DYNAMIC AI

AGENT AUTOMATION

Release 6.3

Enabling the Dynamic AI Agent

This document describes the steps involved in enabling the Dynamic AI Agent functionality using the scheduling functionality of Microsoft Windows. Other scheduling packages exist, but the main concepts should be transferrable.

This document assumes **administrative access** to the Dynamic AI installation or that the appropriate scheduling settings have been set and that the **Agent** user account has been created in Dynamic AI already.

Enabling the agent requires administrative access to the computer (typically, but not necessarily the Dynamic AI Server) from where the agent will run. Specifically it requires permissions to schedule tasks.

Preparing a Dynamic AI installation for Agent use
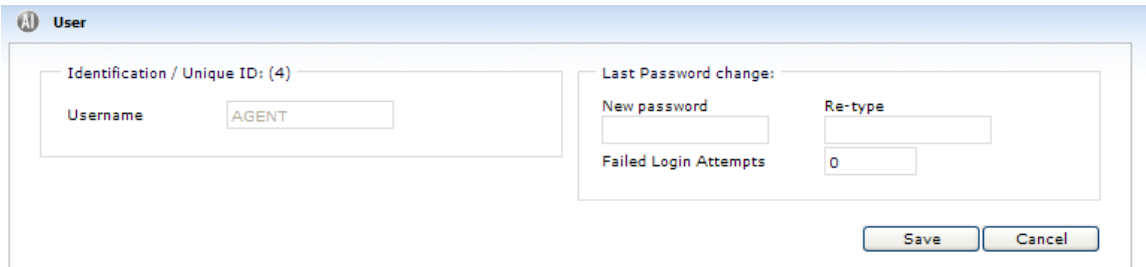
The AGENT account

Dynamic AI has a special user account named **AGENT**. The properties for this account can be accessed using the built-in user administration interface.
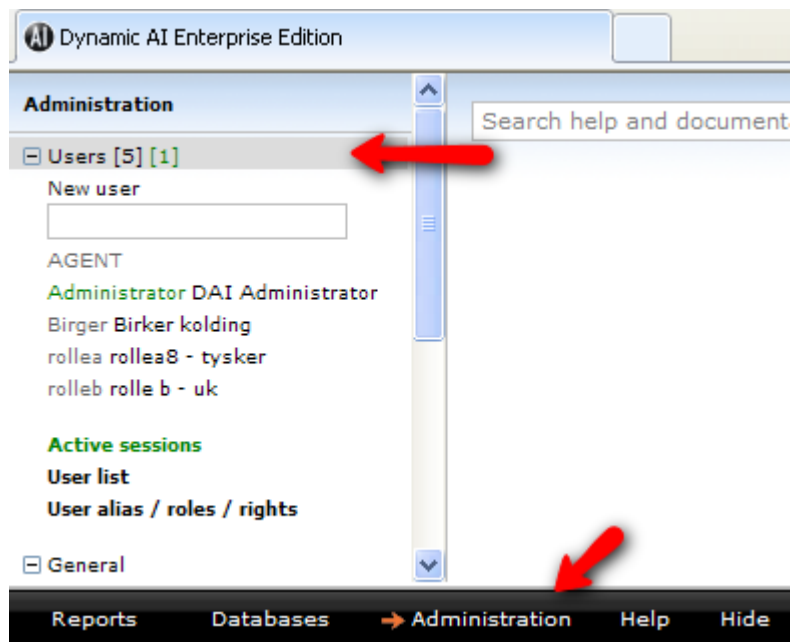
From the **Administation** page, expand users.

