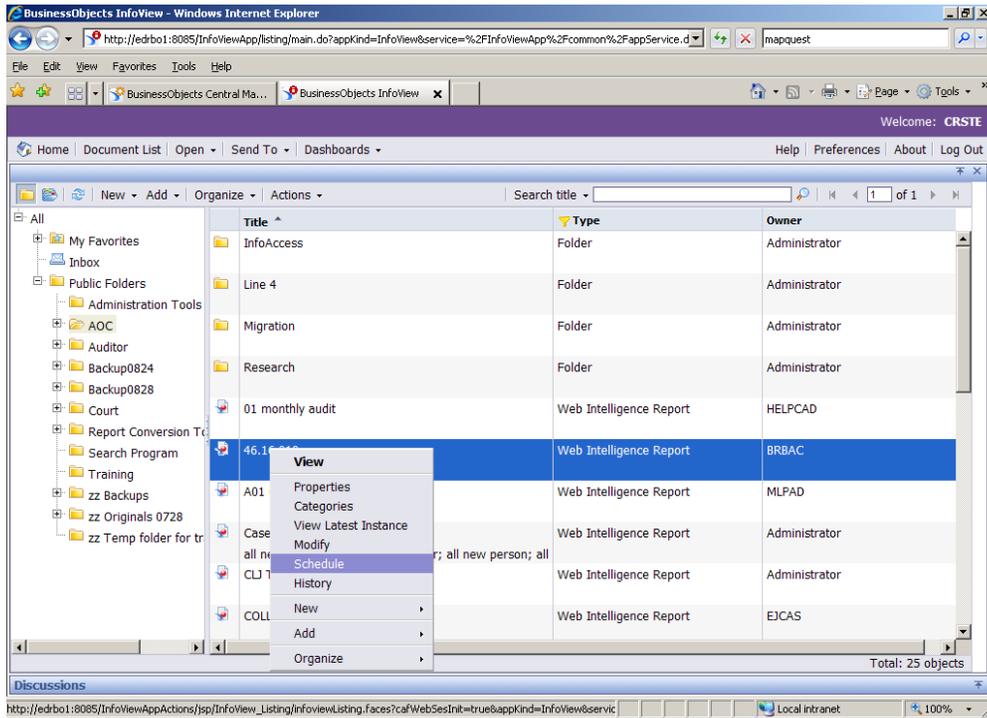


BOXI Output Scheduled to a File or FTP Location

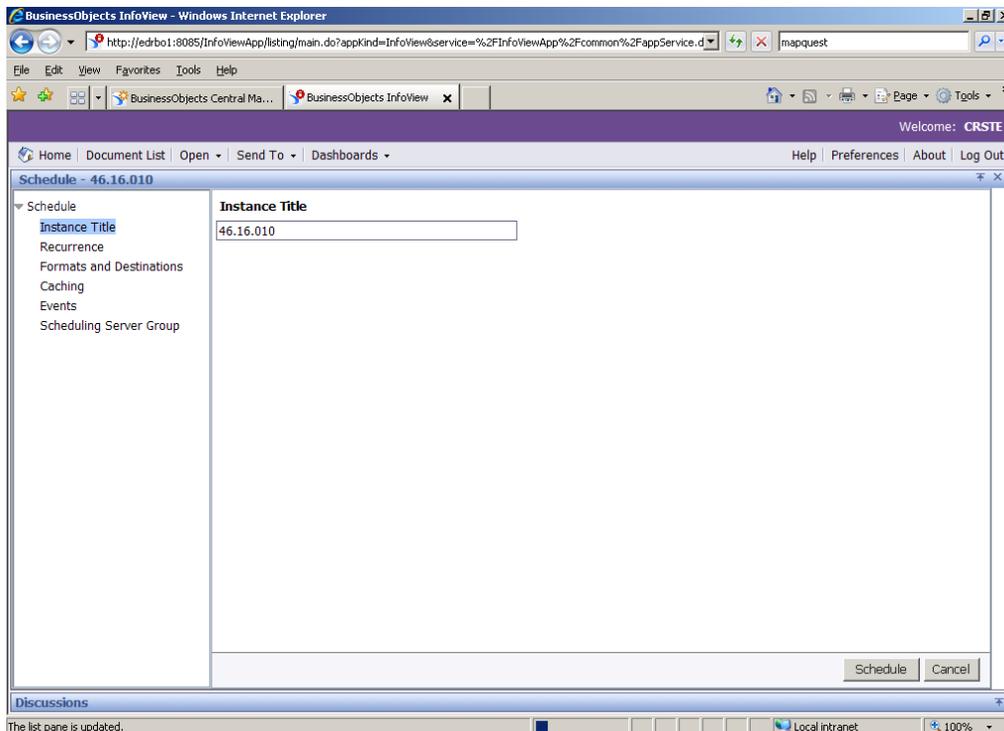
Problem: Customers need the ability to schedule a BOXI query and have the output excel or CSV file made available for other jobs to pick-up the data for further processing.

