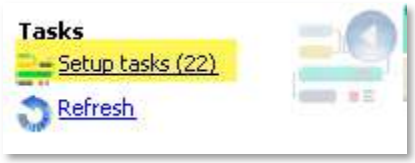
Scheduled Reports
Winter 2023

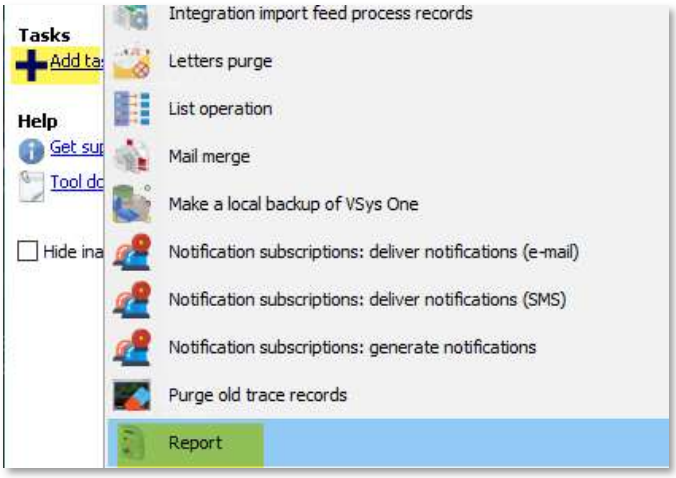
Step 1 - What report do you want to schedule?

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

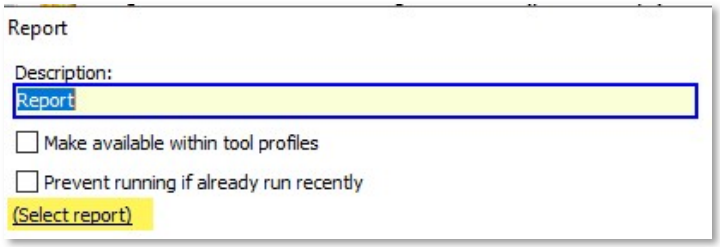
From **Scheduled Tasks -> Setup tasks**



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.



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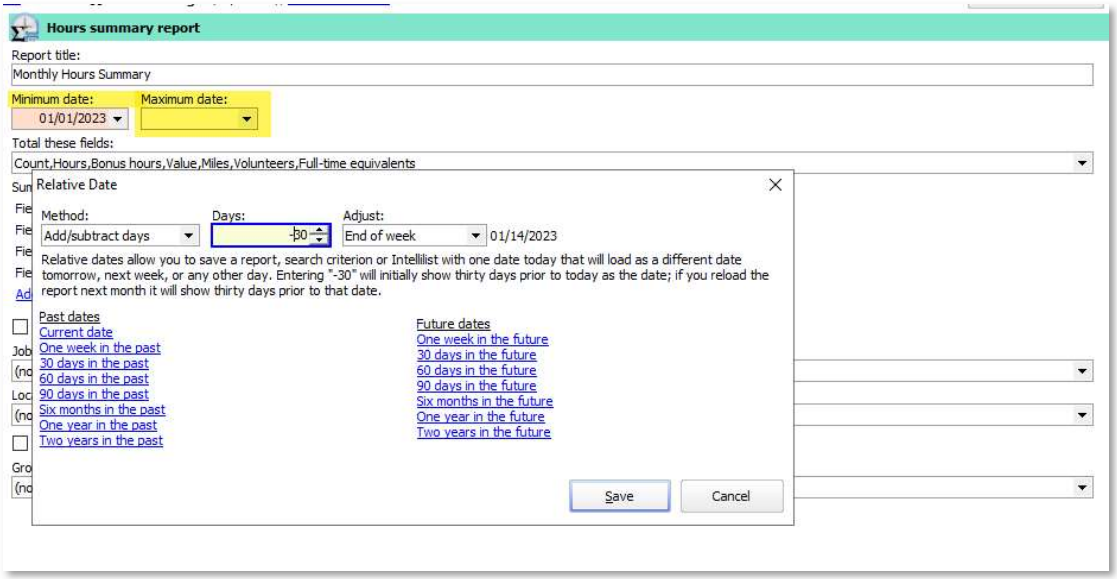
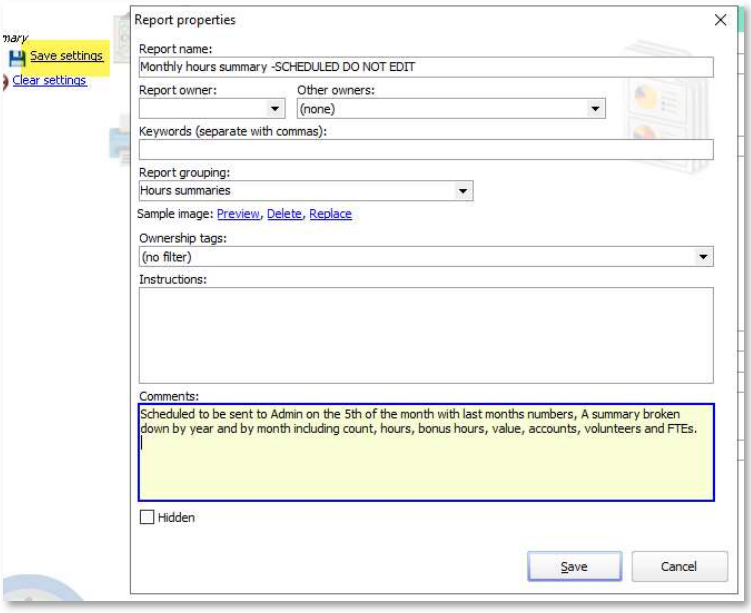
Step 2 - Prepare your report

