

# Scheduler

## Function Definition

Use this function to schedule tasks to automatically run on a recurring basis or for a one-time event. Tasks can be scheduled as often as every 1/2 hour of every day or once a month on a particular day. The tasks that can be scheduled include integraERP reports, *Order Entry/Invoice Processing* and custom functions.

**Important:** When you initially enter the *Scheduler* page, a message box displays: *Warning: Only Reports and Order Entry Invoice Processing can be scheduled.* This message reminds you to schedule only those functions contained within the *Reports* section of a module or *Order Entry/Invoice Processing*. Simply select **OK** to acknowledge that you have read the message and continue to the *Scheduler* page.

**Note:** During the initial installation of your system a cron job will be set up on the **mfocus** database to handle scheduler functionality. If you change the database to another name or add a database, you will need to set up a cron job on that database.

The page is divided into three sections:

- Task Details:** Use this section to define the date and time a function should run and add the task to the scheduler.
- Scheduled Tasks:** Use this section to view the tasks that have already been scheduled and choose tasks for editing.
- Scheduler History:** Use this section to determine if the scheduled tasks completed successfully.

## Task Details

Use the [+] and [-] icons to the right of the title to expand or collapse this section.

### Add a Task

1. Open the integraERP function you wish to add to the scheduler and enter all parameters. Do NOT select **Save/Update** or **Print** at this point.

The following entries can be made in the *Date* fields on the function page: Enter **CURRDT** to represent the current date when the task is run. Enter **CURRFT** to indicate the first day of the month. Enter **CURRLT** to indicate the last day of the month.

The following entry can be made in the *Period* fields on the function page: Enter **CURR** to represent the current period when the task is run.

2. Go to the *Scheduler* page and select **Capture A Submission**. “*Please Run The Desired Function*” displays in the message area. You have 1 minute to return to the integraERP function you wish to add and select **Save/Update** or **Print**.

After you select **Save/Update** or **Print** “*Submission Captured By Scheduler*” displays on the integraERP function page you are scheduling and “*Captured A Valid Submission*” displays on the *Scheduler* page.

If the function is not one that is capable of being run through *Scheduler*, the error message “*Function Cannot Be Scheduled*” displays on the function page after you’ve selected **Save/Update** or **Print**.

If an acceptable function is not run within 1 minute, the error “*Received No Request*” displays on the *Scheduler* page.

3. On the *Scheduler* page, you now need to enter the details for when the function you have chosen should run. The following fields are available for entry.

**Company Number:** The company you are currently logged into defaults and cannot be changed.

**User:** The user currently logged in defaults and cannot be changed.

**Function:** The module initials associated with the function you selected display. It is recommended that you enter a more detailed function name. This name will display later in the *Scheduled Tasks* and *Scheduler History* sections of the page. You will need to recognize these function names when they display. Duplicate function names are not allowed.

**Run Next At:** Use these fields to control the dates the function will run.

**Date:** Tomorrow's date defaults as the first day the function will run, but may be changed.

**Time:** The next even half hour defaults as the first time the function will run, but may be changed.

**Enabled:** Initially, this field is **Checked** to indicate that this task should run as scheduled. If you decide that a task should not run but you do not wish to delete the task, **Uncheck** this field.

**Action:** Indicates the type of output. Select one of the following:

**Print:** Select to print the output. Then, in the *To* field, select the printer name to which the output should be printed.

**E-Mail:** Select to e-mail the output. Then, in the *To* field, enter the e-mail address to which the output should be sent. You may enter more than one e-mail address.

**Save To My Documents:** Select to save the output to the *My Documents* section of *Business Intelligence*. Then, in the *To* field, enter the user name to which the output should be sent and select **Enter** to display the user name in a blue box. (When you begin typing the user name, a list of eligible users displays.) You may also use **Down Arrow** to display the list of eligible users and select from that list. You may enter more than one user. Use the blue **X** to remove a user.

**Perform:** In the *Date* and *Time* fields, you indicated the first time the task should run. Use the *Perform* fields to schedule recurring dates and times. Select one of the following:

**Once:** This is the initial default. The task will run only for the date and time entered in the *Date* and *Time* fields.

**Daily:** Select this option to run the task on selected days. Activate one of the following:

Activate the **Every** radio button and enter the number of *Days* to indicate how often it should be performed. Then **Check** the box(es) in the *At These Times* section to indicate the times it should be performed.

Activate the **On** radio button and select *Weekdays*, *Saturday*, and/or *Sunday* to perform the function on specific days of the week. Then **Check** the box(es) in the *At These Times* section to indicate the times it should be performed.

