Hubble Desktop and Web

User Guide for Scheduler

Version 25.3

August 2025

Contents

Document Information

Notices

Copyright

Disclaimer

This guide is designed to help you to use the Hubble applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.

Version History

Date	Revision	Software Version	Comments
30th August, 2025	1.0	25.3	Initial issue for 25.3.

Customer Support

For more information regarding our products, please contact us at https://insightsoftware.com/hubble/.

For upgrade questions, parallel version installations, product support, training, and documentation, contact Professional Services at http://central.insightsoftware.com/ or email HubbleServices@insightsoftware.com.

Introduction To Scheduler

Hubble® is an integrated suite of performance management apps. It offers reporting, analytics and planning in a single, real-time solution that fully understands your ERP. Hubble is built on a simple idea – that things should be easy. Hubble integrates your critical business systems so end users at all levels of the organization have access to live data – extraordinarily fast. With this type of visibility, everyone can easily understand, manage and predict the business. Redundant processes disappear, and a high-performance business can emerge.

Scheduler is a tool that allows users to define distribution lists, define Hubble reports to be run at a scheduled time, automatically run reports according to their predefined schedules, and distribute the reports via email in PDF and/or Microsoft Excel® format.

Scheduler is a standalone application that installs on a server. The application allows authorized Scheduler users to define schedules and distribution lists for automatically running and delivering the reports.

Getting Started

Prerequisite

Microsoft .NET must be installed prior to Scheduler. Please see the Minimum Technical Requirements for Desktop Reporting; the same .NET requirements specified for Desktop Reporting also apply to Scheduler.

ERP Versions

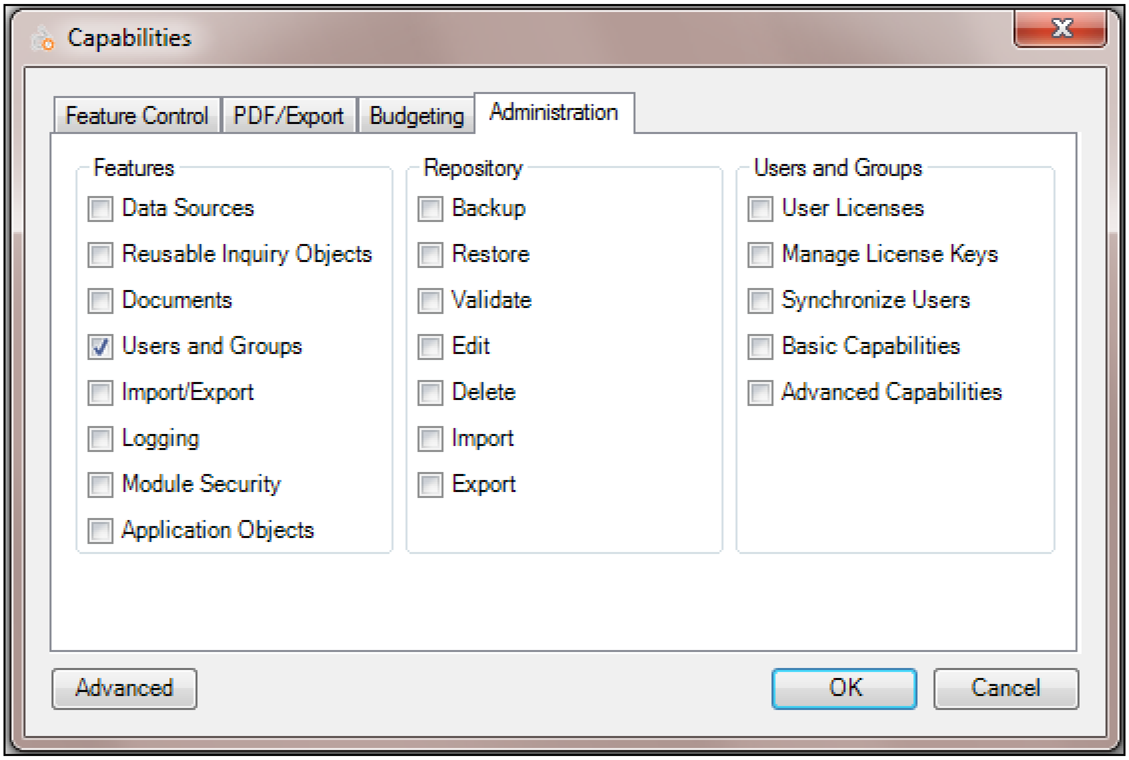
Scheduler works with JD Edwards Enterprise One, JD Edwards World and Oracle ERP Systems. It is important to know that with JDE World, the associated Profile in the Administrator application must use option 4 in the World Security Options (login with Hubble user and password is authenticated by the Object Repository). If this is not the option currently being used with your World Profile, you would need to set up a separate World Profile to be used with scheduled reports so that it is set this way. (The reason for this requirement is that all the other World Security Options rely on the user entering their JDE password at the time the report is scheduled to be run, which does not work with the concept of reports running automatically.)

Licensing

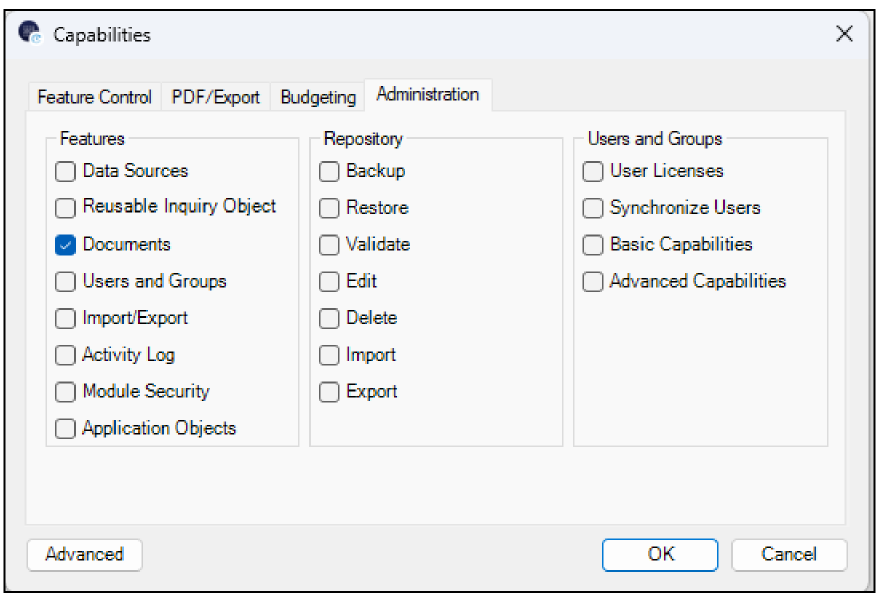
Scheduler Administrators

Scheduler Administrators, the users who manage the Schedules and Distribution Lists, need the Scheduler license (SCH). Scheduler Administrators are able to log into the Scheduler Application in order to create, view, edit and delete all Schedules and Distribution Lists that they have defined. If the Scheduler Administrator is NOT in the Administrator group in Administrator, the user will also need to be given the Users and Group Administration Capability in order to manage the Recipient Users:

Standard Version



Platform Version



Repository Administrators (those in the Administrator group within Administrator) are also able to log into the Scheduler Application in order to manage the schedules and distribution lists in the system.

Scheduler (SCH) License Behavior With Platform Integration

- **SCH** is Application-Level License
- Default available on License assignment irrespective of users is on Platform or not on Platform or what user role (designer role/power role/viewer role) on Platform

Repo user on Platform as	Any SCH SKU assigned to Org ID (either of ADD SCHED Lrg / ADD SCHED Med / ADD SCHED Sm)	SCH status	Able to Log in ? Why?
Designer/power/viewer	Yes	Available to edit & checked	Yes, has platform authentication, relevant SKU for Org ID & SCH module is checked
No user role checked in Platform	Yes	Available to edit & checked	Yes, has platform authentication, relevant SKU for Org ID & SCH module is checked
User not on Platform	Yes	Available to edit & checked	No, has no platform authentication even with relevant SKU for Org ID & SCH module is checked
Yes (any one first 2 cases)	Yes	Available to edit & checked	No, has platform authentication & SCH module checked but no relevant SKU for product
Yes (any one first 2 cases)	Yes	Available to edit & checked	No, has platform authentication & relevant SKU for Org ID but no SCH module check

Run As Users

For each scheduled task, an individual user will be defined as the ‘run as user’ so that the inquiry is run using this user’s ERP credentials. To run a scheduled inquiry, the ‘run as user’ must be someone who can open that inquiry in an application. More specifically, the ‘run as user’ must have one of the following:

- A license assignment for the same module as the inquiry being scheduled as well as the Reporting License
- An Viewer (CON) License
- A Reconciler License when the inquiry belongs to the Reconciliation Module

Recipient Users

The ‘recipient users’ are the users on the report distribution lists who only receive an email with the report output. They must be added as ‘recipient users’ in the Scheduler Application or the standard Administrator Application. They do not need to have a license assigned to them.

Standard Users

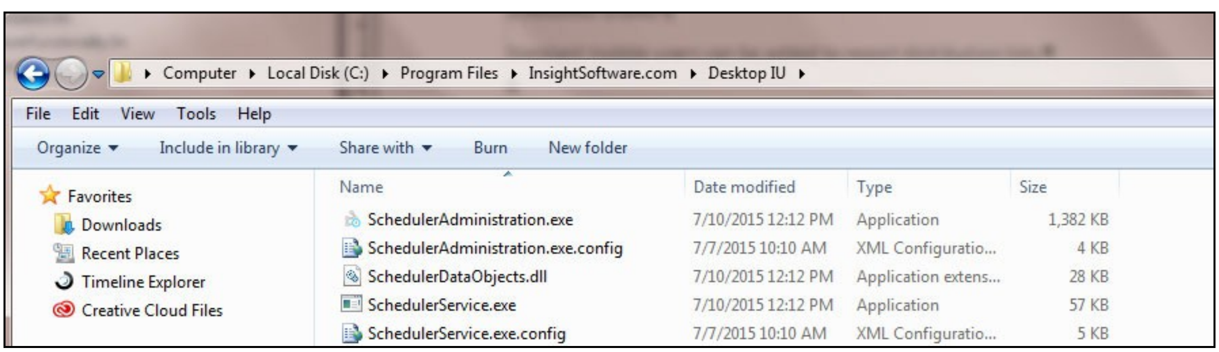
Standard Hubble users can be added to report distribution lists.

Installing Scheduler

Scheduler is a standalone application that installs on a server and has an additional component, Scheduler Service. Scheduler must be installed in the same folder as the standard Hubble release with which it is being used.

> **Important:** Install Scheduler on a dedicated application server or on any server that does not host the Hubble Web application. Keeping these services separate helps avoid performance issues and resource conflicts.

After the installation, you see that 5 files have been added to the install path for the Scheduler application:



If you install Scheduler on a client PC as well as a server, it is important to note that the service component is not needed on the client PC as the service on the server will run the jobs. So it is critical that you permanently deactivate the service on the client PC. For detailed information on how to do this, see the section on Windows Services on page 10.

Only one Scheduler Service should be active (started) per Hubble Object Repository. This is why it must be deactivated on the client PC if it is active on a server.

Also it is important to note that the active Scheduler Service should be located in close proximity within the network to the repository database.

In version 2012.2 and above, Scheduler is available on a 64-bit platform.

Administration Setup

The items below must be done in Administrator prior to running Scheduler.

Profile

We recommend setting up a Scheduler profile and using this for all the Scheduled jobs. If at some point you want to point to different data, you can do this within the same profile rather than changing all the scheduled jobs.

Permissions

'Run as users' must have read permissions for the profile and connection that are being used for their scheduled reports.

Save Repository Selection File

If this is a new install of a Hubble, save the repository selection file in the new install path, or set up a connection to a remote repository selection file. Refer to the Administrator & Configuration Guide for further details of repository files and how to set them up.

The Scheduler Application must also point to this repository selection file; this can be done once you launch Scheduler.

Verify that the RepositorySelection.xml file is located in the correct location path and is viewable for the Administrator starting the Windows Service.

Licensing

Licenses must be assigned in License Assignments. All non-administrator users who will be managing the scheduled reports must be assigned a Scheduler, or SCH, license. Also the "run as users" must have the appropriate license assignment to be able to open the scheduled inquiry in Hubble.

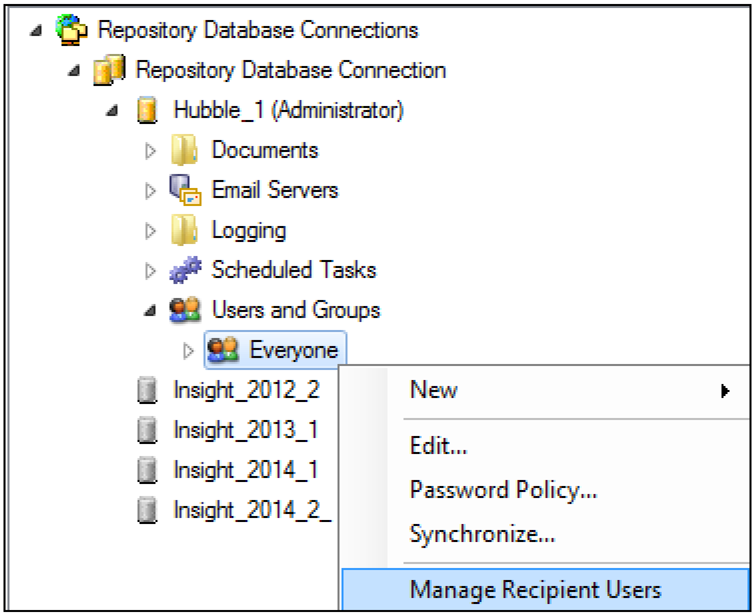
User Setup Required

Recipient Users

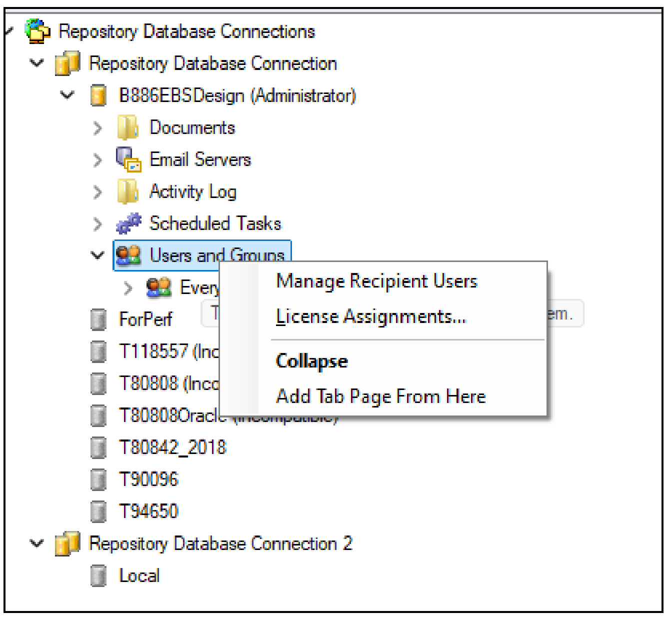
Users who will be receiving scheduled reports via email are not required to have a license for a specific module or Viewer; however they must be named as 'recipient users' in the Scheduler Application or in the standard Administrator Application.