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



Save it clearly.



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.

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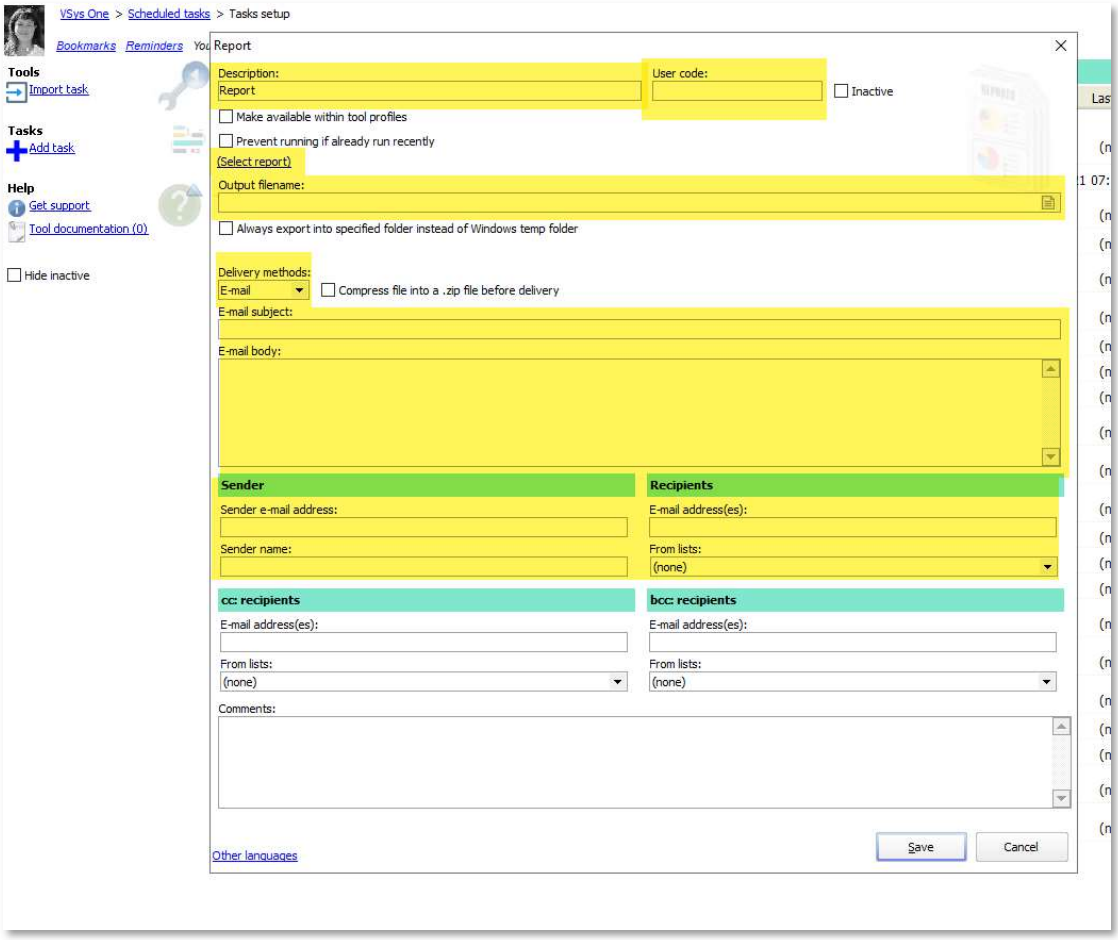
Step 3 - Setup the task

