



ENTRINSICON
LEVEL UP!

September 26th-29th, 2023
Raleigh, NC

Using Jobs to Enhance Business Processes

Robin Lamb, VP Informer Client Services, Entrinsik Inc

- 1 Refreshing Data
- 2 Modifying and Filtering Data
- 3 Distributing Data
- 4 Customizing Email
- 5 Error Reporting

Refreshing Data

Jobs refresh datasets which in turn refreshes all content built from datasets

Add multiple datasets to one job

Have the choice not to refresh

Take a snapshot on job run

Jobs refresh datasets which in turn refreshes all content built from datasets

Schedule

Automatically run the Job on a recurring schedule

Enabled

Interval
Weekly

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

at 10:25 AM

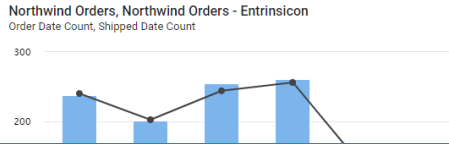
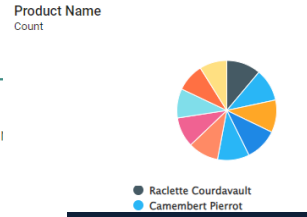
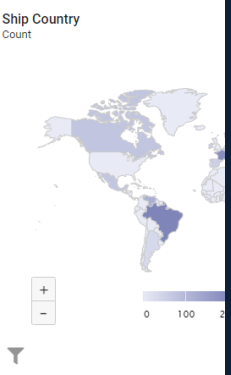
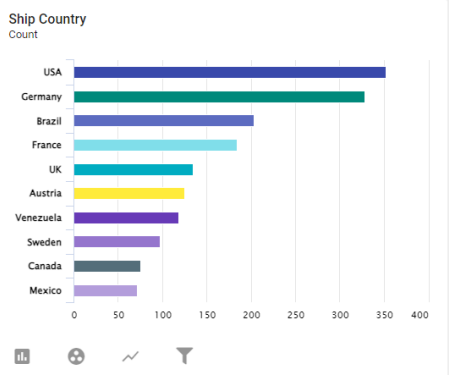
Next fire times

- Fri, August 11, 2023 at 10:25 AM GMT (Fri, August 11, 2023 at 06:25 AM EDT)
- Fri, August 18, 2023 at 10:25 AM GMT (Fri, August 18, 2023 at 06:25 AM EDT)
- Fri, August 25, 2023 at 10:25 AM GMT (Fri, August 25, 2023 at 06:25 AM EDT)

Salesperson

Sum Order Amount

Salesperson	Sum Order Amount
Margaret Peacock	250,187.45
Nancy Davolio	202,143.71
Janet Leverling	213,051.30
Laura Callahan	133,301.03
Andrew Fuller	177,749.26
Robert King	141,295.99
Michael Suyama	78,198.10
Steven Buchanan	75,567.75
Anne Dodsworth	82,964.00
Total	1,354,458.59



