

Next Analytics

Automation
For Windows XP
Step-by-Step

Scheduled Updates

- * Typical Scenarios:

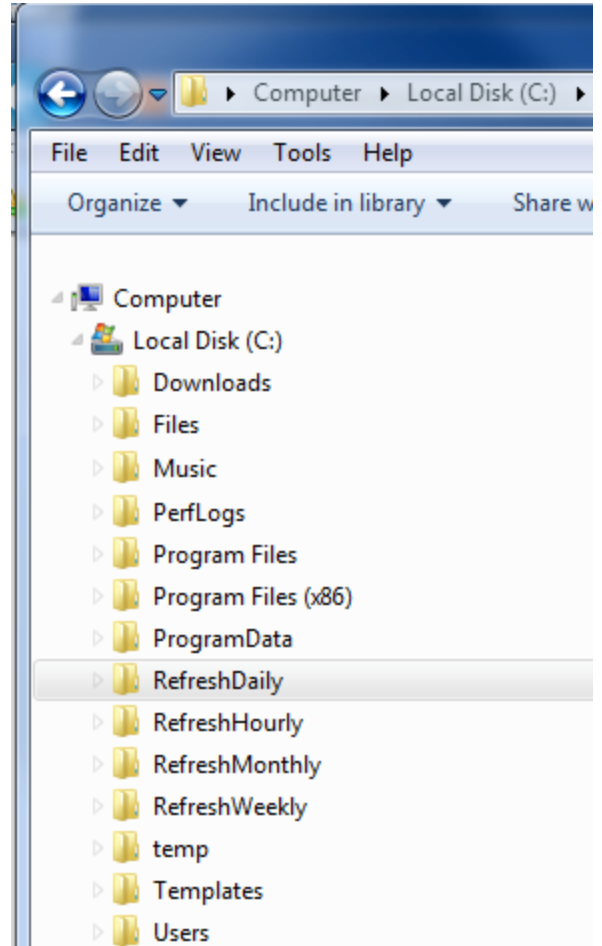
- * Prepare the monthly reports for my boss or my clients
- * Capture competitive Facebook metrics weekly
- * Capture Twitter message traffic daily
- * Have my daily sales lead report waiting for me
- * Refresh specific reports overnight for me

- * Command Line Utility

- * Provides Windows batch/command interface
- * Used with Windows Task Scheduler for ultimate flexibility

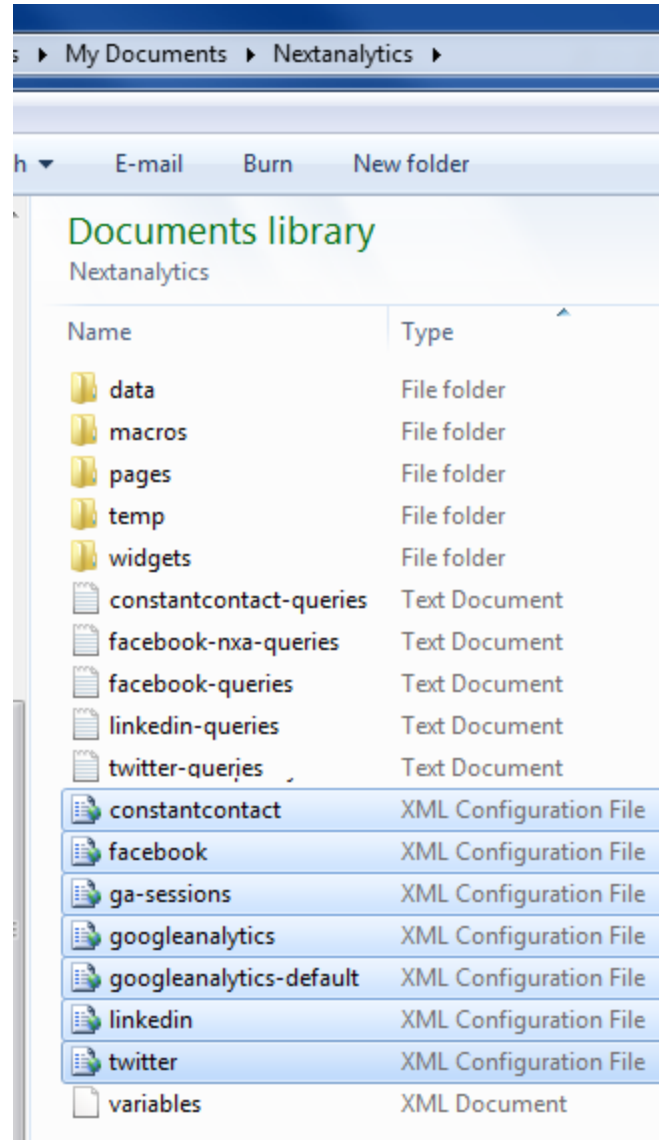
Step 1 – Create a Directory

- * Create a new directory for the workbooks to be refreshed
- * Avoid really long directory paths (too many sub-directories of sub-directories)
- * Group by frequency of refresh as all files in each directory will be updated at the same time