If the AGENT account does not exist, it can be created using the "New User" menu item. If exist, click it, to open the properties.
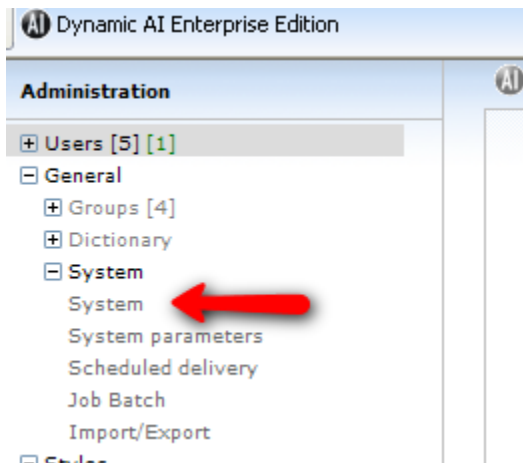
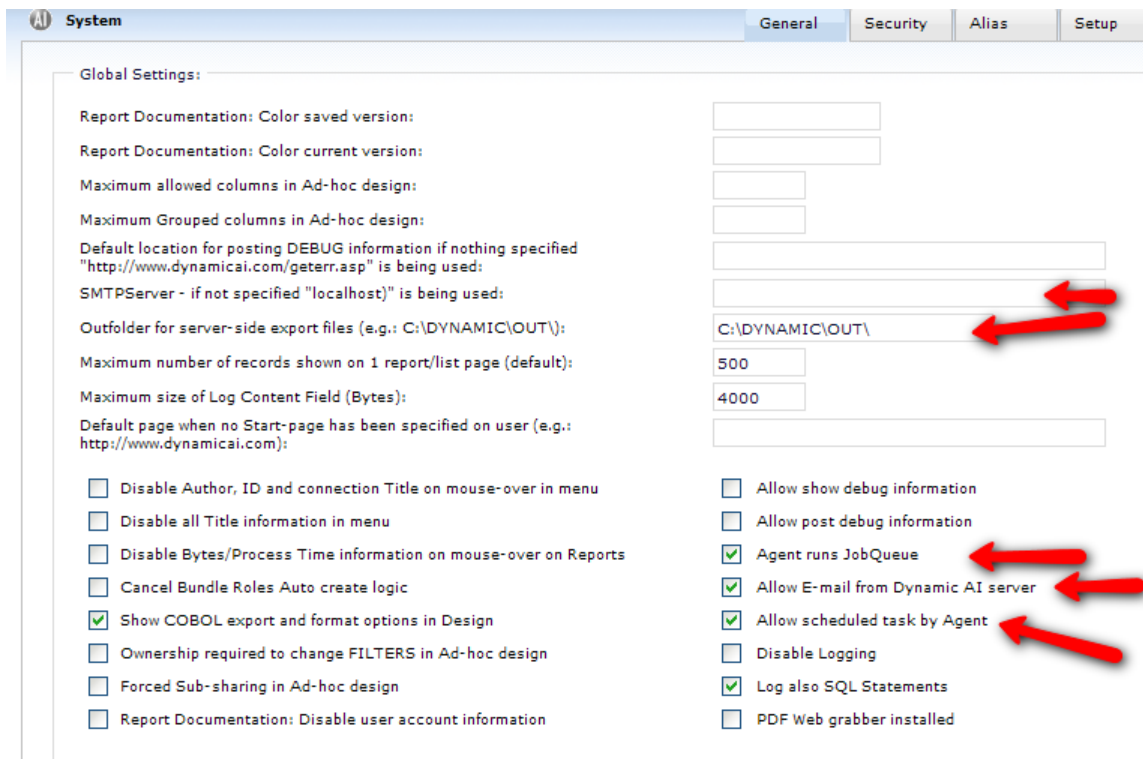Note that the only properties on the AGENT account, is a password.

If agents have been run using the wrong password several times, the account can be locked out (depending on implemented security settings). In this case, the "Failed Login Attempts" counter must be reset from here.

System settings related to agent and scheduling use

For in-depth coverage of these settings refer to the user documentation.

From the **Administration** page, select **General** and **System** to bring up system settings:

File Export by Agent usage:

- To allow the agent to process the Jobqueue for interface file generation, check the "Agent runs JobQueue" box

- Set the "Outfolder for server-side export files" to a valid path. *(Note that this path must be accessible for read/write and optionally execute for the windows user account that Microsoft Internet Information Services use to run Dynamic AI)*

Regular scheduled delivery usage:

- To allow the agent to run regular scheduled report delivery, check the "Allow scheduled task by Agent"

- To allow Dynamic AI (and thereby also the scheduled delivery by email) to send out emails, check the "Allow E-mail from Dynamic AI Server"

- If the local Dynamic AI Server does not have an active SMTP service, you must specify an SMTP Server in the "SMTPServer" field.

The Agent executable

The "DAIAgentV2.exe" file is a program that accesses the Dynamic AI Server and requests the server to process due agent tasks (pre-calculated reports, deliver scheduled reports and process the jobqueue for interface and export tasks). It is controlled by a text file called "Agent.ini".