**Weekly:** Select this option to run the task on selected weeks.

Enter the number of *Weeks* to indicate how often it should be performed. Then **Check** the box(es) in the *Select The Day(s) Of The Week* section to indicate the day(s) of the week it should be performed. The task will run at the time entered in the *Time* field to the left.

**Monthly:** Choose to run the task on a monthly basis. Activate one of the following:

Activate the **Day** radio button and enter the specific date of the month to perform the function on a specific day of the month. Then **Check** the box(es) in the *Of The Month(s)* section to indicate the months it should be performed. The task will run at the time entered in the *Time* field to the left.

Activate the **Order/Weekday** radio button and select the specific week/weekday of the month to perform the function. Then **Check** the box(es) in the *Of The Month(s)* section to indicate the months it should be performed. The task will run at the time entered in the *Time* field to the left.

4. When all details have been entered, select the **Check** icon at the bottom of the *Task Details* section of the page. The task is saved and added to the list of scheduled tasks in the *Scheduled Tasks* section of the page.

## Scheduled Tasks

Use the [+] and [-] icons to the right of the title to expand or collapse this section.

### Task Display

- Use this section to display all scheduled tasks for the user.

The *Status* field indicates if the task is **Scheduled** (the task was set up as described in the *Task Details* section above), **Re-Scheduled** (the task was rescheduled from a history entry), or **Running** (the task is currently running).

If the *Date* and *Time* entries are red, the task is overdue. The task will run at the next even half hour.

- To display all tasks scheduled by every user on the system,

Select **Show Other Users** in the upper right corner of the *Scheduled Tasks* section of the page. You may view all tasks, but you are allowed to edit only your own tasks.

To change the view back to only your user, select **Hide Other Users**.

- Select **Refresh** to reload the list.

### Edit a Task

1. To edit an existing task, select the **Arrow** icon to the left of the task you wish to edit or simply **Right Click** on the task you wish to edit and select **Edit**. The information for the task displays in the *Task Details* section of the page.
2. Enter your changes in any of the fields.
3. Select the **Check** icon at the bottom of the *Task Details* section of the page. The edited task is saved and re-displays in the list of scheduled tasks in the *Scheduled Tasks* section of the page.

## Copy a Task

1. To copy an existing task, select the **Arrow** icon to the left of the task you wish to copy or simply **Right Click** on the task you wish to copy and select **Edit**. The information for the task displays in the *Task Details* section of the page.
2. At least one of the *Function*, *Date*, or *Time* fields must be changed to differentiate the copied task from the original task.
3. Select the **Copy** icon at the bottom of the *Task Details* section of the page. The copied task is saved and displays in the list of scheduled tasks in the *Scheduled Tasks* section of the page.

## Delete a Task

### *Method 1:*

1. To delete an existing task, select the **Arrow** icon to the left of the task you wish to delete. The information for the task displays in the *Task Details* section of the page.
2. Select the red **X** icon at the bottom of the *Task Details* section of the page. The task is removed from the list of scheduled tasks in the *Scheduled Tasks* section of the page.

### *Method 2:*

To delete an existing task, **Right Click** on the task you wish to delete and select **Delete**. The task is removed from the list of scheduled tasks in the *Scheduled Tasks* section of the page.

## Scheduler History

Use the [+] and [-] icons to the right of the title to expand or collapse this section.

When a task is performed by the scheduler, a history entry is written in the *Scheduler History* section of the page to indicate success or failure. Initially, the list displays the last 50 history entries for the user logged into the system.

To display additional history:

- Select **Show Other Users** in the upper right corner of the *Scheduler History* section of the page to display the first 50 tasks scheduled by every user on the system
- Select **Show All** in the upper right corner of the *Scheduler History* section of the page to display all history tasks for all users. This list could be quite lengthy and may take a few seconds to load.  
*Note:* When you hover over the **Show All** link, the number of history entries displays.
- Select **Hide Other Users** in the upper right corner of the *Scheduler History* section of the page to restore the list to the logged in user.

Select **Refresh** to reload the list.

## Re-schedule a Task

Use this function to quickly set up a new task based on a task that has already completed.

1. **Right Click** on the task to be rescheduled and select **Re-schedule**. The information for the task displays in the *Task Details* section of the page. Note that the *Date* defaults as tomorrow's date and the *Time* defaults as the next even half hour.
2. Enter other changes in any of the fields.
3. Select the **Check** icon at the bottom of the *Task Details* section of the page. The rescheduled task is saved and re-displays in the list of scheduled tasks in the *Scheduled Tasks* section of the page. Note that the *Status* of the task is **Re-Scheduled**.