ibi Summit 2026

WF 9.3.8 ReportCaster New Features Presentation

- By Carlotta Cunningham



© Copyright 2026 Cloud Software Group, Inc.

Confidentiality & Disclaimer

The information in this document is confidential information of Cloud Software Group, Inc. and/or its affiliates. Use, duplication, transmission, or republication for any purpose without the prior written consent of Cloud Software Group, Inc. is expressly prohibited.

This document (including, without limitation, any product roadmap or statement of direction data) illustrates the planned testing, release and availability dates for Cloud Software Group, Inc. products and services. This document is provided for informational purposes only and its contents are subject to change without notice. Cloud Software Group, Inc. makes no warranties, express or implied, in or relating to this document or any information in it, including, without limitation, that this document, or any information in it, is error-free or meets any conditions of merchantability or fitness for a particular purpose.

The material provided is for informational purposes only, and should not be relied on in making a purchasing decision. The information is not a commitment, promise or legal obligation to deliver any material, code, or functionality. The development, release, and timing of any features or functionality described for our products remains at our sole discretion.

During the course of this presentation, Cloud Software Group, Inc. or its representatives may make forward-looking statements regarding future events Cloud Software Group, Inc.'s future results or our future financial performance. These statements are based on management's current expectations. Although we believe that the expectations reflected in the forward-looking statements contained in this presentation are reasonable, these expectations or any such forward-looking statements could prove to be incorrect and actual results or financial performance could differ materially from those stated herein. Cloud Software Group, Inc. does not undertake to update any forward-looking statement that may be made from time to time or on its behalf.

© Copyright 2024 Cloud Software Group, Inc.

Session Agenda

ReportCaster Distribution Features

1. Amazon S3 Distribution Lab
2. ReportCaster CM export utilizing Amazon S3 Bucket Lab
3. Slack and demo



© Copyright 2026 Cloud Software Group, Inc.

1 ReportCaster Amazon S3 Distribution Lab

Connecting WebFOCUS ReportCaster distribution to Amazon S3 Bucket



© Copyright 2026 Cloud Software Group, Inc.

S3 Distribution Overview

Core Capabilities

WebFOCUS ReportCaster allows scheduled reports and files to be automatically distributed directly to Amazon S3 buckets.

Enables seamless cloud integration for data storage, enterprise sharing, automated backups, and downstream data pipeline processing.

Two-Step Workflow

Part 1: Enable ReportCaster Distribution Methods
Enable ReportCaster Distribution Methods from ReportCaster Configuration

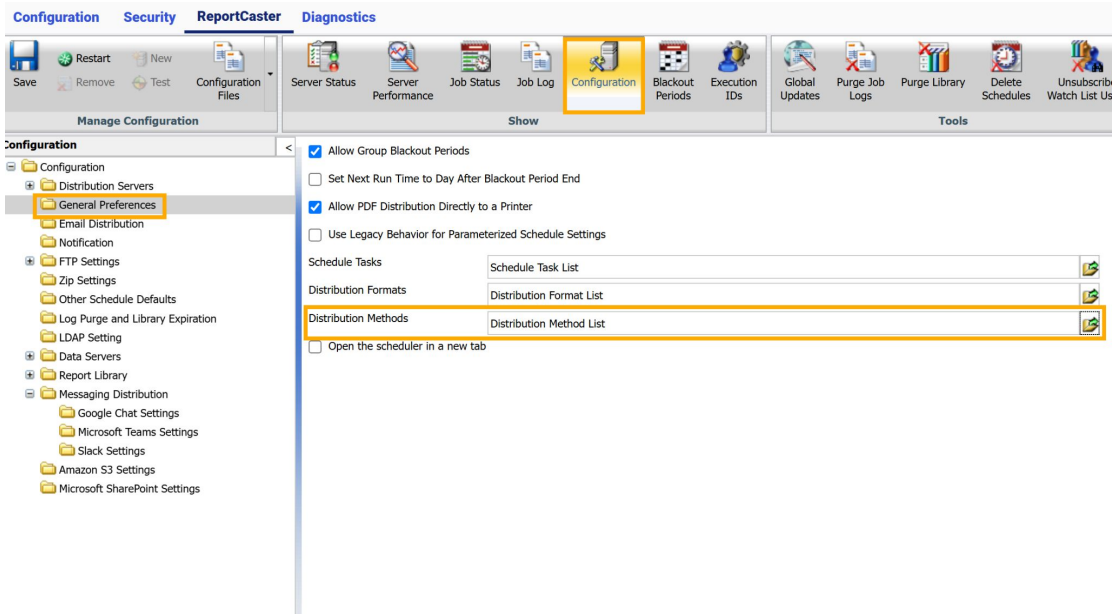
Part 2: Configure S3 Settings from ReportCaster Console
Establish a S3 connection and credential profile in the Administration Console (one-time setup).

© Copyright 2026 Cloud Software Group, Inc.

Part 1: Enable ReportCaster Distribution Methods

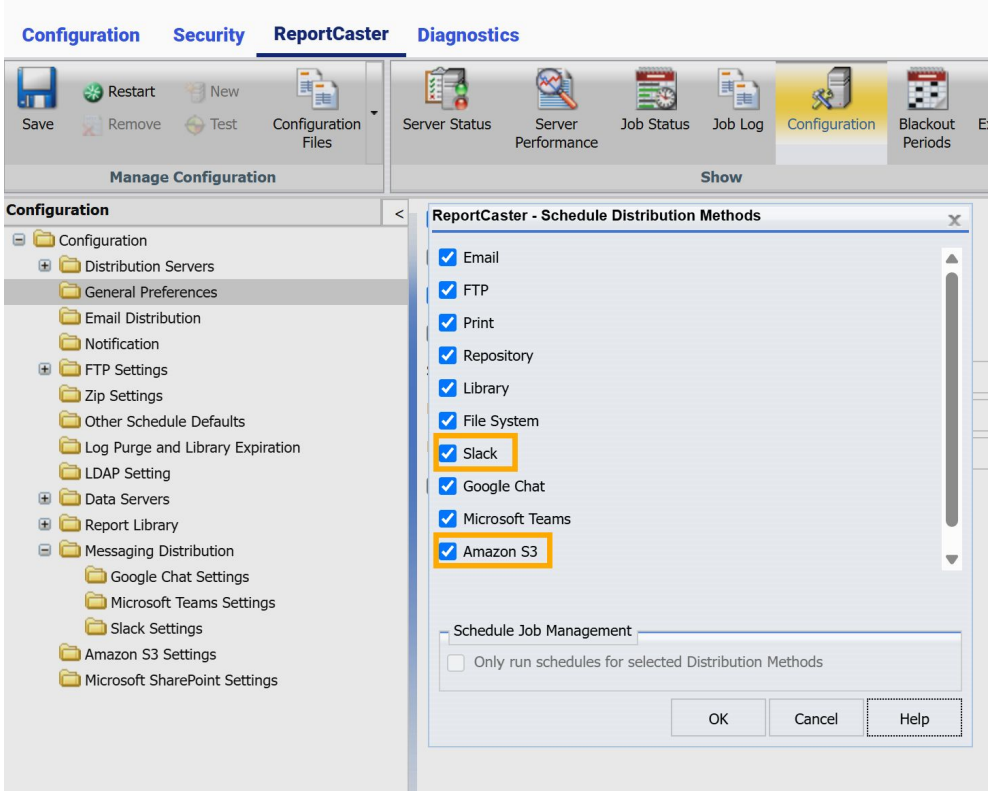
To use Amazon S3 and Slack as distribution methods, enable them from the ReportCaster Distribution Methods configuration.

