

# Start the Scheduler Automatically

## Overview

**XLReporter's** Scheduler provides all the tools necessary to generate and distribute completed reports automatically.

This document describes the options available to start up the Scheduler automatically, how to configure each option and when each option should be used.

## Windows Service

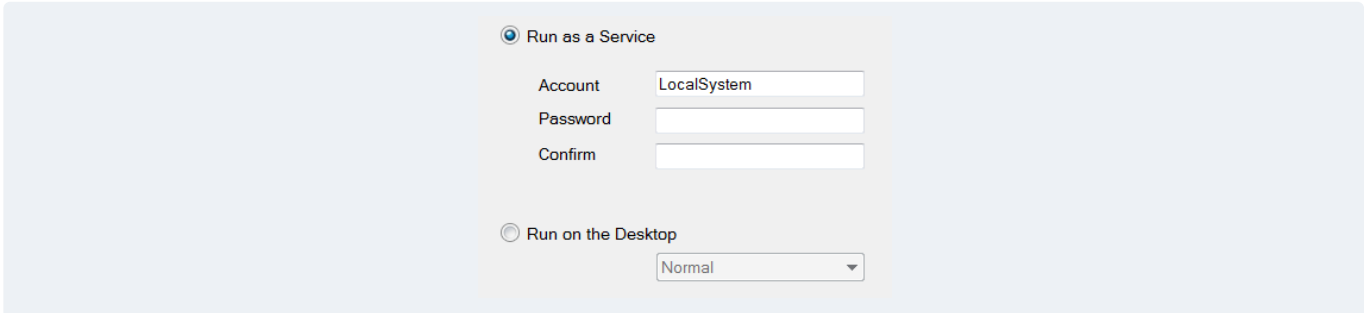
**XLReporter's** Scheduler can be installed as a Windows Service that automatically starts when the system is rebooted.

The advantage of a windows service is that it runs regardless of whether a user is logged in or not. This is the preferred way to start the Scheduler automatically.

## Setup

To set up the Scheduler to run as a Windows Service, from the **XLReporter Project Explorer**, under the **Project** tab, in the **Scheduler** section select **Designer**. Please note that in order to perform this you must either be logged on as a user with Administrator credentials or know an administrator account name and corresponding password.

In the **Schedule Designer** select **Scheduler, Setup**.



Run as a Service

Account

Password

Confirm

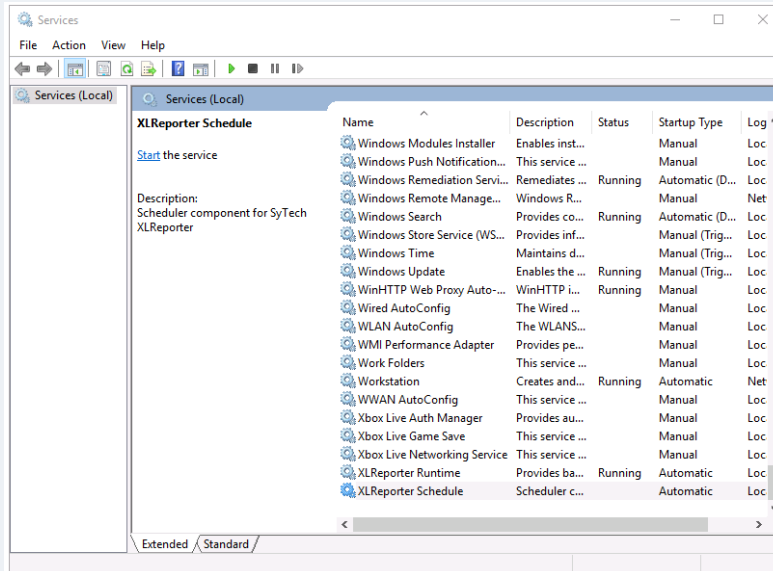
Run on the Desktop

Select **Run as a Service**.

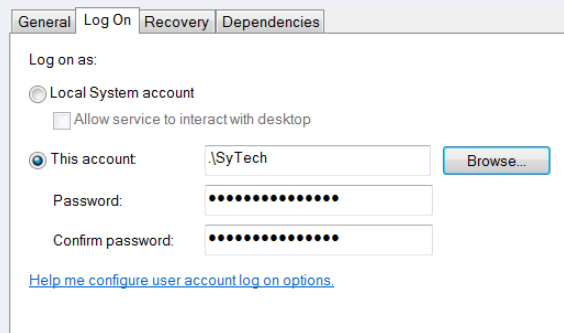
The **Account** settings define the user whose privileges are used by the service when it is running. By default this is set to *LocalSystem* which is a very low level built-in system account. This is suitable in most situations. However, if an action in the Scheduler requires specific rights like moving a report to a protected file server or accessing process data from a remote data server a specific user account may be necessary.

If the specific account has the Log on as a Service right it can be specified here. However, if it does not you should leave the **Account** as *LocalSystem* and click **OK**.

Then open the Windows **Control Panel, Administrative Tools, Services** (run as an Administrator).



Navigate to the **XLReporter Schedule** service and right-click, select **Properties**.



Under the **Log On** tab, select **This Account**. Use the **Browse** button to select the account name. Once selected, enter the **Password** and confirm it. Click **Apply** at the bottom to retain this change. When the service is started it will run under the new account. A specific **Account** should be an **Administrator** and must have a **Password**.