Steps to complete

1. Select the BOXI query by right clicking over the name. A list of options will display based on your BOXI access rights. Select schedule

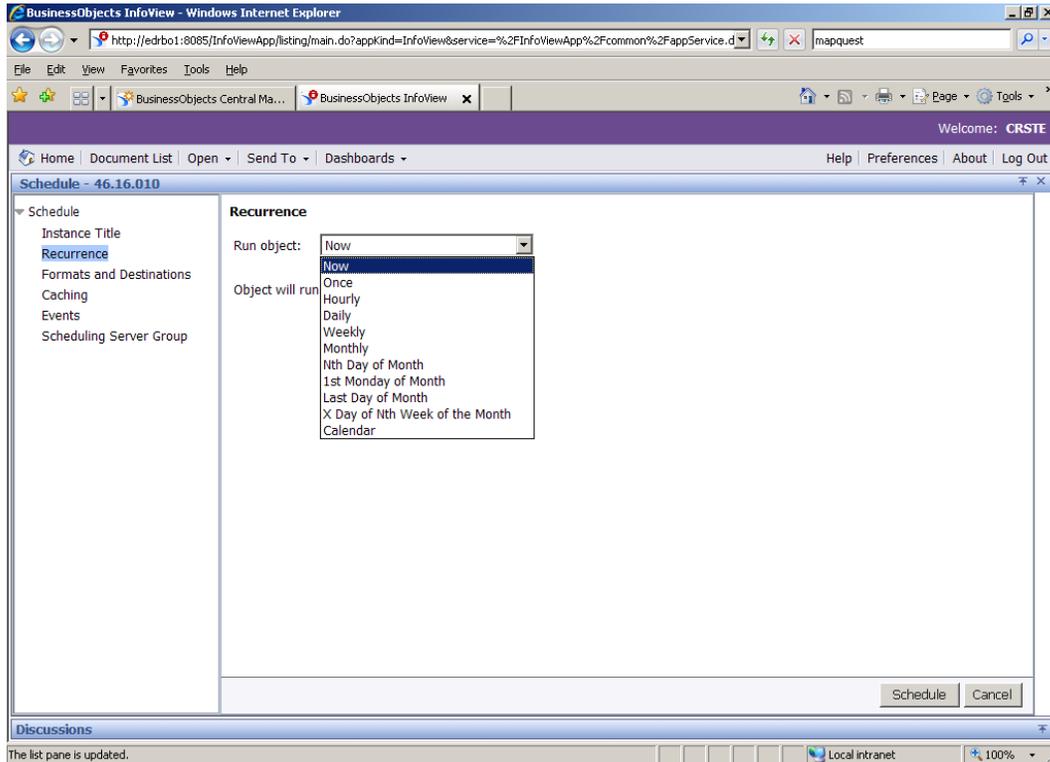


2. The scheduling options will be presented starting with the ability to change the title of the instance name. Do not change this name. Click on Recurrence