1. Navigate to **WebFOCUS Hub > Management Center > Administration Console.**
2. Select the **ReportCaster** tab, then click the **Configuration** tab.
3. From the Configuration **resource tree**, select **General Preferences.**
4. Click the Distribution Methods **icon.**



© Copyright 2026 Cloud Software Group, Inc.

5. In the **ReportCaster – Schedule Distribution Methods** pop-up window, select the checkboxes for the required distribution methods, such as **Amazon S3 or Slack.**
6. Click **OK**.
7. Click Save at the top-left to save the configuration.
8. Click Restart at the top-left to apply the configuration changes.



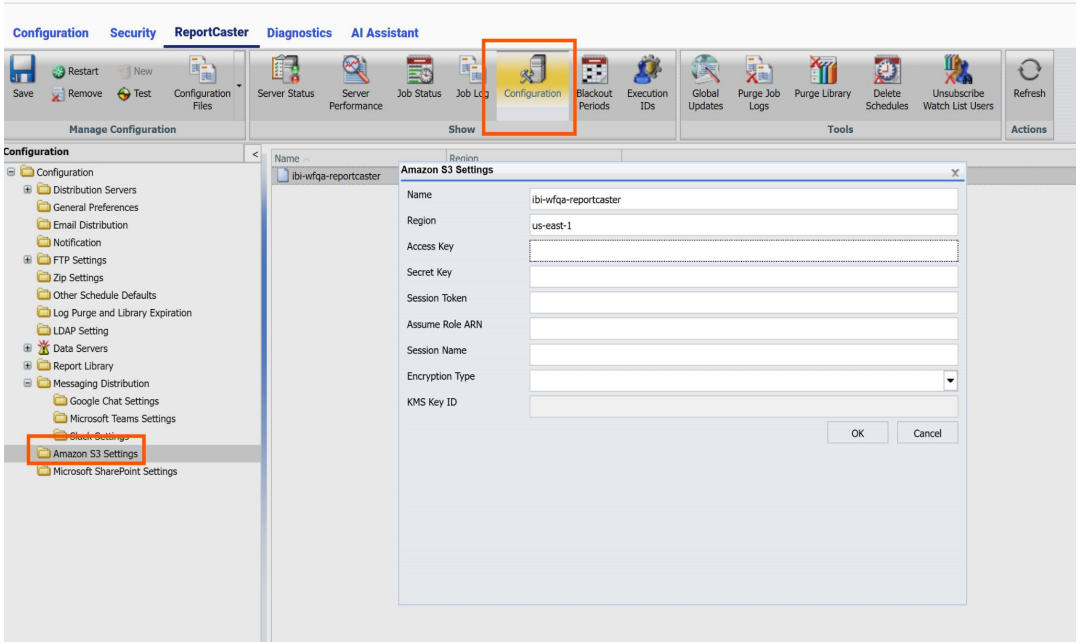
© Copyright 2026 Cloud Software Group, Inc.

Part 2: Configure S3 Settings from ReportCaster Console

Admin Console - ReportCaster

To configure Amazon S3 profiles, open the WebFOCUS Administration Console and follow this location path:

1. Open **WebFOCUS Administration Console**
2. Navigate to **ReportCaster → Configuration**
3. Select **Distribution → Amazon S3 Settings**
4. View and manage configured S3 profiles in the right pane



© Copyright 2026 Cloud Software Group, Inc.

S3 Profile Parameter Reference

Field	Description	Requirement
Name	Unique identifier for the S3 profile (fixed after creation).	Required
Region	AWS Region hosting the S3 bucket (e.g., us-east-1, eu-west-1).	Required
Access Key	AWS Access Key ID for static key authentication.	Required*
Secret Key	AWS Secret Access Key (stored as a masked password).	Required*
Session Token	Optional AWS STS token for temporary AWS credentials.	Optional
Encryption Type / KMS	Server-side encryption (SSE-S3, SSE-KMS) and Key ARN settings.	Optional

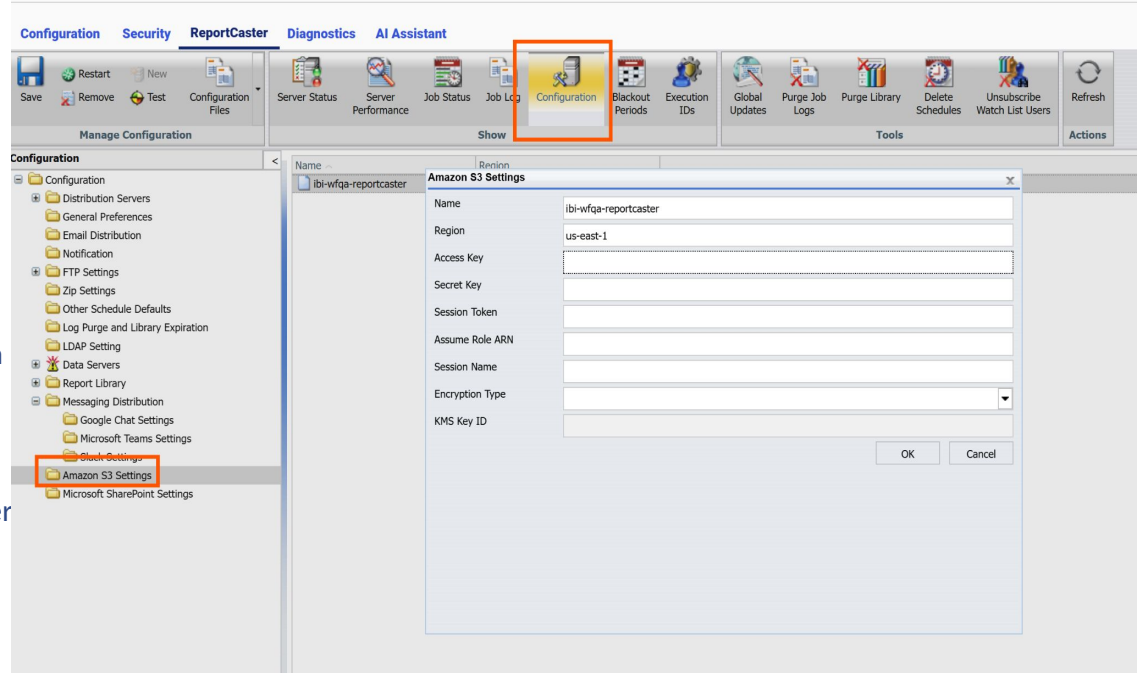
© Copyright 2026 Cloud Software Group, Inc.

Configuration Steps

Amazon S3 Profile Settings

Apply the following configuration values to establish connection with your Amazon S3 bucket:

1. Set Profile Name to **ibi-wfqa-reportcaster** and Region to **us-east-1**
2. Leave **Access Key** & **Secret Key** blank. AWS Java SDK automatically retrieves temporary credentials via EC2 instance profile (IMDS)
3. **Save configuration** and restart the ReportCaster Distribution Service to apply changes



© Copyright 2026 Cloud Software Group, Inc.

Hands-on Lab



© Copyright 2026 Cloud Software Group, Inc.

2

ReportCaster CM Export utilizing Amazon S3 Bucket Lab

The Schedule a WebFOCUS CM Export feature enables you to automate the execution of an existing Change Management (CM) Export scenario using the ReportCaster Scheduler.



