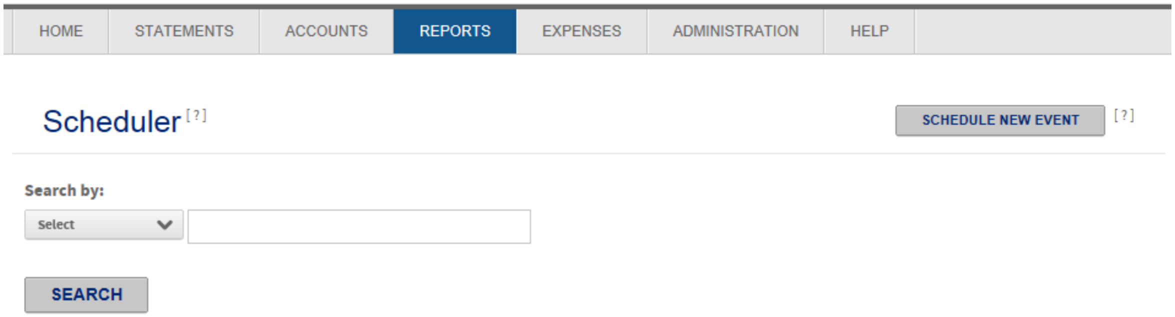
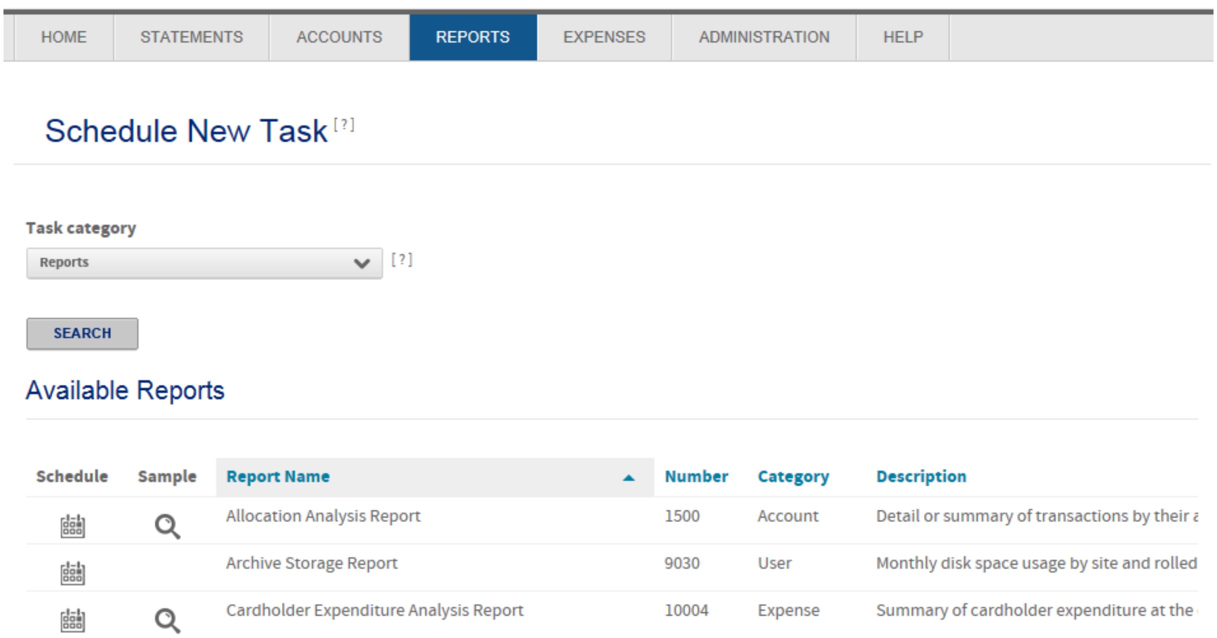
Scheduler

