SCHEDULING AUTOMATED EXCEL REPORTS WITH DBBEAVER EE

Note: This cannot be done on the DBeaver Community edition. You need to use DBeaver Enterprise Edition. Before starting, make sure you are logged in to your BOX drive.

- 1. Copy the code for the query that you want to use to generate the report.
- 2. On DBeaver, on the tabs at the top, select Database Tasks Create new task

DBeaver Enterprise 22.3.0 - <idp_cornell></idp_cornell>	Scrip	ot-31			
File Edit Navigate Search SQL Editor	Dat	abase Window Help			
	¥+ 000 00	New Database Connection New Connection from JDBC URL Driver Manager		p_0	cornell ▼
Enter a part of object name here Finite Image: style="text-align: center;">Image: style="text-align: center;"/>Image: sty		Connect Invalidate/Reconnect Disconnect			
	D.	Disconnect All Disconnect Others Commit	Ctrl+Alt+Shift+K		
	Ľ,	Rollback Transaction mode	Ctrl+Alt+Shift+R		
	€)	Transaction log Pending transactions Read-only			
	Ø	Open Dashboard	Ctrl+Alt+Shift+B		
•	₩ ×	Tasks Tools	>	<u>€</u>	Create new task Database Tasks

3. On the screen that opens, enter a name for the task (and a description, if you like), select 'Data Export' and then click on 'Next'.

😮 Create a task							×
New task properties							
Set task name, type and input	t data						
 New task properties 	Task type						
 Create new task 	Name:	CRXX1 - Loans to t	he White House FY23				
	Description:						
	Task folder:						~
	V 🖻 Comm	non		Common databas	e tasks		^
	📇 Cor	mposite task		Task which consists of othe	er tasks		
		a compare		Compare data from two s	ources		
		a export		Data expo			
		a import		Data impo			
		L Script		Execute SQI			
		ell command		Executes shell con			
	v 🕸 Postgr			PostgreSQL databas			
	V 🕸 Too			PostgreSQL databas			
Save task		Analyze database		Analyze da	tabase		¥
	< Back		Next >	Proceed		Cancel	

4. On the Next screen, click on 'Add Query'

🕜 🕼 Create a task				—		×
Data export						
😵 No objects selected						
 New task properties Export tal 	es					
Data export						
Save task 문화	le Add Query .	. Edit	Remove			
<						
< B	ck	Next >	Proceed	Car	ncel	

5. Choose a source table (in this example, it is ldp_cornell) and click on 'OK'. It's also good to check the box for 'Show connected databases only' so that you can confirm you are connected to the database you are specifying.

Choose source table(s)		_		\times
Enter a part of object name here				₹
✓ ¹ Idp_cornell > □ Databases				
Show connected databases only				
	OK		Canc	el

6. The next screen that shows up will be a blank one that says 'SQL Preview' at the top. Paste your query into the space and click on 'OK'.

CX1 ans to the White Ho T li.loan_id, li.patron_group li.material_typ li.loan_date, CASE	_name,	
T Il.library_name li.loan_id, li.patron_group li.material_typ li.loan_date,	_name,	
T Il.library_name li.loan_id, li.patron_group li.material_typ li.loan_date,	_name,	
T ll.library_name li.loan_id, li.patron_group li.material_typ li.loan_date,	_name,	
<pre>ll.library_name li.loan_id, li.patron_group li.material_typ li.loan_date,</pre>	_name,	
<pre>ll.library_name li.loan_id, li.patron_group li.material_typ li.loan_date,</pre>	_name,	
<pre>ll.library_name li.loan_id, li.patron_group li.material_typ li.loan_date,</pre>	_name,	
li.loan_id, li.patron_group li.material_typ li.loan_date,	_name,	
li.patron_group li.material_typ li.loan_date,		
li.material_typ li.loan_date,		
li.loan_date,		
CASE		
	WHEN li.material_type_name IN ('Peripherals', Supplies', 'Umbrella', 'Locker Keys', '	Carrel
	WHEN li.material_type_name = 'Laptop' THEN 'Laptop'	
	WHEN li.material_type_name IS NULL AND li.loan_policy_name LIKE '3 hour%' THEN 'Eq	uipmen
	WHEN li.material_type_name IS NULL AND li.loan_policy_name LIKE '2 hour%' THEN 'Re	serve'
		eck_ou
	ELSE Regular' END AS collection_type,	
		-
		>
		<pre>WHEN li.material_type_name = 'Laptop' THEN 'Laptop' WHEN li.material_type_name IS NULL AND li.loan_policy_name LIKE '3 hour%' THEN 'Equ WHEN li.material_type_name IS NULL AND li.loan_policy_name LIKE '2 hour%' THEN 'ReyILL and BD below refers to items CUL patrons have borrowed from other institution WHEN (li.material_type_name ilike 'BD%'OR li.item_effective_location_name_at_check WHEN (li.material_type_name ilike 'LL1%' OR li.item_effective_location_name_at_check WHEN li.loan_policy_name LIKE '%hour%' THEN 'Reserve' WHEN li.loan_policy_name SIMLLAR TO '(l]2)%day%' THEN 'Reserve' ELSE 'Regular' END AS collection_type, OK</pre>