To set up recipient users, right-click on Users and Groups and select Manage Recipient Users:

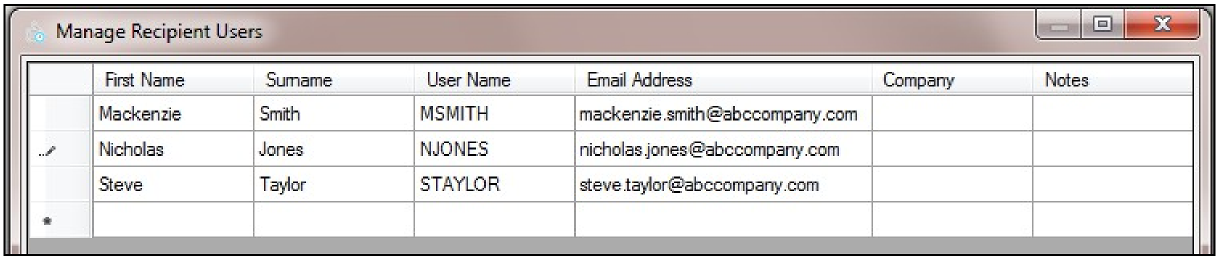
Standard Version



Platform Version



In the **Manage Recipient Users** dialog, recipient users can be added, edited, and deleted completely. To add a user, type the requested information into the field. Once a user is added, you can edit the information by clicking in the field and changing it as needed. To delete a user, highlight the entire row and select Delete on your keyboard.



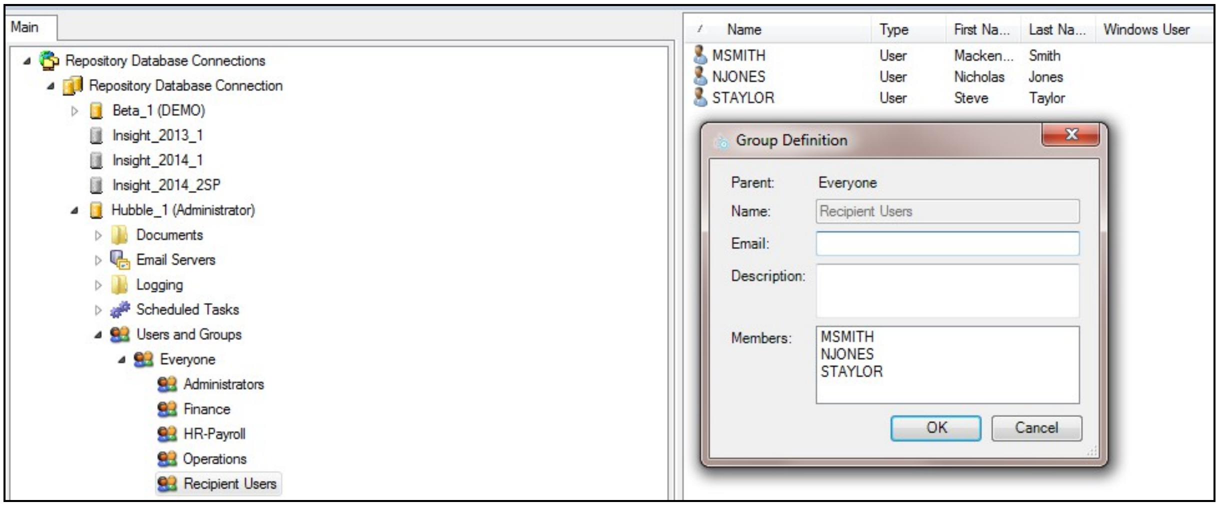
Fields in the Manage Recipient Users dialog:

- First Name - either this or the Surname must be specified.
- Surname- either this or the First Name must be specified.
- Username – Hubble generates the username if one is not specified; also if the user is already a standard licensed Hubble user, the username cannot be edited.
- Email Address – must have a valid email address.
- Company - optional; this information only seen in this dialog.
- Notes – optional; this information only seen in this dialog.

Notes:

- For organizational purposes, recipient users can be moved out of the Recipient Users Group under Users and Groups but they will still be manageable via the Manage Recipient Users command.
- This information in the Manage Recipient Users dialog can be managed in Microsoft Excel and then pasted into this dialog using the Paste Button in the bottom left corner. Pasting will append this list, not replace it. If you want to replace the list that is already in the dialog, you must delete the users in the dialog first and then paste the new list from Excel.
- Recipient users are identified by a different icon in Users and Groups.
- A recipient user cannot be turned into an Hubble user. If the situation arises where the user type needs to change, you need to delete the recipient user and create the Hubble user by using the standard process. All scheduled tasks that contain that previously defined recipient user will still function and deliver an email to the now Hubble user.

Once the recipient users have been set up in the group, you can view them in the Group Definition dialog (accessed by right-clicking on the group and selecting Edit) as well as by focusing on the group in the left panel and viewing them in the right panel. Both of these methods are shown below:



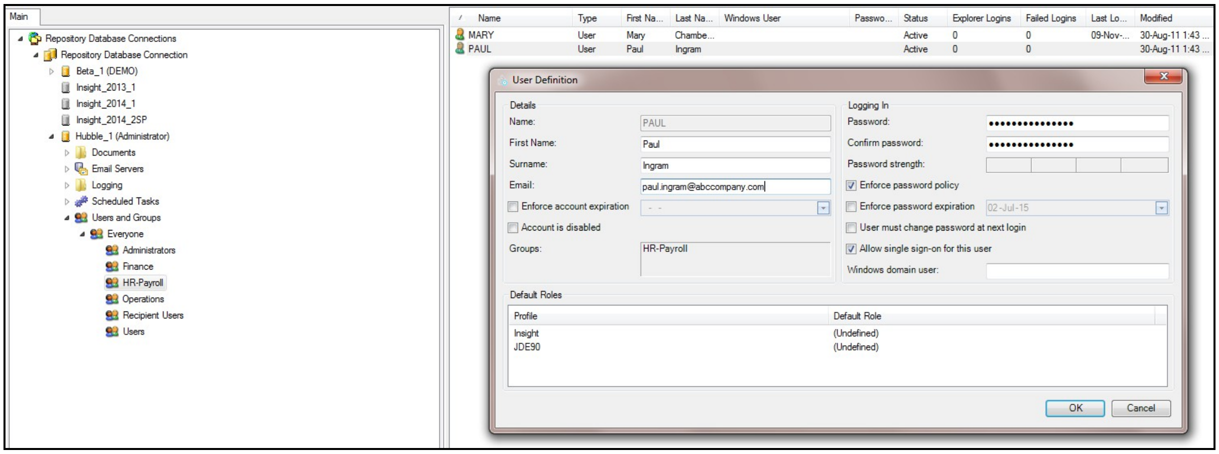
In the **Group Definition** dialog, the email field is for future use, so this should remain blank. Optionally, you can provide a description for this group.

Under the **Administrators** group, you will see a user, **Scheduler Service**. This user is only used by the Scheduler Service to log into the Repository. This username is used to log Scheduler Services activities under a distinct username. This user cannot be deleted or moved.

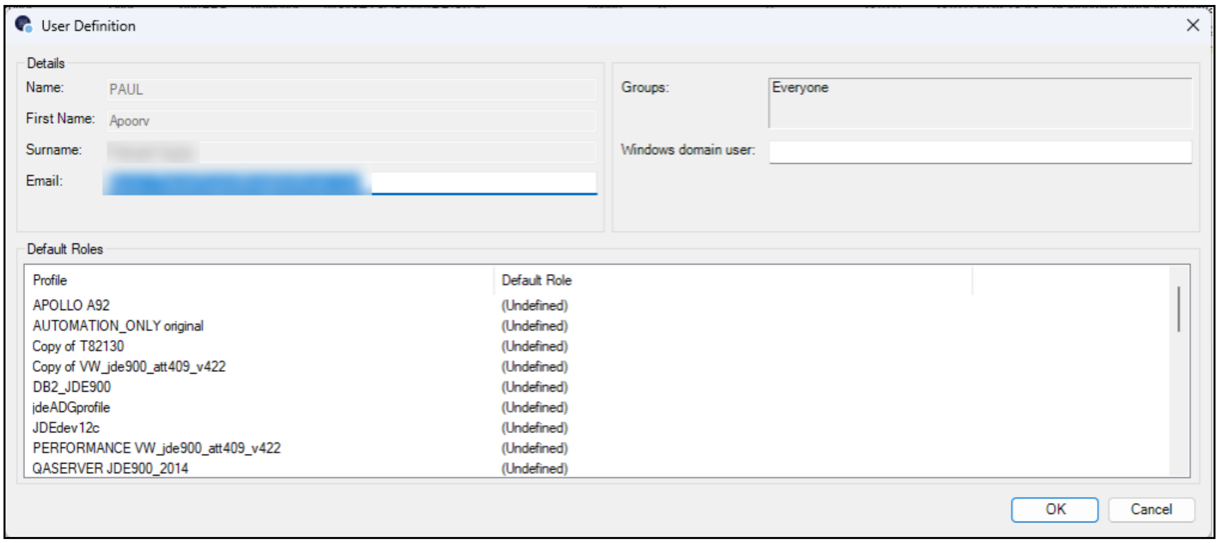
Email Address Set In User Definition

A valid email address must be defined for all email recipients as well as those who will be scheduling reports (the latter for test email purposes). The email address for Recipient Users is done in the Manage Recipient Users dialog. Email addresses for standard Hubble Users are set in the User Definition for each individual user. To access this, expand Users and Groups. Right-click on the specific user and choose Edit to launch the **User Definition** dialog:

Standard Version



Platform Version



Scheduler Setup

Opening The Scheduler Application

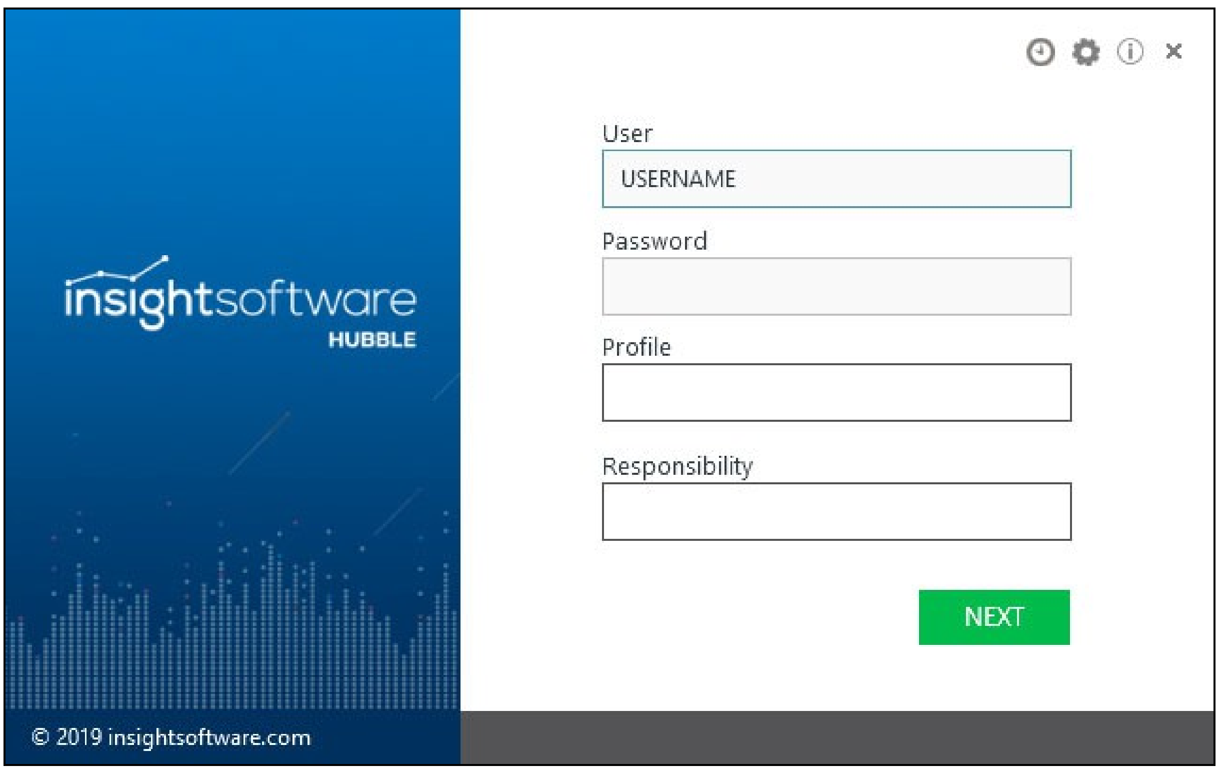
Note: For Platform Version Installations:

If you have installed the Platform version, you must first complete Platform authentication:

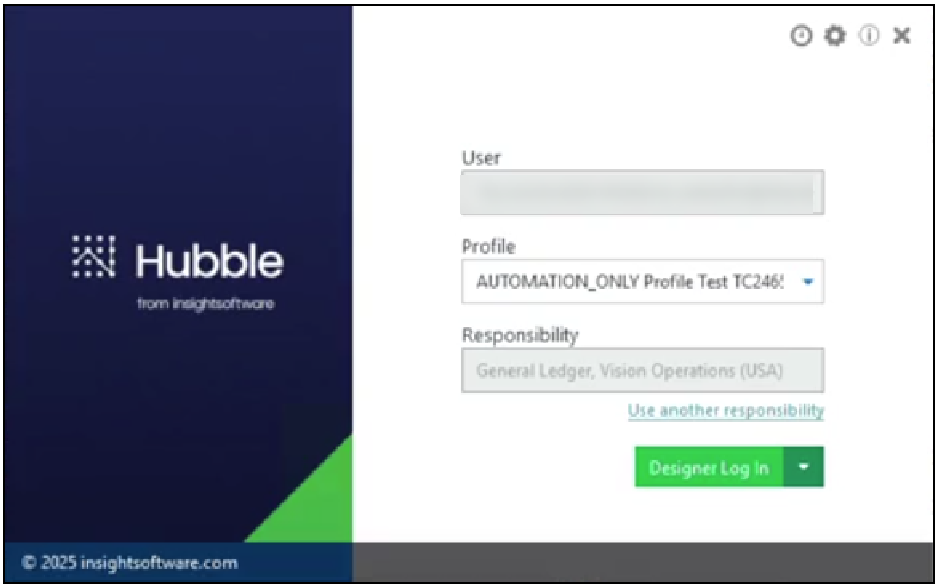
1. Complete authentication in the Platform window.
2. Return to Scheduler to continue setup.