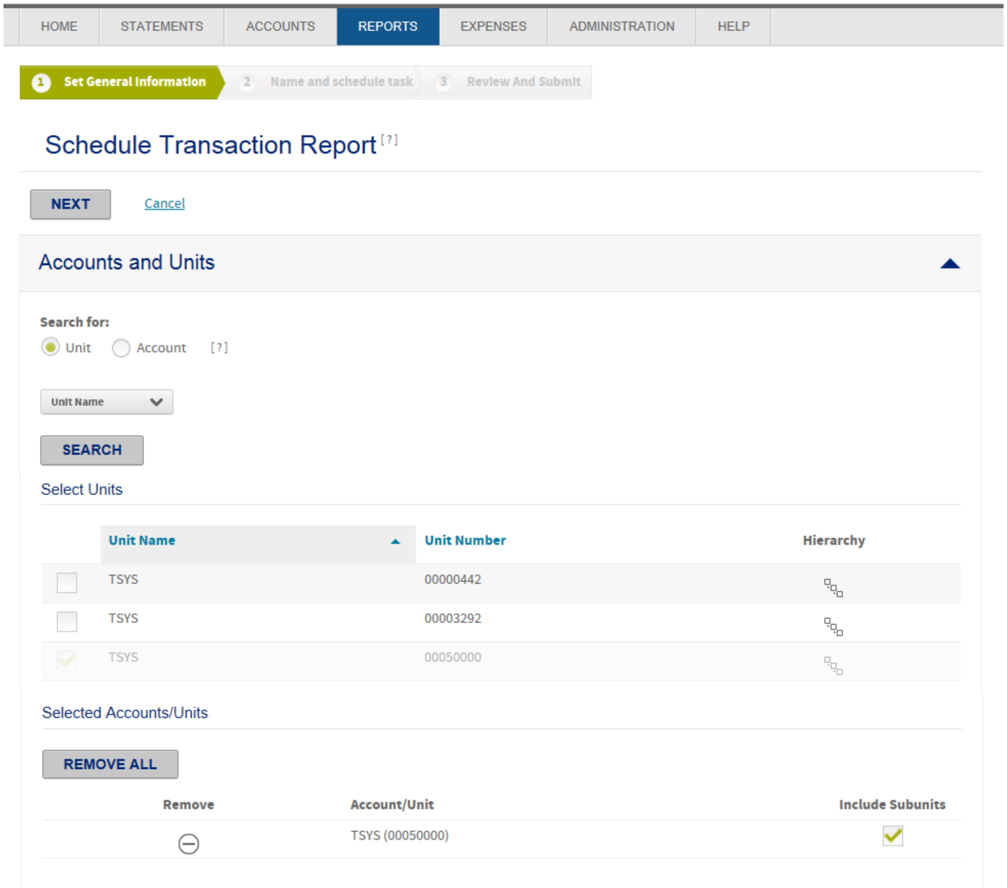
The flow to schedule a report or mapper remains largely the same as existing functionality. Users can click on Reports > Scheduler and then select “Schedule New Event”:



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.



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.


HOME
STATEMENTS
ACCOUNTS
REPORTS
EXPENSES
ADMINISTRATION
HELP
1 Set General Information
2 Name and schedule task
3 Review And Submit
Schedule Transaction Report [?]
NEXT
Cancel
Accounts and Units
Search for:
Unit
Account
[?]
Unit Name
SEARCH
Select Units
Unit Name
Unit Number
Hierarchy
TSYS
00000442
TSYS
00003292
TSYS
00050000
Selected Accounts/Units
REMOVE ALL
Remove
Account/Unit
Include Subunits
TSYS (00050000)