Step 2 – Copy Config Files

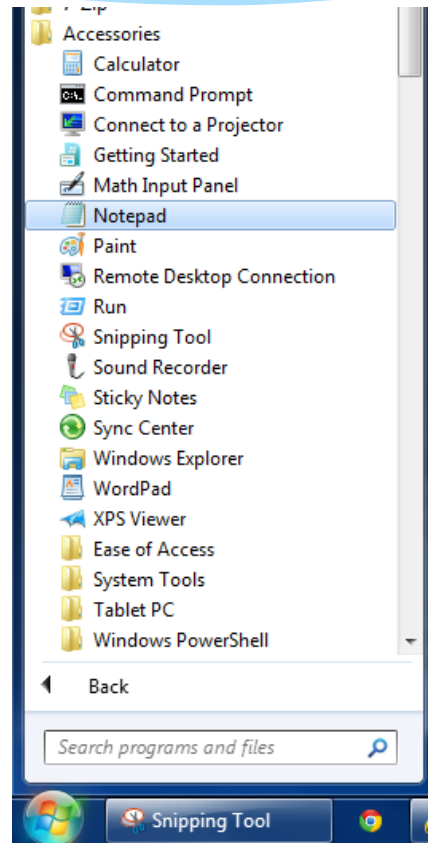
- * Copy all config files from
My Documents > Nextanalytics
to the new directory



Step 3a – Create a Command File

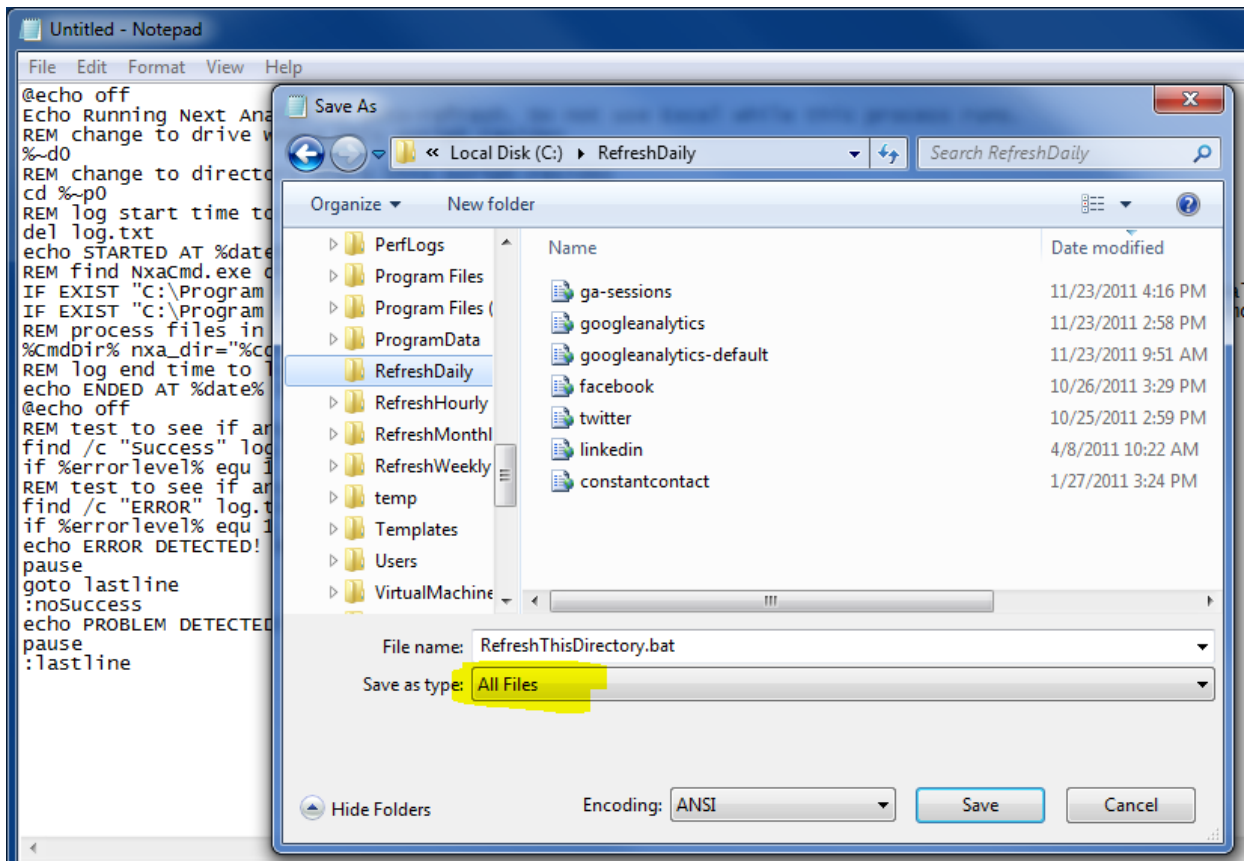
- * Open Accessories > Notepad
- * Copy the script below
- * Paste it into Notepad

```
@echo off
setlocal EnableExtensions
tasklist /nh /fi "imagename eq EXCEL.EXE" 2>NUL | find /I /N "EXCEL.EXE">NUL
if %ERRORLEVEL%==1 goto notrunning
Echo You must close Microsoft Excel before you can run Next Analytics batch refreshes
pause
:notrunning
Echo Running Next Analytics auto-refresh. Do not use Excel while this process runs.
%~d0
cd %~p0
del log.txt
echo STARTED AT %date% %time% >> log.txt
IF EXIST "C:\Program Files (x86)\Nextanalytics\NxaCmd.exe" SET CmdDir="C:\Program Files (x86)\Nextanalytics\NxaCmd.exe"
IF EXIST "C:\Program Files\Nextanalytics\NxaCmd.exe" SET CmdDir="C:\Program Files\Nextanalytics\NxaCmd.exe"
%CmdDir% nxa_dir="%cd%" >> log.txt
REM log end time to local log file
echo ENDED AT %date% %time% >> log.txt
@echo off
find /c "Success" log.txt
if %errorlevel% equ 1 goto noSuccess
find /c "ERROR" log.txt
if %errorlevel% equ 1 goto lastline
echo ERROR DETECTED! Read log.txt file for details.
pause
goto lastline
:noSuccess
echo PROBLEM DETECTED! Read %cd%log.txt file for details.
pause
:lastline
```



