

Scheduled Reports Winter 2023

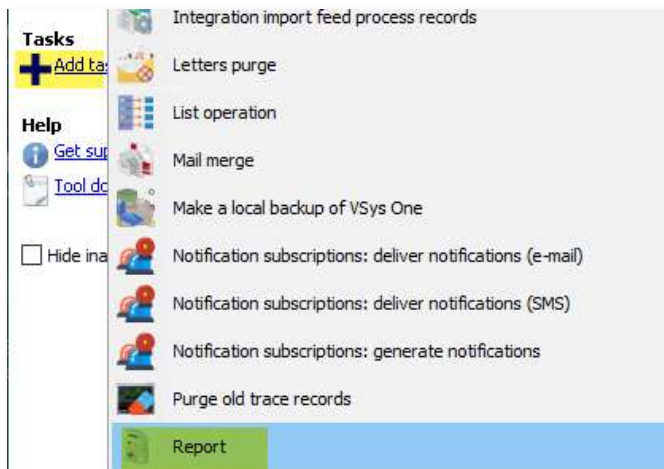
Step 1 - What report do you want to schedule?

Unfortunately, not every report is available. Currently assignment calendar (RTF/PDF), custom column, program statistics and reports based on custom reports are available here, but the list is growing. So before you dive in - Go check

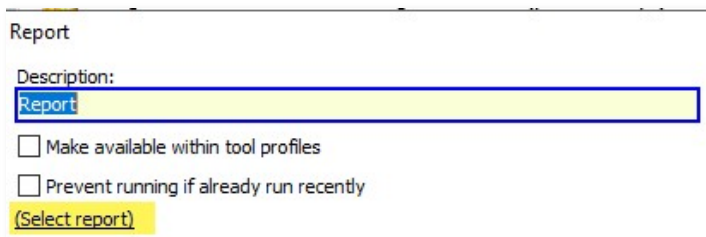
From **Scheduled Tasks** -> **Setup tasks**



Add task - Reports



In the window that pops up, use the **(Select report)** link to see if you can find the report that you want to schedule.



Step 2 - Prepare your report

You will want a saved report with the specific criteria for this scheduled task.

- Your chosen filters
- Relative dates: since the date this will be run keeps changing

Hours summary report

Report title:
Monthly Hours Summary

Minimum date: 01/01/2023 Maximum date:

Total these fields:
Count,Hours,Bonus hours,Value,Miles,Volunteers,Full-time equivalents

Relative Date

Method: Add/subtract days Days: -30 Adjust: End of week 01/14/2023

Relative dates allow you to save a report, search criterion or Intellist with one date today that will load as a different date tomorrow, next week, or any other day. Entering "-30" will initially show thirty days prior to today as the date; if you reload the report next month it will show thirty days prior to that date.

Past dates
Current date
One week in the past
30 days in the past
60 days in the past
90 days in the past
Six months in the past
One year in the past
Two years in the past

Future dates
One week in the future
30 days in the future
60 days in the future
90 days in the future
Six months in the future
One year in the future
Two years in the future

Save Cancel

Save it clearly.

Report properties

Report name:
Monthly hours summary -SCHEDULED DO NOT EDIT

Report owner: (none) Other owners: (none)

Keywords (separate with commas):

Report grouping:
Hours summaries

Sample image: [Preview](#), [Delete](#), [Replace](#)

Ownership tags:
(no filter)

Instructions:

Comments:
Scheduled to be sent to Admin on the 5th of the month with last months numbers, A summary broken down by year and by month including count, hours, bonus hours, value, accounts, volunteers and FTEs.

☐ Hidden

Save Cancel

Tip: Don't start right off scheduling. Run a report for a couple months first to make sure it's what you want, then lock it down.