As soon as you launch Hubble, you are presented with the login dialog. Click the clock icon to launch Scheduler, which has the same look and feel as the Administrator Application. When launched for the first time, you will be prompted to choose the repository selection file or create a new one. Navigate to select the repository selection file located in the install path for the version of Hubble being used.

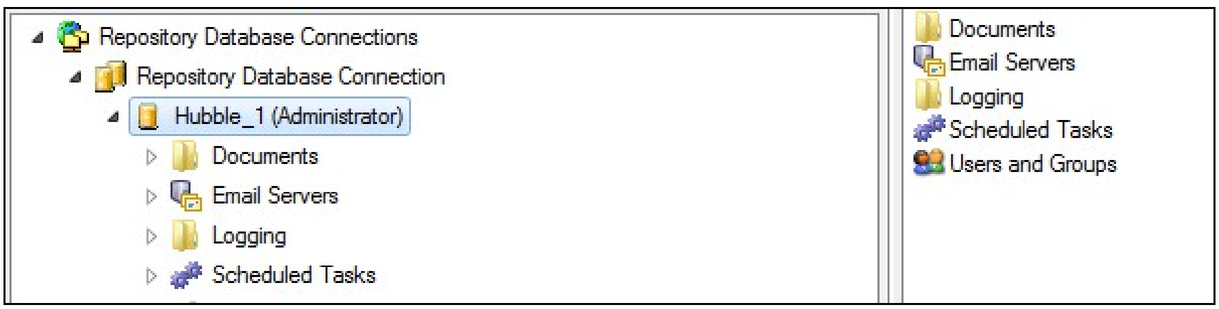
Standard Version



Platform Version



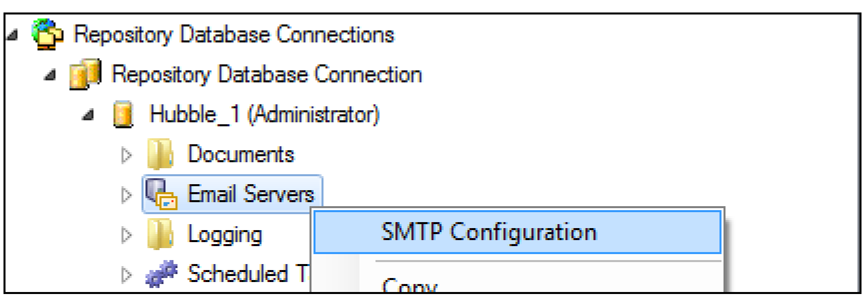
Once launched, log into the Object Repository as either an administrator or a user with a Scheduler (SCH) license:



If you log in as a non-Administrator, you will only see the email servers and scheduled tasks.

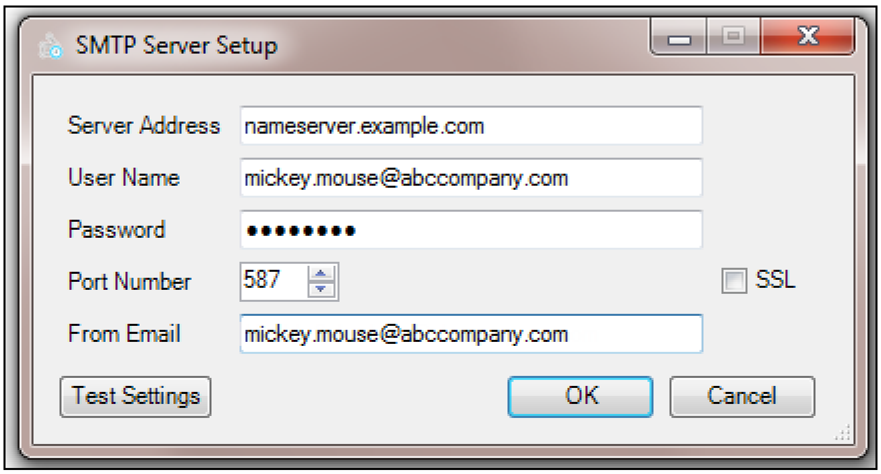
Configuring The SMTP Settings

To configure the SMTP settings in order to be able to allow the sending of emails through the application, right-click on Email Servers and choose SMTP Configuration:



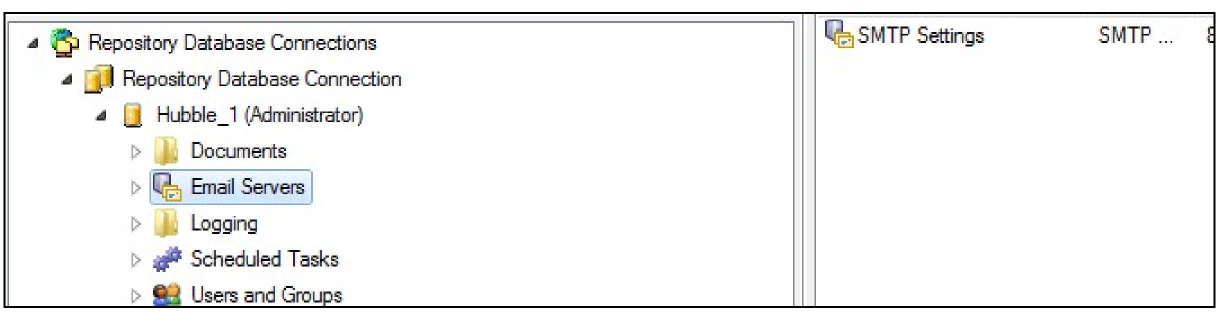
Within the SMTP Server Setup dialog, complete the following information that is specific to your SMTP Server:

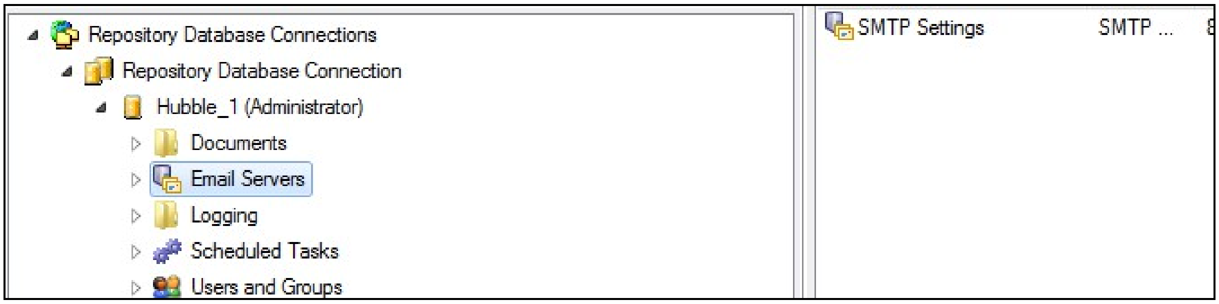
- Server Address - network name or IP address of the SMTP server.
- User Name - if required by the SMTP server, this is the email address of the Scheduler Administrator User (the same user who logged into Scheduler).
- Password - if required by the SMTP server, this is the Scheduler Administrator User's email password.
- Port Number - SMTP server Port Number.
- SSL - check if applicable (has to do with encryption).
- From Email - the From Address that will be used on automated emails sent to recipient (this needs to match the user name).



- Test Settings - sends a test email to the user setting up the task in Scheduler. (It is important to note that Scheduler is using the information of the user who logged into the application, so it is essential that this person has a valid email address defined in his/her User Definition.)

  Once configured, you will see the SMTP Settings on the right panel when the Email Servers folder on the left is highlighted:





The SMTP settings must be set up prior to starting Scheduler in Windows Services.

Windows Services

Starting Scheduler In Windows Services

After you have configured the SMTP Settings and before any scheduled tasks can be run in Scheduler, you must manually start Scheduler in Windows Services if the system is not restarted. You must be an administrator to start the service. It is also important to note that if users want to save the output of scheduled reports to a shared drive, the user who is starting the Scheduler service (this is the “Log on as user”) must have write permissions to that network path.

The below steps are only required when the service is first installed and the PC or server (wherever Scheduler is installed) has not been restarted. On subsequent restarts, as the Startup Type is set to automatic, the service will start once the Operating System is ready for user login.

To manually start Scheduler in Windows Services, follow the below steps:

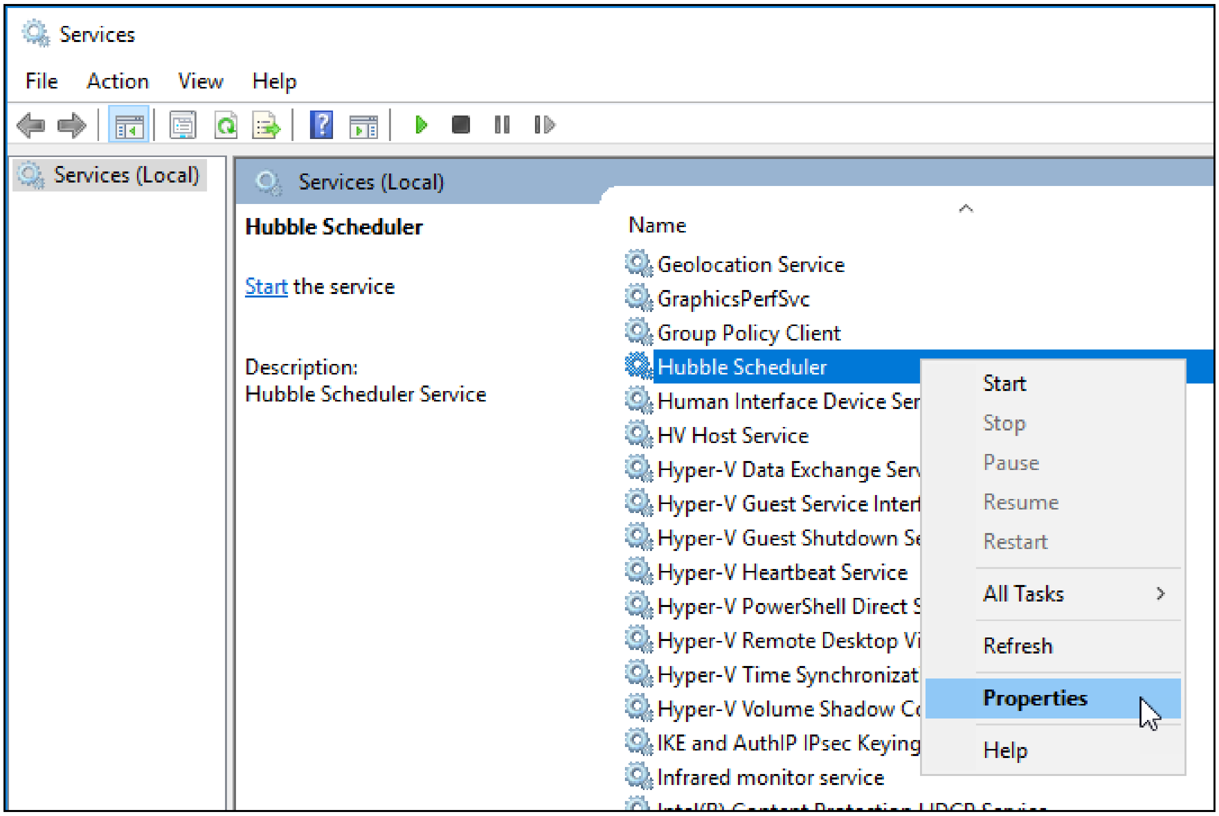
1. Launch Windows Services (in Windows 7 or Windows 10) by typing ‘Services’ into the Windows Start Menu Search.
2. Highlight Hubble Scheduler.
3. Click Start the service at the left side of the screen:
4. Once complete, click Close.

Disabling Scheduler In Windows Services

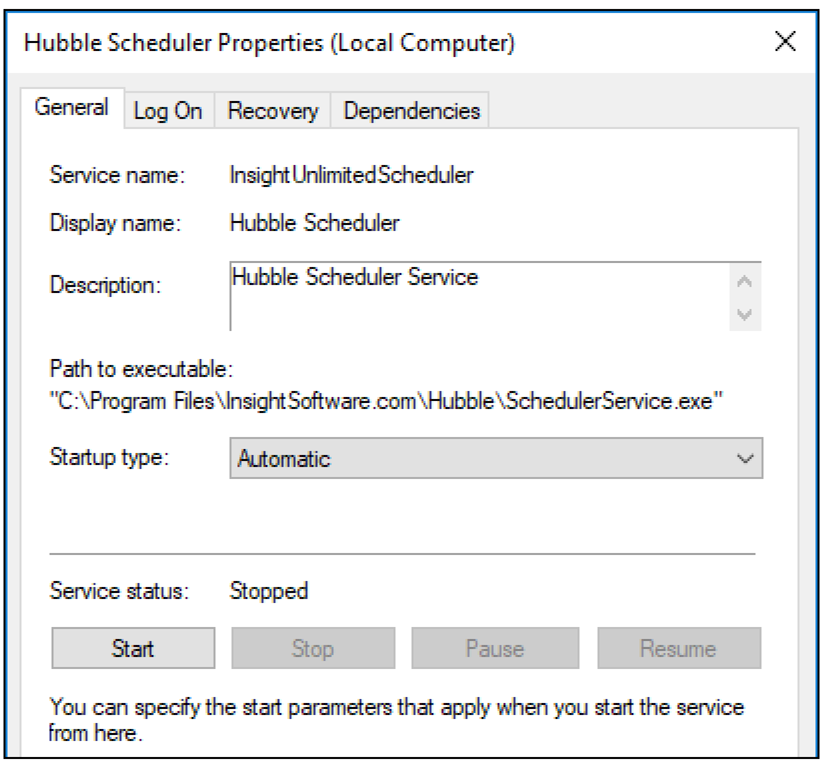
When Scheduler has been installed on both a server and a client PC, you must permanently disable the service on the PC. This is because only one Scheduler Service should be active (started) per Object Repository.

To deactivate the Scheduler Service on the local PC, follow these steps.