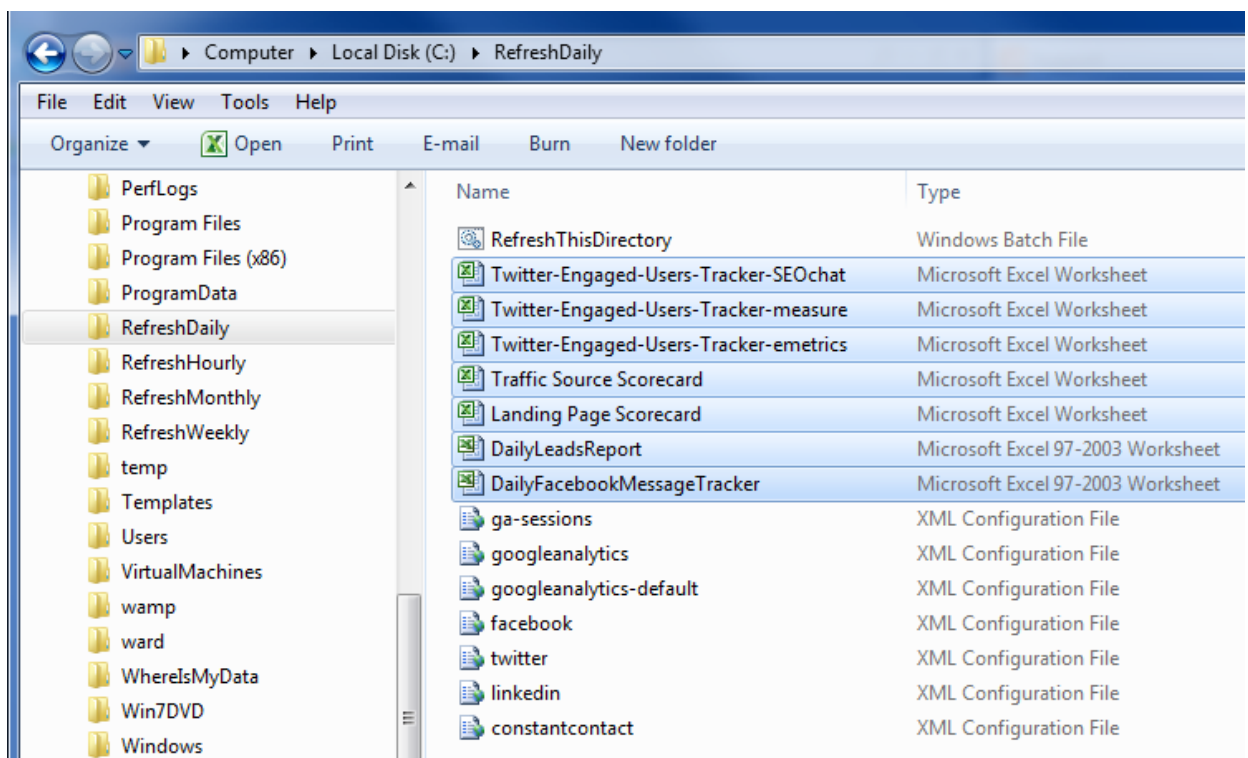
Step 3b – Create a Command File

- * Save the File to your new directory
 - * Call it RefreshThisDirectory.bat
 - * Be sure to select **Save as type: All files**