Step 3 - Setup the task

Back where we were at the beginning to check
Scheduled Tasks -> Setup tasks -> Add task - Reports

The screenshot shows the 'Tasks setup' window in VSys One. The window has a sidebar on the left with 'Tools' (Import task), 'Tasks' (Add task), and 'Help' (Get support, Tool documentation (0)). The main area is titled 'Report' and contains the following fields:

- Description:** Report
- User code:** (empty field)
- ☐ Inactive
- ☐ Make available within tool profiles
- ☐ Prevent running if already run recently
- (Select report):** (dropdown menu)
- Output filename:** (empty field)
- ☐ Always export into specified folder instead of Windows temp folder
- Delivery methods:** E-mail (dropdown menu)
- ☐ Compress file into a .zip file before delivery
- E-mail subject:** (empty field)
- E-mail body:** (empty text area)
- Sender:**
 - Sender e-mail address:** (empty field)
 - Sender name:** (empty field)
- Recipients:**
 - E-mail address(es):** (empty field)
 - From lists:** (none) (dropdown menu)
- cc: recipients:**
 - E-mail address(es):** (empty field)
 - From lists:** (none) (dropdown menu)
- bcc: recipients:**
 - E-mail address(es):** (empty field)
 - From lists:** (none) (dropdown menu)
- Comments:** (empty text area)

At the bottom, there is a link for 'Other languages' and 'Save' and 'Cancel' buttons.

Description -Name of the scheduled report

User Code – Abbreviated, your choice

(Select report) – Pick your saved report

Output filename

Using a special notation "yyyy" (year), "mm" (month), "dd" (day), enclosed within curly brackets, VSys can generate the file name automatically based on the current date rather than a fixed file name. Adding the extension is just a good idea.

Ex. Monthly Summary {yyyy-mm-dd}.pdf

Delivery method - Email

Email wrapper (Subject, Body, Sender, Recipients) – Everything that sends the report.

Step 4 - Scheduling

This step sets up the instructions for when it's run and how it is delivered.

You are logged in as **mbergin** (superuser); [change password](#)

Scheduled task Scheduled task: [KPWCCKB17DPYL762](#)

Description: User code: ☐ Disabled ☐ Make available within tool profiles

[Edit comments](#) (none)

Only run from IP addresses: Prevent running from IP addresses:

Tasks

Order	Task	Status

Schedule

Schedule method: Last run: (never) [When is this task group next eligible to be run?](#) Don't warn about being late unless late by at least: (hours)

Time of day: Skip if later than: (minutes) Days of week:

Days of month: Months of year:

First date eligible: Last date eligible: Not between: And: Exclude holidays:

Notifications

☐ Send results notification e-mail

Description: Name it something descriptive so you don't have to look at the details.

Tasks: Right-click to add the report task you just created.

Note: multiple reports on the same schedule can go in this task.

Schedule: Always **Daily** – this will let it run late if there is a problem.

Time of day: if it matters

Day of week: if weekly

Notifications: This sends you confirmation. Recommended at start.

Step 5: Testing

Tip: Test it for yourself, or let the recipient know you are testing.

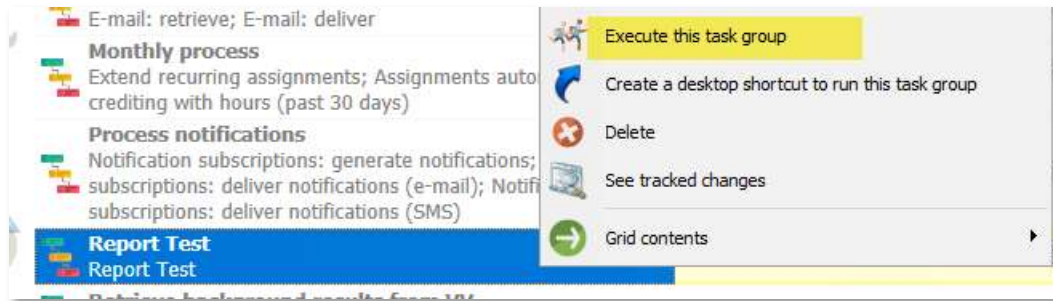
Option one: Change the dates

Check off the next couple days on your days. See what happens.

Pro: More “real-life”

Con: You have to wait

Option two: Manually execute



Make sure today is checked off, and then right-click on **Execute this task group**.

Pro: Immediate

Con: You’re not really testing the schedule part

When you’re done don’t forget to take off any extra days!