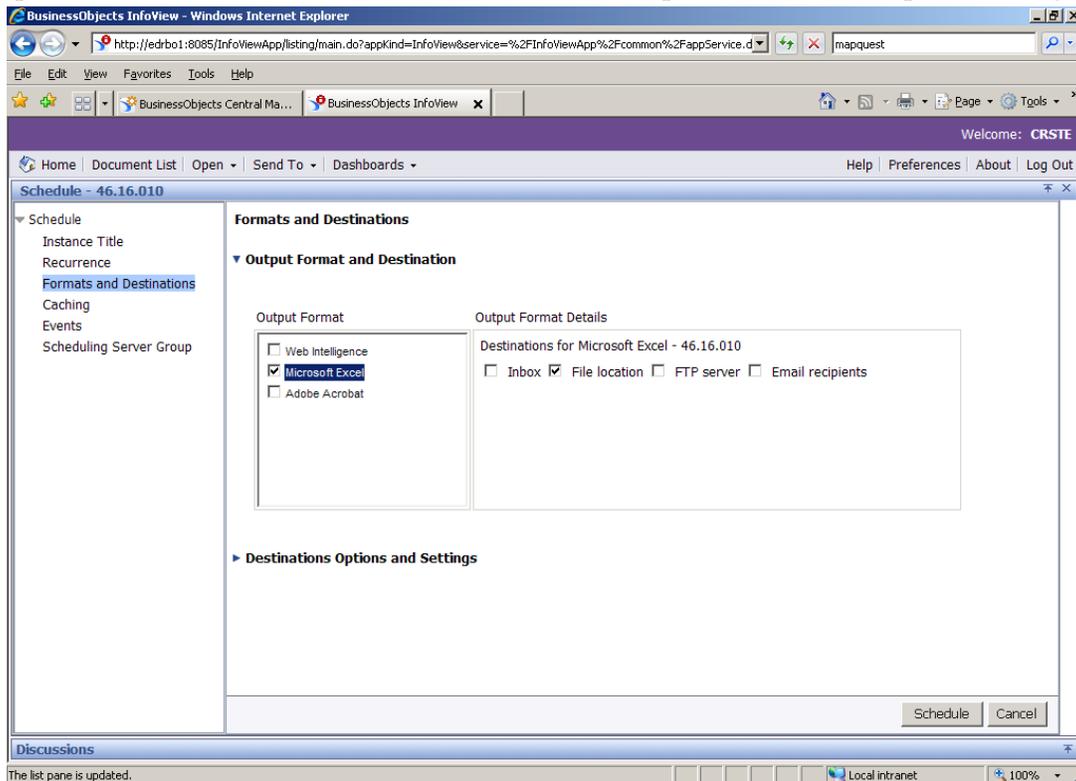


BOXI Output Scheduled to a File or FTP Location

3. The Recurrence Screen allows you to set the time the query will run. For this test, the default, 'Now', was selected. Click on Format and Destinations.