7. For the **Data export** screen that follows, click on 'Next'. You can also edit your query from this screen.

Create a task				I X
Configure Data export setting	IS			
 New task properties 	Export tables			
💙 Data export	Object			Data So
	CRXX11Loans to the White House FY23111SELECT 1 II.library_name,1	li.loan_id,¶	- li	ldp_cor
	<			2
Save task	Add Table Add Query Edit Remove			
	< Back Next > Proceed	C	ancel	

8. On the 'Export target' screen that follows, make sure you choose XLSX format, and then click on 'Next'.

p			
🔞 Data Transfer - [CRXX1 - Lo	oans to the White House FY	[23]	— 🗆 X
Transfer targets			
Configure data transfer targe	t type and format		
 Edit task properties Data export Export target Extraction settings Format settings 	Database SV DbUnit M HTML SON	Database table(s) Export to CSV file(s) Export to DbUnit XML file(s) Export to HTML file(s)	Exported
Output Confirm	M+ Markdown SQL Source code	Export to JSON file(s) Export to markdown file(s) Export to SQL INSERT statements Export to source code array	
	T TXT M XML XLSX	Export to plain text format Export to XML file(5) Export to XLSX (Excel spreadsheet) format	
Save task 📇			<
Save task 🚨	< Back	Next > Proceed	Cancel

9. On the 'Extraction settings screen' that follows, the 'extract type' should be 'Single query', and then click on 'Next'.

D	🔞 Data Transfer - [CRXX1 - Lo	oans to the White Hous	e FY23]					×
	Extraction settings							
9	Database table(s) extraction s	settings						
Ð	 Edit task properties Data export Export target 	Progress Maximum thread:	s: 1					
	 Extraction settings Format settings Output Confirm 	Extract type: Segment size: Open new con						
Θ		Select row cour Fetch size:	nt 10000					
		Variables Configur						
⊜ a								
e	Save task 📕							
e D D D D								
D		< Back	Ne	t>	Proceed	Car	ncel	

10. On the Format settings screen that follows, click on 'Next', unless you want to change some settings.

🔞 Data Transfer - [CRXX1 - Lo	oans to the White House FY23]			_		×
Format settings						
File format settings						
 Edit task properties Data export Export target Extraction settings Format settings Output 	Binaries: Inline		Edit			
Confirm	Configure Columns					
	Exporter settings					
	Name	Value				
	File extension	xlsx				
	Row number(s)	[]				
	Border style NULL string	THIN				
	Header format	true				
	Header row font	BOLD				
	Boolean string TRUE	true				
	Boolean string FALSE	false				
	Export SQL	[]				
	Split SQL Text	[]				
	Max row on sheet	1,048,575				
	Column group	0				
	Excel date format	m/d/yy				
Save task 📇	Append strategy	create new sheets				
	1					
	< Back	Next >	Proceed	Car	ncel	

11. The 'Output' screen is where things can go WRONG, so please check your settings carefully.

- a. Directory this is your BOX folder where the report will be sent
- b. File name pattern the default is the last file name, so make sure you update this each time
- c. File name conflict behavior settings this setting is almost hidden. Make sure you choose 'Overwrite', else each day's updated report will land in your folder with a different filename, in the form of numbers appended to the end of the file name. (Do not select 'Overwrite' if you need to keep individual daily files.) Overwriting is vital if you are using these EXCEL files as input for a Tableau dashboard.