1. Go to Windows Services, right-click on Hubble Scheduler, and select Properties.



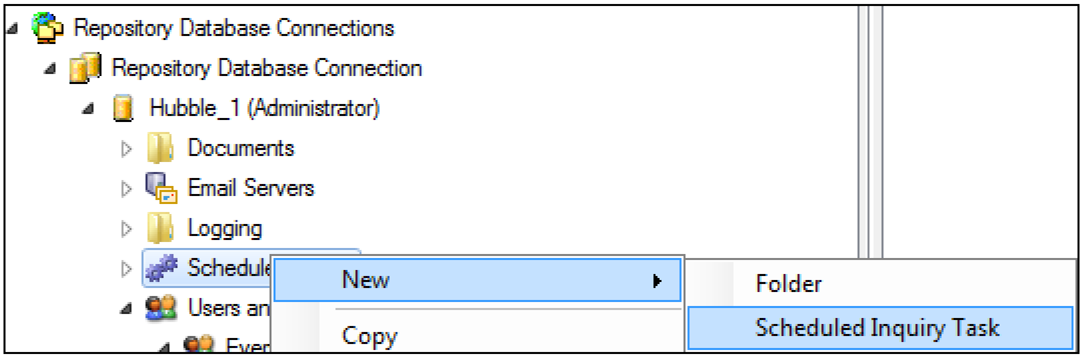
2. Change the Startup Type to Disabled:



Scheduled Tasks

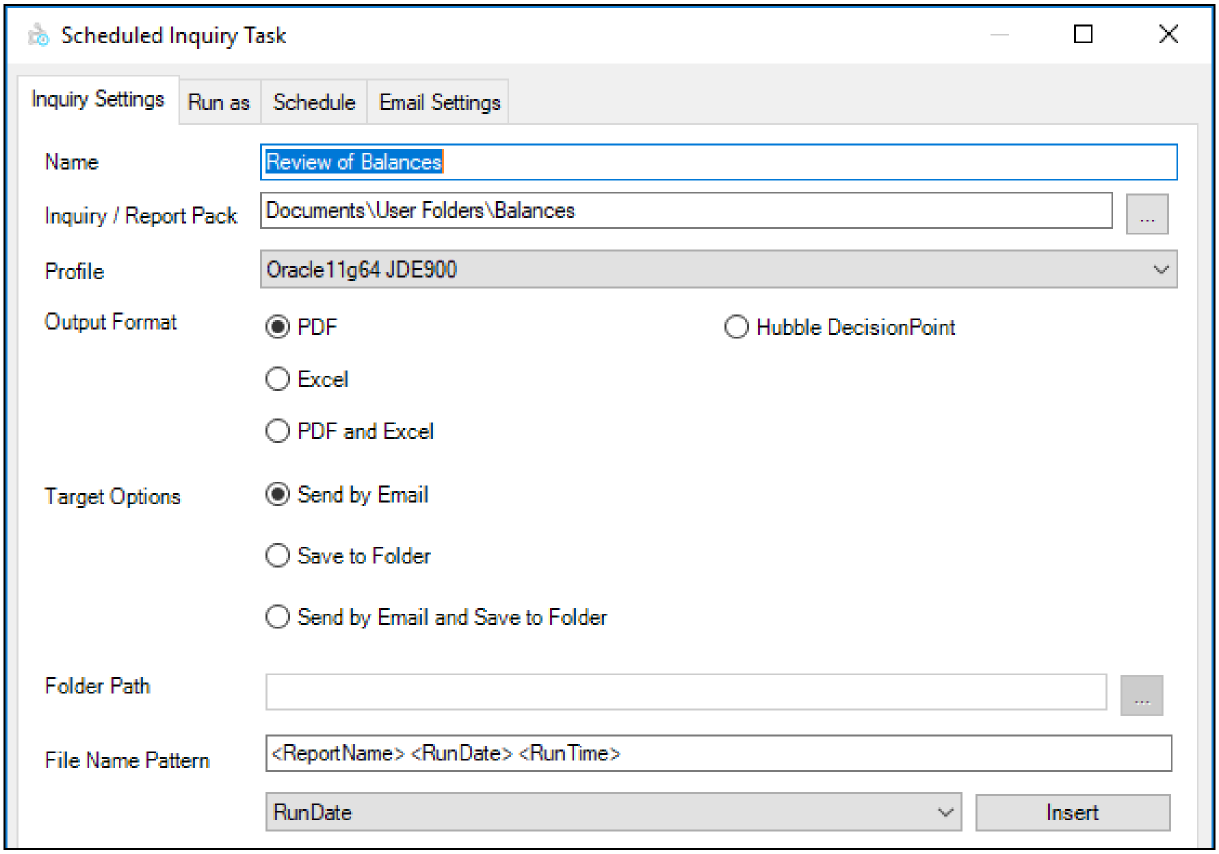
Create A Scheduled Task

Right-click on Scheduled Tasks, select New, and then choose Scheduled Inquiry Task:



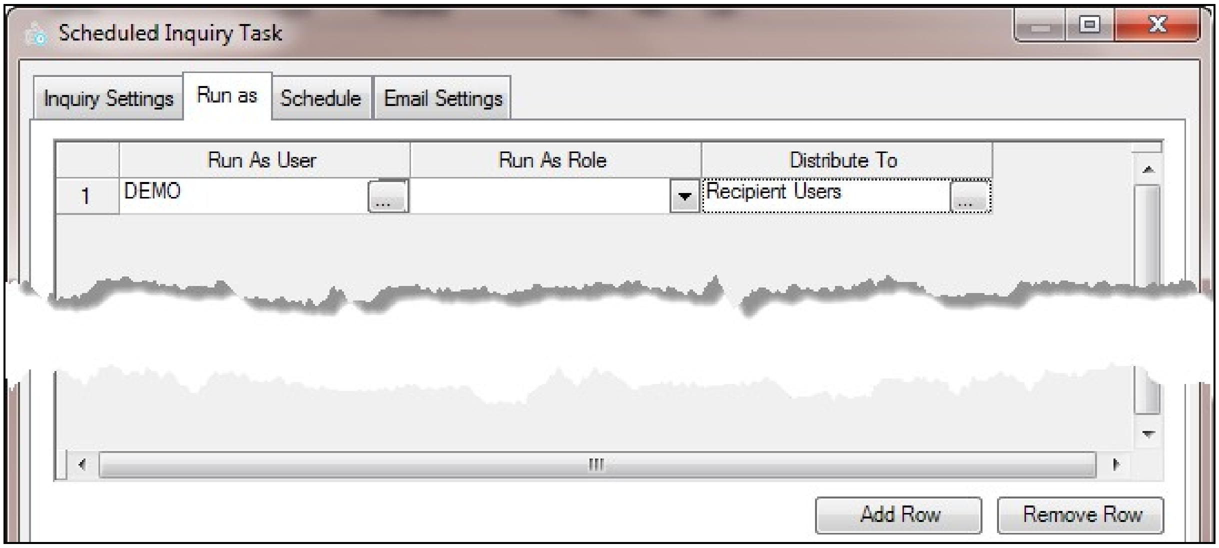
Within the Inquiry Settings tab, set the following:

- Name: name of task (not necessarily the inquiry name).
- Inquiry/Report Pack: navigate to find the inquiry or report pack.
- Profile: profile used to run the inquiry.
- Output Format: PDF/Excel/PDF and Excel/Hubble Decision Point
- Target Options: Send by Email/Save to Folder/both.
- Folder Path: if saving to a folder, this is the path to that folder.
- File Name Pattern: if saving to a folder, here you can set a dynamic file name.



Within the **Run As** tab, set the following:

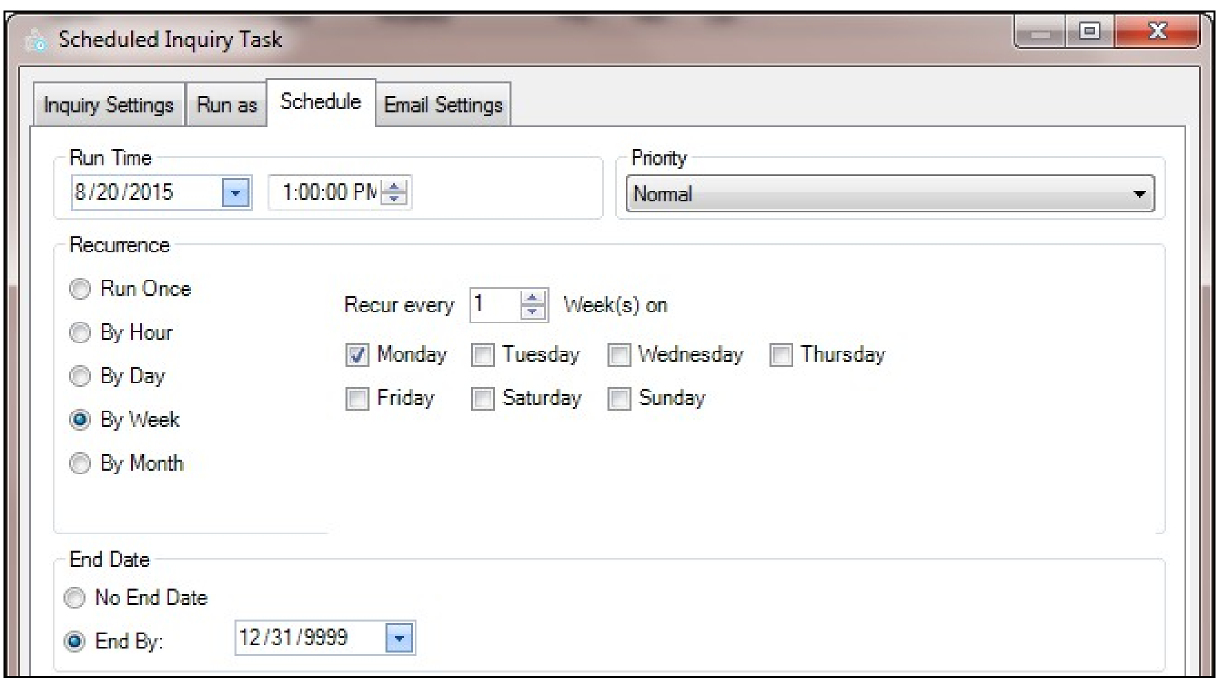
- **Run As User:** inquiry will be run using this user's login information; therefore the ERP security for this user will be honored.
- **Run As Role/Responsibility:** depending on the underlying ERP system, define the user's role (JDE) or responsibility (EBS) being used to run the inquiry.
- **Distribute To:** choose a user or group of users to whom the email notification will be sent.



Scheduler runs the inquiry once for each combination of ‘Run As User’ and ‘Run As Role’, honoring the ERP security for the two together.

Within the Schedule Tab, set the following:

- Run Time (uses Regional Settings to determine MM/DD/YYYY format)
- Priority: task priority
- Recurrence: recurrence information
- End Date: task end date



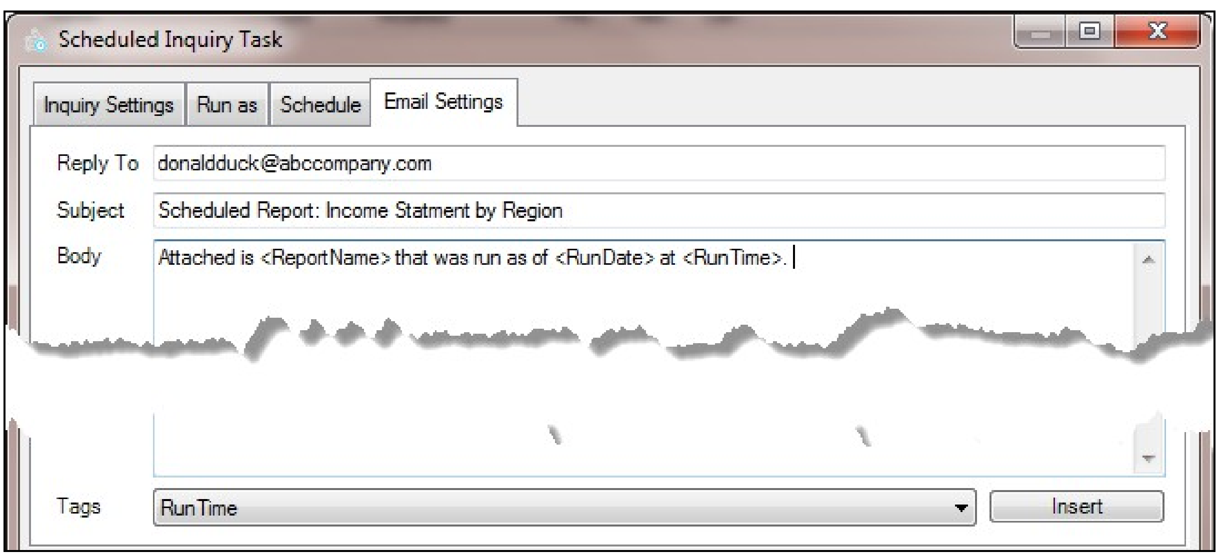
The date and time should be defined in the local time zone – no adjustment should be made to shift the time to the time of the server where Scheduler is started in Windows Services. The stored date and time will make the adjustment to store the time in universal time and the service will make an adjustment to the server time, if required.

Because all dates and times are stored in Universal Time, not the user's time zone, the product cannot change the time of the scheduled tasks when a time change occurs due to Daylight Saving Time/Summer Time. You will need to change the time of your reports twice a year, when the time changes, if you need them to run at the same time year-round. This is not necessary from Release 22.3 onwards.

If there are 2 scheduled jobs at once, the one with the higher priority takes precedence. If there are 2 jobs scheduled at the same time with the same priority, there is no rule as to which runs first.