© Copyright 2026 Cloud Software Group, Inc.

Feature Overview

Core Concept

Automate the execution of existing **Change Management (CM) Export** scenarios directly within ReportCaster Scheduler.

Each scheduled run automatically creates a new **CM package (.zip)** and delivers it to configured destinations without requiring manual intervention.

Key Capabilities

- Automate recurring WebFOCUS content backups.
- Distribute via any ReportCaster method (S3, Email, FTP, Teams, etc.).
- Support for one-time or recurring execution.
- Combine multiple CM tasks into a single schedule.

© Copyright 2026 Cloud Software Group, Inc.

Enable CM Export Task Type

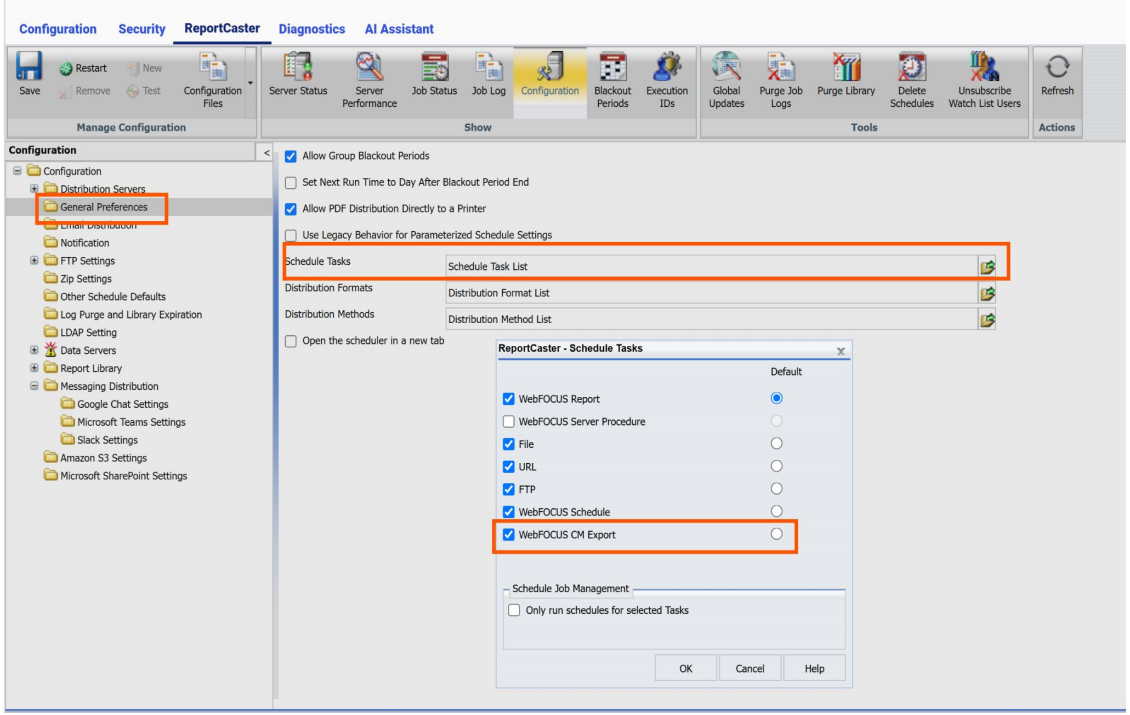
Enable WebFOCUS CM import task from ReportCaster Console

1. Open **ReportCaster Console** and go to **Configuration > General Preferences**.

2. Open **Schedule Tasks** options list.

3. Enable the **WebFOCUS CM Export** checkbox.

4. Restart **ReportCaster Distribution Server** & **Web Application** services.



© Copyright 2026 Cloud Software Group, Inc.

Hands-on Lab



© Copyright 2026 Cloud Software Group, Inc.

3

ReportCaster Slack integration and demo

Connecting WebFOCUS ReportCaster distribution to Slack — from app creation to a working configuration



© Copyright 2026 Cloud Software Group, Inc.

BEFORE YOU BEGIN

Prerequisites & Process Overview

PREREQUISITE

Slack

Access to the Slack workspace is required before configuration can begin.

SEVEN-STEP PROCESS

1. Obtain access to the Slack workspace
2. Create a Slack app using the provided manifest
3. Install the app into the Slack
4. Authorize the required permissions
5. Copy the Bot User OAuth Token
6. Configure Slack under ReportCaster Messaging Distribution
7. Save the configuration and restart the Distribution Server

© Copyright 2026 Cloud Software Group, Inc.

SETUP ROADMAP

Three-Part Integration Overview

PART 1

Create a Slack App

Build and configure the ReportCaster bot application using the pre-defined app manifest.

PART 2

Install the Slack App

Deploy the app to your workspace and authorize the required permissions for distribution.

PART 3

Configure Slack

Set up the Bot OAuth Token within ReportCaster Messaging Distribution settings.

© Copyright 2026 Cloud Software Group, Inc.

PART 1

Create a Slack App

Build the ReportCaster bot app from a ready-made YAML (OR) json manifest



© Copyright 2026 Cloud Software Group, Inc.

PART 1 · STEP 1

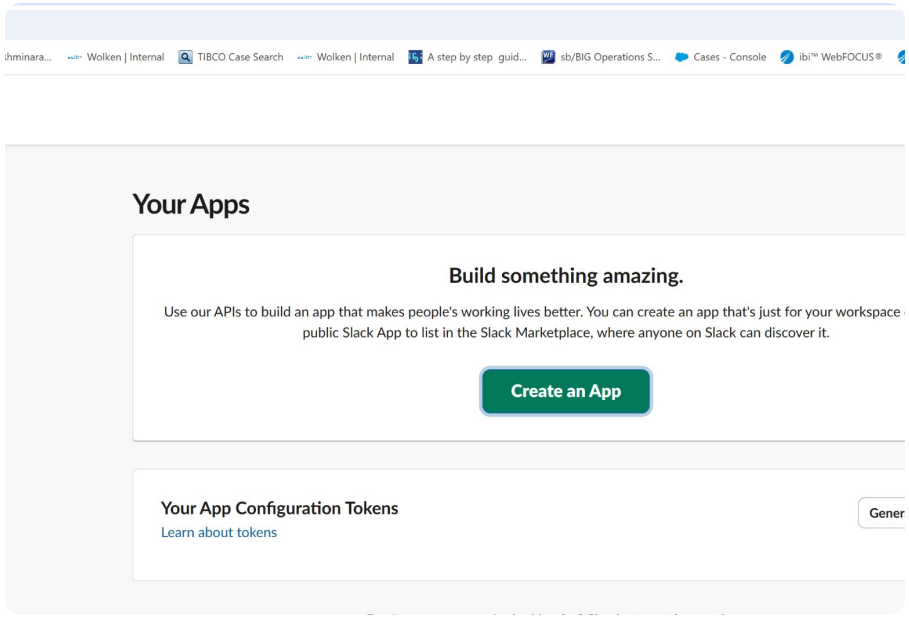
Open the Slack API Portal

1 Start New App

Navigate to the Slack API apps page to start your configuration.

`api.slack.com/apps`

Click **Create an App** *to begin.*



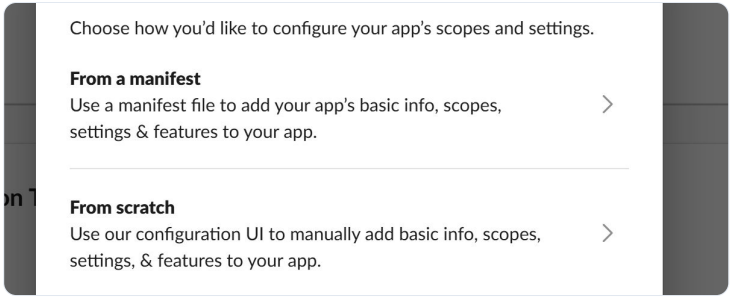
© Copyright 2026 Cloud Software Group, Inc.