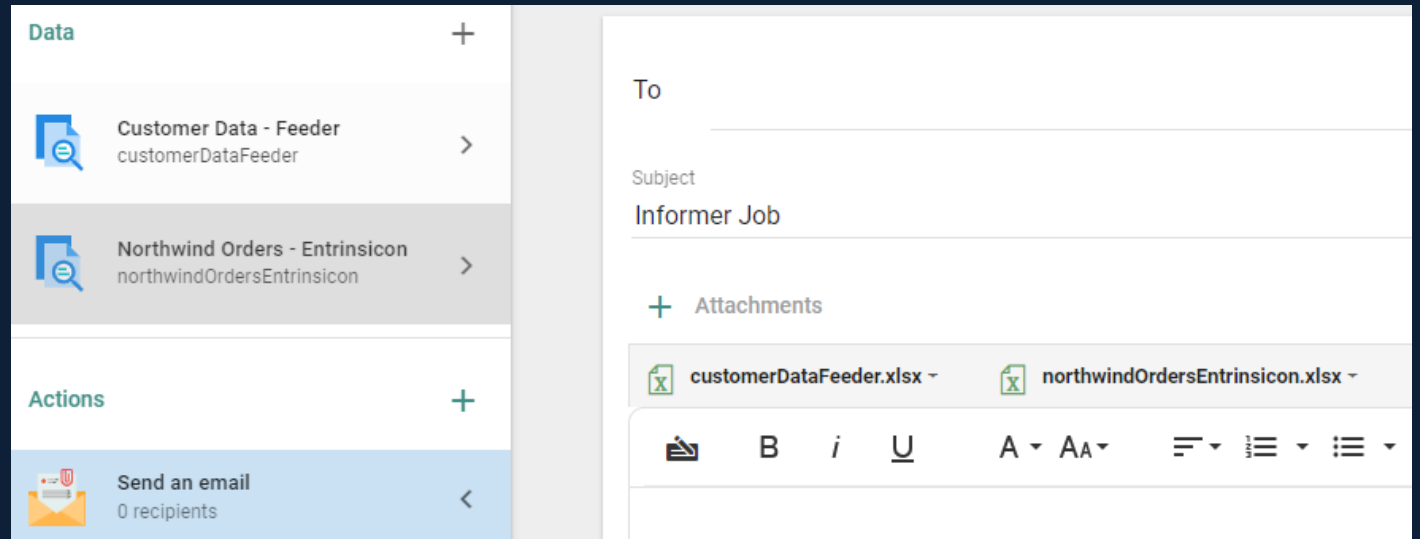
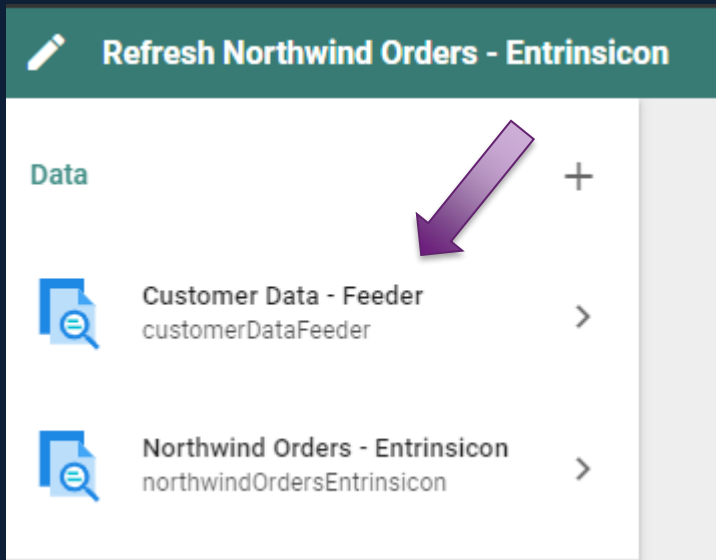
Dataview - Entrinsicon

Home / Reports / Dataview - Entrinsicon

Order Date	Salesperson	Product Name	Order Detail Quantity	Order Detail Unit Price	Order Amount
7/4/1996	Steven Buchanan	Queso Cabrales	12	14.00	168.00
7/4/1996	Steven Buchanan	Singaporean Hokkien Fried Mee	10	9.80	98.00
7/4/1996	Steven Buchanan	Mozzarella di Giovanni	5	34.80	174.00
7/5/1996	Michael Suyama	Tofu	9	18.60	167.40
7/5/1996	Michael Suyama	Manjimup Dried Apples	40	42.40	1,696.00
7/8/1996	Margaret Peacock	Jack's New England Clam Chowder	10	7.70	77.00
7/8/1996	Margaret Peacock	Manjimup Dried Apples	35	42.40	1,484.00
7/8/1996	Margaret Peacock	Louisiana Fiery Hot Pepper Sauce	15	16.80	252.00
7/8/1996	Janet Leverling	Gustaf's Knäckebröd	6	16.80	100.80
7/8/1996	Janet Leverling	Ravioli Angelo	15	15.60	234.00
7/8/1996	Janet Leverling	Louisiana Fiery Hot Pepper Sauce	20	16.80	336.00
7/9/1996	Margaret Peacock	Sir Rodney's Marmalade	40	64.80	2,592.00
7/9/1996	Margaret Peacock	Geltoost	25	2.00	50.00
7/9/1996	Margaret Peacock	Camembert Pierrot	40	27.20	1,088.00