The "Agent.ini" file must be located in the same folder as the "DAIAgentV2.exe" file.

The DAIAgentV2.exe and a sample agent.ini are installed along with Dynamic AI in the root folder (typically c:\program files\Dynamic AI Server\ or c:\program files\Dynamic AI Enterprise\).

Sample Agent.ini:

```
[AGENT]
MonURL=http://localhost/ai6/AI.asp?UID=AGENT&PW=abc
outfolder=
DBID=
```

The agent.ini can have the following parameters:

MonURL (Mandatory):

URL to the AI.asp file in the Dynamic AI installation and password for the Dynamic AI agent account is set here.

Sample: `MonURL=http://localhost/ai6/AI.asp?UID=AGENT&PW=abc`

Outfolder (optional - enterprise edition only):

Dynamic AI Enterprise edition makes it possible to execute shell commands after file generation. Dynamic AI will generate a command file and place it in the outfolder.

When the outfolder is also specified in the agent.ini file, the agent executable will scan for command files and execute them.

Sample: `outfolder=c:\dynamicAI\out\`

DBID (optional – enterprise edition only):

Dynamic AI Enterprise edition allows segmented execution of the jobqueue to facilitate throttling, parallelism, and distribution of the export file generation.

Segmented execution is achieved by specifying a database connection ID (as defined in the Dynamic AI repository) to be used for opening the Jobqueue for processing.

Sample: `DBID=OracleDNMC`

When the DaiAgentV2.exe file is executed, it will open an http request to the server specified in the MonURL setting. The Dynamic AI Server will perform open tasks and return a response to the Agent. If the defined tasks include post processing, the

Agent will spawn a shell process and execute the post processes. In this case, the agent will also issue a receipt request to Dynamic AI upon completing the post processes.

Scheduling the Agent executable

Depending on typical number of agent tasks, nature of scheduled content etc, the agent executable must be set to run at regular intervals. These intervals can be anything from once a day on weekdays to several times each hour.

The agent is typically scheduled using the Microsoft Windows built-in task scheduler available from the Windows Control Panel.

The DAIAgentV2.exe executable is designed for running in the background and does not have a user interface. For this reason, it is safe to run without a logged on user. As all other Windows programs, it does however need to run as a specific account. Usually this account is defined as a local system account, but any windows account with the permissions to execute the file will work.

The chosen account must have Read, Execute and Write permission on the folder where the executable and the agent.ini files are stored, as well as on the "Outfolder" specified in agent.ini and in Dynamic AI (these 2 settings reflect the same physical path)