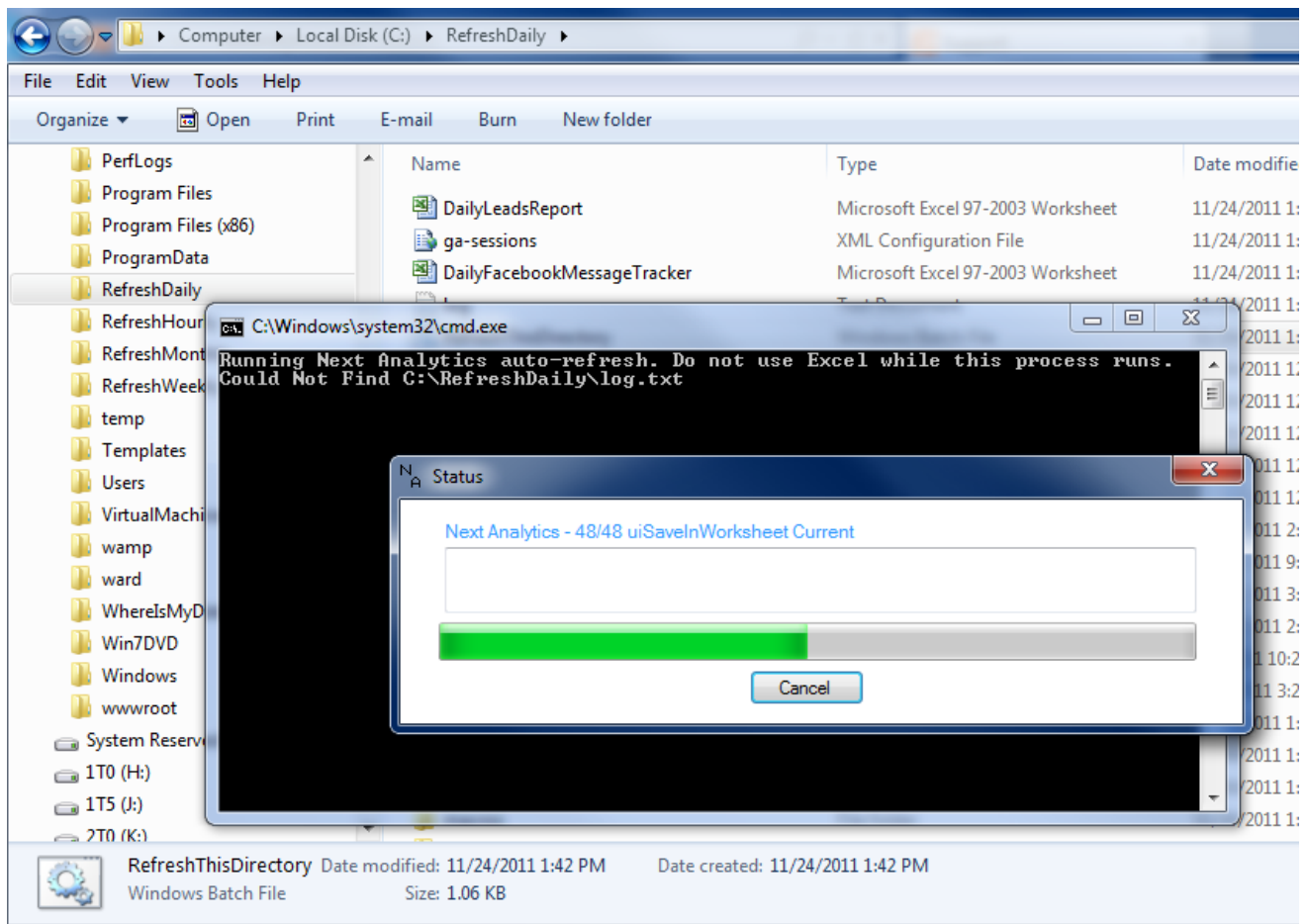
Step 4 – Copy your workbooks

- * Copy the workbooks you want to refresh on schedule into the new directory



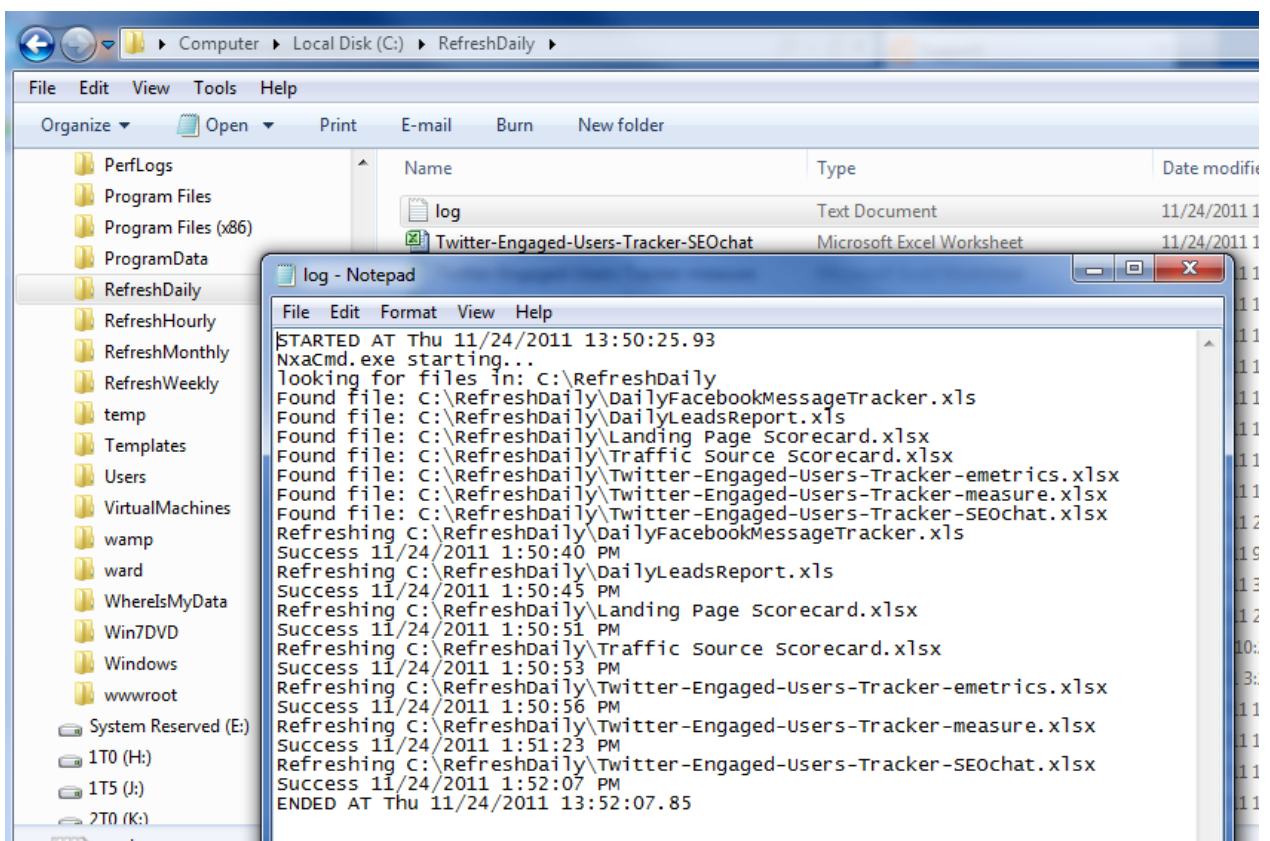
Step 5 – Test the Refresh

- * Double-click on RefreshThisDirectory to run the batch file
- * A black command window should open and Next Analytics progress bar dialogs may appear as the files refresh