Within the Email Notification tab, set the following:

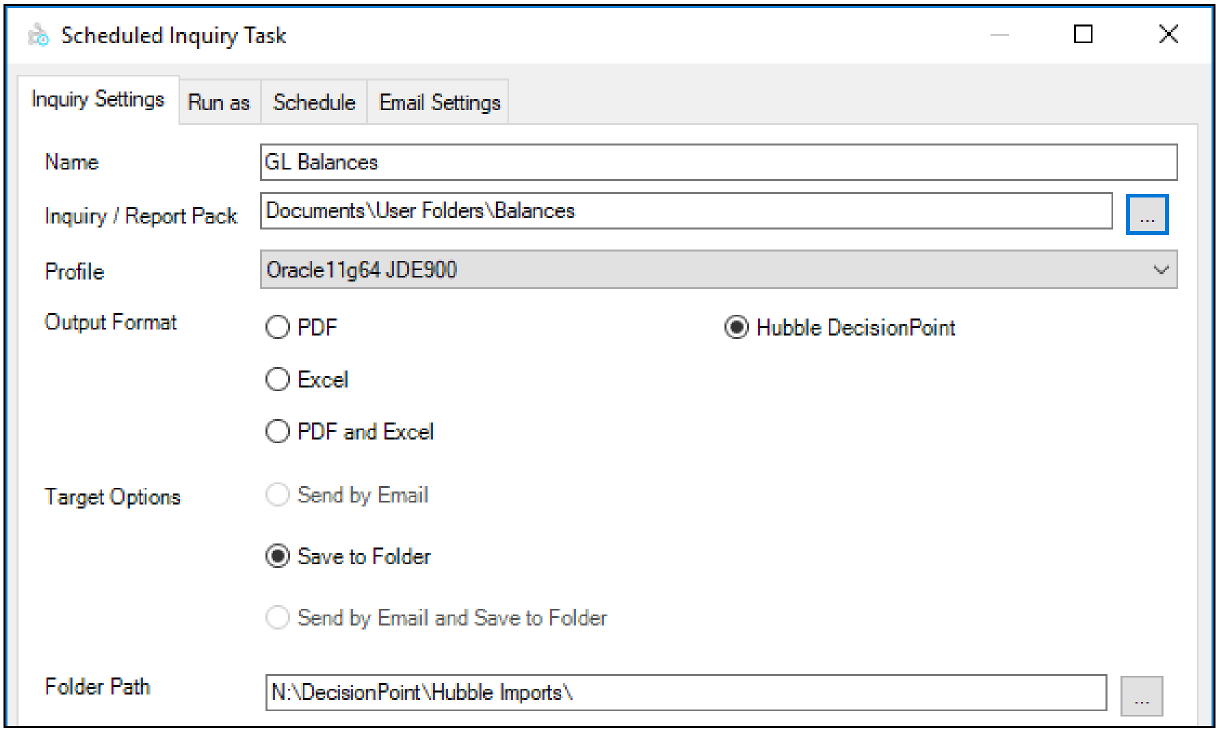
- Reply To – the email address (does not have to belong to a Hubble user) used when an email recipient replies to the email notification. If this field is left blank, the 'From Email' address in the SMTP configuration will be used for email replies
- Subject – subject of the email notification.
- Body – body of the email; can use tags to use dynamic information.
- Tags – dynamic information that you can insert into the body of the email. Note that on tags, the run date/run time comes from the server that the Service is installed on. It will be different than the date/time defined in the Schedule tab if the server is in a different time zone than that of the local machine.



DecisionPoint Integration

Reports can be exported to a DecisionPoint format. When creating a new Scheduled Inquiry Task, choose the Hubble DecisionPoint Output Format. DecisionPoint files can only be outputted via the Save To Folder Target Option.

Choose the shared folder that the DecisionPoint Server will read Hubble imports from. In this example N:\DecisionPoint\Hubble\Imports has been chosen:

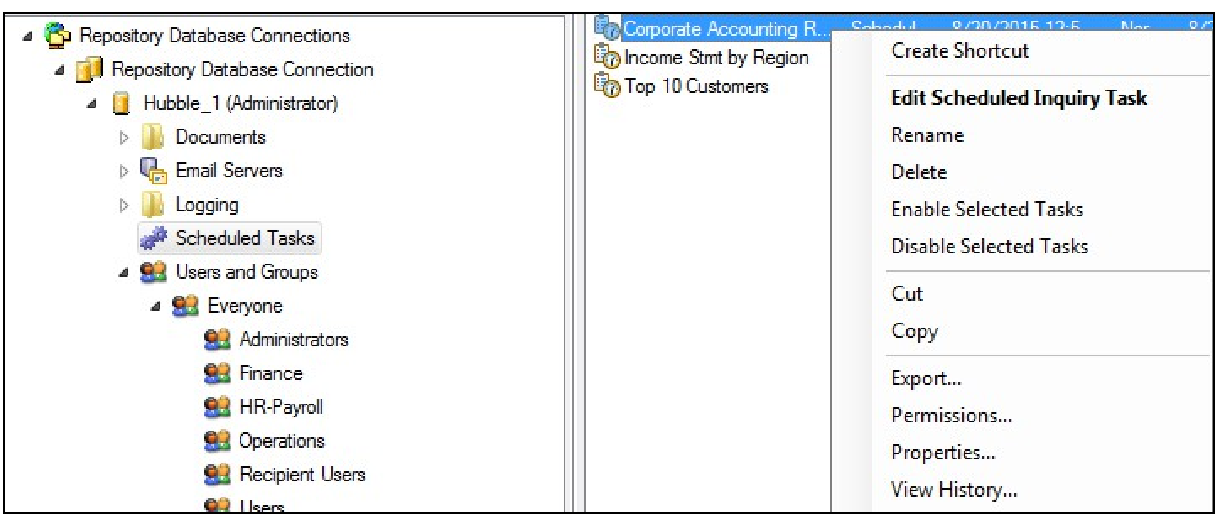


Continue creating the task as normal (see above), then click OK.

After the task has been executed, check the output folder that you specified - there should be a .dph file in that folder corresponding to the report you just exported. This file can be read and imported into DecisionPoint Server.

Managing Scheduled Tasks

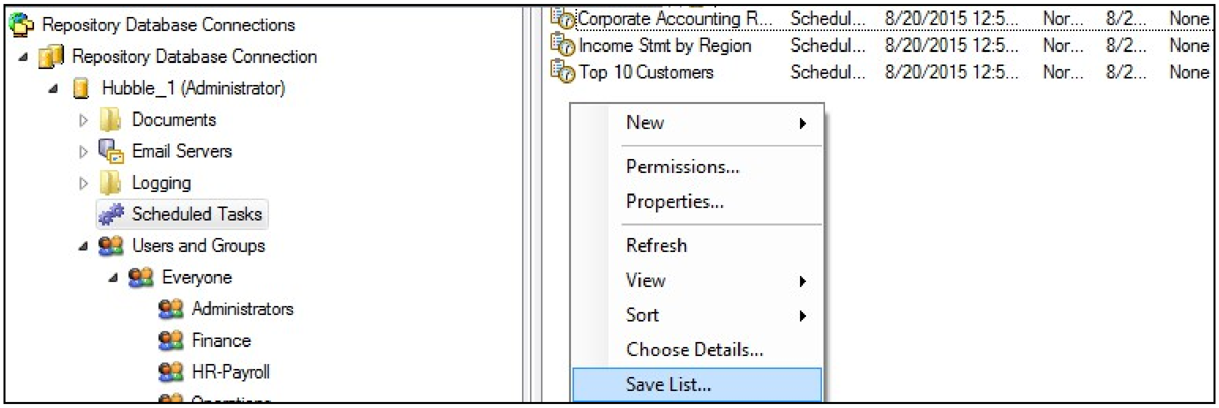
Scheduled tasks can be edited, deleted, renamed, disabled and enabled. To do any of these functions, highlight Scheduled Tasks in the left panel of Scheduler. Right-click on the specific task in the right panel and select the desired function.



You can use multi-select on your keyboard (Ctrl and Shift keys) to highlight multiple scheduled tasks in the right panel. This can especially be useful if you want to disable or enable multiple scheduled tasks at the same time.

To export the entire list of scheduled tasks:

1. Right-click in the white area of the right panel and select Save List.

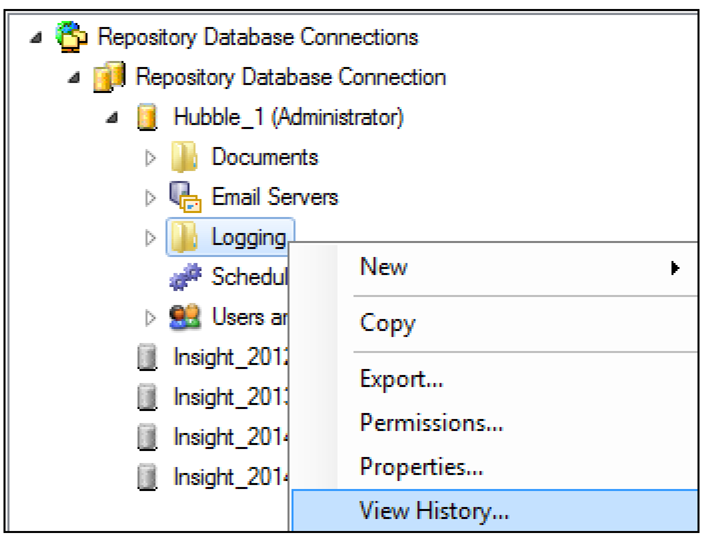


2. You will then be prompted to save the list as a .csv file.

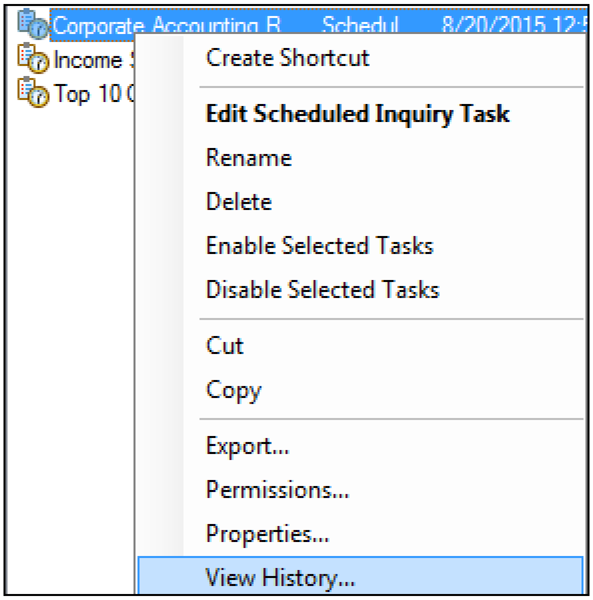
View Logging Information

The logging history in Administrator and Scheduler displays the information about any reports that have been generated using Scheduler.

From Administrator, to view the logged history, right-click on **Logging** and select **View History**.



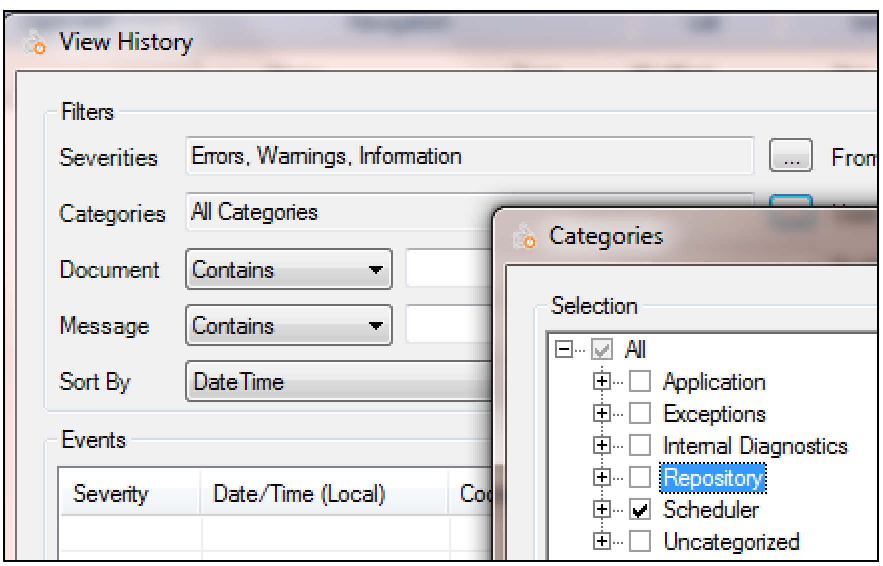
From Scheduler, to view the logged history, right-click on the Scheduled Task and select **View History**.



If you do not have the **View History** option available to select you can grant permissions to View History for the Scheduler User within Administrator. Once logged into the repository using Administrator, you can navigate to the Scheduler User located under User and Groups and right-click on their username and select Capabilities. Click the Advanced button and under the Administration tree node expand Repository Management. You will see an advanced capability for View History. Highlight View History capability and on the right side highlight the Scheduler User and select the Enable = Yes radio button.

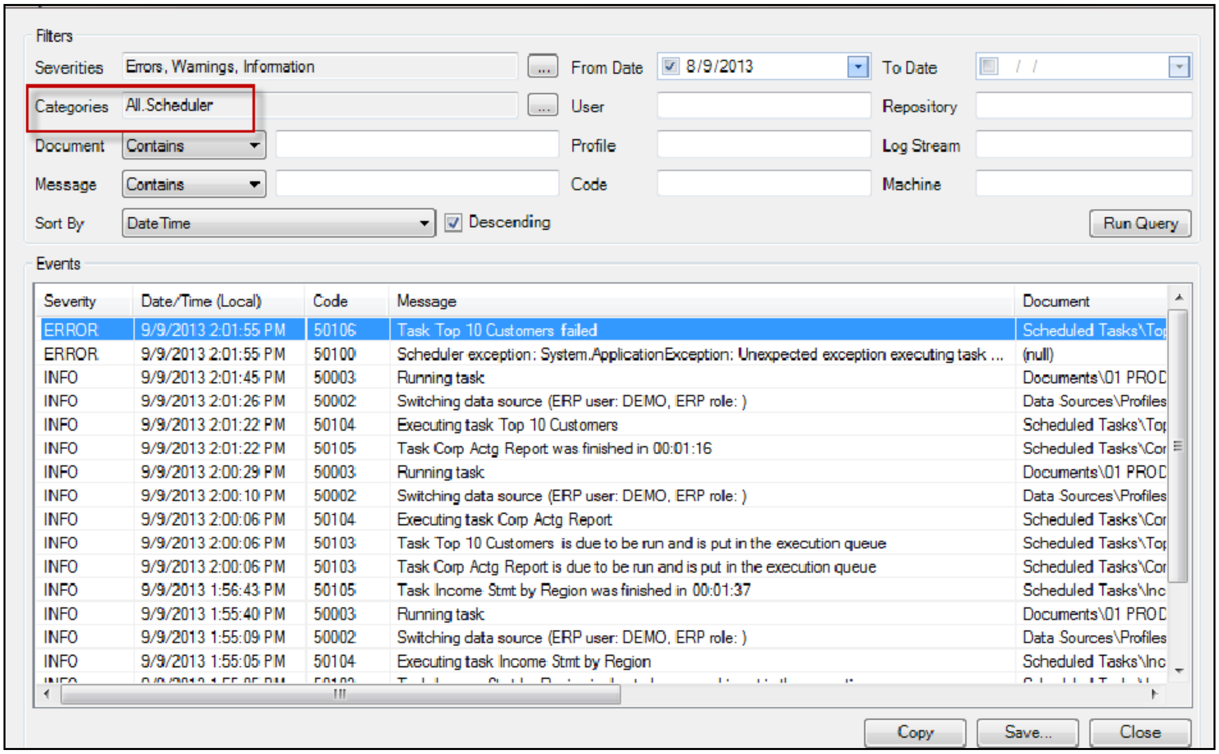
Once the Scheduler user logs back into Scheduler they will be able to View History for their Scheduled Task.

Once View History is selected, set filter data as needed. Within the Scheduler Application, only Scheduler-specific messages are displayed. However within Administrator, to narrow down to Scheduler events, you need to change Categories to only select Scheduler as shown below.