PART 1 · STEP 2

Create the App from a Manifest

1 From a Manifest

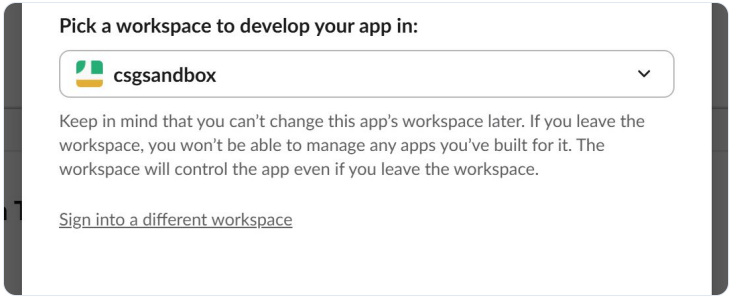
Select **Create an app**, then choose **From a manifest** to configure scopes.



2 Workspace & Confirmation

Select the workspace: **csgsandbox** (OR) **your workspace**

Then click **Next** to proceed.



© Copyright 2026 Cloud Software Group, Inc.

PART 1 · STEP 3

Paste the App Manifest

Paste the following JSON into the manifest editor. Slack automatically converts it to YAML.

```
{
  "display_information": { "name": "ReportCaster" },
  "features": {
    "bot_user": { "display_name": "ReportCaster", "always_online": true
}
  },
  "oauth_config": {
    "scopes": {
      "bot": [
        "channels:read", "chat:write", "chat:write.customize",
        "files:write", "groups:read", "im:read", "incoming-webhook",
        "mpim:read", "users:read", "users:read.email",
        "im:write", "mpim:write", "chat:write.public"
      ]
    }
  },
  "settings": {
    "org_deploy_enabled": false,
    "socket_mode_enabled": false,
    "token_rotation_enabled": false
  }
}
```

SCOPE SPOTLIGHT

`chat:write.public`

Allows the bot to post messages to all public channels without first joining them.

13 BOT SCOPES REQUESTED

channels:read · chat:write · chat:write.customize · files:write · groups:read · im:read · incoming-webhook · mpim:read · users:read · users:read.email · im:write · mpim:write · chat:write.public

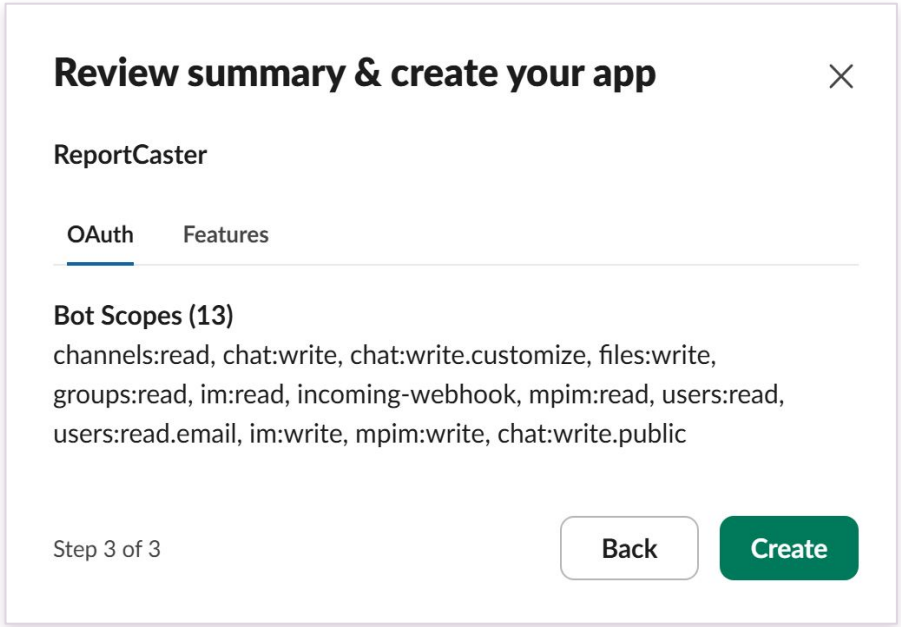
© Copyright 2026 Cloud Software Group, Inc.

Review Scopes & Create the App

1. Click Next.
2. Review the requested scopes.
3. Click Create.

Bot Scopes

Review Bot Scopes on the confirmation screen before the app is created.



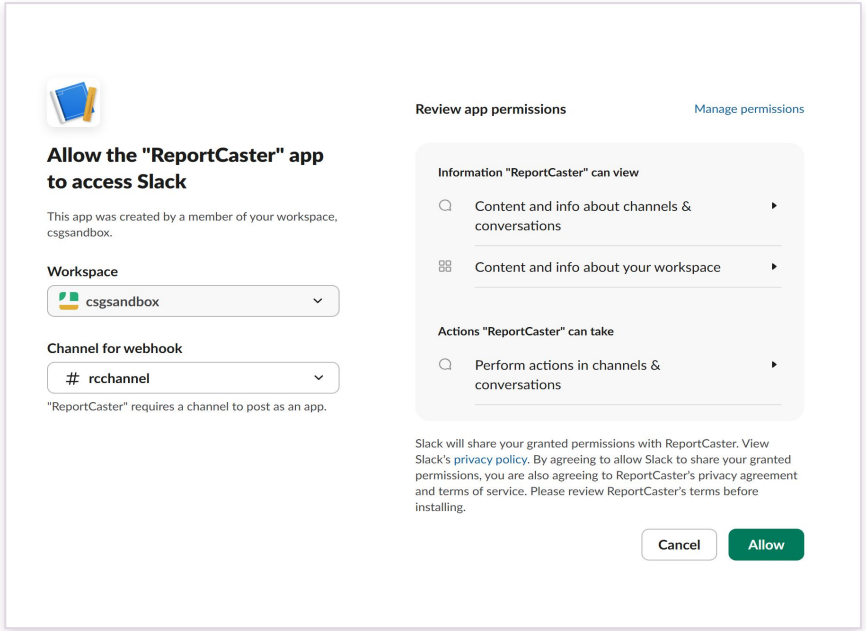
© Copyright 2026 Cloud Software Group, Inc.

PART 1 · STEP 4

Review the App

After the app is created, review the Basic Information page to verify the application details. No action is required at this stage.

- **App ID**
  Unique identifier for the app
- **Client ID / Client Secret**
  Used for OAuth requests
- **Signing Secret**
  Verifies requests genuinely come from Slack
- **Verification Token**
  Deprecated — signing secret is preferred



© Copyright 2026 Cloud Software Group, Inc.

PART 02

Install the Slack App

Deploy the app into the workspace and capture its access token.