Add Multiple Datasets to one Job

- Allows user to send multiple attachments on one email
- Update multiple datasets in order of operation (one dataset might be feeding into another)



Choose to Refresh or Not

- Need data to stay static but attach to email
- Take snapshot of data during job run

Refresh on Job run

Take Snapshot on Job run

TAKE A NEW SNAPSHOT

Show

Current Dataset results

Snapshots

Most recent

Choose specific Snapshots

Search

<input type="checkbox"/>	Data from ↓	Label
<input type="checkbox"/>	Aug 4, 2023 at 8:22 AM	Northwind Orders - Entrinsicon_16

Modifying and Filtering Data

Add filters to dataset or query within job

Use Date Keywords or Date Relative to Now Filters

Hide fields

Format fields and data

Group and add aggregates to summarize data

Add Filters

- Add Filters to Dataset inside the job
- Use Date Keyword filters to automate weekly or monthly reporting

The screenshot shows a filter configuration window for 'Employee Last Name is Buchanan'. On the left, there are options for 'Include' and 'Distinct values', a 'Show selected items only' checkbox, and a search bar. Below the search bar, a list of names with counts is shown: Buchanan (117), Callahan (260), Davolio (345), and Dodsworth (107). The 'Buchanan' entry is selected. On the right, a table titled 'Add Group' shows columns for 'Employee First Name' and 'Employee Last Na...'. The table contains 9 rows, all with 'Steven' in the first column and 'Buchanan' in the second column.

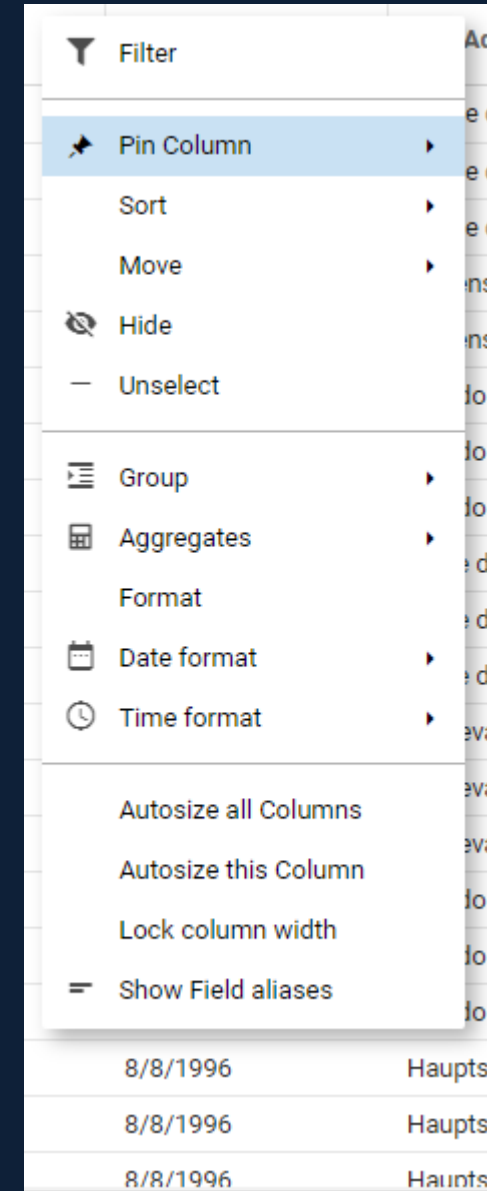
Employee First Name	Employee Last Na...
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan
Steven	Buchanan

The screenshot shows a date filter configuration window for 'Order Date is in past 30 days'. The filter is set to 'Include' and 'Date relative to now'. The time range is 'Past' for '30' 'Days'.