To schedule DAIAgentV2.exe from the Windows Task Scheduler, go to the Windows Control Panel and double click on "Scheduled Tasks":
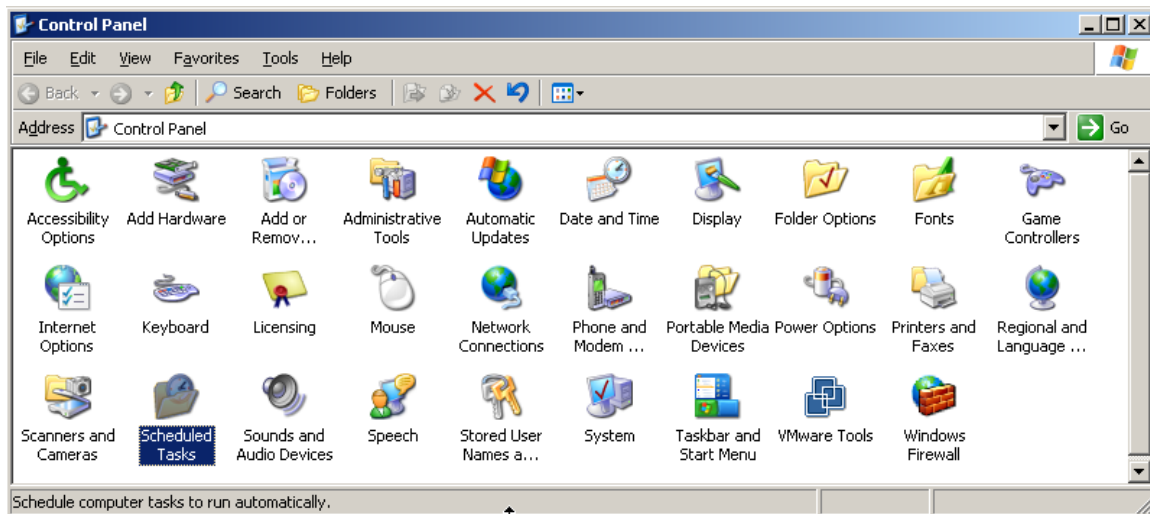
Drag the DAIAgentV2.exe file into the Scheduled Tasks window, or double click on "Add Scheduled Task":
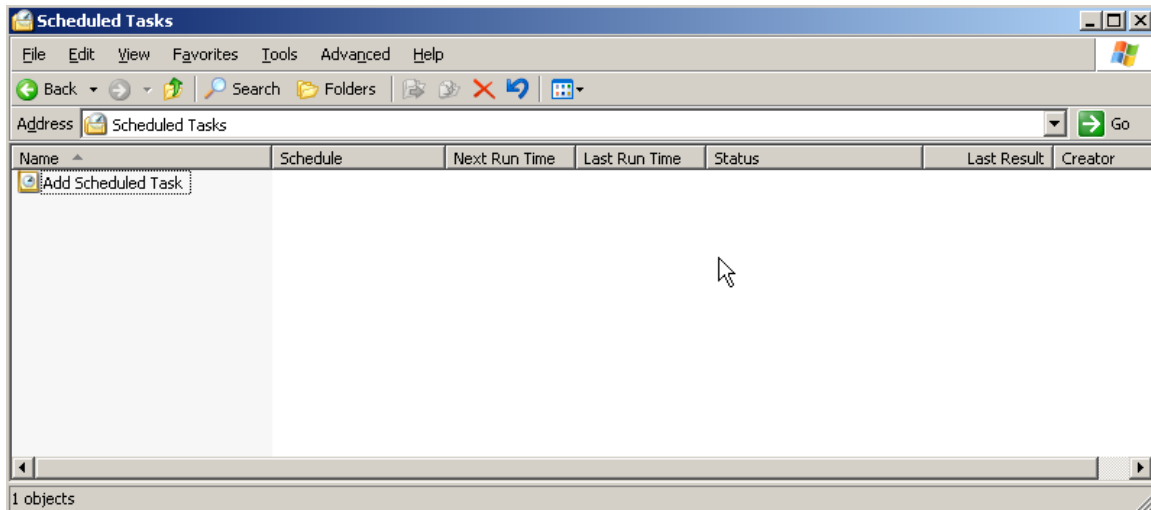
Use the wizard to browse to the DAIAgentV2.exe file (see paths above) and set the schedule options to what most closely resembles your needs. There is no need to spend too much time in the Wizard as you will most likely need to set additional properties thorough the full interface.
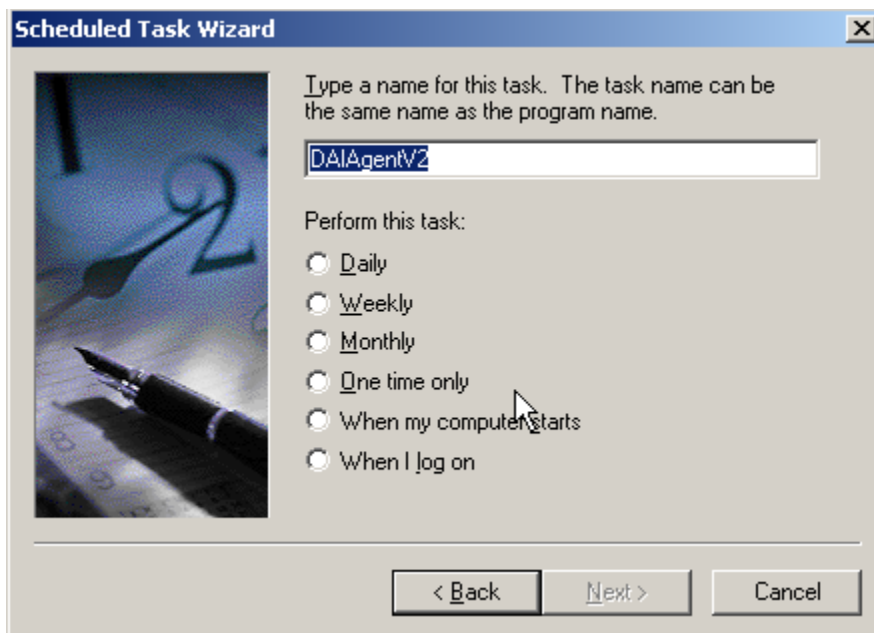
Set the user account that will execute the agent task, and press next.