- * DO NOT USE EXCEL while it is running



Step 6 – Check for Errors

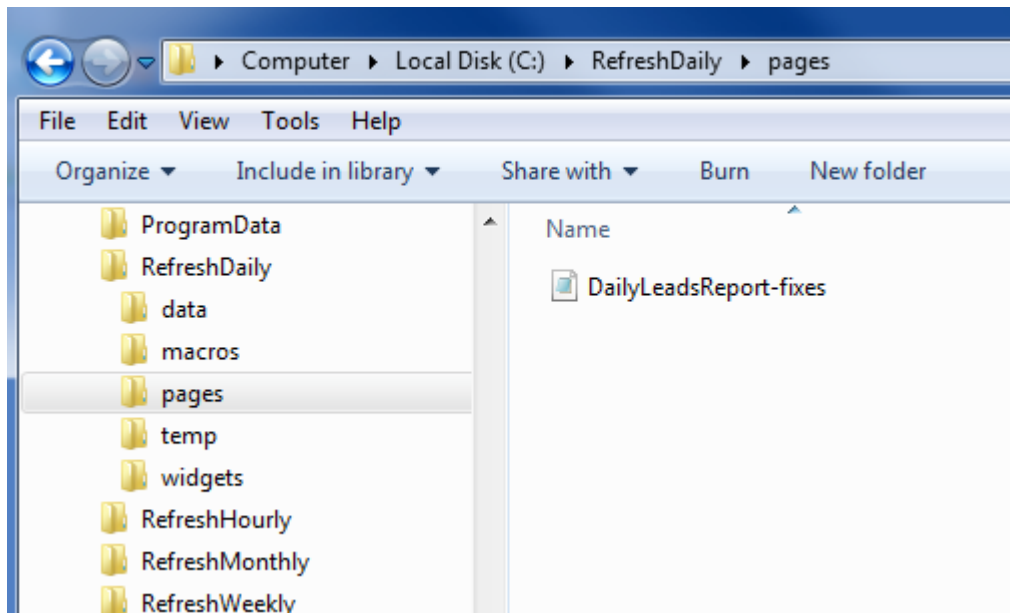
- * If there were errors, the command window will stay open with a warning message
- * Open the log file and check for any errors
- * Manually refresh any workbooks that failed
- * Check each workbook to be sure they refreshed properly