The screenshot shows a date keyword filter configuration window for 'Order Date is on or after MONTH_BEGIN'. The filter is set to 'Include' and 'Date Keyword'. The time range is 'on or after' for 'MONTH_BEGIN'.

Format Fields in Jobs

- Hide fields you don't need to exported format
- Add Sorting
- Customize formats for date or numeric fields



Add Grouping and Aggregates to Summarize Data

- Group Data by fields
- Add Aggregates
- Toggle to Summary mode

+ Filter

Employee Last Name Add Group

Group	Snapshot	Order Date	Required Date
> Peacock (420)			
> Davolio (345)			
> Leverling (321)			
> Callahan (260)			
> Fuller (241)			
> King (176)			
> Suyama (168)			
> Buchanan (117)			
> Dodsworth (107)			

Summary Only Columns Aggregates

Search Fields

All Text Number Date

Clear All Reset

- Order Amount (6)
 - Average
 - Count
 - Count Distinct
 - Maximum
 - Minimum
 - Sum
- Order Detail Quantity (6)
 - Average
 - Count

2 Items selected CANCEL APPLY

+ Filter

Employee Last Name Add Group Summary Only

	Order Detail Quantity	Order Amount
Employee Last Na...	Sum	Sum
Peacock	9,798	\$250,187.45
Davolio	7,812	\$202,143.71
Leverling	7,852	\$213,051.30
Callahan	5,913	\$133,301.03

Distributing Data

Email attachments

Burst Email – User Data Only

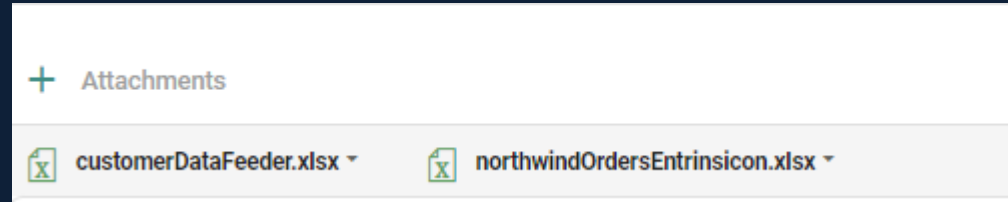
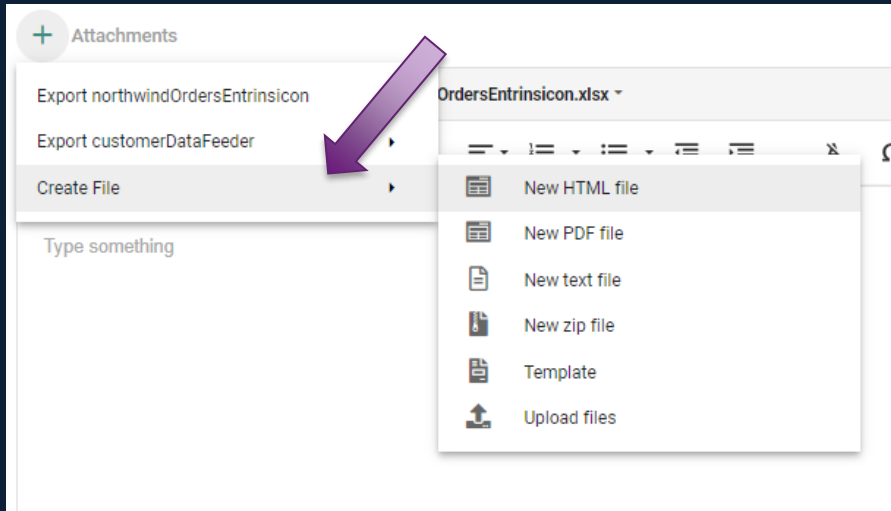
SFTP