🔞 Data Transfer - [CRXX1 - Lo	ans to the White House	FY23]				_		×
Output								
Configure export output para	meters							
Edit task properties Data export Export target Extraction settings Output Confirm	General Copy to clipboa Directory: File name pattern: Encoding: Compress Split output file File name conflic On object data file Ask Append Autofix name Overwrite You can use va Results Show finish mes Show exported f Execute process Send results by E	C:\Users\vp25\B CRXX1 Loans to UTF-8 le file Maximum file siz t behavior setting a name conflict riables in output p sage ile in system explo <u>Configure</u>	ze: 10000000 JS On blob value f Ask Autofix nam Overwrite parameters.	FY23 amp pattern: y	yyyMMddHHmn		Global Se	
2								
	< Back	1	Next >	Proce	ed	Ca	ncel	

										_
	🔞 Data Transfer - [CRXX1 - Loa	ans to the White House FY23]					_		Х	
	Confirm									
)	Check results									
	 Edit task properties 	Objects								
	 Data export Export target 	Source Container	So	ource	Target Container	Target				
	 Extraction settings 	Idp_cornell	₽	CRXX1¶Loans to	C:\Users\vp25\Box\	🗶 CF	XX1 Loan	s to the .		
	 Format settings 								_	
	✓ Output✓ Confirm									
•									_	
									_	
		Source settings	-1	arget settings						
⇒ ⊔		Table settings: Open new conne Extract type: SIN(Select row count: Selected rows on Selected column:		File name pattern: C On object data file n	vp25\Box\Tableau Dashboar RXX1 Loans to the White Ho ame conflict: Overwrite ame conflict: Autofix name			a_Downl	c	
				Encoding: BINARY XLSX settings:						
	Save task								¥	
)										
þ		< Back		Next >	Proceed		Cano	:el		

12. On the following 'Confirm' screen, click on 'Proceed'.

13. Now you will be brought back to the main DBeaver screen from which you run queries, and on the bottom right, you should see the 'success' message.

					· · · ·
					🚯 🕸 📇 🔂 🕨 🕴 🗖
			Ta	sk executions	s: type a part of error message
Project		^	T	Duration	Result
General				859ms	Success (rows fetched: 9734, queries: 1)
General			1		
General					
General					
General					
General		۷.			
	>		<		>
				EST en	

Your report has been created and sent to your BOX folder, please make sure it is there.

14. <u>Next, you need to set up a daily update of this task</u>. On your main Dbeaver page (from where you run queries), right-click on the task you just created. (If you can't see your tasks, click on the 'Window' tab on the top panel in DBeaver, and select 'Database Tasks'.)

If you cannot access Scheduler, please ask Desktop Services to enable this functionality.

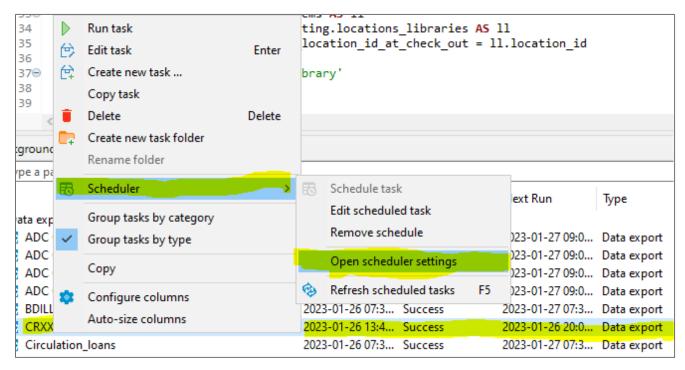
Right-click on your task and select 'Scheduler' –'Schedule task'.

33⊕ FROM folio_repor 34 LEFT J01 35 ON li.it	Copy Delete	isk e new task task			AS 11 = ll.location_id	
S9		uler	>	FR3	Schedule task	
Background Tasks Background Tasks Tasks: type a part of task name here	Group	tasks by category			Edit scheduled task Remove schedule	
Name ADC CR184A loans and renewals	Сору	tasks by type			Open scheduler settings	Project General
ADC CR193 filled delivery requests BDILL from CUL to other univs	•	gure columns size columns		B	Refresh scheduled tasks F5 2023-01-27 07:3 Data expor	General t General
CRXX1 - Loans to the White House		2023-01-20 13.4 3	Juccess		Data expor	t General
Circulation_loans		2023-01-26 07:3 S	Success		2023-01-27 07:3 Data expor	t General
Circulation_renewals		2023-01-26 07:3 S	Success		2023-01-27 07:3 Data expor	t General
📧 Filled requests Contactless and Circ d	desk pickup	2023-01-26 07:3 S	Success		2023-01-27 07:3 Data expor	t General
ILLBD borrowed from other univs		2023-01-26 07:3 S	Success		2023-01-27 07:3 Data expor	t General
Physical materials counts		2022-10-19 16:3 S	Success		Data expor	t General
📧 Withdrawn items		2022-10-28 15:5 S	Success		Data expor	t General
IoansrenewalsCombined		2023-01-26 09:0 S	Success		2023-01-27 09:0 Data expor	t General
E test1		2023-01-25 10:3 S	Success		Data expor	t General

