

Scheduled Reports – VSys Anywhere (Spring 2025)

Scheduled tasks are tasks for VSys to perform without interaction - things such as completing an export, running a report, sending e-mails, etc.

Concepts

- Tasks are the actions being done: running a report, sending an export, sending notifications, etc.
- Task groups are groups of actions (tasks) that can be scheduled. This is what runs them and where the schedule piece is.
- A task group is comprised of at least one task, and each task group has a status (inactive or not), a schedule (manual or otherwise), and optional notification lists.

Plan ahead:

Have your report ready:

- Does it use relative dates?
- Properly filtered?
- Recommendation: Run it a few times manually in the same type situation before you schedule it.









Are you emailing it?

- Have addresses of who it is going to

Note: NOT all reports can be scheduled here (most can). Only assignment calendar (RTF/PDF), custom column, program statistics and reports based on custom reports can be chosen here.

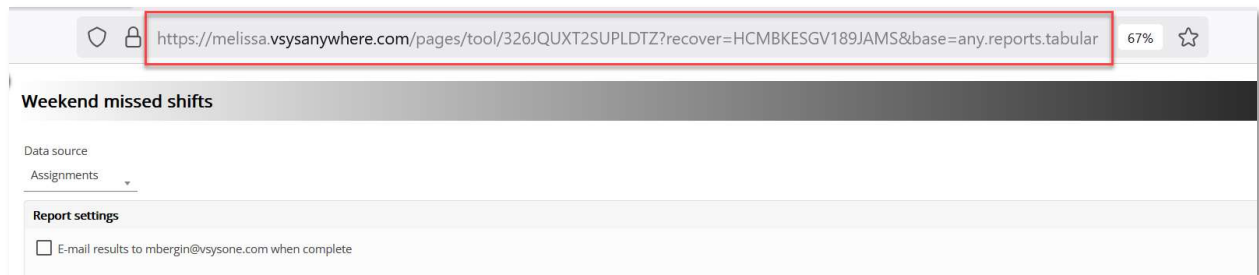
1. Get your report

Head to your **My Reports**

Download	Status	Completed	Cancel	↓ Submitted
  Weekend missed shifts (results)  View results as listing  Forward results  Processing log  Properties/settings  Run again	Finished; 7 records Successfully run by VOXI version 4.1.0.656 on 20.2.0.195	04/22/2025 12:03PM	Delete 	04/22/2025 12:03PM

Click **Run again** on the report you want to schedule.

When it comes up on screen, copy the URL somewhere you can copy it from later – Notepad, Word, etc.



2. Setting up a Scheduled Task

Start from **Scheduled Tasks -> Create new.**

A screenshot of a web form titled 'Task: Monday morning missed shift'. The form has several sections: 'Description' with the text 'Monday morning missed shift'; 'Ownership tags' with an 'Inactive' checkbox; 'User code' with an empty text field; 'Schedule' with a checkbox 'Prevent running if already run recently'; and 'Options' which contains a 'Run again' URL field with the same URL as in the first screenshot, a 'Report name' field with 'Weekend missed shifts' and 'Type: Custom column report', and a 'Delivery methods' section with a radio button selected for 'E-mail'.

Most of the fields have common uses, but a few specific things to know:

Use **“Run again” URL** to choose a saved report. Remember that URL we grabbed at the start? Paste that in that field.

Note: It pulls the Report name from the original report.

Select your **Delivery Method** to **E-mail**.

That will offer you more fields about how it should be sent.

E-mail

E-mail subject
Monday morning

E-mail body
E-mail stuff

Sender e-mail address
mbergin@vsysone.com

Sender name
M Bergin

Recipient e-mail address(s)
mbergin@vsysone.com

cc: e-mail address(s)

cc: from lists

cc: be-mail address(s)

bcc: from lists

Recipients from lists

☐ Include people as recipients if they're referenced in the report/export

☐ Include people as cc: recipients if they're referenced in the report/export

☐ Include people as bcc: recipients if they're referenced in the report/export

Comments

☐ Save as a copy

[See changes](#)

Save **Cancel**

The **Sender** is e-mail address and name of the "sender" for these e-mails.

Recipients are one or more explicit e-mail addresses to receive this report. When including more than one recipient, separate their e-mail addresses with commas, e.g.
someone@vsysone.com,someoneelse@gmail.com.

*Tip: Have a couple reports to schedule? Get the first one correct, then use the **Save as Copy** checkbox as the base of the later ones.*

3. Set up the Scheduled Task Group

Move to **Scheduled Task Groups** -> **Create new**

Give your task group a descriptive name. Add ownership tags if used. Then jump to the bottom, and add a comment to help out future you. (And others in your system.)

The Tasks

Add in the task previously made from the dropdown.

The Schedule

This tells when these tasks run. *Best practice: leave it at **Daily**, and use the other fields to limit the time/dates.*

The screenshot shows the 'Scheduled task group' configuration window. It has a dark header bar with the title 'Scheduled task group' and a close button. The main area is divided into several sections: 'Description' (containing 'Monday morning reports'), 'Ownership tags' (with an 'Inactive' checkbox), 'Tasks' (a list of tasks from Task 1 to Task 10, with Task 1 highlighted in yellow and showing a red 'X' icon and the text 'Monday morning missed shift'), 'Schedule' (containing 'Schedule method' set to 'Daily', 'Time of day' set to '6am', 'Skip if later than' set to '3 (minutes)', and 'Don't warn about being late unless late by at least' set to '3 (hours)'), 'Days of week' (with 'Mon' selected and a red 'X' icon), 'Days of month', 'Months of year', 'First date eligible', 'Last date eligible', 'Not between (min)', 'Not between (max)', and 'Excluded holidays'), 'Notifications' (with a checkbox for 'Send results notification e-mail'), and 'Comments' (a text area).

Notifications

Notifications are optional. But if you are not receiving the report yourself, it's a way to monitor it ran as expected.

The screenshot shows the 'Notifications' configuration window. It has a light gray header bar with the title 'Notifications'. The main area contains several sections: 'Send results notification e-mail' (checked), 'Send notifications when' (set to 'Always'), 'Compress notifications into a .zip file' (unchecked), 'Notification e-mail subject' (set to 'Monday report errors'), 'Notification sender name' (set to 'Melissa Bergin'), 'Notification sender e-mail' (set to 'mbergin@vsysone.com'), 'Notification "bounces-to"', 'Recipients' (set to 'mbergin@vsysone.com'), 'Recipients (cc)', 'Recipients (bcc)', and 'E-mail body' (containing the text 'Message about this report!').