Momentive

mip Accounting

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Scheduler User's Guide

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Contents

Chapter 1: Introducing the Scheduler Module

Finding time for printing reports or processing data can be difficult on a busy system. The Scheduler module reduces the load by producing reports, posting transactions, and processing allocation calculations, during times when there is less network traffic. Scheduler works behind the scenes, polling the database and running scheduled tasks at user defined intervals.

Using Scheduler to execute tasks is simple. Select a job to do, enter a task name and description, as well as a date and time for the task to run, and Scheduler takes over the process. Single tasks, multiple tasks, or recurring tasks can all be scheduled ahead of time and can be printed, exported to a spreadsheet or printed to a PDF file. Also, Scheduler can be set up to email notifications as tasks are completed. With Scheduler's tracking, complete lists of attempted and completed jobs can be viewed.

An additional feature is the Report Binder. The Report Binder can bundle groups of reports to process and print at the same time (such as monthly Board reports). They can be printed immediately, exported to a spreadsheet, printed to a PDF file, emailed as a PDF file, or scheduled to be processed later. Scheduler works quietly in the background of the system and can keep working long after the office is closed for the day.

To Add This Module

1. First the Scheduler module must be added to the organization by the Administrator.
2. The first time you log on to the system, enter NPS in the User box. The user ID NPS initially has no password and has full security rights to all systems. Once your own user ID is created (Security>Maintain Users), go back and establish a password for NPS.
3. Either add Scheduler to a current organization (Organization>Add a Module Wizard - Module Panel), or select the Scheduler module when creating a new organization (File>New Organization Wizard - Modules Panel). For more information on these wizards, see the *Administration* guide.
4. Once the new module has been applied to an organization, the Scheduler menu selections are available. Menu selections are available in the Scheduler system, and they are also integrated into the MIP Accounting menu selections.
5. There are Checklists available for setting up this module and its processes. Please refer to the online help (Help>Contents and Index>Reference) for modular specific menu selections, checklists, and common questions.

Scheduler Login

Access this form by starting Scheduler in the Start>Programs menu.

The Scheduler module allows scheduled tasks and processes to occur simultaneously during the day or after regular office hours when there is less traffic on the network. Working behind the scenes, Scheduler polls the databases for scheduled tasks at user defined intervals.

Use this form to log on to the Scheduler system. After logging on, the Scheduler icon appears on the taskbar at the bottom of the screen. To view its menu items, click the Scheduler icon.

Scheduler is also enabled on applicable forms throughout the system, allowing tasks to be scheduled while working in the system. For more information, see "Task Scheduler" (page 10).

Note: The Scheduler jobs process on individual workstations.

Fields

User: Enter a user ID to log on to Scheduler. Enter the same user information that was entered when logging on to the MIP Accounting system.

If this is the first time logging on to Scheduler, enter NPS in the User box. We strongly suggest establishing a password for the user ID NPS after creating your own user IDs (Security>Maintain Users in the MIP Accounting system).

Password: Enter a user password.

Tips:

- Consider using the "Report Binder" (page 3) to group reports together to be printed immediately, exported to XLS, printed to a PDF file, emailed as a PDF file, or scheduled to be processed later. This feature is especially useful if recurring monthly board reports or internal reports need to be processed immediately.

Chapter 2: Scheduling Reports

Report Binder

Access this form using MIP Accounting>Reports>Report Binder.

Use this form to group reports together to be printed immediately, exported to XLS, printed to a PDF file, emailed using SMTP as a PDF file, or scheduled to be processed later. Use the Set Up Scheduler Email tab to set up default email information that is specific to the binder information entered on the Binder Information tab.

Note: If you are emailing the report binder, you must have configured your Simple Mail Transfer Protocol (SMTP) settings for email using Organization>Organization Information>Email Setup tab.

Report Binder - Binder Information

Access this form using MIP Accounting>Reports>Report Binder.

Use this form to group reports together to be printed immediately, exported to XLS, printed to a PDF file, emailed using SMTP as a PDF file, or scheduled to be processed later. Use the Set Up Scheduler Email tab to set up default email information that is specific to the binder information entered on the Binder Information tab.

Note: If you are emailing the report binder, you must have configured your Simple Mail Transfer Protocol (SMTP) settings for email using Organization>Organization Information>Email Setup tab.