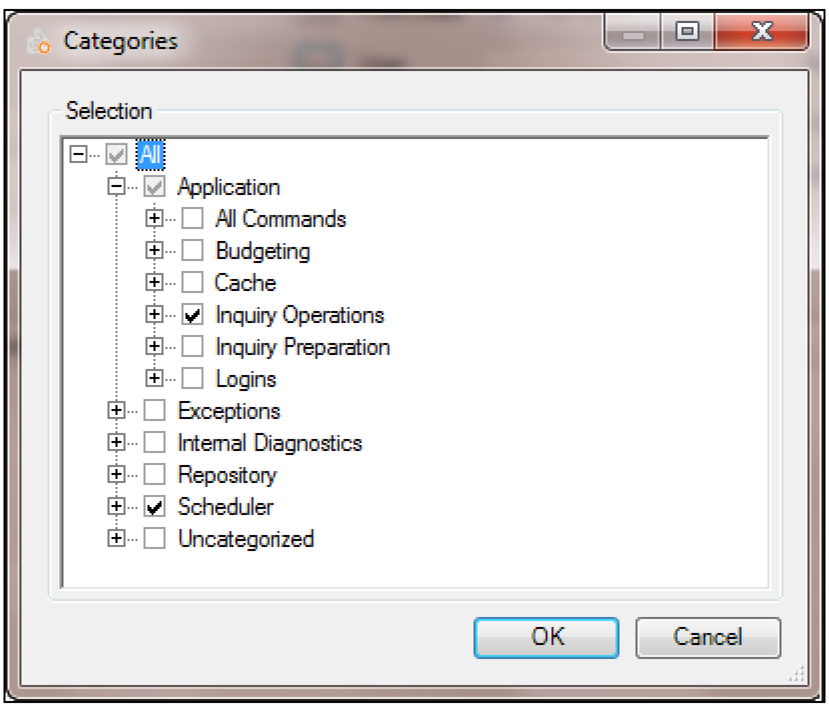


After running the query, you will see the Scheduler Events. In the screenshot below, you can see the event according to its corresponding message: Windows Services started, scheduled inquiry task put in the execution queue and later started, data source switched, task run, task finished and email output.

If any errors occurred, such as an invalid email address being set up for a Recipient User, you would see the error in this log:



To see the number of rows generated in the report, you must include the Inquiry Operations category, located under Application:



Missed Tasks

If the Scheduler Service or the repository database server is ever down or offline (e.g. down for maintenance or a backup is being done), once it is back up Scheduler looks for any missed tasks. It will then run those tasks if they were missed. If a task was scheduled to run multiple times while the service or server was down, it will only run one time once the service/server is back up.

By default, Scheduler will look back 1 day for missed tasks. This is a configurable option, set in the SchedulerService.exe.config file that is installed in the same directory as Scheduler.

There is a section in the file which is initially:

<setting name="RetryWindow" serializeAs="String">

<value>1.00:00:00</value>

</setting>

The value is in the format "days.hours:minutes:seconds".

If you were to set this to 0.00:00:00, it means that the service does not look back for any missed tasks.

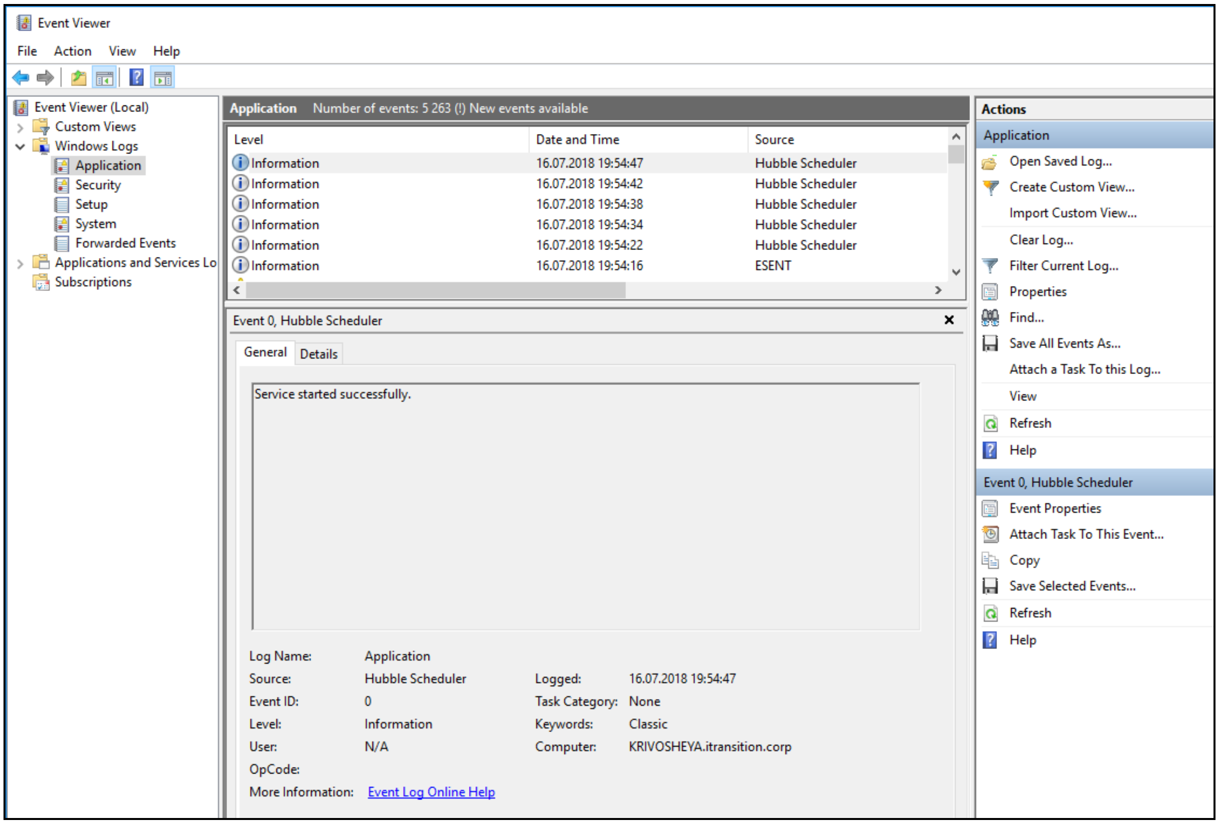
The SCHEDULERSERVICE.EXE.CONFIG file can be changed using whatever application the System Administrator prefers, however Notepad is suggested.

Windows Event Viewer

To view Windows Events such as scheduled tasks being run or any errors that have occurred, follow the below steps.

1. Launch Windows Event Viewer (in Windows 7 or Windows 10) by typing ‘Event Viewer’ into the Windows Start Menu Search.

2. Expand Windows Logs and then Application:



Uninstall Scheduler

Uninstall Scheduler using Add/Remove Programs on Windows. It is important to note that you cannot install a higher version of Scheduler on top of an existing Scheduler installation. You must first remove the previous service using Add/Remove Programs and can then install the new version.

Frequently Asked Questions

Top FAQs

Below we list our most frequently asked questions. Please contact our Customer Support Department for further assistance beyond what is explained in these answers.

- In Scheduler, I have saved the repository selection file to the proper installation path. Why am I still prompted for this file when I log in?
- Why am I getting a Windows error saying that access is denied when I try to save the repository selection file in the Hubble installation path?
- The results on my report are not what I expect. How can I verify what they should be?
- Can I send output from a Scheduled Task to an email distribution group?
- Does a user have to be a true Hubble Administrator (in the Administrator group in the Administrator Application) in order to be a Scheduler Administrator?
- We will be installing Scheduler on a server as well as on multiple client PCs so that those users can individually create and manage the scheduled tasks, but the tasks will actually run on the server. What does the installation look like to achieve this?
- What date and time will my scheduled task use - my local date and time or the date and time where the Service is running on the server?
- What date and time format is used on a report that is output to Microsoft Excel?
- In Scheduled Tasks under the Email Notification Tab, are the tags for Run Date and Run Time coming from the server the Service is installed on?
- My scheduled report is not running. Where can I go to troubleshoot why this is happening?
- Will the output PDF and Excel documents from the Scheduled task be saved anywhere?
- Under the Administrators Group there is a user, “SchedulerService”. What is this user used for?
- Can Scheduler be deployed using Click Once Technology?
- Can reports created in Designer Express (DX) be scheduled using Scheduler?
- Is there a way to determine which machine my Scheduler Service is running on?
- Can I use report bursting functionality in the output from Scheduler?

- Can I run multiple instances of Scheduler?
- I have multiple repositories and multiple Scheduler Services set up, however it is not working. What should I check?

In Scheduler, I have saved the repository selection file to the proper installation path. Why am I still prompted for this file when I log in?

In Windows 7 and Windows 10, you must have the proper access to save the repositoryselection.xml file to the install path. If you do not have the proper authority to do this, you can do one of the following:

1. Run Scheduler as an Administrator in order to be able to select and save the repositoryselection.xml file in the Hubble install path. (You can log on as an administrator from the Start Menu shortcut by right-clicking on Scheduler and choosing ‘Run as administrator’. You can also do this by navigating to the install path, right-clicking on the SchedulerAdministration Application File and choosing ‘Run as administrator’.)

2. Run Windows Explorer as an administrator and copy and paste the repositoryselection.xml file from your own documents to the Hubble install path. (You can log on as an administrator from the Start Menu shortcut by right-clicking on Windows Explorer and choosing ‘Run as administrator’.)

   Why am I getting a Windows error saying that access is denied when I try to save the repository selection file in the Hubble installation path?

If you are in Windows 7 and Windows 10 and User Account Control (UAC) is enabled for Hubble, the RepositorySelection.xml file displaying in the Hubble install path is only a pointer and acts as a shortcut. This shortcut file will only work for you, not other users on the PC, since it is not the actual file. If you want to overwrite it, you can follow these instructions:

1. In the Task Bar, click on the button for Compatibility Files. (This takes you to where the actual file is stored.)

2. Overwrite the file here and it will automatically update the pointer file in the install path.

If you are installing on a shared server, such as a Citrix server, you need to ‘Run as administrator’ for Administrator so that the repository selection.xml file is saved in the directory and available for all users logging in. (To run Administrator as an administrator, navigate to the install path, right-click on the Administration Application File, and choose ‘Run as administrator’.)

Please contact our Customer Support Department for more assistance with this if needed.

I am trying to save the output of a scheduled report in a folder on a shared drive but it is not working. Is there some requirement that I am missing? I need to know whether you require a UNC path, drive, URL, etc.

There is a requirement that the user who is starting the Scheduler service (this is the “Log on as user”) has write permissions to that network path.

The results on my report are not what I expect. How can I verify what they should be?

Verify the following information that is defined in the scheduled task:

In the Inquiry Settings tab:

- Inquiry
- Profile

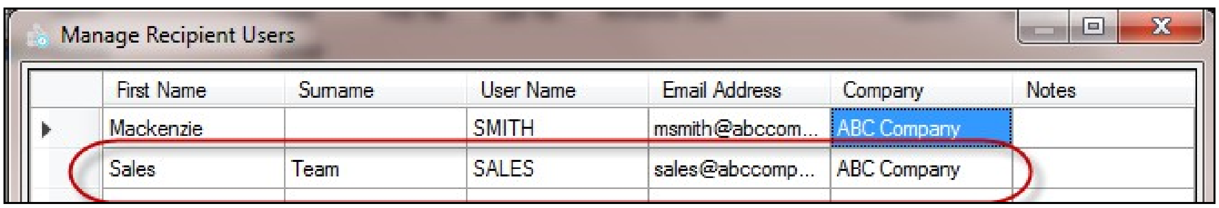
  In the Run As tab:

- Run As User
- Run As Role

Next log into Hubble as this user, using the same role and profile, and run the inquiry. The results in the automatically-generated report should be the same as these results since the ERP credentials of the user/role/profile combination are used. There may be a difference in the inquiry results based on the date/time that the report was automatically generated as the data in the ERP system may have changed.

Can I send output from a Scheduled Task to an email distribution group?

Yes. All that is needed is to key in the Distribution Group Name and email address in the Manage Recipient Users dialog:



If a recipient of a Scheduled Task is listed in more than one distribution group or listed individually as well as a member of an email distribution group – Microsoft Exchange may strip out the extra emails to the recipient therefore allowing only one email per Scheduled Task to be received.

Does a user have to be a true Hubble Administrator (in the Administrator group in the Administrator Application) in order to be a Scheduler Administrator?

A Scheduler Administrator does not need to be a true Hubble Administrator. In order to do all the setup and tasks required in Scheduler, the Scheduler Administrator must have the Administration Capability for Users and Groups (in order to manage Recipient Users) as well as be assigned the SCH license. The only other permission that may need to be set is that for a Recipient User that was added to the Recipient Users group by a true Hubble Administrator. In that scenario, the Scheduler Administrator would need to be granted Update permission to the Recipient User that was already established if any changes need to be made, such as an email address of the Recipient User.

We will be installing Scheduler on a server as well as on multiple client PCs so that those users can individually create and manage the scheduled tasks, but the tasks will actually run on the server. What does the installation look like to achieve this?

Installation on the server:

1. Hubble must be installed prior to installing Scheduler.
2. Install Scheduler in the same install path as Hubble.

3. Activate the Scheduler Service in Windows Services by either restarting the server or by activating the service with the standard right-click method.

Installation on the client PC:

1. Hubble must be installed prior to installing Scheduler.
2. Install Scheduler in the same install path as Hubble.
3. Deactivate the service component on the client PC since it is already active on the server and only 1 Scheduler service should be active per Object Repository:
    i. Go to Windows Services.
    ii. Right-click on Hubble Scheduler.
    iii. Choose Properties.
    iv. Change the Startup Type to Disabled.

    What date and time will my scheduled task use - my local date and time or the date and time where the Service is running on the server?

    The date and time should be defined in the local time zone - no adjustment should be made to shift the time to 'server time'. The stored date and time will make the adjustment to store the time in Universal Time and the service will make an adjustment to the server time, if required. While the stored date and time is in Universal Time (Greenwich Mean Time), the displayed date and time for the scheduled tasks is always in the local time zone.

    What date and time format is used on a report that is output to Microsoft Excel?

    Scheduler takes its date and number format from the machine it is running on, and more specifically, from the Windows account that the Scheduler Service runs under. By default, this the “Local System” account, respecting the regional settings set in Windows.

    In Scheduled Tasks under the Email Notification Tab, are the tags for Run Date and Run Time coming from the server the Service is installed on?

    Yes, since it is the service that resides on the server that picks up the Scheduled Task, the Run Date and Run Time are going to display as the Server Run Date and Time.

My scheduled report is not running. Where can I go to troubleshoot why this is happening?

1. Verify that you have set the SMTP Settings in Scheduler.
2. Verify that you have started Scheduler in Windows Services. For more information, see page 10.
3. Verify that the RepositorySelection.xml file is located in the install location path and viewable for the administrator starting the Windows Services. For more information, see page 10.
4. Verify the schedule information in the Scheduled Task (First Run, Recurrence and End Date, all of which are set in the Schedule Tab). If you are not using military time, be sure the AM/PM is set appropriately.