Step 7 – Copy Supporting Files

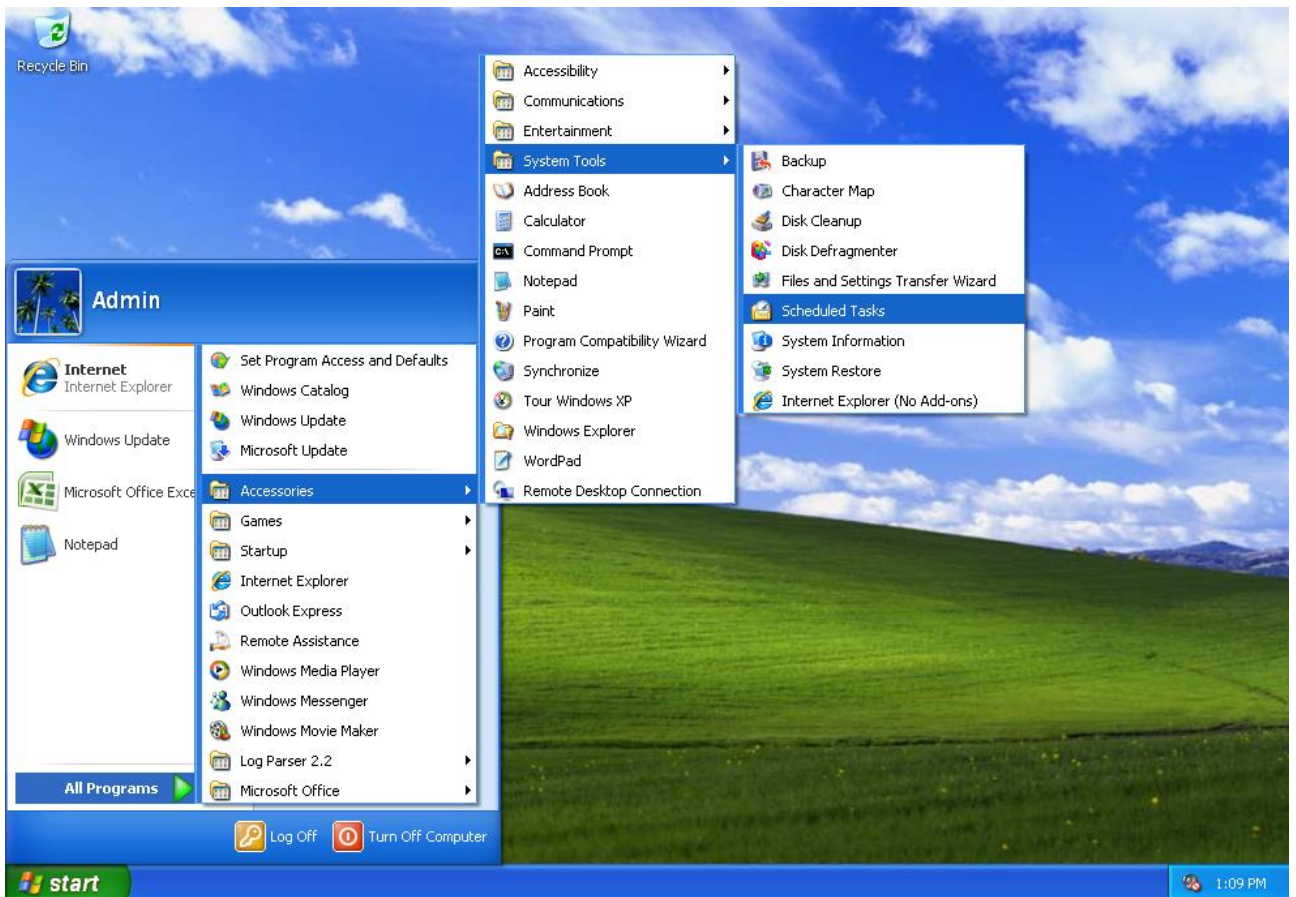
- * If you have not used the Fix (search and replace) function of Next Analytics, then ignore this step
- * If any of your workbooks needed Fix (search/replace) definition files, they will need to be copied from:

My Documents > Nextanalytics > pages
into the ‘pages’ directory that now exists In your new directory