Use this tab to group reports together to be printed immediately, exported to XLS, printed to a PDF file, emailed as a PDF file, or scheduled to be processed later. This feature is especially useful if recurring monthly board reports or internal reports need to be processed immediately.

Click Scheduler to schedule the group of selected reports. It is not available if adding or editing a Report Binder. The Binder must be saved first, and then the button becomes available. For more information, see "Task Scheduler" (page 10).

Data Consolidation Users

The Report Binder only displays the Reports available in this module.

Fields

Name: Enter a name for the set of reports to be processed together. We recommend limiting your entry to strictly alphabetic characters (A through Z) or numeric characters (0 through 9), and avoid using symbols.

Description: Enter the description of the reports to process together.

Reports: Select the reports to include in the binder. The system displays the Report Name and Description (type of report, such as UnPostedBD for Unposted Budget Transactions) for both the Available Items and the Selected Items. Only reports in which you have "Process Rights" appear in the list (Security>Set Up Organization Menus).

- **Available Items, Selected Items:** The Available Items box contains all available reports that can be included in the binder. (Default reports, appearing in brackets, are listed first.) To have a report appear in the binder, select it in the Available Items column, and click the Mover (>) to move it to the Selected Items column. Include as many reports as needed to make up the binder.

Tips:

- To delete a report that is included in a report binder, you must first remove the report from the binder, then the report can be deleted.
- If you plan to email a scheduled report binder, you must have configured your Simple Mail Transfer Protocol (SMTP) settings for email using Organization>Organization Information>Email Setup tab. Note that if you email directly from the binder, without using Scheduler, the system will combine all reports into a PDF file with the report binder name as the title of the PDF to be emailed.
- Consider using "Report Binder Scheduler" (page 7) to schedule tasks to run automatically at scheduled times. The Scheduler works behind the scenes, polling the databases for scheduled tasks at user defined intervals. Reduce processing time by producing reports after regular office hours when there is less network traffic.

Report Binder - Set Up Scheduler Email

Access this form using MIP Accounting>Reports>Report Binder.

Use this tab to define an email distribution list for each binder in the system that can be used whenever the option to email the binder is selected as part of a scheduled task. Enter an email address in the From, To, Cc, and Bcc fields. To enter multiple email addresses, separate each address with a semicolon (;) and a space.

Note: You must have configured your Simple Mail Transfer Protocol (SMTP) settings for email using Organization>Organization Information>Email Setup tab. See Configuring SMTP.

To schedule a group of selected reports and send them as an attached PDF via email, click Scheduler and select the Output Option to Email PDF. If this option is selected, the scheduled task process creates an email, each report in the report binder will be attached as a PDF, and an email is sent to each recipient whose email address was entered on the Set Up Scheduler Email tab of the Report Binder. This button is not available if adding or editing a Report Binder. The Binder must be saved first, and then the button becomes available. Each report binder should have its own list of email recipients. For more information, see "Report Binder Scheduler" (page 7).

Fields

Define Email Routing

- **From:** Enter the email address from where the email is being sent. (This is required to email.) For example, you might want to enter your company's email address here if you have rights to monitor it.

Important! If the Use Custom Credentials check box was selected and a User name was entered on the Organization>Organization Information>Email Setup tab, the "From" email address here must match the User name, in order to use the Report Binder Scheduler.
You cannot use a User name with someone else's email address when the Use Custom Credentials check box was selected.

- **To:** Enter an email address of the person you want to receive this report. When you decide to schedule email tasks, the system only uses the email addresses entered here.

Note: If you are entering multiple email addresses, separate each address with a semicolon and a space. Example, you@email.com; me@email.com.

- **Cc, Bcc:** To send this report binder to another email address, enter that email address here. (The email address entered displays on the email being sent; however, the Bcc email address will not display on the email.

Customize Email Content

- **Subject:** Enter an email subject line for your report binder. It is important to make this specific so the receiver knows what they are getting in their email box.

- **Message:** Enter the message body for the report binder. You might consider listing the name and descriptions of the reports that are included in the report binder.

