Suffix**

Change the Output Format to iSeries that will display the predefined configuration saved in the Menu:

Create Task

Task Name

Source

Menu Alias: BAI Demonstration
 Menu Item: Export DemoMultiCriteria to iSeries

Parameters

Area?
 Salesman Name:
 Date? (Use key words or a calendar date)

Destination

Output Format: PDF HTML

Destination Table

Write Mode

DataBase Output Format File (*.fmt)

Connection to Output Data Source

User ID

Password

Note that the **Destination Table** is now the Library and the Table names, not modifiable here for security reason (only the Administrator who has created the Menu can modify it).

Note that the **Write Mode** is now the one defined in the Menu, not modifiable here for security reason (only the Administrator who has created the Menu can modify it).

Database Output Format File (*.fmt): if you don't wish to use the file.fmt, leave it blank. (in that case the column names, column types, column length etc will be the one of the query source, but we recommend to use the FMT file to avoid mistakes.)


If you wish to use it, just enter the name of the file name without any path (the file must be located in the Server into the directory C:\Program Files\Click and DECiDE\BAI\Templates\Database Output)

Connection to Output Data Source: if a login is required to export data to this database, enter here your UserID and Password. The password will be encrypted in the tasks file.

Destination	
Output Format:	<input type="radio"/> PDF <input type="radio"/> HTML <input checked="" type="radio"/> iSeries
Destination Table	SAMPLE/DEMOTABLE
Write Mode	DROP
DataBase Output Format File (*.fmt)	demo_multicriteria_for_Series.fmt
Connection to Output Data Source	
User ID	QSECOFR
Password	●●●●●●●●

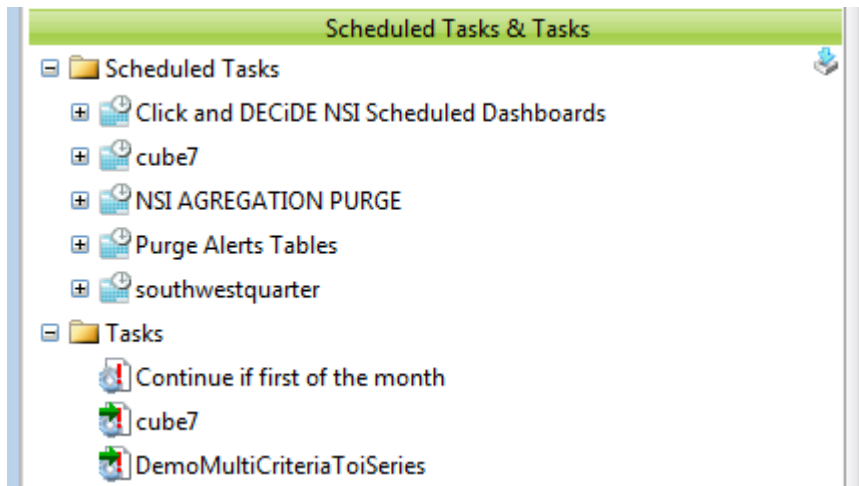
Optional: Send an Alert

Here you can use the Alert Type "Send an e-mail", only to get an email saying that the task has been done successfully. (Of course no attachment can be sent with the mail with this kind of output format).

Alert	
<input checked="" type="checkbox"/> Send an Alert	
Alert Type:	e-mail
From	didier@clickndecide.com
To	didier@clickndecide.com
Subject	Export to iSeries
Text	The demo_multicriteria has been sent to the iSeries
Attachment	=Destination()
 <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

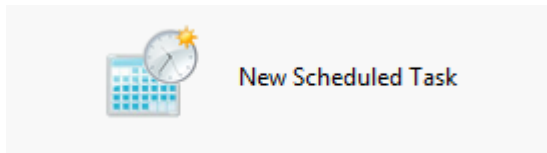
When finish, click **Save**.

The Task Name will appear in the left Tasks List in the Web Portal:

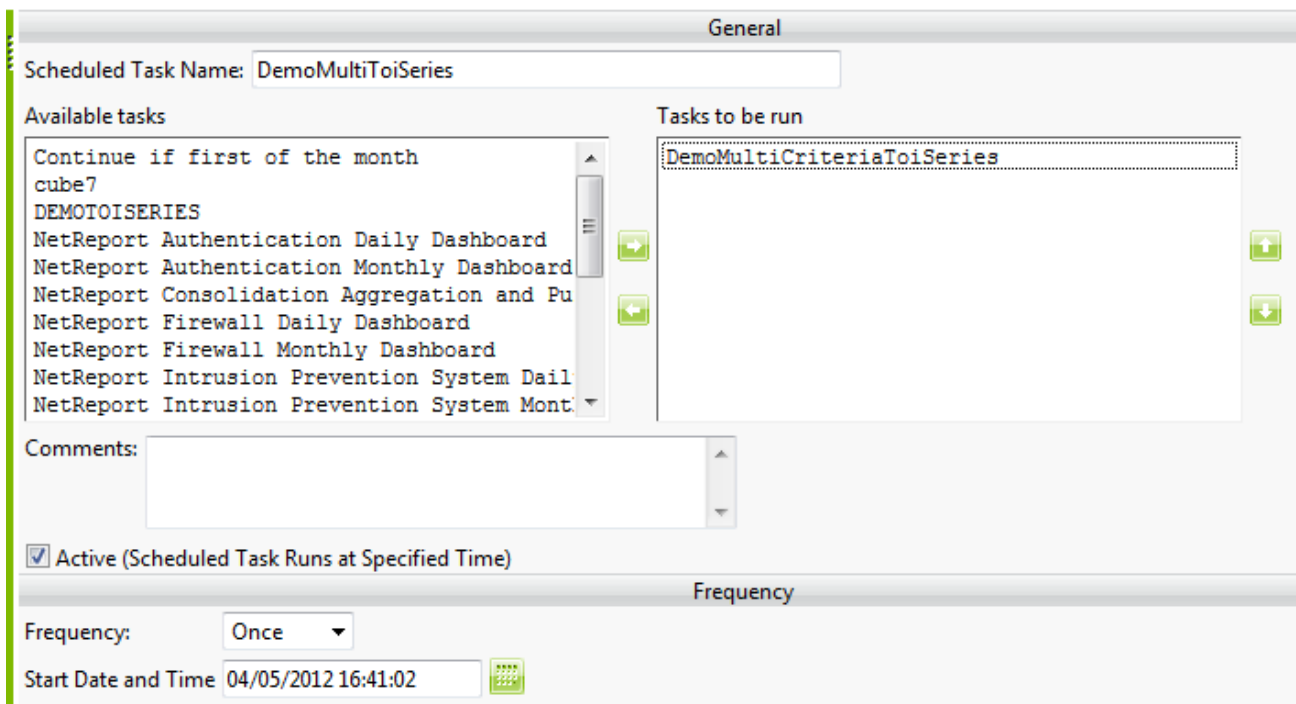


6. Creating the Scheduled Task in the Web Portal

Click now the icon New Scheduled Task in the right pane of the Web Portal:



and give a name, then add the Task in the Tasks to be run box:



Define the Frequency. (Once, Now, Daily, Weekly, Monthly).

Then define, if needed the Repetition, and finally save the Scheduled Task by clicking the **Finish** button.

Repetition

Repeat the Scheduled Task

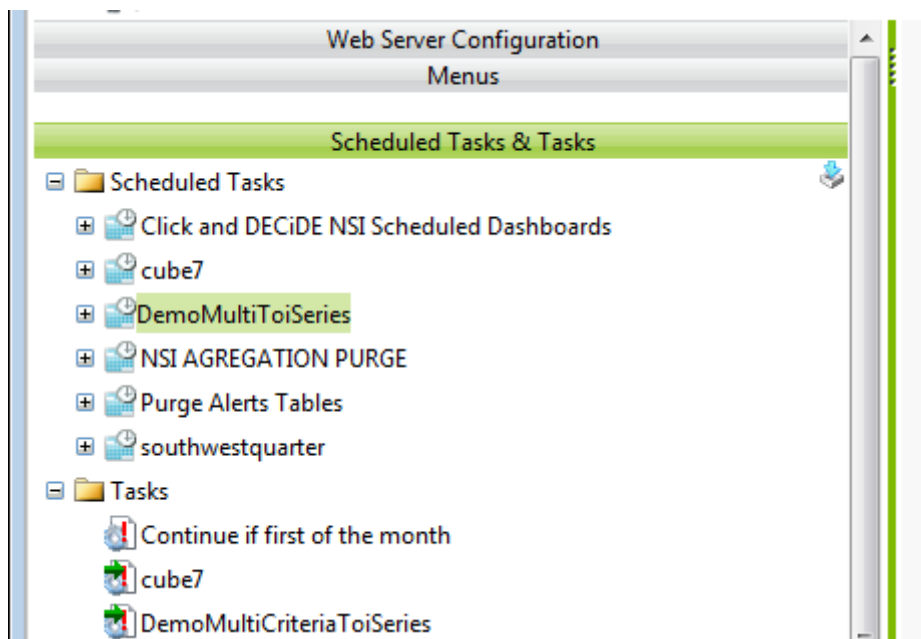
Interval Minutes

Duration Hours Minutes

When running the task, use the following user account: SYSTEM Change

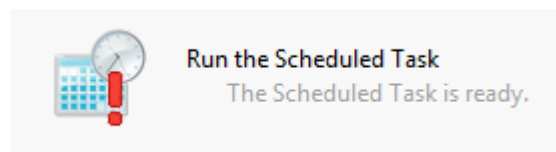
Finish
Cancel

The new scheduled task name will appear in the left Scheduled Tasks List on the Web Portal:

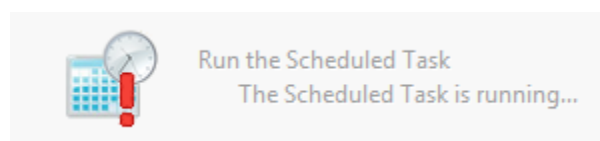


7. Testing now the Scheduled Task in the Web Portal

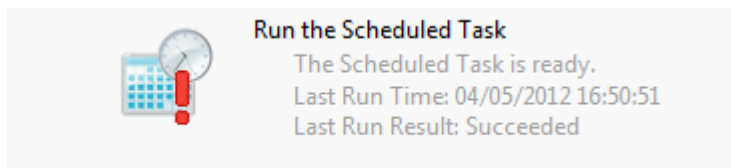
If you wish to test immediately the new Scheduled Task you just created, first select this task on the left list and click the icon Run the Scheduled Task in the right pane of the Web Portal:



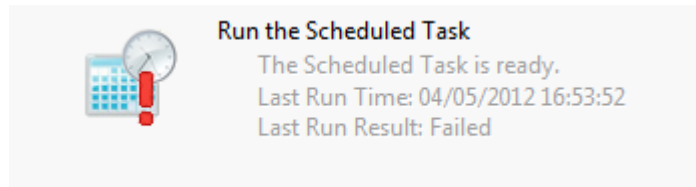
While the task is running the icon will look like:



When the task is done the icon will look like this one if successful:



Or can look like this one in case of error:



In that case we recommend first to open the Event Viewer and see the error.

This error should give information about the problem (wrong table name, wrong column name, wrong type, wrong length, conversion data error, etc.).