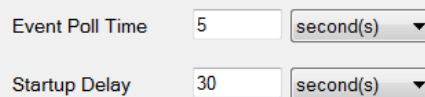
## Considerations and Limitations

### Event Triggers

If the Scheduler contains event triggers you should consider when the data source of the event triggers is started to make sure that the Scheduler does not attempt to connect to or read data from the data source before it is running.

To compensate for this, a **Startup Delay** can be configured so the Scheduler does not attempt to do anything right at startup.

To configure, in the **Schedule Designer** select **Scheduler, Settings**.



### Network Locations

If any action in the **Scheduler** specifies a network location the location must be specified with the UNC path. Mapped drives are not supported from Windows Services.

The format of a UNC path is \\Server\folder\folder

## An Application Shortcut in Windows Startup

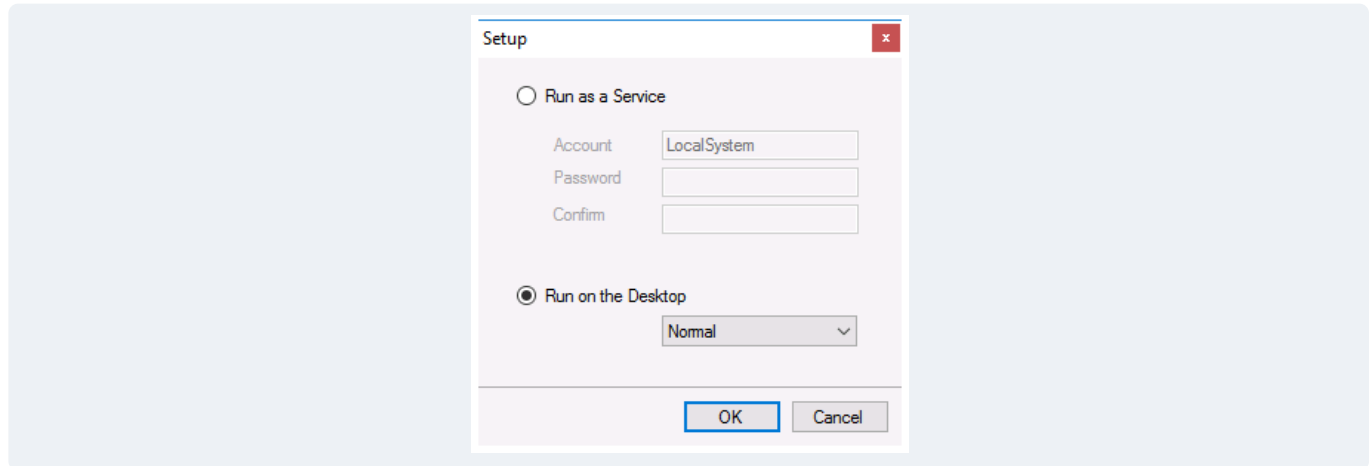
As an alternative to a Windows Service the Scheduler can be configured to run as a desktop application with a shortcut for the Scheduler application placed in the Windows Startup folder for all users.

In this scenario the Scheduler is started up once a user is logged into Windows. This should only be considered if the system is set up to automatically log in with a specific user and that is the only user that is logged into the system.

### Setup

#### Schedule Designer

To run on the desktop in the **Schedule Designer** select **Scheduler, Setup**.



Select **Run on the Desktop**.

There are 3 options available for this setting that define how the Scheduler window appears when it is started.

**Normal** means that the Scheduler window appears visible in the middle of the desktop when started. This is most useful when testing or troubleshooting the Scheduler as it displays all the actions and triggers along with the last time each action was executed.

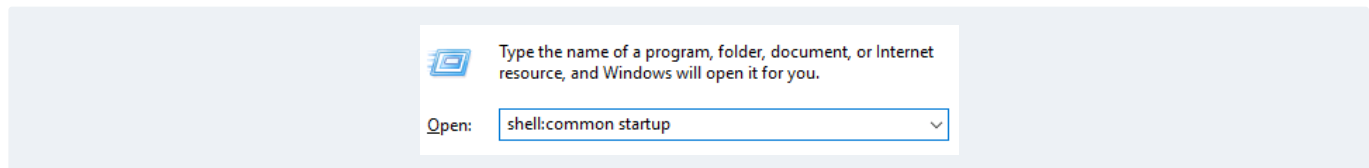
**Minimized** means that the Scheduler window appears visible but minimized on the taskbar when started. The icon on the taskbar can be clicked to view the Scheduler if needed.

**Background** means that the Scheduler window is invisible on the desktop.

#### Windows File Explorer

Note the following requires Administrator privileges.

To access the startup folder for all users, open a **Run** dialog by pressing the Windows key + r.



For **Open** specify *shell: common startup*. This opens the Windows File Explorer to the folder where shortcuts to applications can be placed that startup whenever Windows starts up and a user is logged in.

A shortcut to the **Scheduler Engine** has been provided from the Windows start menu. However, you cannot drag this shortcut directly to this folder. Instead, drag the shortcut to the desktop and then drag it again to the startup folder.

## As Part of the HMI Startup

If the Scheduler is such that it should not run unless the HMI is started up and the HMI is not running as a Windows Service, this is an option for starting the Scheduler automatically.

In this scenario the Scheduler should be set up to **Run on the Desktop**.

The syntax varies from HMI to HMI but basically a command should be put in to the Startup macro or script to run the application:

`C:\XLReporter\XLRschedule.exe`

Where `C:\XLReporter` is the folder where **XLReporter** is installed.