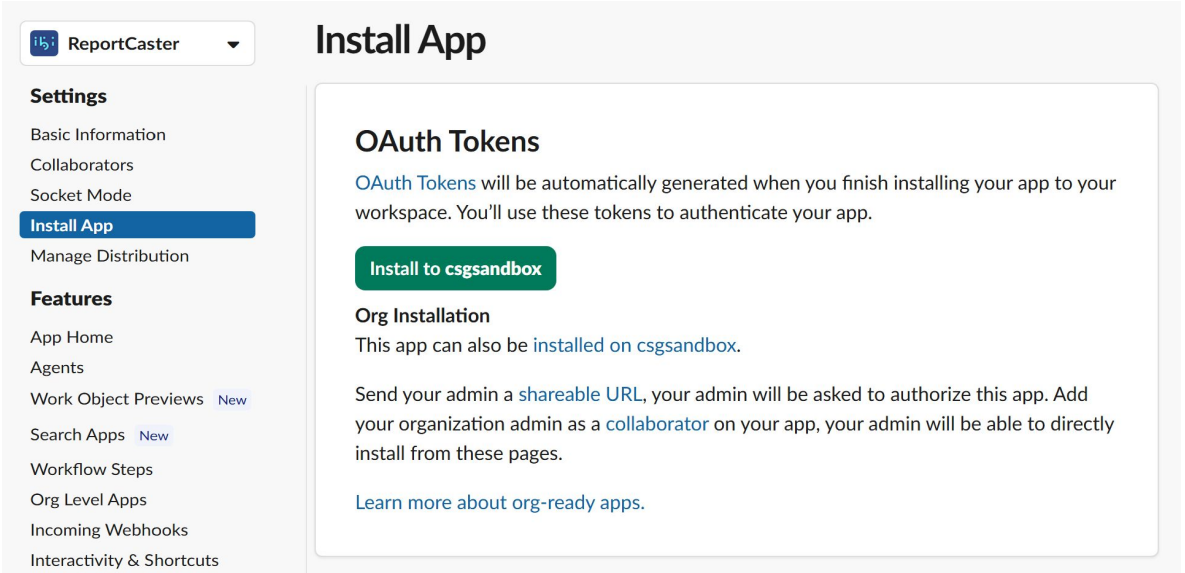
© Copyright 2026 Cloud Software Group, Inc.

PART 2 · STEPS 1

Install & Authorize the App

1 Install the App

Navigate to Settings → Install App, then click Install to csgsandbox (OR) Your Workspace.



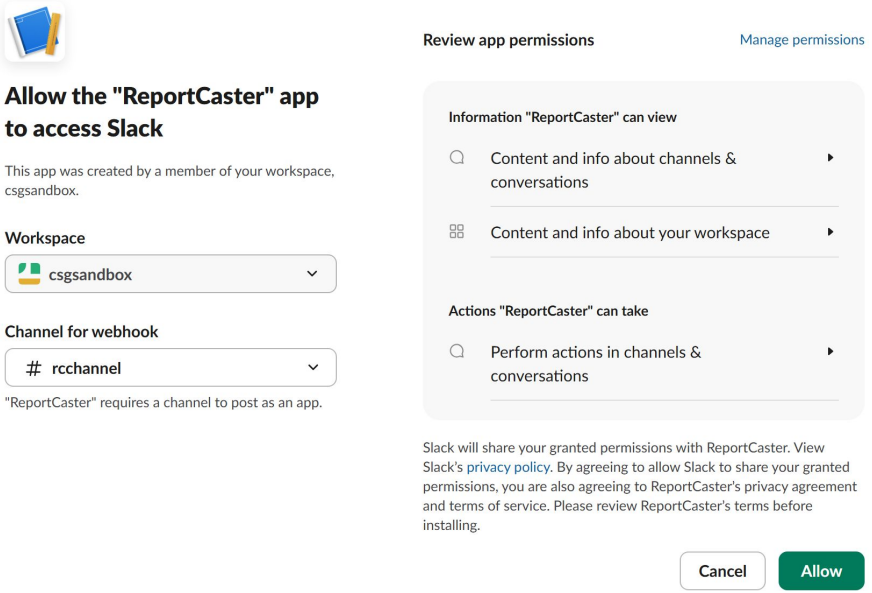
© Copyright 2026 Cloud Software Group, Inc.

PART 2 · STEPS 2

Install & Authorize the App

2 Authorize the App

Slack requires a channel for the Incoming Webhook permission — select any channel, then click Allow.



© Copyright 2026 Cloud Software Group, Inc.

PART 2 · STEP 3

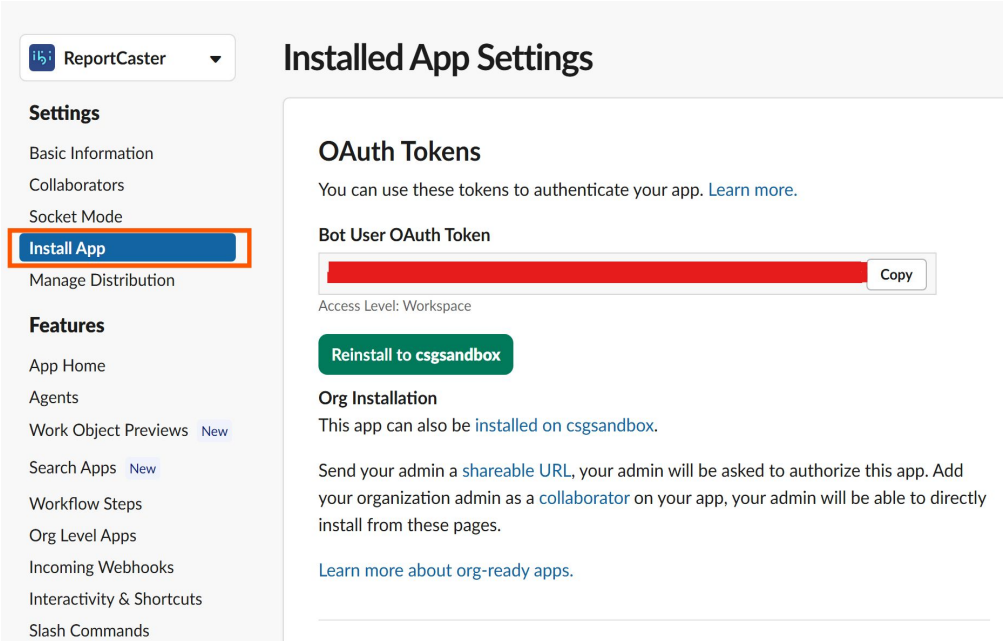
Obtain the Bot User OAuth Token

1. Open OAuth & Permissions.
2. Copy the Bot User OAuth Token.

✓

This token is used when configuring ReportCaster in Part 4.

If scopes or permissions change later, click Reinstall to csgsandbox to generate updated permissions.



© Copyright 2026 Cloud Software Group, Inc.