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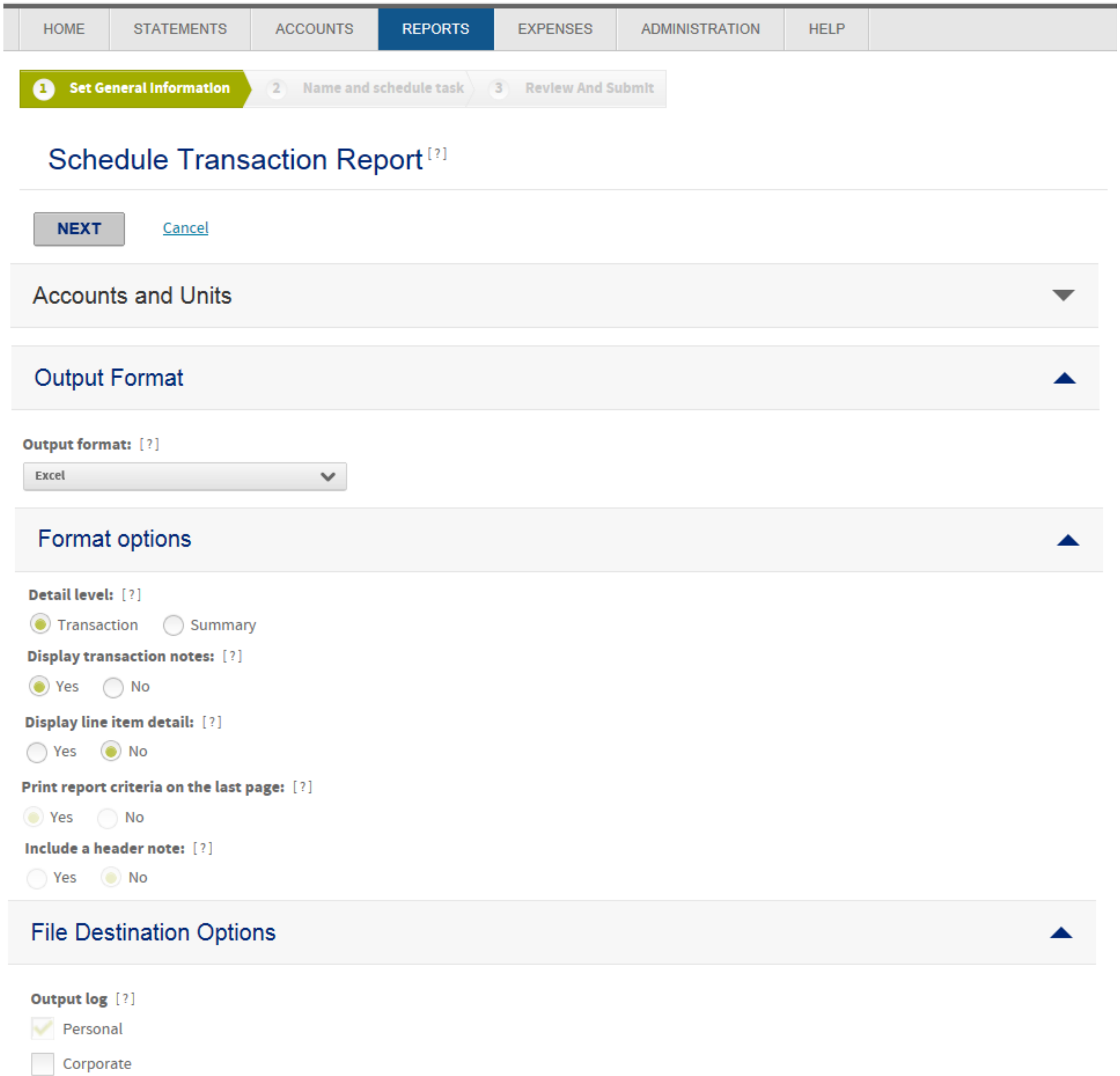
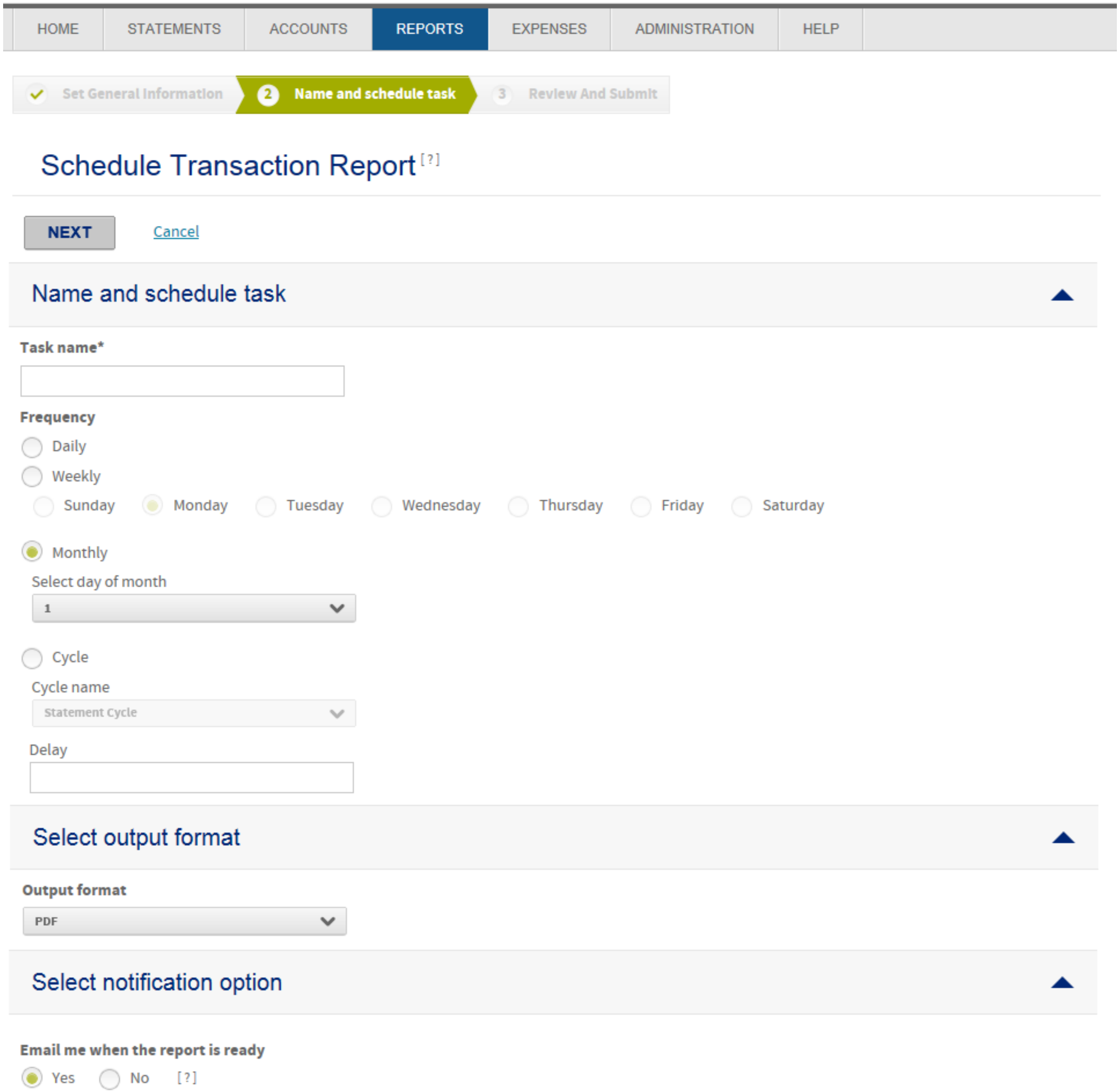
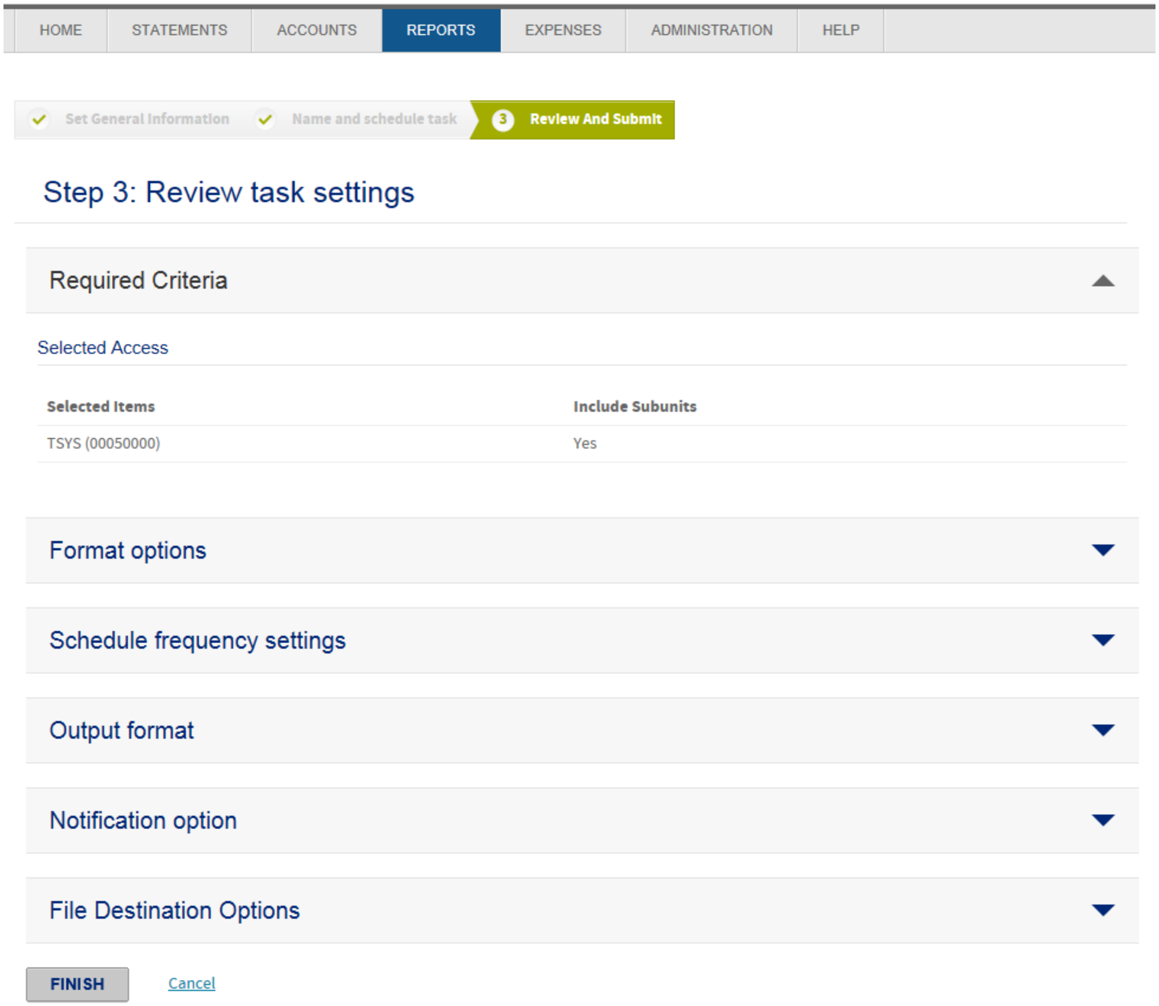


Once the above options are set click on Next to set the name of the scheduled event, the frequency for how often the report will be run and the Email Notification options.



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



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