Send Test Email: Click this button to validate that the information provided is valid and that SMTP will work with the system to email forms and reports. If you entered From and To email addresses (on the Organization>Organization Information>Email Setup tab), the system will use them to test the connectivity with the Server each time this button is clicked. If the From and To email address fields were left blank, the system will only verify that the Server, Port, and User and Password fields have information but a test email will not be sent when this button is clicked.

Tips:

- Consider using Report Binder Scheduler to schedule tasks to run automatically at scheduled times. The Scheduler works behind the scenes, polling the databases for scheduled tasks at user defined intervals. Reduce processing time by producing reports after regular office hours when there is less network traffic.

Report Binder Buttons

	Print Report Binder List: Use this button to print a list of the reports included in the report binder.
	Print: Use this button to print all of the reports in the report binder. You can choose to print all reports to the printer of your choice, keeping each report's Print Orientation, such as Portrait or Landscape, or print to the report's default printer.
	Export to XLS: Use this button to export your report data to a spreadsheet in a new or existing workbook. Each report becomes a separate spreadsheet within the workbook. A new workbook is saved to your My Documents folder on your Desktop, as the Report Binder name and system date/time stamp, such as Budgets20171219122618.xls. This button is only available if the Data Import/Export module is installed. (It is not available on every report.)
	Print to PDF File: Use this button to save the report binder as a PDF file. Print to PDF Files are saved in the \MIP Share\Report PDF Files directory as the name of the Report Binder. This process creates a file that can be attached and sent electronically.
	Email Report as PDF File: Use this button to email the report binder as a PDF file. The file is sent in an email and does NOT save to a directory. You must have configured your Simple Mail Transfer Protocol (SMTP) settings for email using

	Organization>Organization Information>Email Setup tab.
	Scheduler: Use this button to schedule tasks to run automatically at designated times. You can print the report binder, export the report data to a spreadsheet, save the report data as a PDF file, or email the report data as a PDF to the email addresses associated with the report binder.

Report Binder Scheduler

Access this form using MIP Accounting>Reports>Report Binder> Scheduler.

Use this form to schedule tasks to run automatically at scheduled times. To schedule a task, enter the Task ID and its Description, an Output Option, a beginning and ending Date and Time, and how often the task should run, such as Run only once.

Note: A printer driver is provided to create PDF files. If you uninstall the printer driver while the product is still installed, PDF is not available. To email a PDF, a configured email profile must be installed: SMTP must be configured for emailing Scheduler Report Binder reports (Organization>Organization Information>Email Setup tab) and to use Email Report as PDF File .

The Scheduler works behind the scenes, polling the databases for scheduled tasks at user defined intervals. Reduce processing time by producing reports after regular office hours when there is less network traffic.

Nonprofit Online Users

The ability to schedule reports is not available. See Nonprofit Online.

Fields

Task Information

- **Task ID:** Enter a unique name to identify the task being scheduled. Use the Drop-Down Lookup to view a list of existing tasks; however these names cannot be used again.
  Once a task ID is entered and scheduled, either allow the task to run or delete it from the Display Scheduled Tasks form on the desktop taskbar. Once the task is completed, the system removes the task ID from the list.

- **Description:** Enter a brief description of the task. It is a good idea to include the name or type of report being scheduled. This will help later when viewing the scheduled and completed tasks forms.

Output Options

- **Output To:** Select from Printer, XLS, PDF, Email PDF.

Note: If you select Email PDF but the address fields are empty for the Report Binder, a message displays that email addresses must be entered upon selecting this option. Simply return to the Report Binder form and enter email addresses on the Set Up Scheduler Email tab. Then schedule the task again.

- **Path:** Enter the path and file name for the XLS or PDF file. When the system is installed, a default directory is created for PDFs: <Server Name>:\ MIP Share\Report PDF Files. This is the default location for new spreadsheets and all saved PDF files. You can use Browse ... to change the path or select an existing workbook or PDF file. Note that the existing workbook cannot be open when attempting to export.
- **Remover Report Headers, Footers, and Page Breaks:** Select this check box to remove the report data's headers, footers, and page breaks from the spreadsheet.

Schedule Information

- **Recurrence:** Select how frequently to process the task using the drop-down list. For a one-time task, the end date and time does not matter. For all other recurrences (such as weekly or monthly), specify the date and time to cancel the processing interval.
- **Begin Date, Begin Time:** Enter the date and time to begin the task.
- **Total Occurrences:** The system displays the number of occurrences based upon the begin date/time, end date/time, and the recurrence option chosen.
- **End Date, End Time:** Enter the date and time to end the task.

