ASICOMP.COM

Schedule Reports

Tammy Mason - 2022-07-18 - in Reports

Schedule Reports

Reports Setup

1. A Saved Report Format must be setup for any report to be scheduled.

2. Go into the menu option for each report and set up a **"Saved Report Format"** with the desired report settings.
   The icons to Save Report Format and Restore Report Format are contained in the left corner of the upper toolbar within each report option.

3. Reports may be saved in many different formats for various reporting needs.

4. See Help within any report option for explanations of Saving Report Format.

Optional setup: Within this option, Saved Report Format(s) may also be setup to indicate a "group" of reports that may commonly be run at the same time (Monday reports, Friday reports, 15th day of the month reports, etc.) The icons to **Save Report Format** and **Restore Report Format** are contained in the left corner of the upper toolbar.

Select any of the report names being displayed to choose for a desired "group" by putting a check mark in front of the report name. Then, go into the **Save Report Format** icon and save the grouping. Report format name should be easy to understand, ie. "Monday reports".

To run a stored group, click on the **Restore Report Format** and choose the Report Format Name for the desired group. All reports in that group will then be the only reports flagged with a check mark to be processed.

Schedule Reports Procedure

1. Payroll security - If your company has a payroll security set up and you wish to have payroll vendors printed on the A/P reports (Including Monthly Payments Report, Cash Requirements Report, A/P G/L Distribution, etc), you will need to enter your payroll security. If you do not wish to include payroll vendors, choose Cancel.

Note: If you cancel out of the payroll security window, there will be no payroll vendors printed on your Monthly Payments Report, etc. If you accidentally click Cancel, you will still have a chance to "Include payroll vendors", once the program is loaded.
If you don't have a payroll security, but do have payroll vendors, they will automatically be printed on the A/P reports, as they currently do.

2. Once the program is loaded, there will be multiple tabs visible. The General tab contains miscellaneous information needed to run the option to your specifications. Following that are tabs for each of the report types. By clicking on each tab, you will see a list of all the reports available. The Scheduled tab will eventually show a list of all the reports which have been chosen along with a Start and Restart (optional) time.

3. Reports
· **Select all -** Will place a check mark next to ALL reports listed on all sections. If you wish to choose only selected reports, you may go to that tab and manually check the box next to the reports you wish to have stored. You may also find is faster to select all reports and just manually unselect the reports you don't want. If you are restricted from a report, it will not be selected.
· **Unselect all -** Will uncheck all reports for all sections.
· If **Saved Report Formats** have been setup for any "group" of reports that may commonly be run at the same time (Monday reports, Friday reports, 15th day of the month reports, etc.) you may **Restore Report Format** to select the desired group of reports. (See Setup for additional information)

4. Email address to receive completion confirmation - If emailing is setup within Company Information, an email will be sent to this email address upon completion of this option (after all selected reports have been stored and selected update/clear options performed) and the program closes. This email address will default from this operator's master. If emailing is set up, an email address will be required.

5. Tabs for all report types - Review each tab to be certain the reports you want have been checked. If the operator is restricted from a report, they will not be able to select it.

6. Scheduled Tab - Should contain a list of all reports to be stored.

7. Start now - Will start the processing immediately. If you choose this option, no start/stop/restart times will be entered. If the program is closed, no processing will occur.

Important! Once processing has started through "Start now" or "Start later", the server cannot be stopped.

8. Start later (Start/Stop/Restart times) - Will require entry of a start time. Stop and restart times are optional. When entering a start time, keep in mind the length of time this may take to run, if you have a scheduled nightly backup. You may decide to have this processing start at a certain time, set up a stop time to be certain that it stops prior to the starting of the scheduled backup and then set up a restart time for a time that you are certain will be after the completion of the backup. Again, stop and restart times are optional. When entering a time, see the sample on the screen for the appropriate time format. Server status will normally be indicated as waiting for starting time.
Current time will indicate your current computer time with the start time shown below it.

If you have chosen Start later and decide something is incorrect or you wish to stop the program, you may click to Stop Server button only if the function has not started processing. Once you stop the server, you may either make changes and start again (now or later) or close the program to end the option. If the program is closed, no processing will occur.

Stopping the server – If you choose to have the server stopped at a certain time, the report which it is storing at that time will be completed prior to the server stopping. **Therefore**, if any reports have MANY pages, you will want to make sure there is plenty of time between stopping this server and starting any automatic backup.

Note: If there is an error and the program is not totally completed, it may be able to be restarted.
Important! Keep in mind, that whether you start now or start later, this option may take a long time to complete. This can be partially gauged based on the amount of time it normally takes your company to complete all the selected reports. The time savings will occur because all the reports will be stored (not printed) and the option will run unattended.Once all processing is complete, this program will close.

9. After the program is closed, an email will be sent to the email address indicated. The email will contain various information pertaining to the completion of this option such as:

· Recipient's email address

· Module name, menu option, report format name/description for each of the reports processed

· Status for each process:

~ Success = Option was successfully opened and closed.

~ No data to report = Report attempted to process but there was no data that met the report criteria.

~Failed = Option was unable to successfully open and close. If this occurs, the failed options should be processed again.

10. The stored reports and a copy of the confirmation email will be stored in individual year/month folder subdirectories under your ASIDTA\ScheduledReports directory. Each year will have its own folder with a folder for each month of that year within it.

Note: A copy of the confirmation email will be stored even if no email was originally generated or an invalid email address was entered. Viewing this file may allow us to determine why an email was not received.

11. The reports may then be viewed/printed through the View/Print Scheduled Reports option. Reports will be stored in a compressed format for security purposes and will be opened as PDF's through the Month-End Reports option.