Save to a Mapped Drive

Templates

Email Attachments

- Add multiple attachments from multiple queries
- Add other saved forms to email
- Create file on the fly
- Modify the pdf attachment



Attachment - northwindOrdersEntrinsicon.pdf 

PDF Export of Dataset Northwind Orders - Entrinsicon

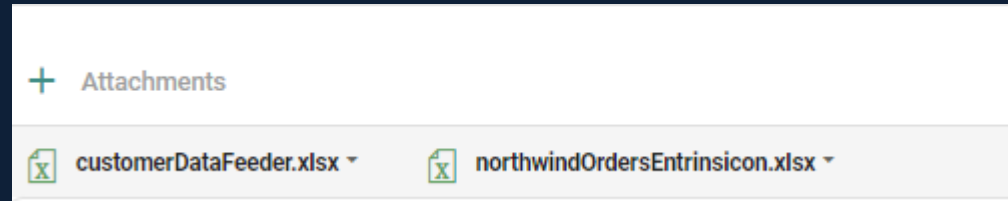
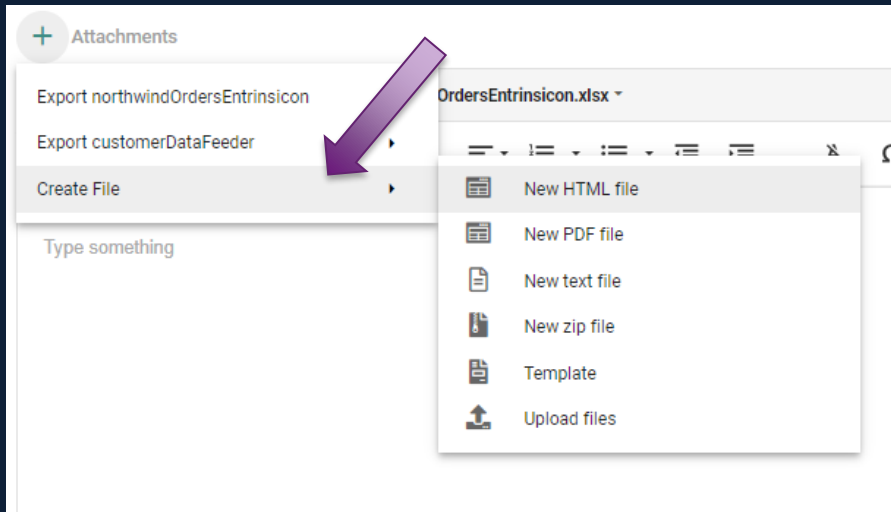
DOCUMENT **COLUMNS**

If the columns cannot fit on the page size selected, they will be truncated.
[Select All](#) [Clear All](#)

Name	Width Setting	Width Amount	Width Type
<input type="checkbox"/> Employee First Name	Fixed	166	px
<input type="checkbox"/> Employee Last Name	Auto		
<input checked="" type="checkbox"/> Order Amount	Auto		
<input checked="" type="checkbox"/> Order Date	Fixed	116	px
<input checked="" type="checkbox"/> Product Name	Auto		
<input checked="" type="checkbox"/> Order Detail Quantity	Auto		
<input checked="" type="checkbox"/> Required Date	Auto		
<input checked="" type="checkbox"/> Salesperson	Auto		
<input checked="" type="checkbox"/> Ship Address	Auto		
<input checked="" type="checkbox"/> Ship City	Auto		

Burst Email

- Add multiple attachments from multiple queries
- Add other saved forms to email
- Create file on the fly
- Modify the pdf attachment



Attachment - northwindOrdersEntrinsicon.pdf
PDF Export of Dataset Northwind Orders - Entrinsicon

DOCUMENT **COLUMNS**

If the columns cannot fit on the page size selected, they will be truncated.
[Select All](#) [Clear All](#)

