Scheduled Tasks

VSys Webinar - August 2013

Scheduled tasks allow you to pre-set certain tasks in VSys and queue them up to run on a specific schedule.

How they work:

There are two parts to Scheduled tasks - **Tasks** and **Task Groups**
- Tasks are the specific things to be done.
- Task groups are what are scheduled to be done and may be made up of one or more tasks.

Available Tasks:

Scheduled Background Check Synchronization

When to Use: To process requests with VSys linked background check companies such as IntelliCorp and Commercial Investigations.

Scheduled Backups

When to Use: To create a backup of your VSys data.

Scheduled Bulk Value Updater

When to Use: To make changes to you data in bulk, for example setting everyone who hasn't worked in the last 2 months to inactive.

Scheduled E-mail Delivery

When to Use: Use this in tandem with the Scheduled Mail Merge to send the merged e-mails if you are not running the Standalone E-mail Robot.

Scheduled Export

When to Use: To export data from VSys for another application - perhaps for data analysis or a regular mailing (newsletter).

Scheduled Generate Reminders

When to Use: If you are using reminders (for example, e-mails or text messages to volunteers about upcoming assignments, e-mails about expiring certifications or trainings), this will allow you to automatically generate them at regular intervals. (Specifically configured through Reminders in the Setup panel.)

Scheduled Hours Automatic Approval

When to Use: To automatically approve hours submitted via VSys Web, VSys Live or the Kiosk. This can be limited to specific groups, people types or jobs.

Scheduled Import File

When to Use: Use to set up regular imports from other systems into VSys.

Scheduled Index Rebuild

When to Use: To schedule a regular index rebuild.

Scheduled Mail Merge

When to Use: To set up sending of regular e-mails - for example, monthly/weekly assignment letters.
(For printed mail merges, you are better off setting it up like a scheduled task with relative dates, but saving it and merging it manually.)

Scheduled Notifications

When to Use: To automate generating and then delivering notifications that need to be delivered via e-mail or SMS. Notifications are things like "Volunteer self-cancelled assignments", "Applications pending approval", "Standalone E-mail Robot not running", "Indices need rebuilding".

Scheduled Report

When to Use: For a daily, weekly, or monthly report. Also includes mailing labels.
To add a date to a file name: {yyyyy-mm-dd hh.nn}

Scheduled Raiser's Edge Synchronization

When to Use: This runs one or more of the Raiser's Edge automatic synchronization tools.

Scheduled SMS/Text Message Delivery

When to Use: To send SMS/Text messages on a regular basis if the Standalone E-mail robot is not running.

Scheduled SMS/Text Message Status Checks

When to Use: To download new, incoming text messages and check the status of ones previously sent. (Same as Receiving SMS/Text Messages tool.)

Scheduled VSys Web Synchronization

When to Use: Synchronizes VSys with VSys Web. Does not automatically accept applications or hours, they are still held as pending.

Triggering Scheduled Tasks

1) The most seamless way is through *Setup windows scheduler*.
Plus: Set up once, goes automatically
Minus: Computer needs to be running.

2) *Create a shortcut*.
Plus: You control when it happens. No need to get IT involved.
Minus: It has to be manually triggered with the icon.