Managing the Slack App

BASIC INFORMATION

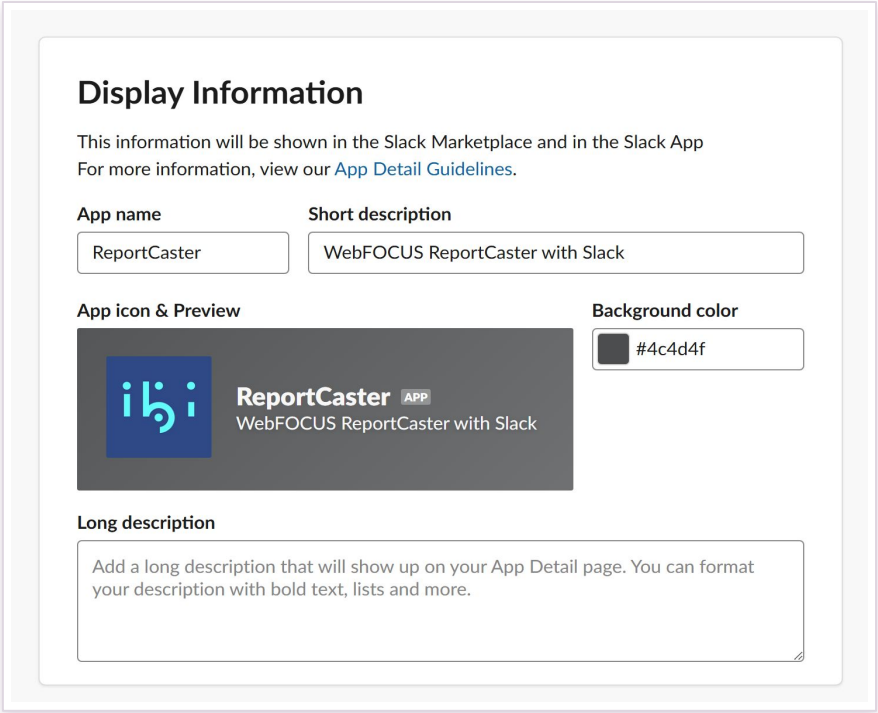
`Settings → Basic Information`

Update as required: App Name (e.g. ReportCaster), Short Description, App Icon, and Preview Image.

OAUTH & PERMISSIONS

`Features → OAuth & Permissions`

Add or remove Bot Token Scopes, and review permissions defined in the App Manifest. Reinstalling is required after any change.



© Copyright 2026 Cloud Software Group, Inc.

PART 03

Configure Slack in ReportCaster

Connect the access token to the WebFOCUS Distribution Server



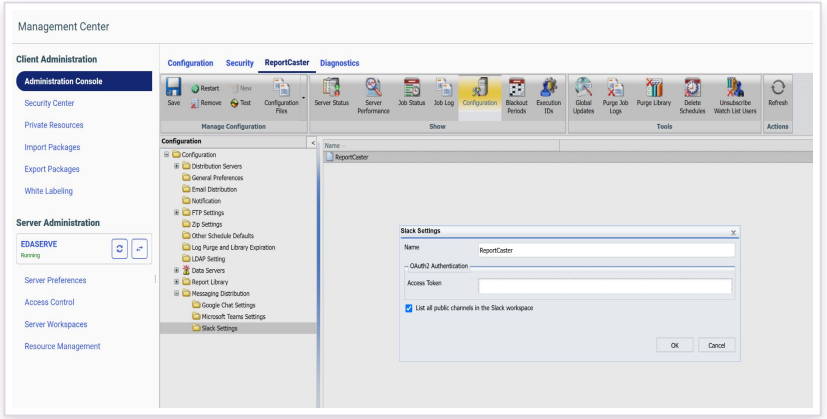
© Copyright 2026 Cloud Software Group, Inc.

PART 3

Configure Slack in WebFOCUS ReportCaster

After obtaining the Bot User OAuth Token, configure Slack within ReportCaster.

1. Open WebFOCUS Administration Console
2. Navigate to ReportCaster Console tab ⟶ Configuration
3. Select New
4. Enter a name for the Slack configuration
5. Paste the Bot User OAuth Token into the Access Token field
6. (Optional) Enable “List all public channels in the Slack workspace”
7. Click OK to create the Slack configuration
8. Save the ReportCaster configuration
9. Restart the Distribution Server for changes to take effect



List all public channels in the Slack workspace

This option retrieves and displays all available public Slack channels.

© Copyright 2026 Cloud Software Group, Inc.

Testing the Configuration from ReportCaster Console

Validate the Setup

Verify your integration directly from the console to ensure seamless connectivity.

1. Select Configuration

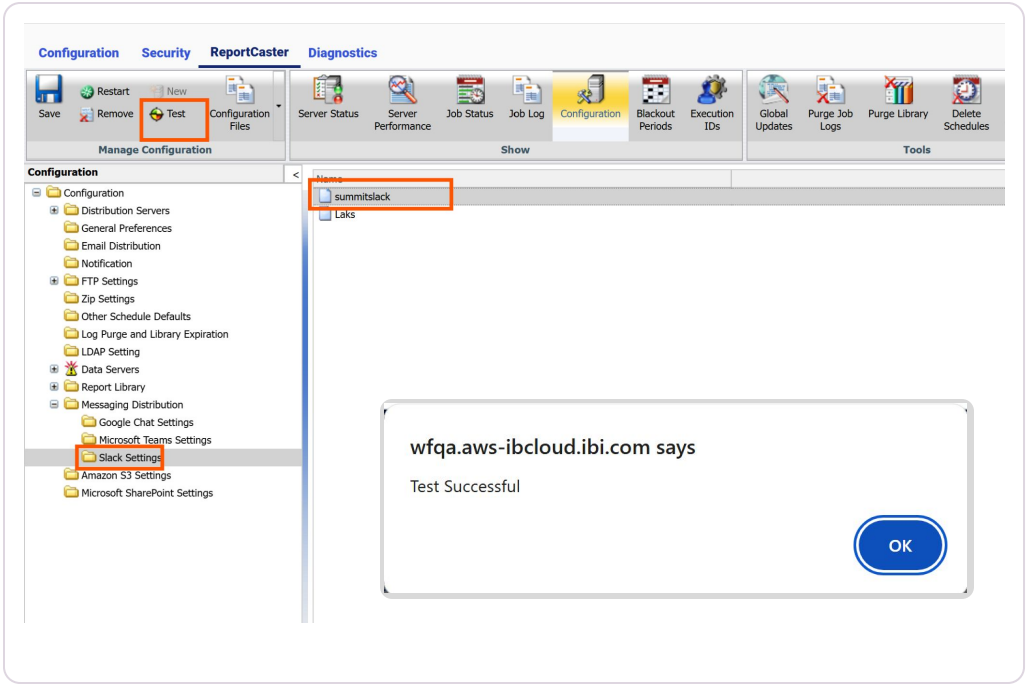
Choose your saved Slack configuration (e.g., Slack Settings) from the console tree.

2. Run Connection Test

Click the **Test** button on the top toolbar to trigger the verification process.

3. Verify Result

A successful connection will pop up a confirmation alert. If it fails, check your OAuth token settings.



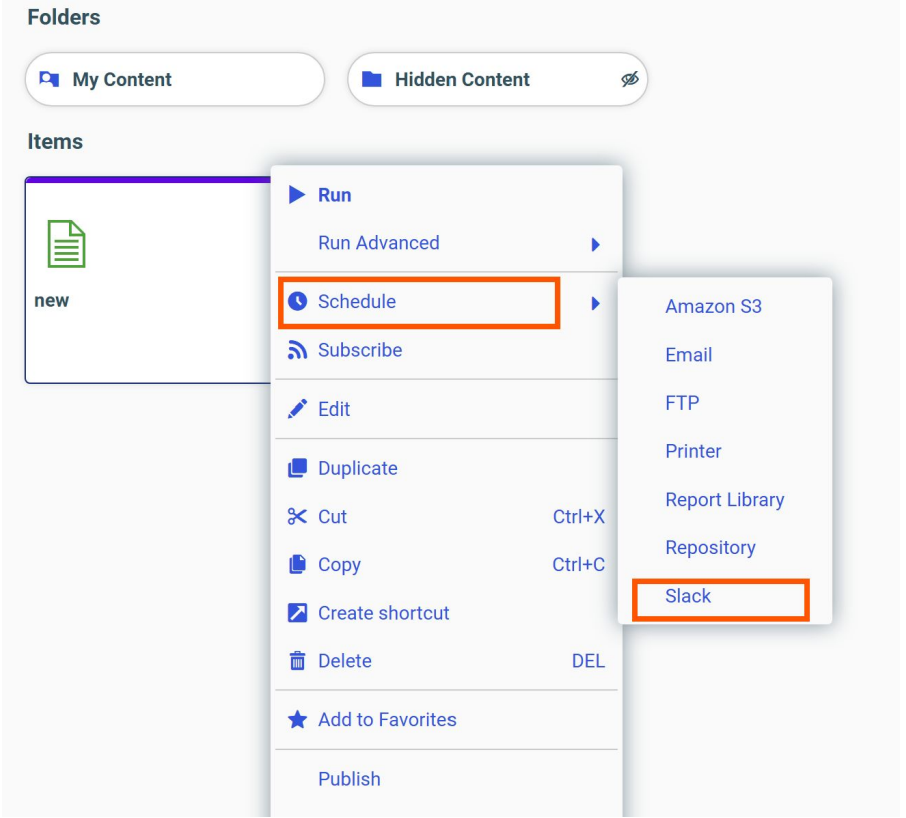
© Copyright 2026 Cloud Software Group, Inc.