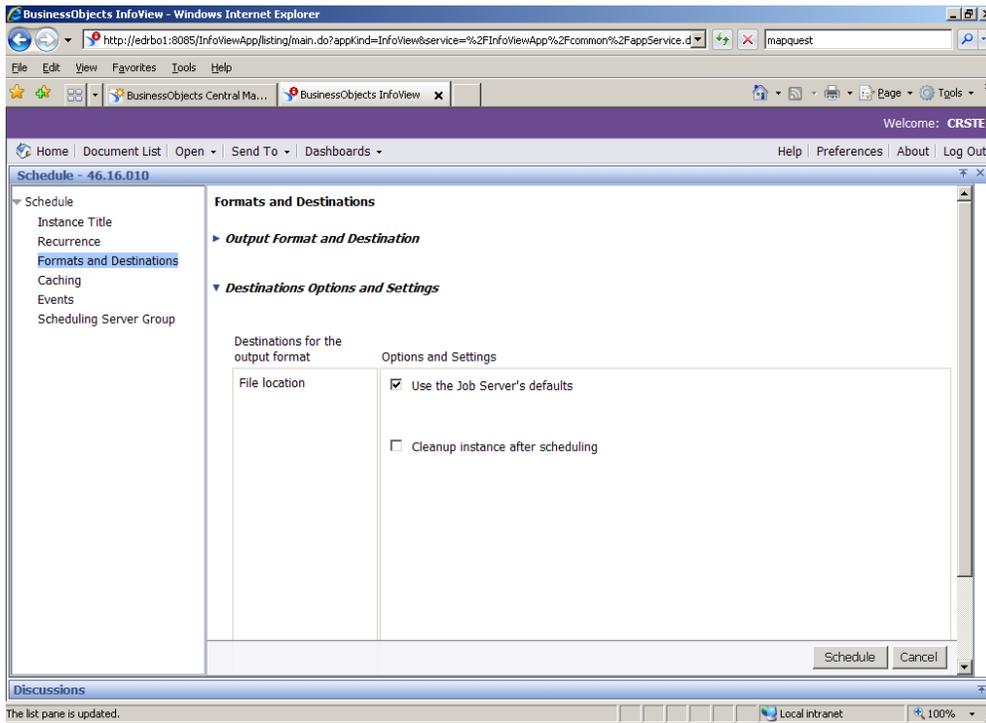


4. Once on the Formats and Destination screen, check the Output Format (Microsoft Excel), select the Output Format Details (File Location or FTP Server), then press Destinations Options Settings.