Name	Width Setting	Width Amount	Width Type
<input type="checkbox"/> Employee First Name	Fixed	166	px
<input type="checkbox"/> Employee Last Name	Auto		
<input checked="" type="checkbox"/> Order Amount	Auto		
<input checked="" type="checkbox"/> Order Date	Fixed	116	px
<input checked="" type="checkbox"/> Product Name	Auto		
<input checked="" type="checkbox"/> Order Detail Quantity	Auto		
<input checked="" type="checkbox"/> Required Date	Auto		
<input checked="" type="checkbox"/> Salesperson	Auto		
<input checked="" type="checkbox"/> Ship Address	Auto		
<input checked="" type="checkbox"/> Ship City	Auto		

SFTP – Import Data from One System to Another

FTP Connection

FTP

Host	Port
localhost	21

Remote Directory

Requires password

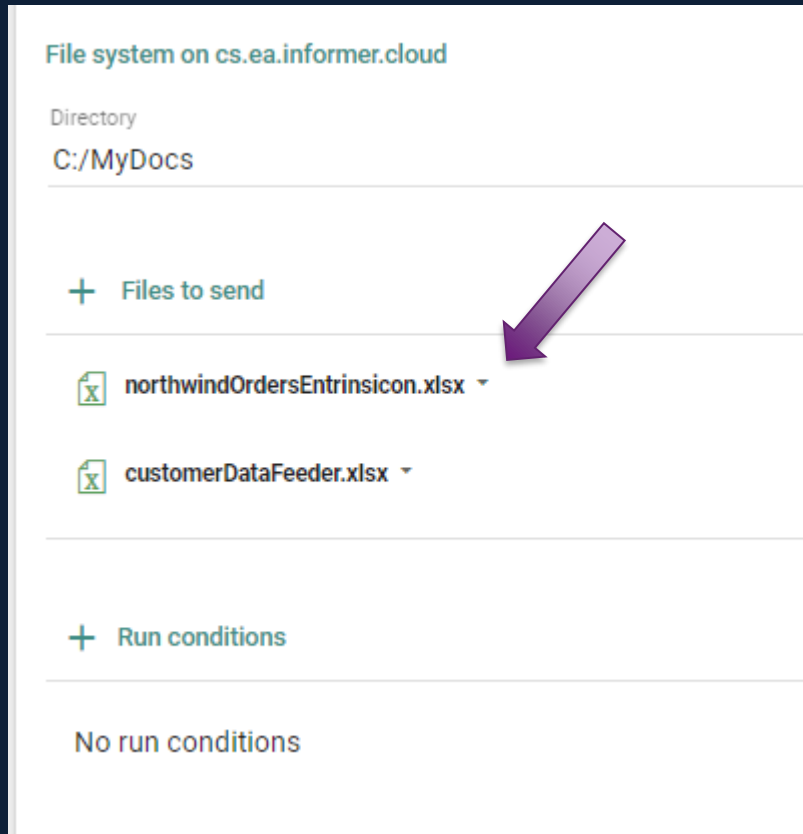
+ Files to send

No Attachments have been added

+ Run conditions

Northwind Orders - Entrinsicon: 1 Record

Save to a Directory



- Save to a shared password protected directory instead of sending via email
- Save as a new file or overwrite at runtime
- Save more than one file at a time