Tips:

- If "Print Results Report" is selected on the Options>Reporting tab (from the Scheduler menu), a task results report prints after the scheduled task has processed. The report displays the task ID, description, result (success, warning, or failure), and the organization. If the scheduled task result is warning or failure, an error report prints, in addition to the results report. The error report displays the task ID, result, and a brief description of the error.
- Consider using the "Report Binder" (page 3) to group reports together to be printed immediately, exported to XLS, printed to a PDF file, emailed as a PDF file, or scheduled to be processed later. This feature is especially useful if recurring monthly board reports or internal reports need to be processed immediately. On the Display Task History form, if the scheduled task result is warning or failure, double-click the result (hyperlink) to display the detailed error message.
- If you plan to email a scheduled report binder, you must first set up SMTP Email using Organization>Organization Information>Email Setup tab. Note that if you email directly from the binder, without using Scheduler, the system will combine all reports into a PDF file with the report binder name as the title of the PDF to be emailed.
- This form is not available if adding or editing a report. The report must be saved first, and then the button becomes available. It is also available for all default reports.

Chapter 3: Scheduling Tasks

Task Scheduler

Access this form using Activities>Manage Sessions>Post Transactions> Scheduler and Activities>Process Allocations> Scheduler.

Use this form to schedule tasks to run automatically at scheduled times. To schedule a task, enter the Task ID and its Description, a beginning and ending Date and Time, and how often the task should run. Since transactions can be posted only once, select a Recurrence type of "Run only once" when scheduling transactions.

The Scheduler works behind the scenes, polling the databases for scheduled tasks at user defined intervals. Reduce processing time by scheduling these tasks after regular office hours when there is less network traffic.

Allocation Users

The Recurrence field is set to "Run only once" and the End Date and End Time fields are disabled. The Allocation process scheduled tasks are restricted to one time only recurrences due to the complexities in setting the calculation dates.

Nonprofit Online Users

The ability to schedule tasks is not available. See Nonprofit Online.

Fields

Task Information

- **Task ID:** Enter a unique name to identify the task being scheduled. Use the Drop-Down Lookup to view a list of existing tasks; however these names cannot be used again.
  Once a task ID is entered and scheduled, either allow the task to run or delete it from the Display Scheduled Tasks form on the desktop taskbar. Once the task is completed, the system removes the task ID from the list.
- **Description:** Enter a brief description of the task. It is a good idea to include the name or type of report being scheduled. This will help later when viewing the scheduled and completed tasks forms.

Schedule Information

- **Recurrence:** Select how frequently to process the task using the drop-down list. For a one-time task, the end date and time does not matter. For all other recurrences (such as weekly or monthly), specify the date and time to cancel the processing interval. It is recommended when scheduling transactions to post, to select a Recurrence type of "Run only once."
- **Begin Date, Begin Time:** Enter the date and time to begin the task.
- **Total Occurrences:** The system displays the number of occurrences based upon the begin date/time, end date/time, and the recurrence option chosen.
- **End Date, End Time:** Enter the date and time to end the task.

Tips:

- If "Print Results Report" is selected on the Options>Reporting tab (from the Scheduler menu), a task results report prints after the scheduled task has processed. The report displays the task ID, description, result (success, warning, or failure), and the organization. If the scheduled task result is warning or failure, an error report prints, in addition to the results report. The error report displays the task ID, result, and a brief description of the error.
- On the Display Task History form, if the scheduled task result is warning or failure, double-click the result (hyperlink) to display the detailed error message.
- If you plan to email a scheduled report binder, you must first set up SMTP Email using Organization>Organization Information>Email Setup tab. Note that if you email directly from the binder, without using Scheduler, the system will combine all reports into a PDF file with the report binder name as the title of the PDF to be emailed.