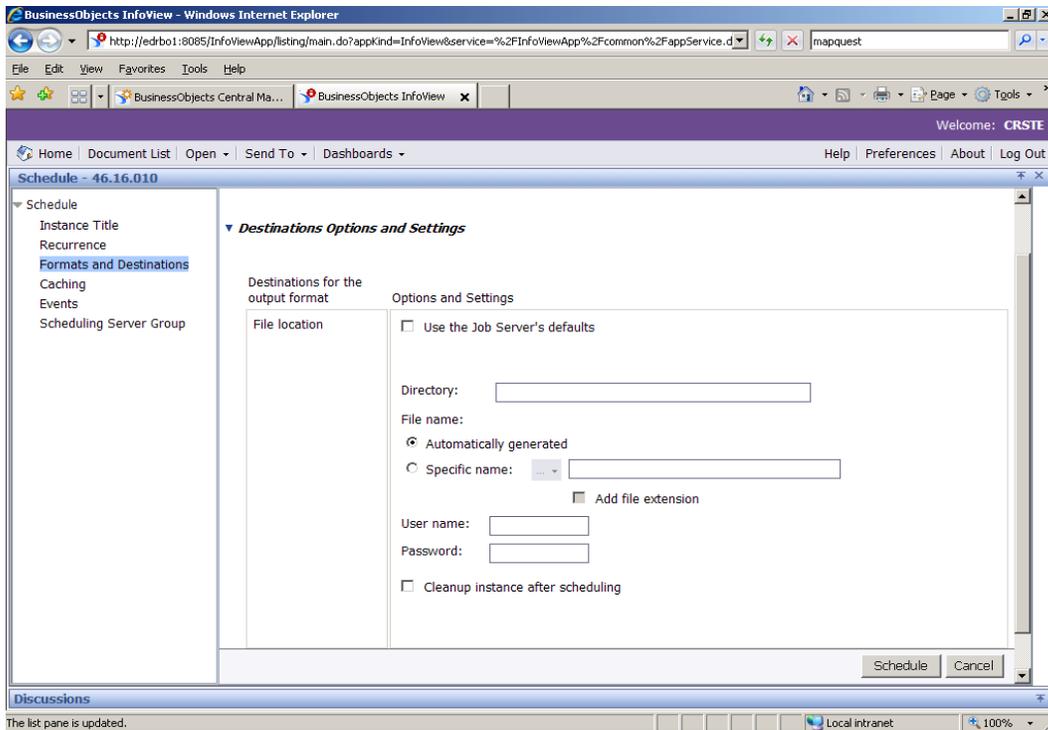


BOXI Output Scheduled to a File or FTP Location

5. When the Format Details is File Location, do the following:
 - a. Once in the Destinations Options and Settings, uncheck the box for “Use Job Server default”



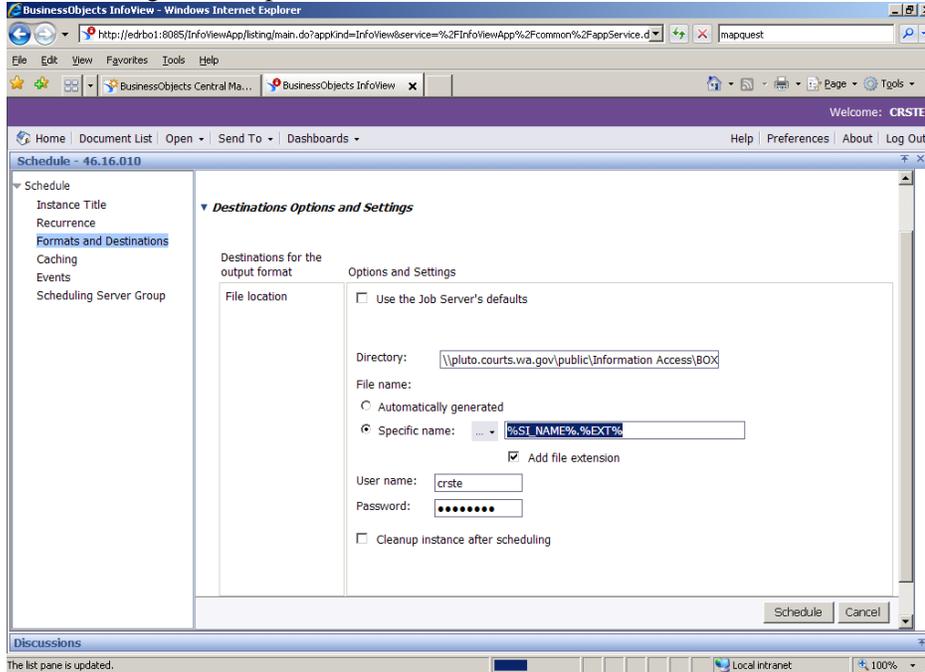
- b. Once the default box is unselected, the details of the file location are provided.



- (1) The **directory** name syntax is as follows: [\\servername\folderpathname\foldersubpathname](#)
For example: `\\AOCserver.courts.wa.gov\publicfolder\DataManagement\BOXIData`
- (2) The **file name** can be generated by BOXI or a specific name can be entered.
- (3) The **user name** and **password** must be a valid logon id for the server.
- (4) The check box next to “Cleanup instance after scheduling” can remain unchecked.