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



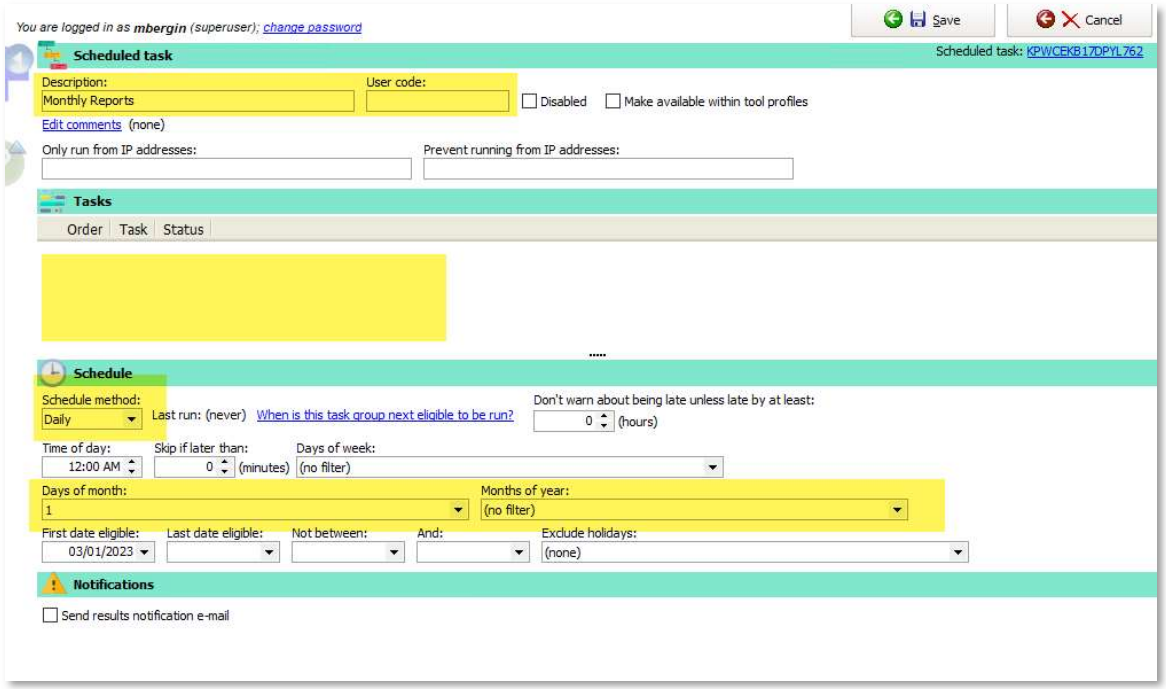
Description -Name of the scheduled report
User Code – Abbreviated, your choice
(Select report) – Pick your saved report
Output filename

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.



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.

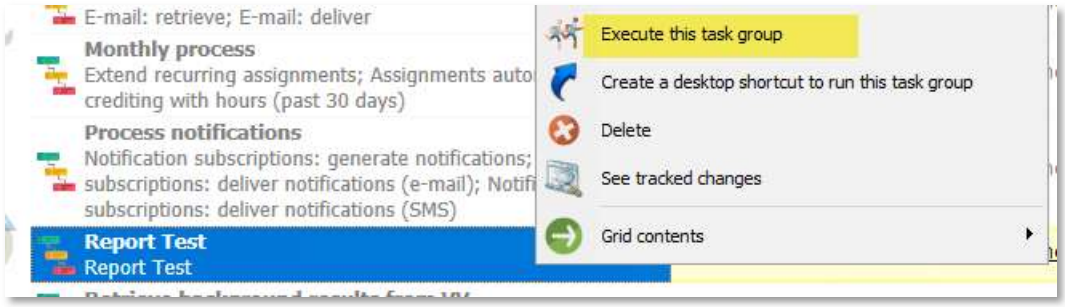
Step 5: Testing

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!