Slack Schedule Initiation

Creating an Slack Schedule

Once the Slack is saved, create a schedule for any procedure file in the Workspace:

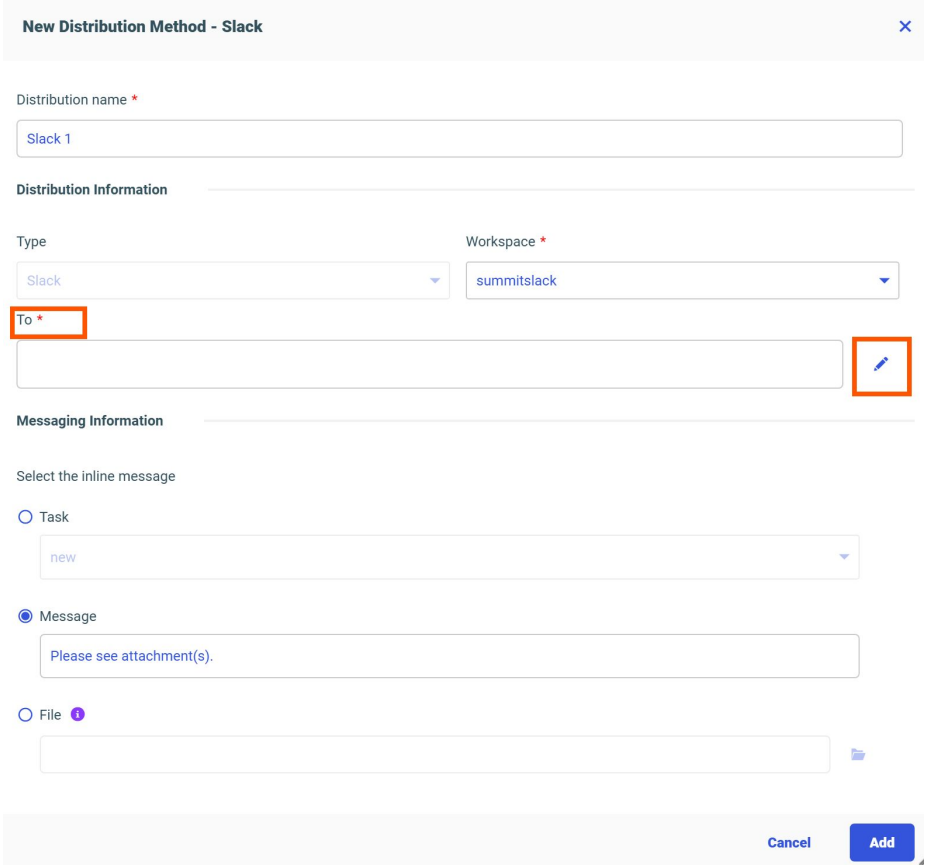
1. Navigate to **Workspace**
2. Right-click the target **.fex procedure**
3. Select **Schedule** from the context menu
4. Choose **Slack** as the distribution method



© Copyright 2026 Cloud Software Group, Inc.

Adding Distribution details

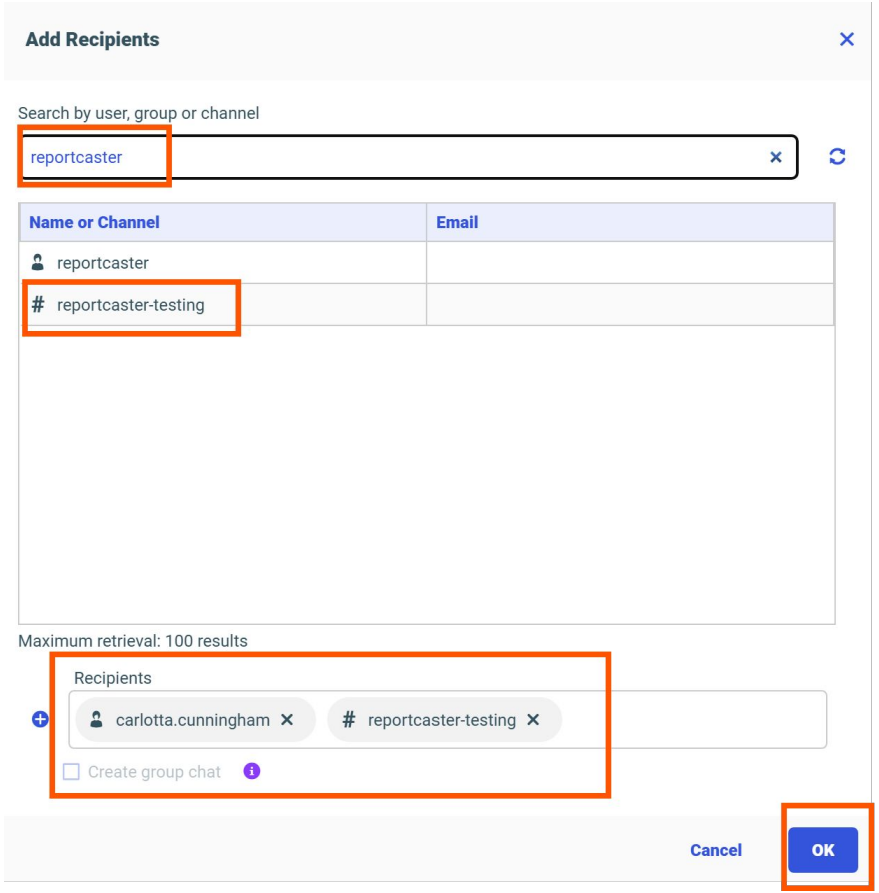
5. Enter **Distribution name**
6. Select your Target **Workspace** (Name of Slack Config)
7. Click on Edit icon to add Slack user or group or Channel



© Copyright 2026 Cloud Software Group, Inc.

Adding Recipient

8. Type your recipient in "**Search by user, group or channel**" textbox
9. Double Click your recipient under **Name or channel** section
10. Verify the recipients under the **Recipients** section and click OK.



© Copyright 2026 Cloud Software Group, Inc.