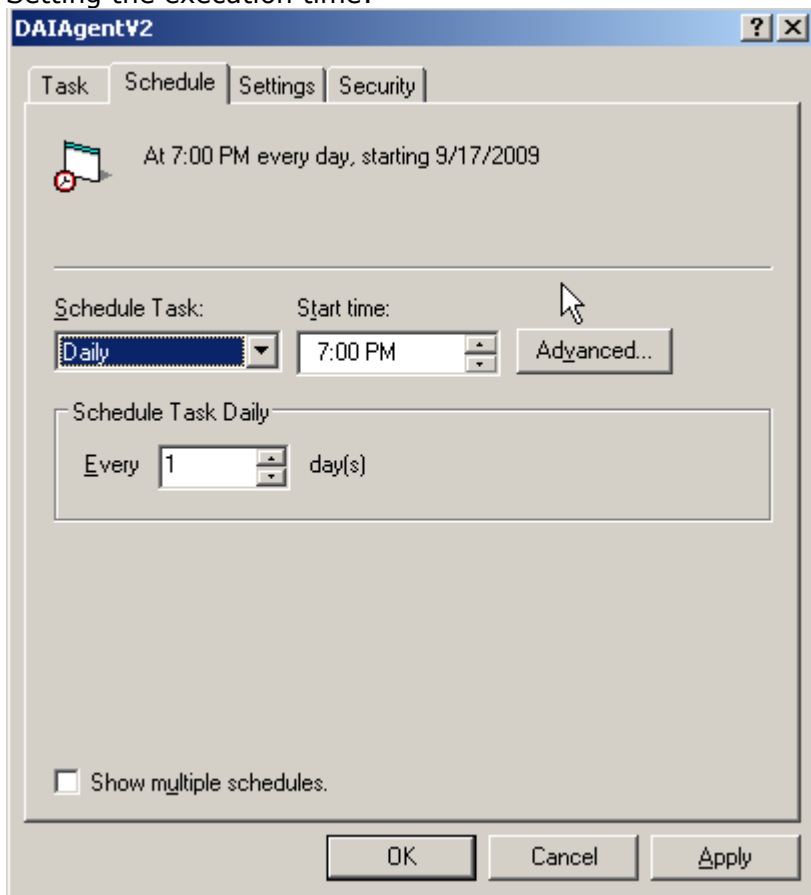Check the box to open additional settings after the wizard completes.

