Scheduled Reports – VSys One Spring 2025

Scheduled tasks are tasks for VSys One to perform without interaction - things such as backing up your data, running a report, sending e-mails, etc. This webinar is looking at reports.

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 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:

- Consider adding (DO NOT EDIT -Scheduled) to the name and more information in the Comments.
- 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

Are you exporting it to a shared drive?

- Know the directory it's going to

Setting up a task

Start from **Scheduled Tasks -> Add task.**

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

Use **(Select report)** to choose a saved report. Note: NOT all reports can be scheduled here. Only assignment calendar (RTF/PDF), custom column, program statistics and reports based on custom reports can be chosen here.

Output filename is the file and folder where the generated report will be saved. Even if the report is being e-mailed, it must have a filename here. Use date formatting codes within curly brackets to have VSys dynamically name the file using the current date/time.

Example: Report Name-{yyyy-mm-dd}.pdf   - yyyy – year, mm – month, dd - day

The variable portion goes within the curly brackets and is evaluated based on the current date/time; everything outside the brackets is considered a fixed value.

If **Compress file into a .zip file before delivery** is checked VSys will take the file it creates (PDF, RTF, etc.) and compress it into a standard WinZip .zip file before sending it out. You probably don't want to use this for reports sent to volunteers, but for large reports and exports it can dramatically reduce the size of the file that needs to be e-mailed will be the subject and body of the e-mail that VSys sends. It will be the same every time the report is sent regardless of recipient or results.

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.
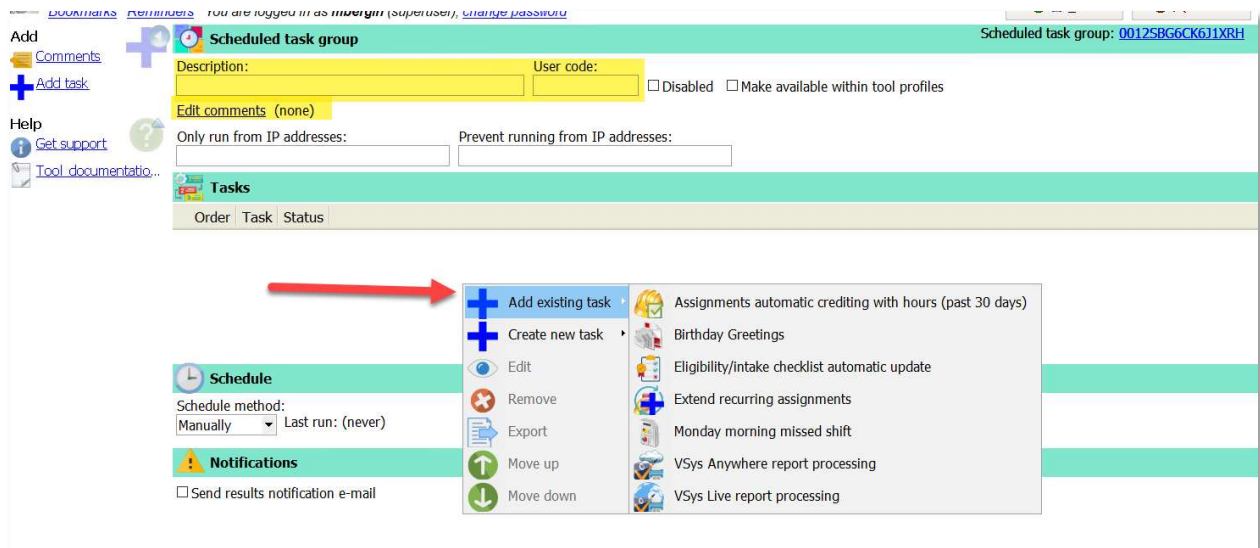

*Tip: Have a couple reports to schedule? Get the first one correct, then **right-click -> Duplicate** as the base of the later ones.*

Scheduled Task Groups

Give your task group a descriptive name, and add a comment to help out future you.
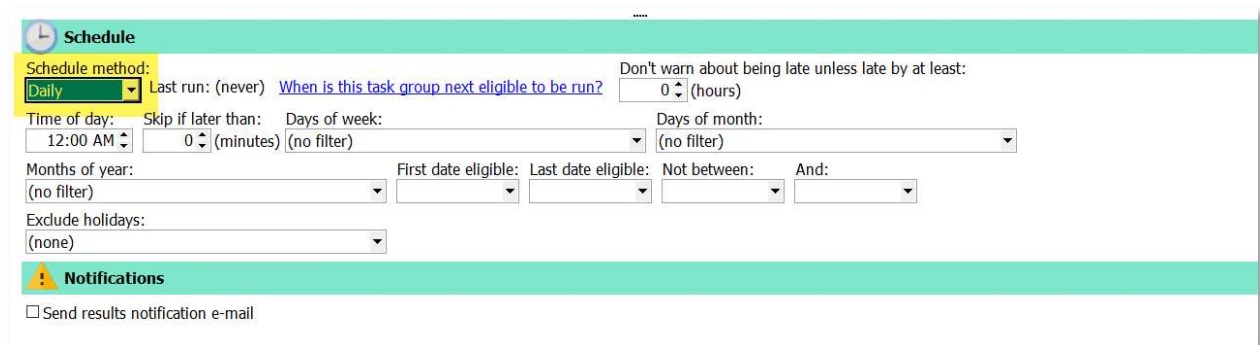
The Tasks

Add in the task previously made **(Right-click -> Add existing task)**.

The Schedule

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

Notifications - Notifications are optional, but can be useful for diagnostics if you aren't receiving the report yourself. Set a **To/From** to receive an email when the task is run.

Troubleshooting:

VSys uses system tasks underneath these to trigger them. If you are hosted these are probably already in place for you. If you are self-hosted look if there are other task groups. If there are, you are probably good. If not, you'll need to loop in IT to set that up.

You can also manually execute a task (**right click –> Execute this task**) for diagnostics