15. Choose the frequency and start time and click 'Schedule'.

🖻 Schedule task	'CRXX1 - Loans to the White House FY23'		×
Scheduler parar	meters		
Set task 'CRXX1 -	- Loans to the White House FY23' scheduler parameters		
Scheduler: Loca	al Windows Task Scheduler \sim		
Frequency	Settings		
O Minutely	Start time: 1/26/2023 🖨 8:00:00 PM 🖨		
O Hourly	Recur every 1 days		
 Daily Weekly Monthly 			
One Time			
	Schedule	Cancel	

16. <u>Right-click AGAIN on the task</u>, and this time you will see a somewhat different menu. Select 'Scheduler' – Open scheduler settings'.



17. Now you will see the Task Scheduler view. Click on the drop-down under Task Scheduler (left pane), and click on 'DBeaver'. In the Middle pane, you will see a list of DBeaver tasks. Right-click on the task you want to schedule, and choose 'Properties'.

Action View Help							
🔷 📧 🛛 🖬							
Task Scheduler (Local)	Name Status	Triggers	Next Run Time	Last Run Time	Last Ru	Act	ions
Task Scheduler Library	ADC CR174(Ready				The op	DBe	aver
DBeaver Intel	ADC CR174(Ready				The op	1	Create Basic Task
> 📋 Ivanti	(ADC CR184 Ready	At 9:00 AM every day	1/27/2023 9:00:00 AM	1/26/2023 9:00:02 AM	The op		Create Task
> 🧾 Microsoft	ADC CR193 f Ready	At 9:00 AM every day	1/27/2023 9:00:00 AM	1/26/2023 9:00:02 AM	The op		
📔 Mozilla	BDILL from Ready				The op		Import Task
	Circulation_I Ready				The op		Display All Running Tasks
	Circulation_r Ready				The op		Disable All Tasks History
	CRXX1 - Loa Ready			11/30/1999 12:00:00 AM	The tas	1	New Folder
	Filled reques Ready ILLBD borro Ready			1/26/2023 7:30:01 AM 1/26/2023 7:30:01 AM	The op The op	×	Delete Folder
	loansrenewa Ready			1/26/2023 9:00:02 AM	The op		View
		Export		.,,		Q	Refresh
	<	Properties			>		
	General Triggers Actions	Delete	story			?	Help
	Name: CRXX1 - Loa		erizo (9dbefdfa-9be7-4	9f7-a919-a0cec0cfa5dd)		Sele	ected Item
	Location: \DBeaver						Run
	Author:					н.	End
	Description: DBeaver Ent	i					Disable
	Description: Deaver En	terprise					Export
							Properties
						×	Delete
						?	Help
	Security options						
	When running the task, u	ise the following user	account:				
	vp25						
	Run only when user is	logged on					
	Run whether user is lo	ogged on or not					
	Do not store pass	word. The task will or	ly have access to local r	esources			
	Run with highest priv	ileger					

18. Now choose 'Run whether user is logged on or not' and click on 'OK'.By doing this, your task will run as long as the computer is running, whether you are logged on or not. Remember that the computer has to be ON.

General	Trigge	rs Actions	Conditions	Settings	History		
Name:	(CRXX1 - Loar	is to the Whit	e House F	Y23 (9dbefdfa-9be7-49f7-ag	919-a0cec0cfa5dd)	
Location	n: \	DBeaver					
Author:	(CORNELL\vp	25				
Descript	ion:	DBeaver Ente	erprise				
C	_ 						
-Security							
	runnin	g the task, us	e the followin	ng user aco	count:	a 11	_
vp25						Change User	
⊖ Run	n only v	vhen user is l	ogged on				
Rur	n wheth	ner user is log	jged on or no	t			
	Do not	t store passw	ord. The task	will only h	nave access to local compu	ter resources.	
Run	n with ł	nighest privile	eges				
			_				_
Hidd	en	Configu	re for: Wind	lows Vista	™, Windows Server™ 2008		

19. You will be prompted for your netid password, which you need to enter.

Task Scheduler		?	×
Enter user account i	nformation for running th	is task.	
User name:	💆 vp25	<u> </u>	×
Password:	•••••		
	ОК	Can	cel

20. Once you click 'OK' you are all done. The screen will revert back to the previous one, and you will see a greyed-out option that shows it will run whether you are logged on or not.