Running Scheduled Tasks

Note the following information regarding running scheduled tasks using the Scheduler module:

- If tasks were scheduled to run at noon, but you do not log on to Scheduler until 3 p.m., the system processes the tasks at that time.
- The MIP Accounting system *does not* have to be running in order for scheduled tasks to process, but the Scheduler has to be running.
- If "Warn Before Posting" or "Prevent From Posting" when over budget is selected on the Primary Budget Controls tab (Organization>Set Up Modules>Budget>Primary Budget Controls), posting cannot be scheduled using the Scheduler module. The system cannot check for "over budget" if using

- Scheduler. To run Scheduler when the Budget module is installed, clear the "Check Available Budget During Posting" check box on the Primary Budget Controls tab to schedule tasks.
- Reports use the Default Reporting Date setup using Options>Customize Workstation Settings>Reports tab for all reporting. However, if a Default Reporting Date does not exist, the system date will be used. For example, if the report is set up for "This Month," the default date is set to 8/31/20xx, and today is any day in September. The report prints using August data. This also applies to the Report Schedule. If Jane sets up the report with a Default Reporting Date but Paul schedules the report to run but does not have a Default Reporting Date, the system date will be used.
- If you plan to email a scheduled report binder, you must first set up SMTP Email using Organization>Organization Information>Email Setup tab. Note that if you email directly from the binder, without using Scheduler, the system will combine all reports into a PDF file with the report binder name as the title of the PDF to be emailed.

Tips:

- Scheduler  is also enabled on applicable forms throughout the system, allowing tasks to be scheduled while working in the system. For more information, see "Task Scheduler" (page 10).
- Consider using "Report Binder Scheduler" (page 7) to schedule tasks to run automatically at scheduled times. The Scheduler works behind the scenes, polling the databases for scheduled tasks at user defined intervals. Reduce processing time by producing reports after regular office hours when there is less network traffic.

Chapter 4: Processing Tasks

Stop/Start Scheduler

Access this menu selection using the Scheduler icon on the taskbar>Stop/Start Scheduler.

Use this selection to stop any scheduled tasks from being processed. Scheduler has to be running in order for scheduled tasks to be executed. When Scheduler is stopped, the menu selection changes to "Start Scheduler." Choose this menu selection to begin running the Scheduler again.

Display Scheduled Tasks

Access this form using the Scheduler icon on the taskbar>Display Scheduled Tasks.

Use this form to view information about all scheduled tasks–any scheduled task can be viewed or deleted.

Fields

Filters: The filter is for display purposes only; it simply limits which items are displayed in the Available Items table.

- **Available Filter, Selected Filter:** Select an item in the Available Filter column, and click the Mover (>) to move it to the Selected Filter column. Choices for filtering items are: Task ID, Task Description, Status, Next Scheduled To Run, Organization, Date Scheduled, and User ID.
- **Compares To:** Select an operator from the drop-down list. The operator compares the value in the Selected Filter column with the values in Criteria 1 and Criteria 2 to determine which items are displayed in the Available Items table.
- **Criteria 1:** Enter a value to compare with the item in the Selected Filter column. When using Like or Not Like, "%" can be used to represent any number of characters.
- **Criteria 2:** Enter a value for the end of a range if the Compares To column contains the Between or Not Between operators.

Available Items: The system displays all scheduled tasks, including the task ID, task description, status, when the task is scheduled to run, the organization, the date and time the task was scheduled, and the user who scheduled the task. Select how many items per page to display using the Records per Page drop-down list. View items in the table in increments of 10, 25, 50, 100, 250, 500, or 1000. The default value for the Records per Page drop-down list was selected using the Options>Customize Workstation Settings>Preferences tab.

When a task is first scheduled, it displays as "SCHEDULED" in the status column. When a task is about to run, it displays as "RUN" in the status column.

Tips:

- The only time two tasks appear with the same task ID, is when a task is scheduled to run more than once.
- In the Available Items table, you can sort the data based on any column. Simply double-click on a column heading to sort according to that column.
- When filtering data, select Operators to determine which data to display. Also, view a list of Filter Examples that are useful throughout the system and examples of How to Use Wildcards characters with Like and Not Like.
- The sorting functionality is only for table display and does not affect printing. Print uses the data from the database and is therefore not reflective of how the items were sorted.

Display Task History

Access this form using the Scheduler icon on the taskbar>Display Task History.

Use this form to view historical information about each task that has already processed–any completed task can be viewed or deleted.

Fields

Filters: The filter is for display purposes only; it simply limits which items are displayed in the Available Items table.