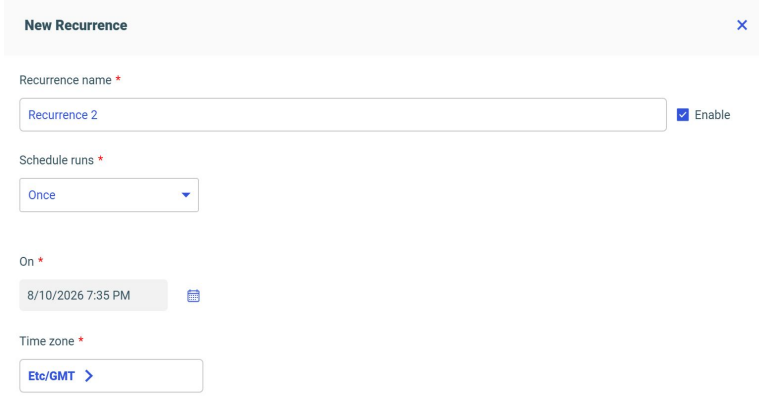
Recurrence & Execution

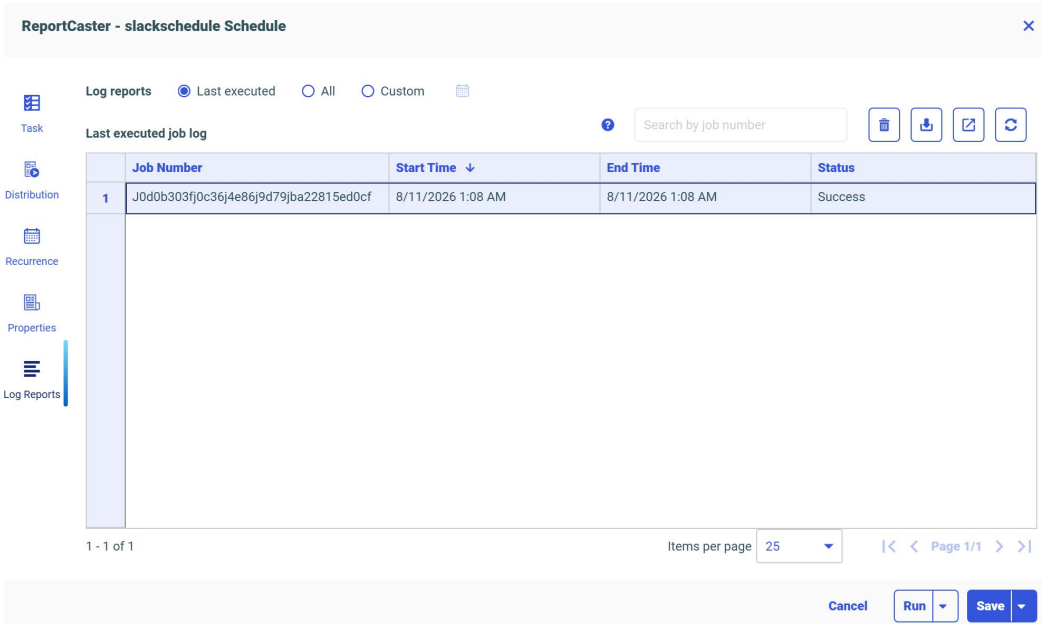
Define execution timing and trigger the schedule:

11 Select the **Recurrence** tab to configure schedule timing (once, daily, weekly, etc.).

12 Click **Save** to persist the schedule configuration.

13 Click **Run** to execute the schedule immediately for testing.

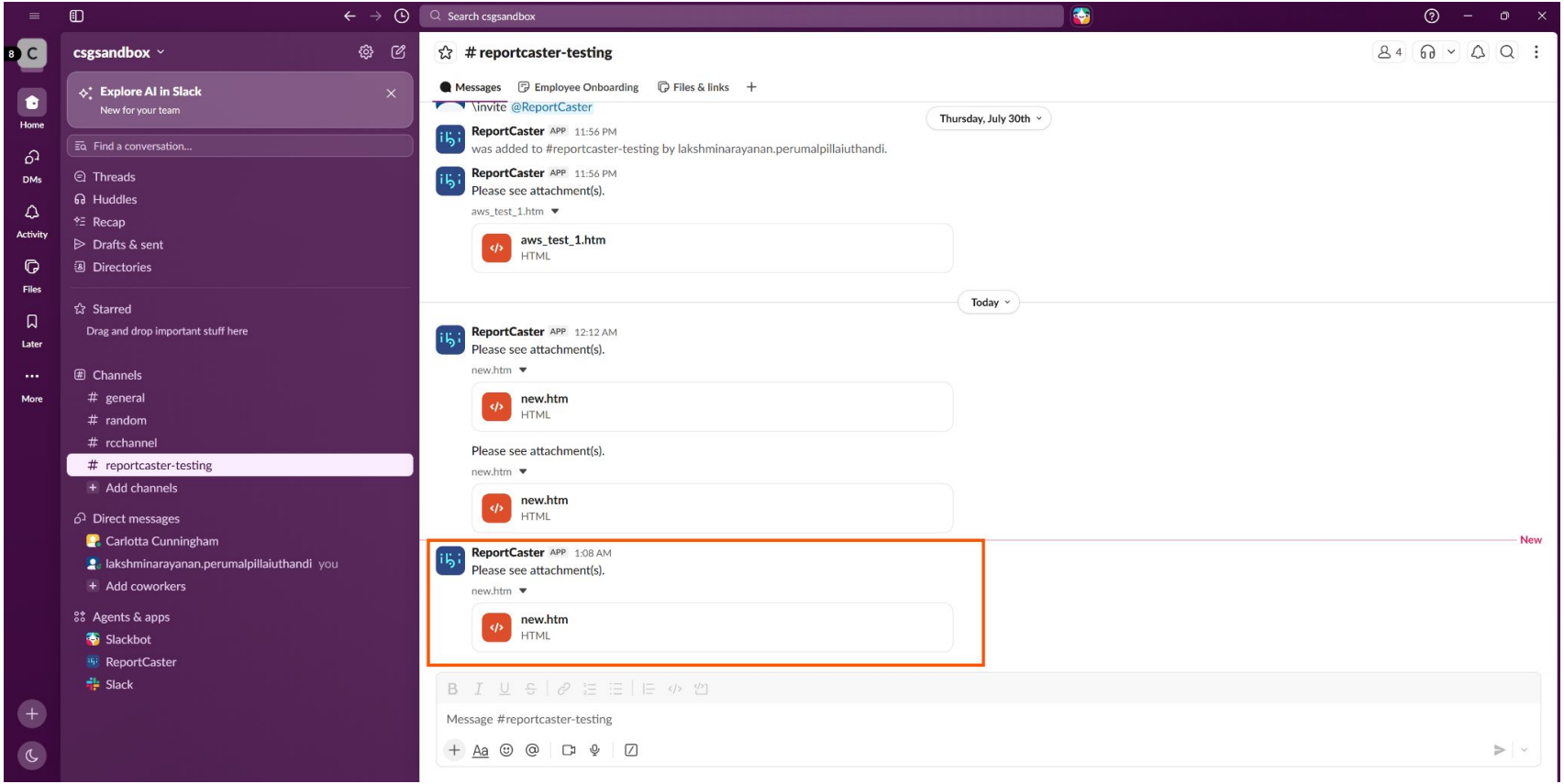




© Copyright 2026 Cloud Software Group, Inc.

Verification in Slack

Open Slack and Verify the report Distribution



© Copyright 2026 Cloud Software Group, Inc.

THANK YOU Questions?



© Copyright 2026 Cloud Software Group, Inc.



© Copyright 2024 Cloud Software Group, Inc.