Automate Templates

Customizing Email

Customize Email with Logos

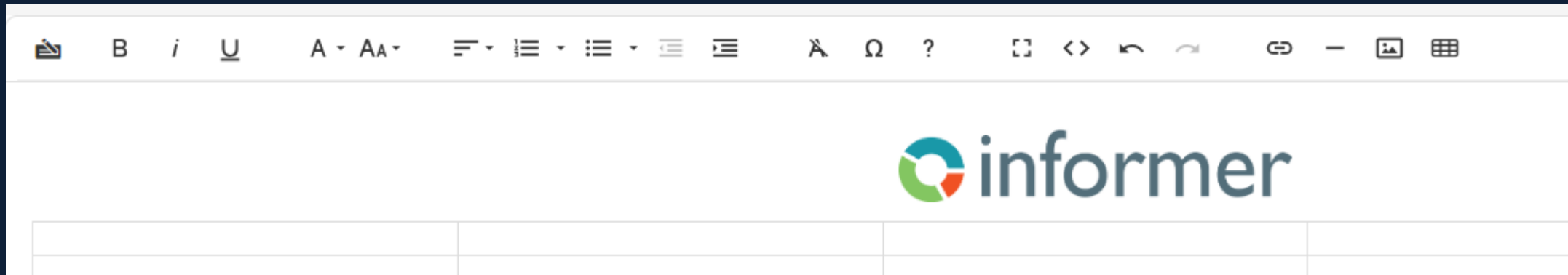
Add User Fields to populate text

Add tables to email

Use aggregate values to summarize data

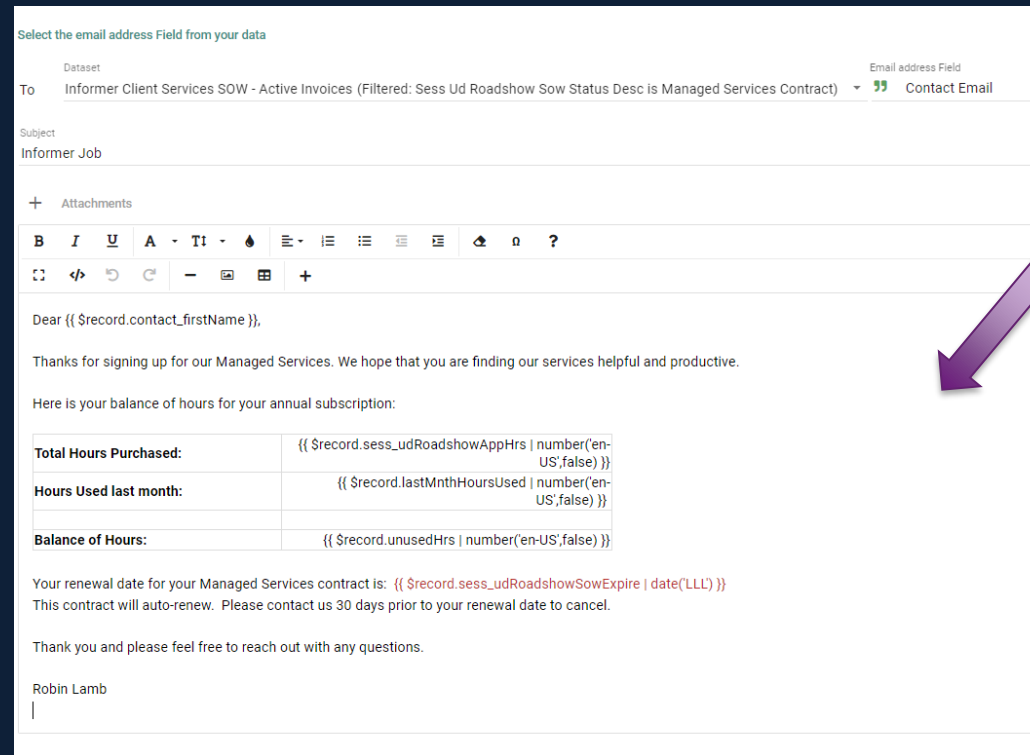
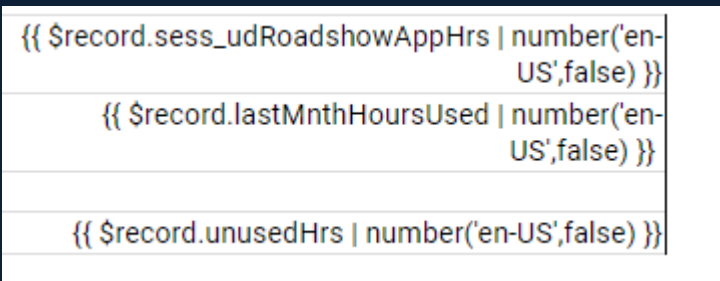
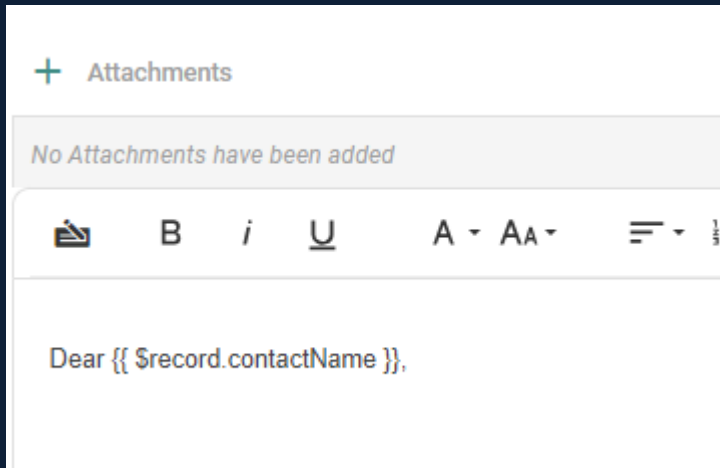
Include Entire Data Results