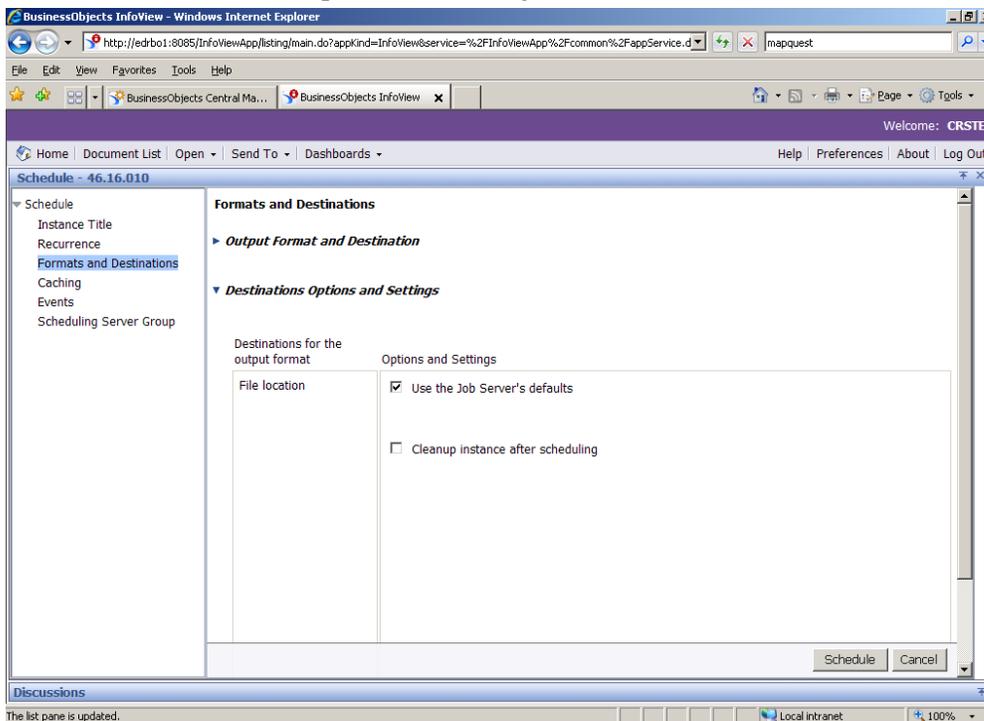
BOXI Output Scheduled to a File or FTP Location

c. The following is a completed screen



- (1) Under the specific name the drop down has several options. The title option was selected above so the value “%SI_NAME%” was placed in the name specified area.
- (2) Since the ‘add file extension box is check, the file extension will be added to the file by the “.%EXT%” that has been placed in the name specified area.
- (3) Username and password must be valid

6. When the Format Details is FTP Location, do the following:
 - a. Ensure AOC has access to write to your FTP location. Do this by contacting you local IT department and allowing traffic from <https://edrbo31.courts.wa.gov> to write to your server.
 - b. Once in the Destinations Options and Settings, uncheck the box for “Use Job Server default”



