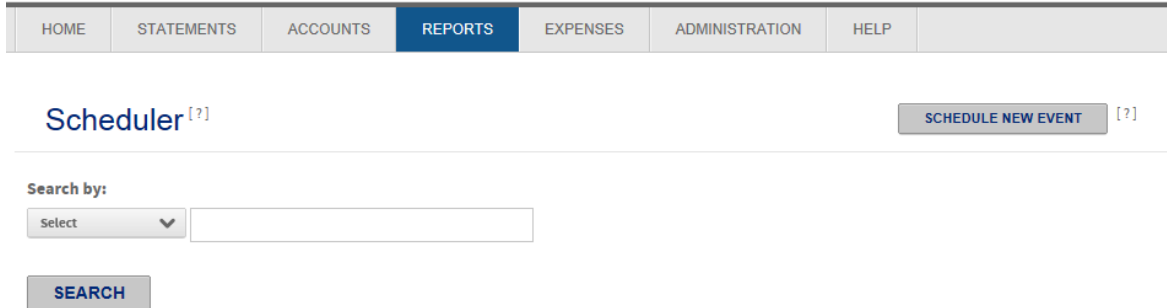


## Scheduler

The flow to schedule a report or mapper remains largely the same as existing functionality. Users can click on Reports > Scheduler and then select “Schedule New Event”:



HOME STATEMENTS ACCOUNTS **REPORTS** EXPENSES ADMINISTRATION HELP

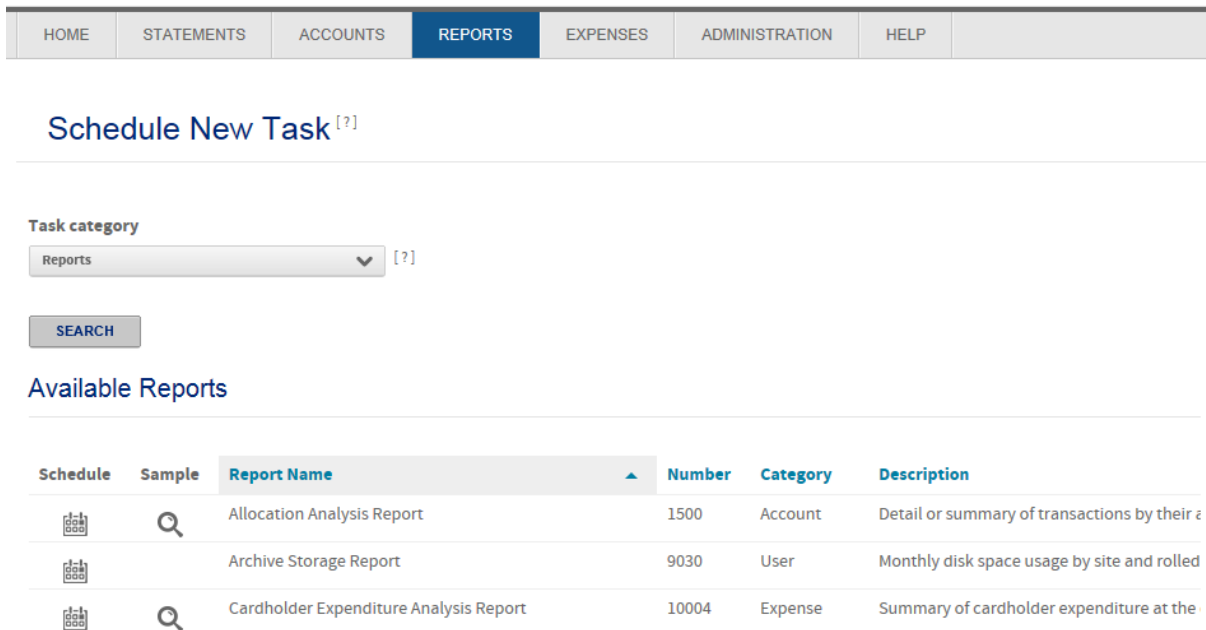
Scheduler <sup>[?]</sup> [SCHEDULE NEW EVENT](#) <sup>[?]</sup>

Search by:

Select

[SEARCH](#)

Users can search for standard reports or mappers from the drop down list. Users will click on the Schedule icon next to the item they want to schedule.



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Schedule New Task <sup>[?]</sup>

Task category

Reports <sup>[?]</sup>

[SEARCH](#)

Available Reports

Schedule	Sample	Report Name	Number	Category	Description
		Allocation Analysis Report	1500	Account	Detail or summary of transactions by their c
		Archive Storage Report	9030	User	Monthly disk space usage by site and rolled
		Cardholder Expenditure Analysis Report	10004	Expense	Summary of cardholder expenditure at the

For both reports and mappers, the schedule options will vary depending on the event selected. Below is a sample of the Transaction Report. Users will select the accounts and/or units, the output format and format options and the file destination options. The Next and Cancel options display at the top and bottom of the screen.

## Schedule Transaction Report <sup>[?]</sup>

**NEXT** [Cancel](#)

### Accounts and Units ▲

**Search for:**  
 Unit  Account [?]

Unit Name

**SEARCH**

Select Units

	Unit Name	Unit Number	Hierarchy
<input type="checkbox"/>	TSYS	00000442	□□□
<input type="checkbox"/>	TSYS	00003292	□□□
<input checked="" type="checkbox"/>	TSYS	00050000	□□□


Selected Accounts/Units


**REMOVE ALL**

Remove	Account/Unit	Include Subunits
⊖	TSYS (00050000)	<input checked="" type="checkbox"/>


## Schedule Transaction Report <sup>[?]</sup>


**NEXT** [Cancel](#)

Accounts and Units 

Output Format 

Output format: <sup>[?]</sup>

Excel 

Format options 

Detail level: <sup>[?]</sup>

Transaction  Summary

Display transaction notes: <sup>[?]</sup>

Yes  No

Display line item detail: <sup>[?]</sup>


Yes  No

Print report criteria on the last page: <sup>[?]</sup>

Yes  No

Include a header note: <sup>[?]</sup>

Yes  No

File Destination Options 

Output log <sup>[?]</sup>

Personal

Corporate

Once the above options are set click on Next to set the name of the scheduled event, the frequency for how often the report will be run and the Email Notification options.

## Schedule Transaction Report <sup>[?]</sup>

**NEXT** [Cancel](#)

### Name and schedule task ▲

Task name\*

Frequency

Daily

Weekly

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Monthly

Select day of month

Cycle

Cycle name

Delay

### Select output format ▲

Output format

### Select notification option ▲

Email me when the report is ready

Yes

No

[\[?\]](#)

Click Next to review all settings. Once the user confirms the setup they can click on Finish to save the new scheduled event.

### Step 3: Review task settings

**Required Criteria** ▲

---

Selected Access

---

Selected Items	Include Subunits
TSYS (00050000)	Yes

---

**Format options** ▼

---

**Schedule frequency settings** ▼

---

**Output format** ▼

---

**Notification option** ▼

---

**File Destination Options** ▼

---

FINISH
[Cancel](#)

The new scheduled event will display when the user clicks on Search on the Scheduler screen:

HOME STATEMENTS ACCOUNTS **REPORTS** EXPENSES ADMINISTRATION HELP

---

Scheduler <sup>[?]</sup>
SCHEDULE NEW EVENT <sup>[?]</sup>

---

Search by:

Select ▼

SEARCH

---

**Scheduled Events**

Modify Criteria	Modify Schedule	Delete	Name	Type	Created	Last Run	Status	Next Run
			EP Test	Reports:Transaction	10/7/2015		Waiting	

---

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