Customize Email with Logos



Add User Fields and Tables to Customize Email Body

- Choose User fields to auto-populate Burst emails
- Add table to email to create attractive formats
- Add aggregated data fields to summarize metrics



Export Entire Data Results in Email



Customer Data - Feeder
customerDataFeeder

Northwind Orders - Entrinsicon
northwindOrdersEntrinsicon

showColumnHeaders:true, fontName: "Roboto"

Information
Count
Count Distinct
Full Export

```

{{ customerDataFeeder|htmlDataTable( { columns: ["address","city","companyName","contactName","contactTitle","country","customercustomerdemo_customerId","customercustomerdemo_customerType","customerId","fax","phone","postalCode","region"],
showColumnHeaders:true, fontName: "Roboto", fontSize: 10, showLogoHeader: true, applyFormatting: true } ) | safe }}
    
```

Insert

HTML Data Table

DOCUMENT **COLUMNS**

Select All Clear All

Name

- Employee First Name
- Employee Last Name
- Order Amount
- Order Date
- Product Name
- Order Detail Quantity
- Required Date
- Salesperson

CANCEL APPLY

📧 Reply Reply All Forward 📧 ⋮

Tue 8/8/2023 5:52 PM

🔗 If there are problems with how this message is displayed, click here to view it in a web browser.

Address	City	Company Name	Contact Name	Contact Title	Country	Customercustomerdemo Customer	Customercustomerdemo Customer Type	Customer	Fax
90 Wadhurst Rd.	London	Seven Seas Imports	Hari Kumar	Sales Manager	UK			SEVES	(171) 55 5646
89 Chiaroscuro Rd.	Portland	Lonesome Pine Restaurant	Fran Wilson	Sales Manager	USA			LONEP	(503) 55 9646
12 Orchestra Terrace	Walla Walla	Lazy K Kountry Store	John Steel	Marketing Manager	USA			LAZYK	(509) 55 6221
89 Jefferson Way Suite 2	Portland	The Big Cheese	Liz Nixon	Marketing Manager	USA			THEBI	
Grenzacherweg 237	Genève	Richter Supermarkt	Michael Holz	Sales Manager	Switzerland			RICSU	
Vinbæltet 34	Kobenhavn	Simons bistro	Jytte Petersen	Owner	Denmark			SIMOB	31 13 35
Torikatu 38	Oulu	Wartian Herkku	Pirkko Koskitalo	Accounting Manager	Finland			WARTH	981-443655
120 Hanover Sq.	London	Around the Horn	Thomas Hardy	Sales Representative	UK			AROUT	(171) 55 6750
Taucherstraße	Cunewalde	QUICK-Stop	Horst Kloss	Accounting	Germany			QUICK	

Why are Jobs so important?

Automates processes within your institution

Automates moving importing and exporting data

Customizable output

One source – multiple processes

Clean and consistent data

Live Demo



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Raleigh, NC

Q & A



ENTRINSICON
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Thank You