BOXI Output Scheduled to a File or FTP Location

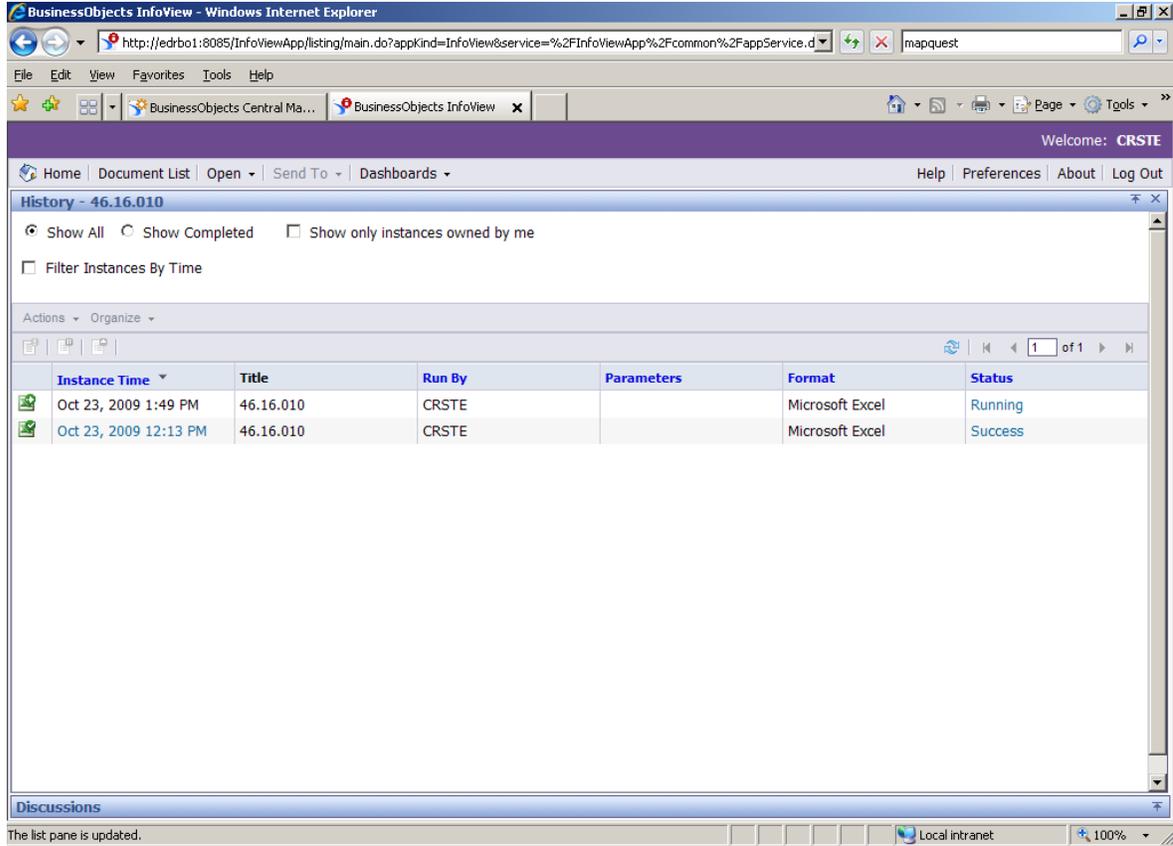
- c. Once the default box is unselected, the details of the FTP location are provided. Fill in the following information:

The screenshot shows the 'Formats and Destinations' configuration window. The left sidebar lists various settings, with 'Formats and Destinations' selected. The main area is titled 'Formats and Destinations' and contains two sub-sections: 'Output Format and Destination' and 'Destinations Options and Settings'. Under 'Destinations Options and Settings', there are two columns: 'Destinations for the output format' and 'Options and Settings'. The 'Destinations for the output format' column shows a list with 'FTP server' selected. The 'Options and Settings' column contains several fields and checkboxes. The 'Host' field is empty, 'Port' is set to 21, 'User name', 'Password', and 'Account' are empty. There are checkboxes for 'Use the Job Server's defaults' and 'Cleanup instance after scheduling'. The 'File name' section has two radio buttons: 'Automatically generated' (selected) and 'Specific name'. The 'Specific name' section has a dropdown menu and an input field. There is also a checkbox for 'Add file extension'. At the bottom right, there are 'Schedule' and 'Cancel' buttons.

- (1) The **Host** is the URL for your local FTP server. This is provided by local IT department
- (2) The **directory** name syntax is as follows: [\\servername\folderpathname\foldersubpathname](#)
For example: [\\AOCserver.courts.wa.gov\publicfolder\DataManagement\BOXIData](#)
This is the location where the file will be placed. Ensure AOC can write to this location
- (3) The **Port** is the location for your local FTP server. This is provided by local IT department, but default Port is 21.
- (4) The **user name** and **password** must be a valid logon id for the server.
- (5) The Account is an optional setting set by your local IT department
- (6) The file name can be generated by BOXI or a specific name can be entered.
 - a. Under the specific name the drop down has several options. The title option was selected above so the value “%SI_NAME%” was placed in the name specified area.
 - b. Since the ‘add file extension box is check, the file extension will be added to the file by the “.%EXT%” that has been placed in the name specified area.
- (7) The check box next to “Cleanup instance after scheduling” can remain unchecked.

BOXI Output Scheduled to a File or FTP Location

7. Press Schedule and the Instance History screen will show the status of the job.



8. Check file folder for the document