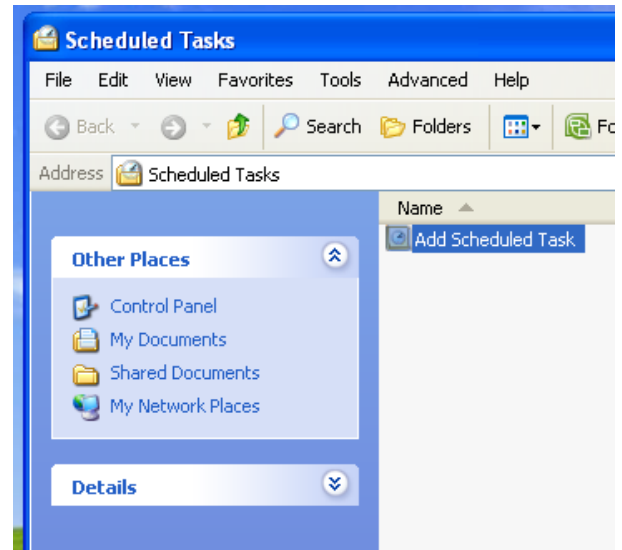
Step 8 – Start Task Scheduler

- * Windows Start menu
 - * Accessories
 - * System Tools
 - * Scheduled Tasks



Step 9a – Schedule a new task

* Add Scheduled Task

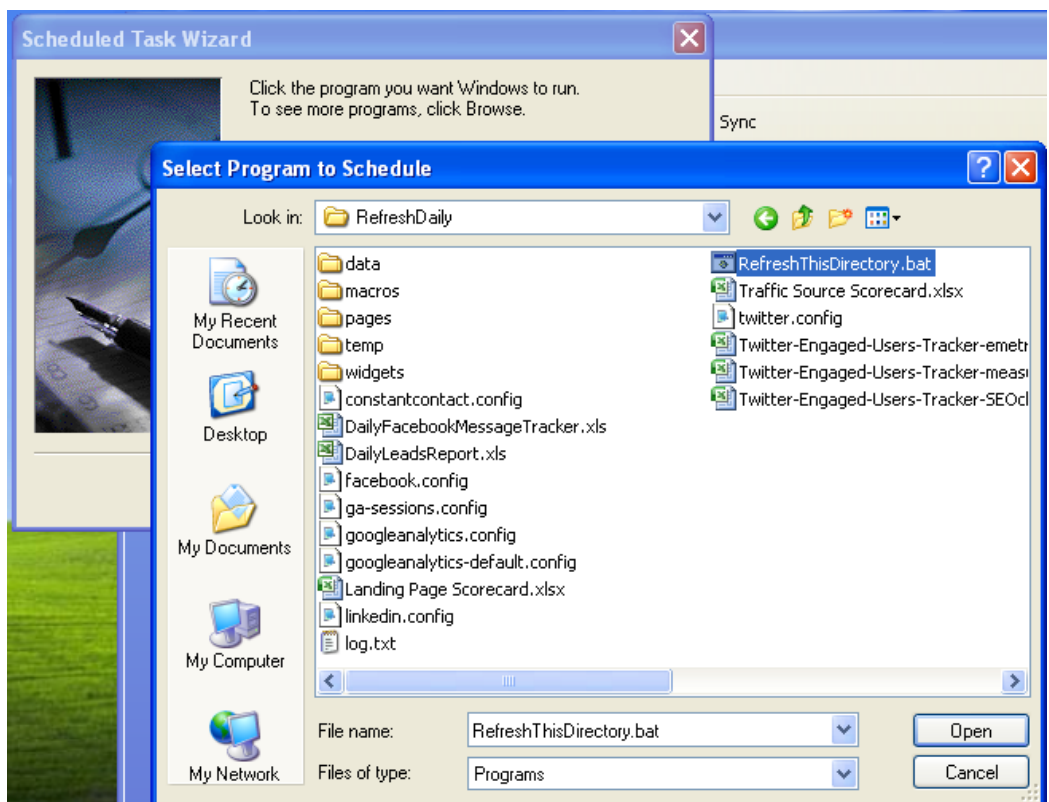
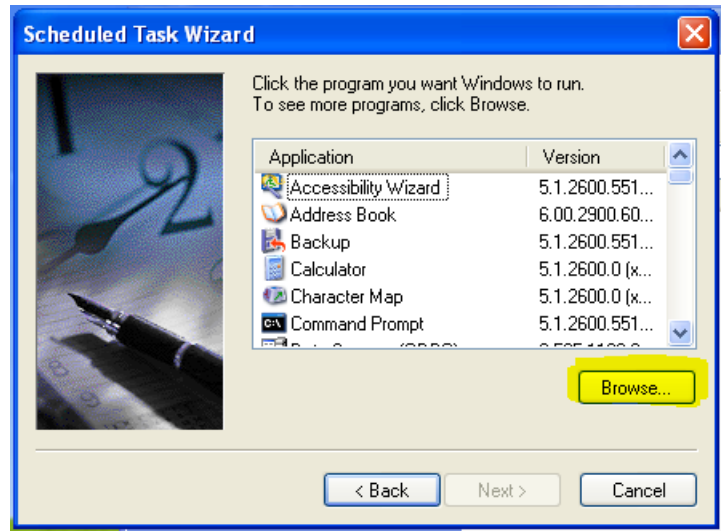