CKXX1 - Loa Keady At 8:00 PM every day 1/26/2023 8:00:00 PM 11/30/1999 12:00:00 AM Ine ta: Image: Filled reques Ready At 8:30 AM every day 1/27/2023 7:30:00 AM 1/26/2023 7:30:01 AM The op Image: ILLBD borro Ready At 8:30 AM every day 1/27/2023 7:30:00 AM 1/26/2023 7:30:01 AM The op Image: ILLBD borro Ready At 8:30 AM every day 1/27/2023 7:30:00 AM 1/26/2023 7:30:01 AM The op Image: ILLBD borro Ready At 9:00 AM every day 1/27/2023 9:00:00 AM 1/26/2023 9:00:02 AM The op Image: Im	 New Folder Delete Folder View Refresh Help
Name: CRXX1 - Loans to the White House FY23 (9dbefdfa-9be7-49f7-a919-a0cec0cfa5dd)	Selected Item
Location: \DBeaver Author: CORNELL\vp25	 Run End
Description: DBeaver Enterprise	Disable Export
	 Properties Delete
	Help
Security options	
When running the task, use the following user account:	
vp25	
Run only when user is logged on Run whether user is logged on or not	
Do not store password. The task will only have access to local resources Run with highest privileges	
Hidden Configure for: Windows Vista™, Windows Server™ 2008	

- 21. You can now close the scheduler window.
- 22. Some useful checks to make on a regular basis:
 - a. Make sure you are logged into BOX from the computer that hosts your DBeaverEE.
 - b. Check your BOX folder to make sure the files are being updated according to your schedule.

23. You can DELETE or EDIT your task anytime from the Database Tasks pane, by rightclicking on the task.

loans_renewal_dates		19	WHEN (li.ma	aterial type name	ilike 'ILL'	%' OR li.item ef	fective locat	tion name at check o	
		20							
locations_libraries		21		an policy name L1					
locations_service_points		22 WHEN li.loan_policy_name SIMILAR TO '(1 2)%day%' THEN 'Reserve'							
po_acq_unit_ids		23	ELSE 'Regul	lar' END AS colle	ction_type,				
po_instance		24							
po_lines_cost		250	CASE WHEN						
po_lines_details_subscription		26 27	<pre>date_part ('month' THEN concat ('FY '</pre>			data + 1			
po_lines_er_mat_type		28	ELSE concat ('FY '						
po_lines_eresource		29	END as fiscal year		, <u>, , , , , , , , , , , , , , , , , , </u>	acc))			
po_lines_locations		30	2						
po_lines_phys_mat_type		31							
po_lines_physical		32							
po lines tags		330 FROM folio_reporting.loans_items AS li				vc 11			
po lines vendor reference numbers			 34 Left Jun tollo_reporting.locations_libraries AS II 35 ON li.item_effective_location_id_at_check_out = ll.location_id 						
po_ongoing		26							
po_organization									
po prod ids		38	3						
requests items		39							
requests_items	~	<							
State addresses		m Dealers and Tea	ks 📇 Database Tasks - General 🗙						
📩 🛶 👍 😅 🖻									
· · · · · · · · · · · · · · · · · · ·		Tasks: type a part of	task name here						
DataSource	<u> </u>	Name		Last Run	Last Result	Next Run	Туре	Project	
		✓ 🖪 Data export							
7_22.sql ldp_cornell		ADC CR1	74(1) BD ILL counts	2023-01-26 09:0	Success	2023-01-27 09:0	Data export	General	
ewals_11_02_22 Idp_cornell			74(2) BD ILL counts	2023-01-26 09:0		2023-01-27 09:0		General	
ldp_cornell			34A loans and renewals	2023-01-26 09:0		2023-01-27 09:0		General	
.sql ldp_cornell_test			33 filled delivery requests	2023-01-26 09:0		2023-01-27 09:0		General	
11_16_22.sql ldp_cornell			m CUL to other univs	2023-01-26 09:0				General	
urchase request: ldp_cornell						2023-01-27 07:3			
L to others.sql dp cornell			oans to the White House FY23	2023-01-26 13:4		2023-01-26 20:0		General	
22 sal Ida cornell		📴 Circulatio	n_loans	2023-01-26 07:3	Success	2023-01-27 07:3	Data export	General	

THE END

Question, comments, or suggested corrections/changes: Please contact Vandana Shah at vp25.

02/02/2023