- **Available Filter, Selected Filter:** Select an item in the Available Filter column, and click the Mover (>) to move it to the Selected Filter column. Choices for filtering items are: Task ID, Task Description, Date/Time Executed, Organization, Result, and User ID.
- **Compares To:** Select an operator from the drop-down list. The operator compares the value in the Selected Filter column with the values in Criteria 1 and Criteria 2 to determine which items are displayed in the Available Items table.

- **Criteria 1:** Enter a value to compare with the item in the Selected Filter column. When using Like or Not Like, "%" can be used to represent any number of characters.
- **Criteria 2:** Enter a value for the end of a range if the Compares To column contains the Between or Not Between operators.

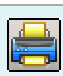
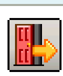
Available Items: The system displays the task history, including the task ID, task description, the date and time the task was executed, the organization, its result (success, warning, or failure), and the name of the user who processed the task. Select how many items per page to display using the Records per Page drop-down list. View items in the table in increments of 10, 25, 50, 100, 250, 500, or 1000. The default value for the Records per Page drop-down list was selected using the Options>Customize Workstation Settings>Preferences tab.

The result options are SUCCESS if the task processed properly, WARNING if an event occurred but the task completed, or FAILURE if the system was unable to complete the scheduled task. If the result is WARNING or FAILURE, double-click the result (hyperlink) to display the detailed error message. This message is available to view until the Task ID is deleted from the Available Items table.

Tips:

- When filtering data, select Operators to determine which data to display. Also, view a list of Filter Examples that are useful throughout the system and examples of How to Use Wildcards characters with Like and Not Like.
- In the Available Items table, you can sort the data based on any column. Simply double-click on a column heading to sort according to that column.
- The sorting functionality is only for table display and does not affect printing. Print uses the data from the database and is therefore not reflective of how the items were sorted.

Display Task Buttons

	**Select All:** Use this button to select all items in the table.
	**Deselect All:** Use this button to clear all items in the table.
	**Delete:** Use this button to delete the selected items from the data.
	**Display/Hide Filter:** Use this button to display or hide the Filters group box.
	**Clear Filter:** Use this button to clear all of the selected filter items. The filter is used for display purposes only; it limits what the system displays in the table. You cannot save the filter items.
	**Display Records:** Use this button to display only the records that match the currently selected filter items. If you are not using the filter (it is blank), the Display Records button displays all of the items you currently have.
	**View First Page:** Use this button to display the first page of data in the table.
	**View Previous Page:** Use this button to display the previous page of data in the table.
	**View Next Page:** Use this button to display the next page of data in the table.
	**View Last Page:** Use this button to display the last page of data in the table.
	**Print Setup:** Use this button to select a printer and set up default printer information for printing your list.
	**Print:** Use this button to print the items in the list.
	**Export:** Use this button to export data to one of several popular file formats. This button is available only if the Data Import/Export module is installed.

Options

Use this form to set up preferences for the Scheduler module.

Options - General Tab

Access this tab using the Scheduler icon on the taskbar>Options.

Use this form to set up preferences for the Scheduler module. On this tab, designate how often Scheduler checks for scheduled tasks and when the tasks are executed.

Fields

Polling FrequencyCheck tasks every (15) minutes: Enter in minutes how often Scheduler checks for any scheduled tasks to be executed.

Run Scheduler Always, Only between: Set the time to run the Scheduler. "Always" runs at all times. "Only between" specifies a time limit so that Scheduler runs only between those times. For example, set the time between 5:00 p.m. and 7:00 a.m. to run Scheduler only after office hours.

Options - Reporting Tab

Access this tab using the Scheduler icon on the taskbar>Options.

Use this tab to specify task notifications and to select an alternate printer. As tasks are completed, the system can print a results report.

Fields

Task Results Notification

- **Print Results Report:** Select this option to print a results report after a task is executed. The report displays the task ID, description, result (success, warning, or failure), and the organization. If the scheduled task result is warning or failure, an error report prints, in addition to the results report. The error report displays the task ID, result, and a brief description of the error.

Alternate Print Setup Use default printer for all print jobs: Clear this option so the default printer is not used for every task printed. Then, use the Print Setup button to choose another printer and set up printer information.

Exit

Access this menu selection using the Scheduler icon on the taskbar>Exit.

Use this selection to close the Scheduler.

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