* Start the Wizard



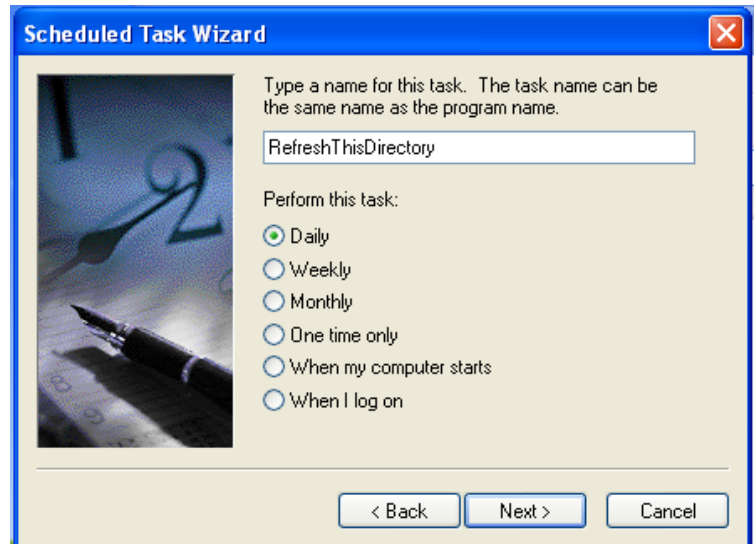
Step 9b – Schedule a new task

- * Browse and select the command file

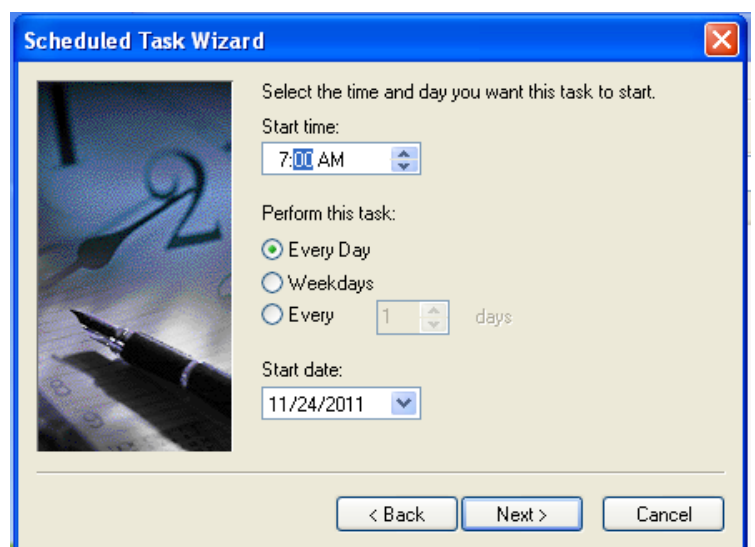


Step 9c – Schedule a new task

- * Name the task and run it Daily

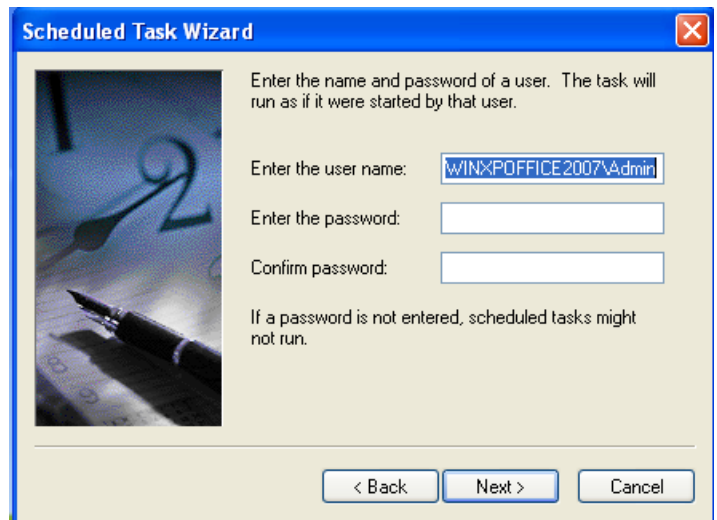


- * Pick a time for it to run



Step 9d – Schedule a new task

- * Run the task as yourself

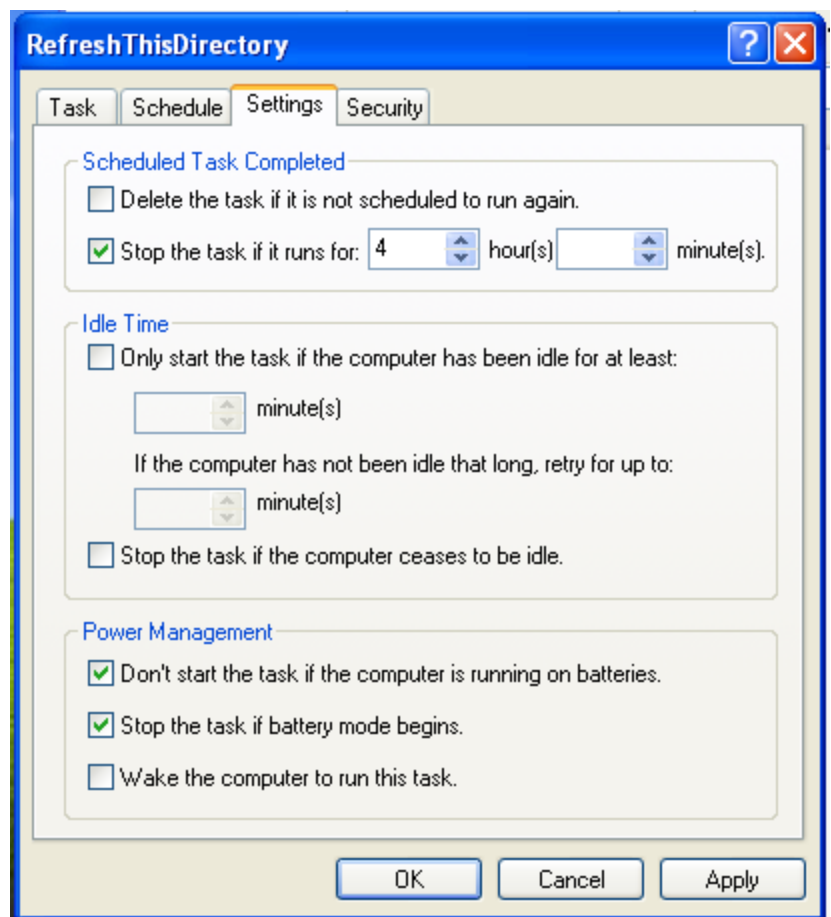


- * Check the box to open the advanced properties



Step 9e – Schedule a new task

- * Verify the information on each tab
- * Set the time to Stop the task after 4 hours
- * ... and you are Done!



Step 10 - Verification

- * If possible, be present when the batch runs for the first time
 - * The command window should open
 - * Progress dialogs should appear and disappear
 - * The command window should close
- * Check the log file to make sure no errors occurred
- * Check each workbook to ensure that the data has refreshed correctly

Summary

- * Create a new directory
- * Copy identity config files from My Documents\Nextanalytics
- * Create a command file
- * Copy your workbooks
- * Test the command file refresh
- * Check for errors
- * Copy any missing support files
- * Open Windows Scheduled Tasks
- * Schedule a new task
- * Verify operation