5. Go to Windows Event Viewer on page 24 to see any errors that may have been generated.

   Will the output PDF and Excel documents from the Scheduled task be saved anywhere?

For each scheduled task, you can designate that the output be saved to a designated folder if desired. Within the Inquiry Settings (when creating or editing a scheduled task), you must designate that you want to save the output to a folder and then designate the folder path.

Under the Administrators Group there is a user, “SchedulerService”. What is this user used for?

The SchedulerService user is used by the Scheduler Service to log into the repository when looking for a scheduled task. It is created automatically by the Scheduler Service the first time it connects to the repository. Its purpose is for the Scheduler Services’ activities in the repository to be logged against a distinct user name. No user can log in as SchedulerService – it is an internal account like ‘System’. This user cannot be deleted, renamed or moved. You can edit it, but its properties, including the password, are irrelevant and not used.

Can Scheduler be deployed using Click Once Technology?

You cannot deploy Scheduler using Click Once Technology. The Scheduler Service must be installed on the server of choice and the Scheduler Application must be installed as a fat client for users who intend to schedule tasks.

Can reports created in Designer Express (DX) be scheduled using Scheduler?

Yes, reports that are created in Designer Express can be run automatically using Scheduler.

- Scheduler Admin/User: The person creating the task in Scheduler needs an SCH license but does not need any other license unless they are going to be set as the Run As user.

- Run As User: If this user is a Power user, then they would need a DX license as well as the appropriate module license in order to run the report. If this user is an Viewer user, then they would only need a CON license and can be set up as a Run-As user.

Is there a way to determine which machine my Scheduler Service is running on?

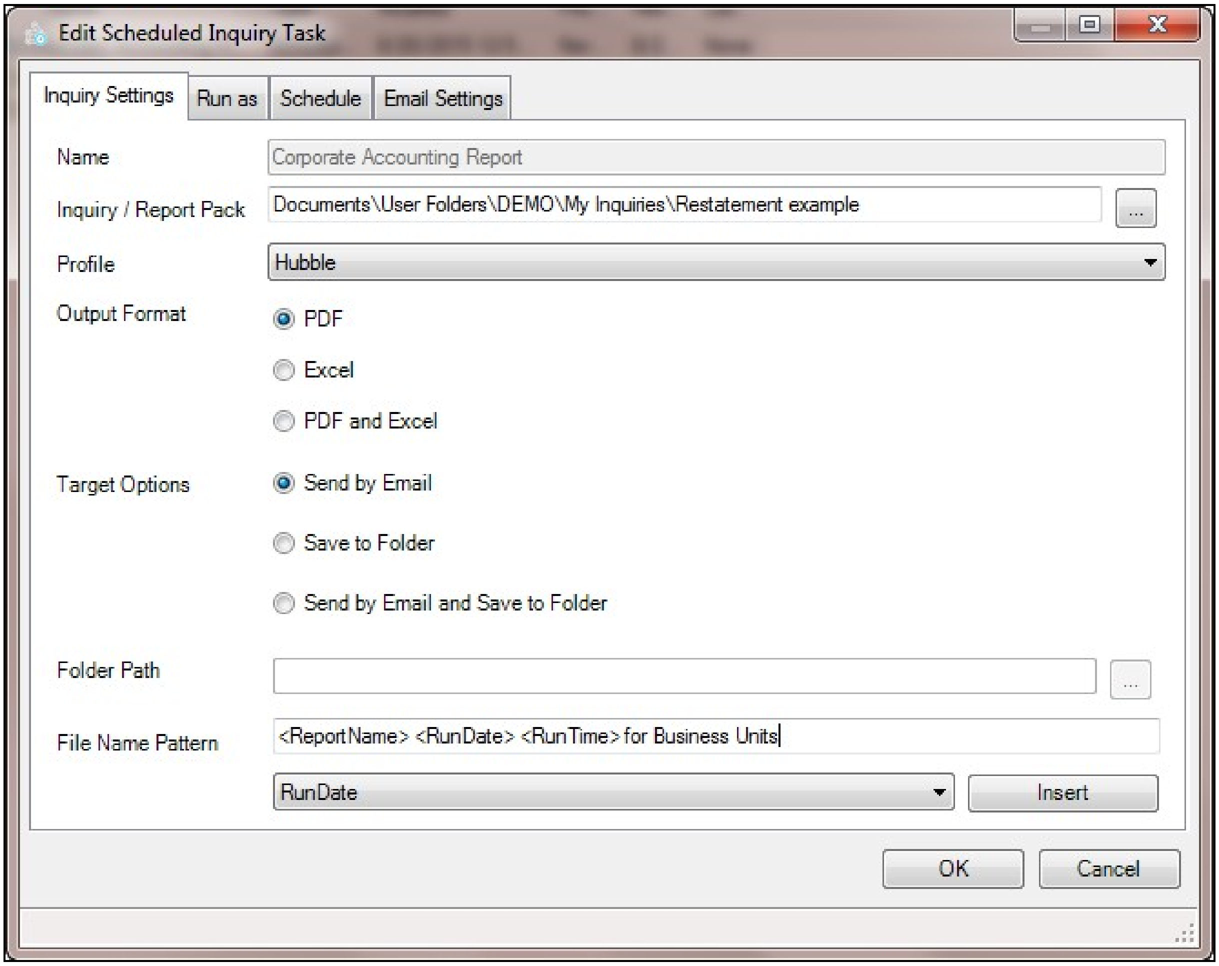
As long as the Scheduler service has been running jobs, then it will also have been writing entries in the Hubble log.

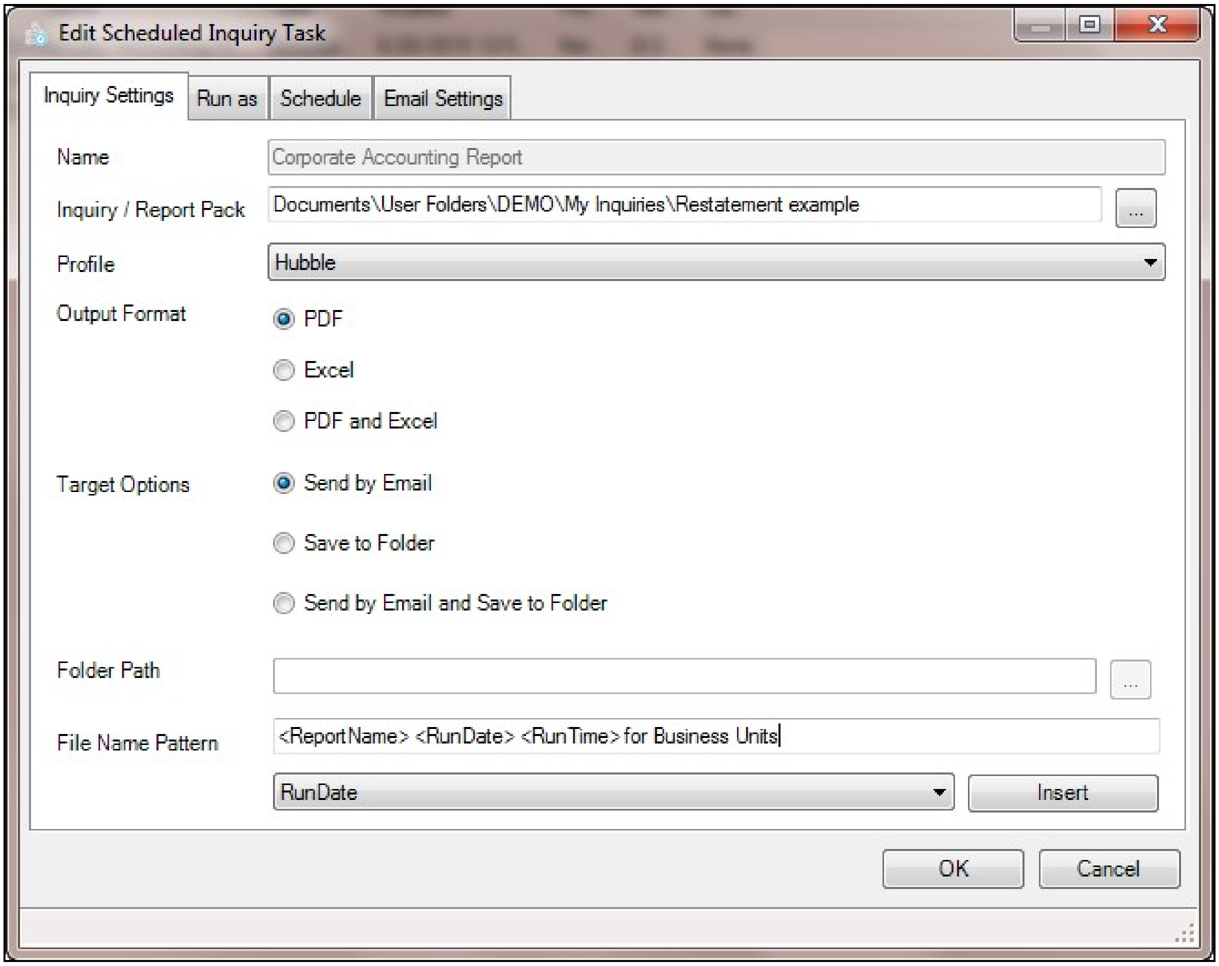
Query the log using View History in Administrator, filter on User = “SchedulerService”, run the query and look in the ‘Machine’ column. That should tell you the name of the computer running the Scheduler service.

Can I use report bursting functionality in the output from Scheduler?

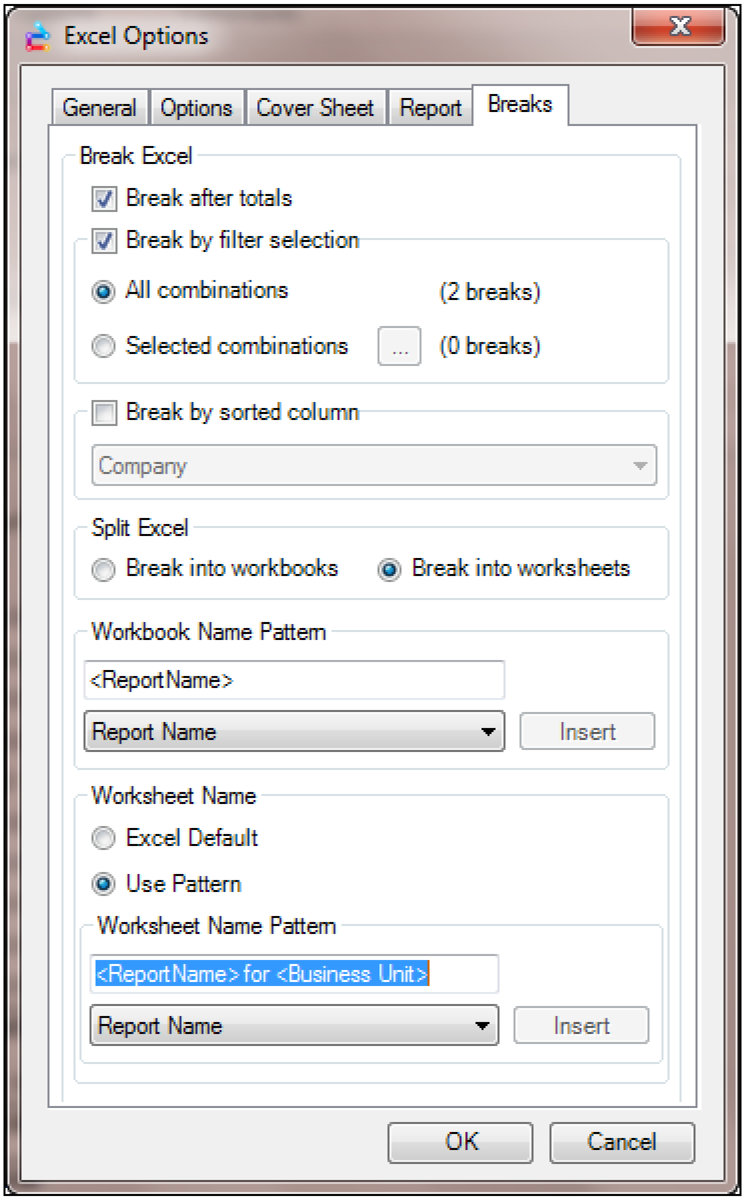
Report bursting, which is the ability to create separate documents based on filter criteria, is honored when outputting a report using Scheduler. It is important to note that when breaking into multiple files either in Excel or PDF, the File Name Pattern as set in Scheduler takes precedence over the settings in Excel Options or PDF Options.