Schedule advanced settings:
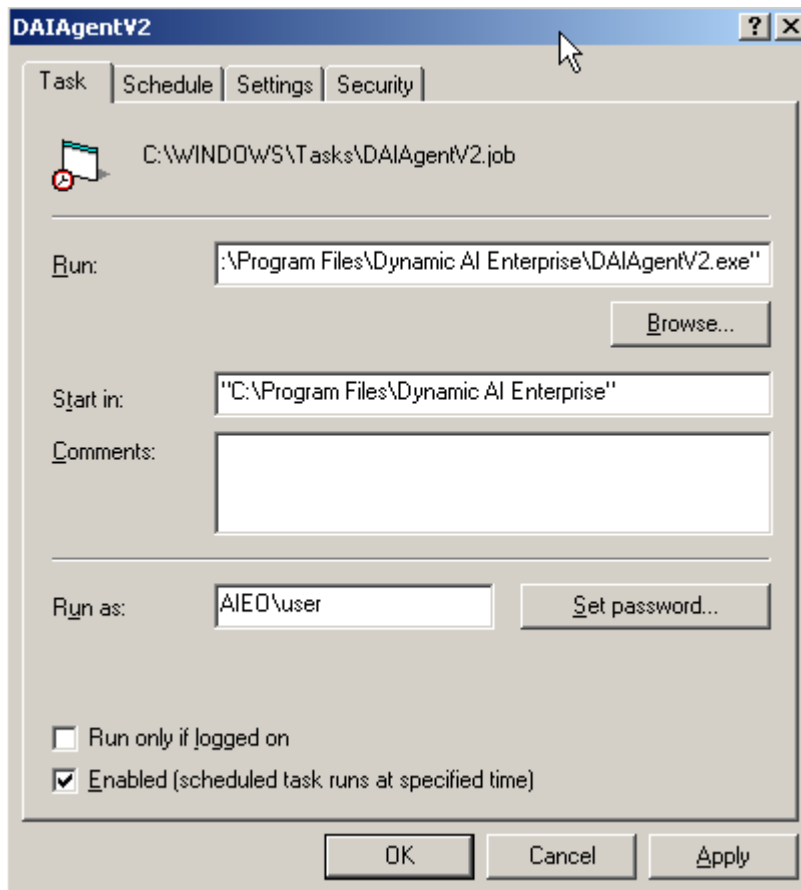
Remember to specify the password for the chosen user account. Note that the task will stop running if the password is changed.
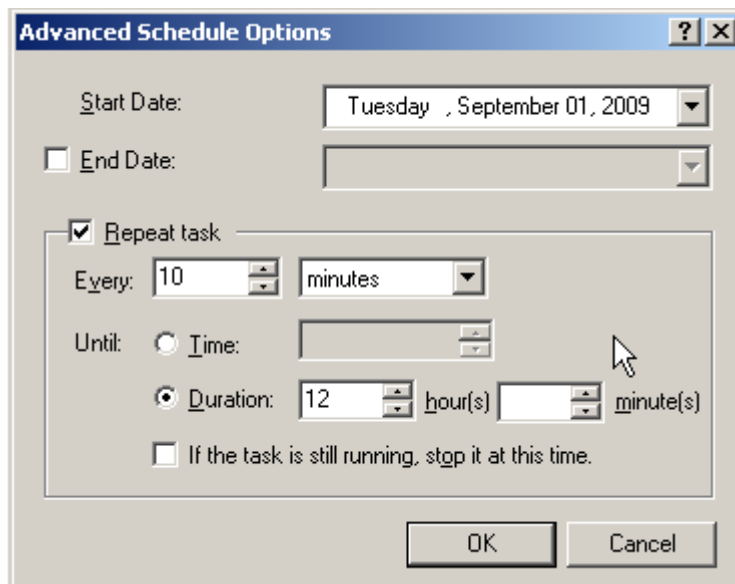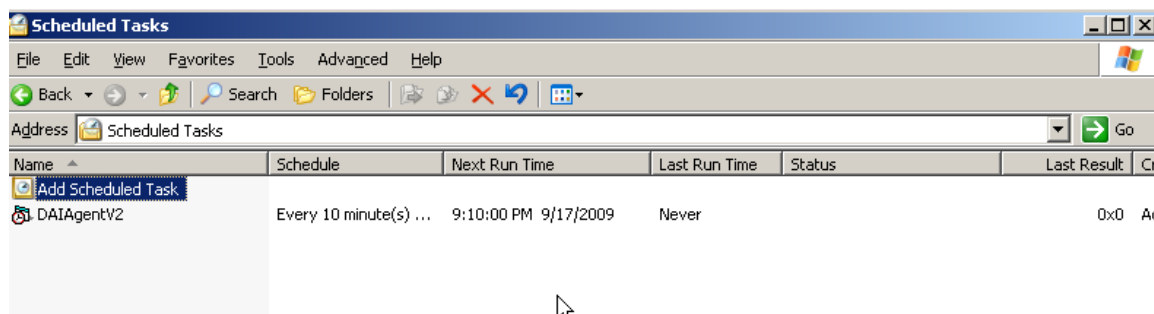
Setting the execution time:

On the schedule tab, set at which time you want the schedule to first execute, then click advanced. If you want to only run the agent on certain days, specify weekly or weekdays.

On the Advanced Schedule Options dialog, you can set start date, end date and recurrence.

Click OK and verify that the task is shown in the task list:

Finally, right click the task and chose execute. This will execute the task immediately using the entered account information, and will allow you to verify that that information was entered correctly.

Multiple Schedules

Sometimes there is a need to have multiple agents execute against the same or several different Dynamic AI instances.

The recommended procedure for this is to copy the agent executable and the agent ini file to a new directory for each necessary session.

Modify each agent.ini file to point to the correct Dynamic AI server URL, and optionally set appropriate outfolders to match the outfolders set on the target Dynamic AI servers.

Specify one or more scheduled tasks in Windows task scheduler for each agent.

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