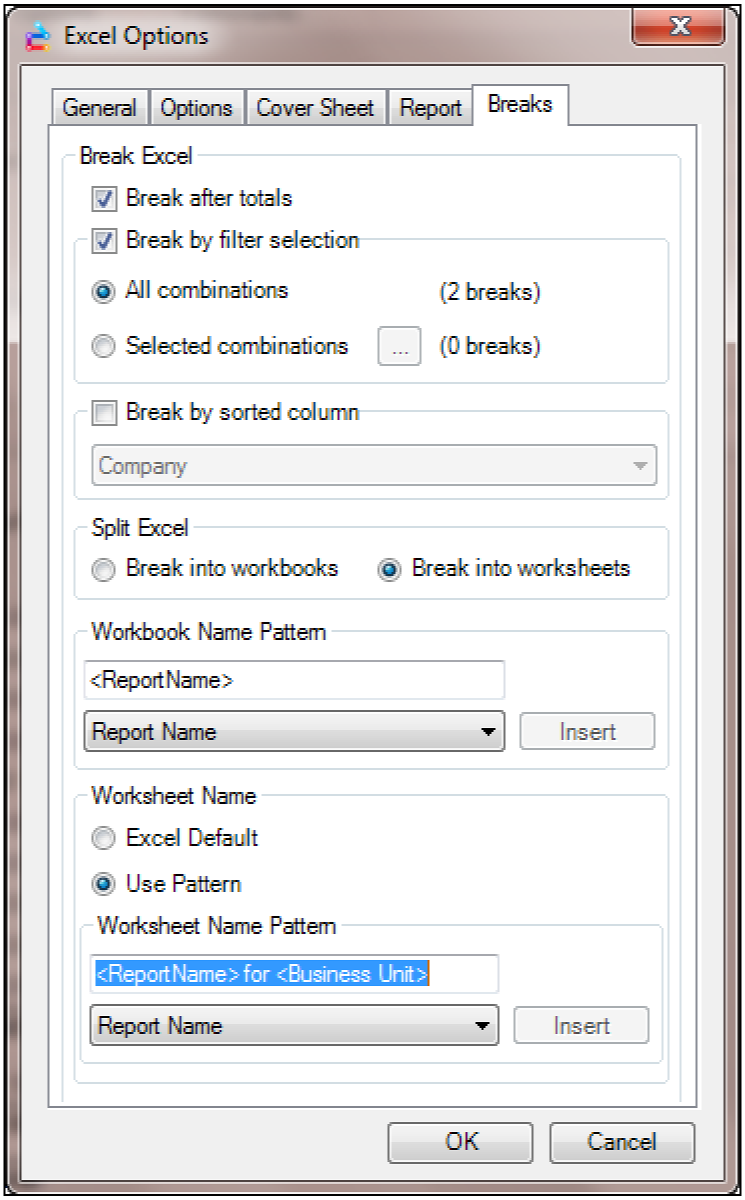
The File Name Pattern as set for the scheduled task is what is used for the produced files:

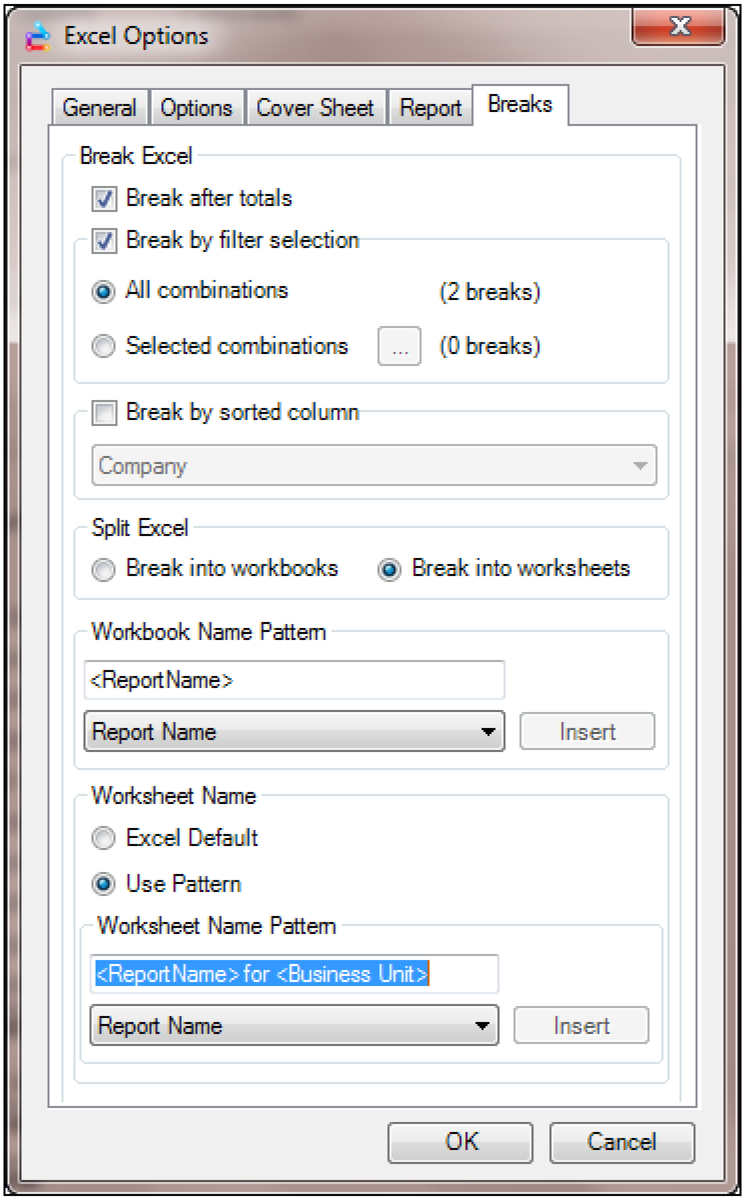

Edit Scheduled Inquiry Task
Inquiry Settings
Run as
Schedule
Email Settings
Name
Corporate Accounting Report
Inquiry / Report Pack
Documents\User Folders\DEMO\My Inquiries\Restatement example
Profile
Hubble
Output Format
PDF
Excel
PDF and Excel
Target Options
Send by Email
Save to Folder
Send by Email and Save to Folder
Folder Path
File Name Pattern
<ReportName> <RunDate> <RunTime> for Business Units
RunDate
Insert
OK
Cancel



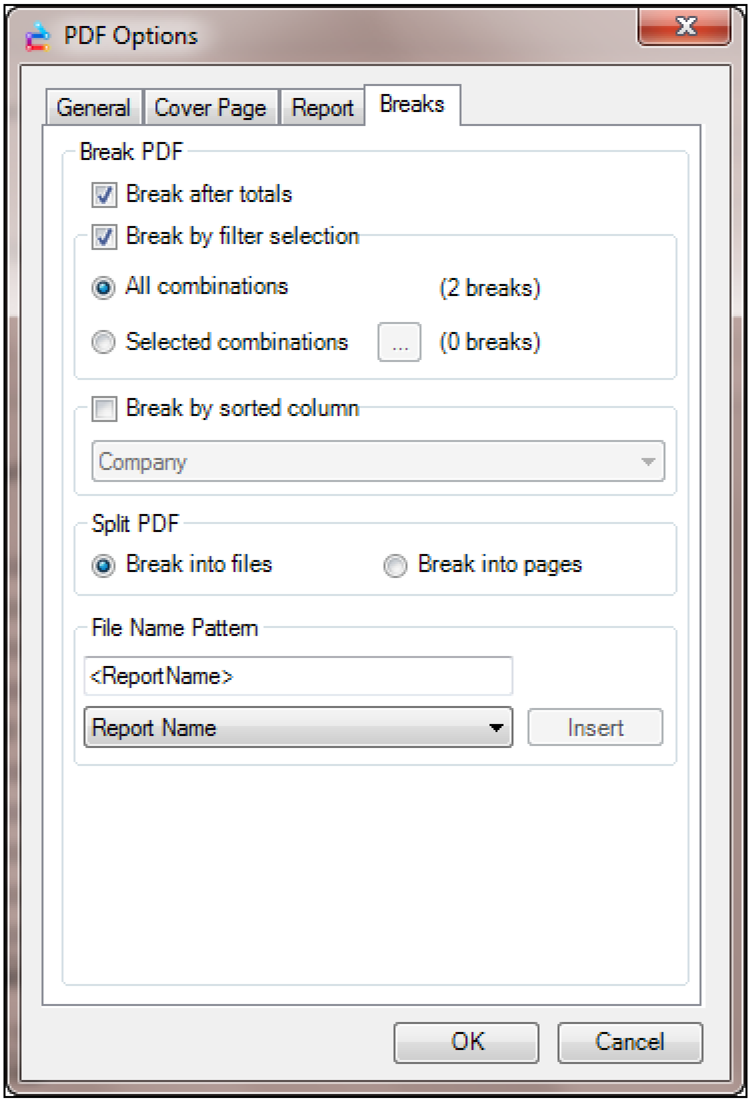
In Excel Options, you set the option to Break into worksheets. The Worksheet Name Pattern at the bottom of this dialog will not be used because the File Name Pattern that is set in the scheduled task is used:

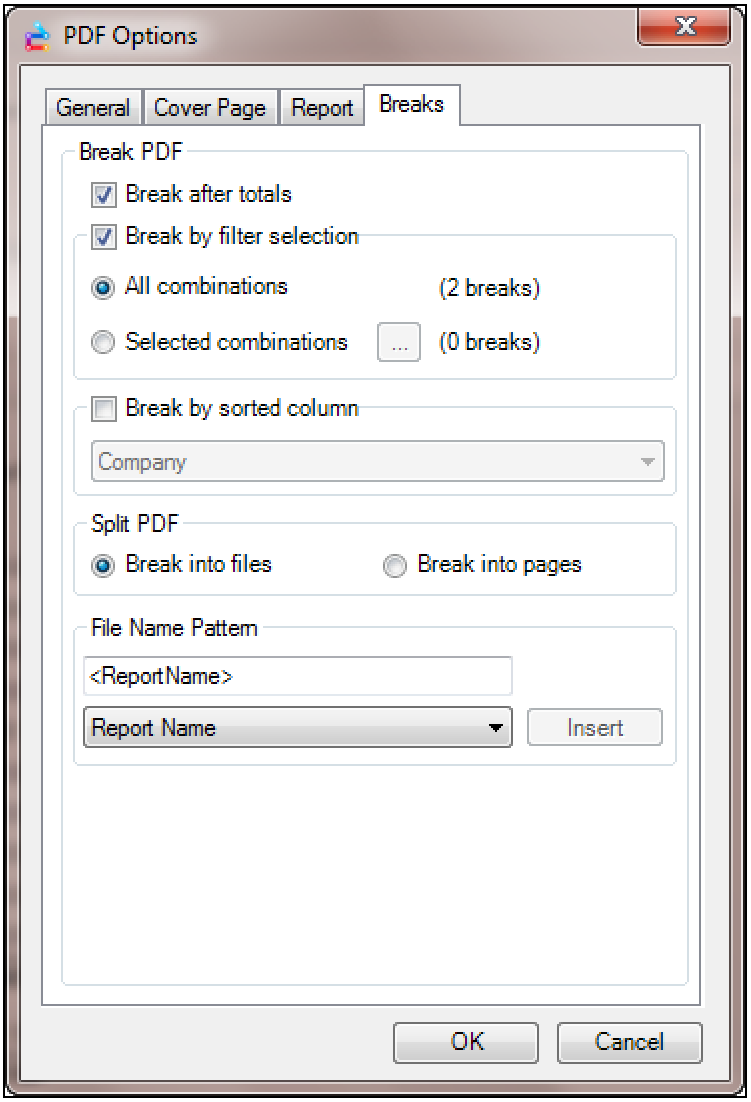

Excel Options
General
Options
Cover Sheet
Report
Breaks
Break Excel
Break after totals
Break by filter selection
All combinations
(2 breaks)
Selected combinations
...
(0 breaks)
Break by sorted column
Company
Split Excel
Break into workbooks
Break into worksheets
Workbook Name Pattern
<ReportName>
Report Name
Insert
Worksheet Name
Excel Default
Use Pattern
Worksheet Name Pattern
<ReportName> for <Business Unit>
Report Name
Insert
OK
Cancel

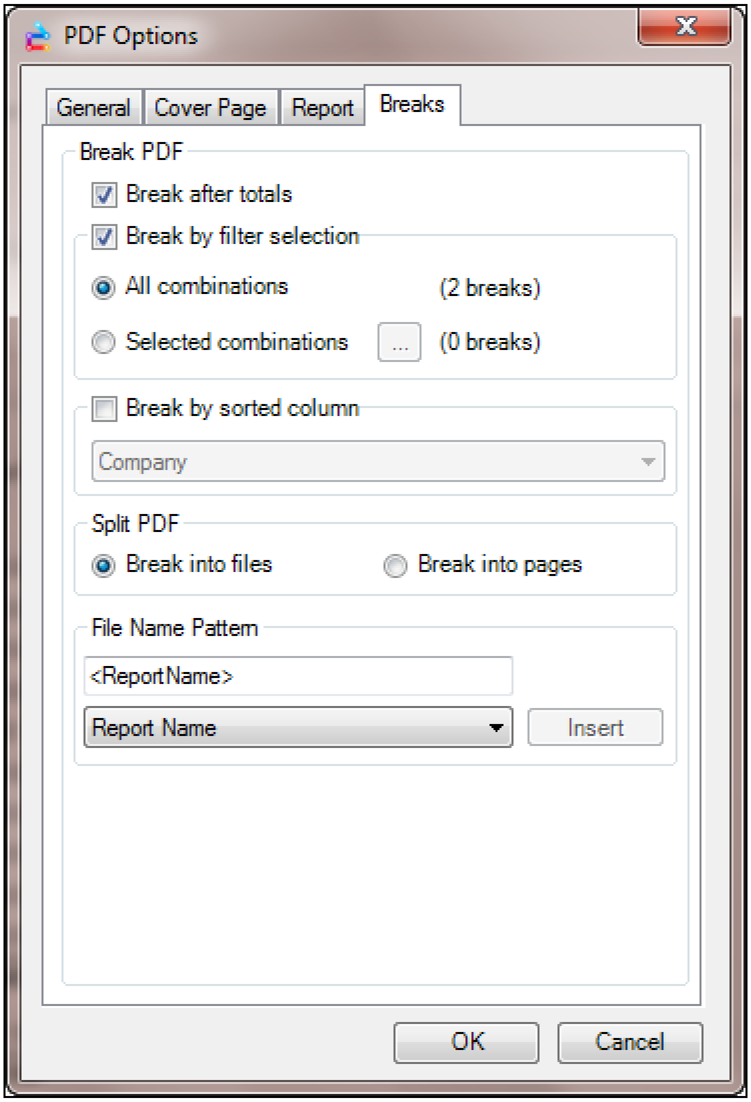

Excel Options
General
Options
Cover Sheet
Report
Breaks
Break Excel
Break after totals
Break by filter selection
All combinations
(2 breaks)
Selected combinations
...
(0 breaks)
Break by sorted column
Company
Split Excel
Break into workbooks
Break into worksheets
Workbook Name Pattern
<ReportName>
Report Name
Insert
Worksheet Name
Excel Default
Use Pattern
Worksheet Name Pattern
<ReportName> for <Business Unit>
Report Name
Insert
OK
Cancel



If printing to PDF, in PDF Options, you can set the option to Break into files. The File Name Pattern at the bottom of this dialog will not be used because the File Name Pattern that is set in the scheduled task is used:


PDF Options
General
Cover Page
Report
Breaks
Break PDF
Break after totals
Break by filter selection
All combinations
(2 breaks)
Selected combinations
...
(0 breaks)
Break by sorted column
Company
Split PDF
Break into files
Break into pages
File Name Pattern
<ReportName>
Report Name
Insert
OK
Cancel


PDF Options
General
Cover Page
Report
Breaks
Break PDF
Break after totals
Break by filter selection
All combinations
(2 breaks)
Selected combinations
...
(0 breaks)
Break by sorted column
Company
Split PDF
Break into files
Break into pages
File Name Pattern
<ReportName>
Report Name
Insert
OK
Cancel



Can I run multiple instances of Scheduler?

There can only be one instance of Scheduler Service set up per repository. If you have multiple repositories, say for example if one is pointing to a production environment and the other to a development environment, then you can set up separate Scheduler Services. You must ensure prior to setting up multiple services that there is a separate repository set up for the new service instance.

Great caution, however, must be taken when using multiple instances of Scheduler. Because it can create confusion when duplicate copies of scheduled reports are being run, we recommend - other than the case of testing a new version - that you only use a single instance of Scheduler.

I have multiple repositories and multiple Scheduler Services set up, however it is not working. What should I check?

Verify that the repositories are not using the same RepositorySelection.xml file.