





# Create a Scheduled Task

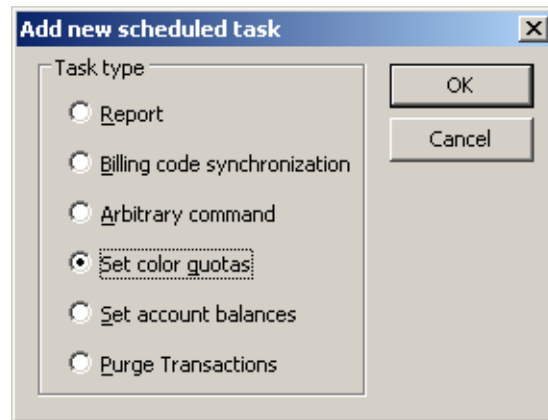
Instructor Led Training  
Chapter 3 – Exercise L

Topics include:

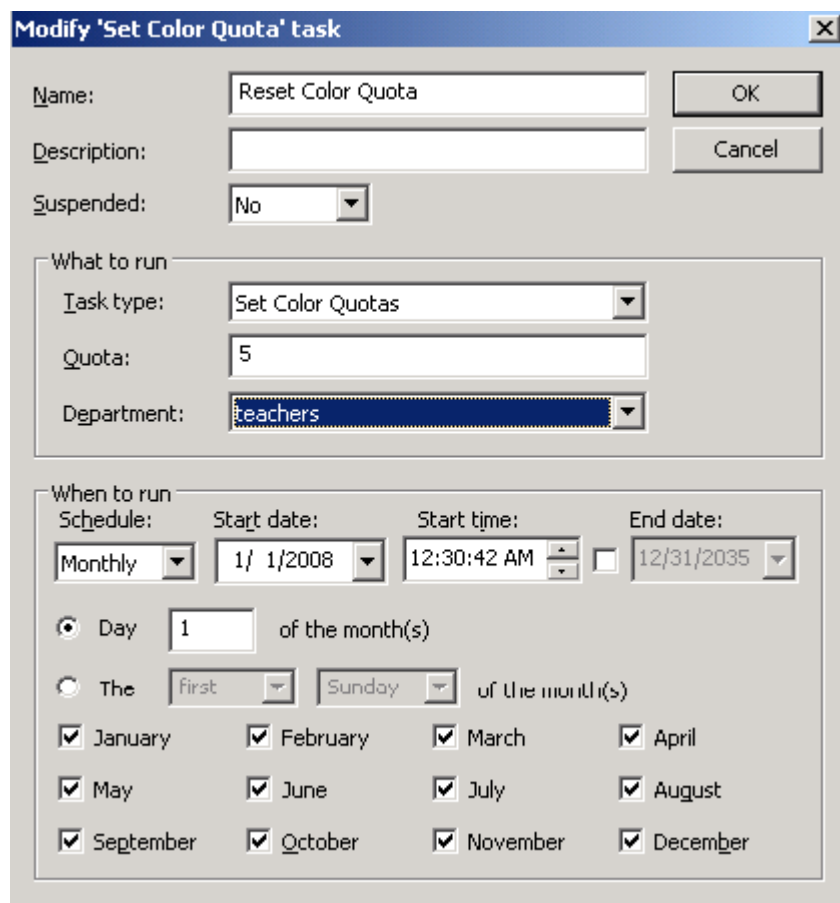
- Schedule a Color Quota Reset
- Configure Email Options for Scheduled Reports
- Schedule a Report
- Schedule an Account Balance Reset

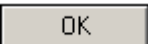
## Schedule a Color Quota Reset

1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click  **Scheduled tasks**.
3. In the right pane, click **<Add...>** to create a new scheduled task.
4. In the Add new scheduled task dialog box, click the **Reset Color Quotas** radio button.
5. Click the  button.




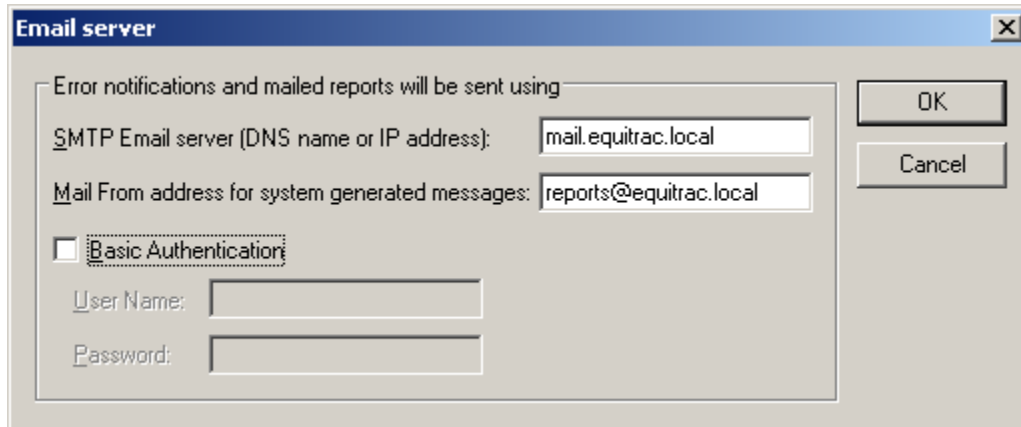
6. In the New task dialog box, type **Reset Color Quota** in the **Name** field.
7. Click the **Task type** drop-down arrow and select **Set color quotas**.
8. In the **Quota** field, type **5**.
9. Click the **Department** drop-down arrow and select **Teachers**.
10. Click the **When to run Schedule** drop-down arrow and select **Monthly**.



11. Click the **Start date** drop-down arrow and select **the first day of the next month**.
12. Adjust the **Start time** field to **12:30 AM**; do not set an End date.
13. Click the  button.



### ***Configure Email Options for Scheduled Reports***

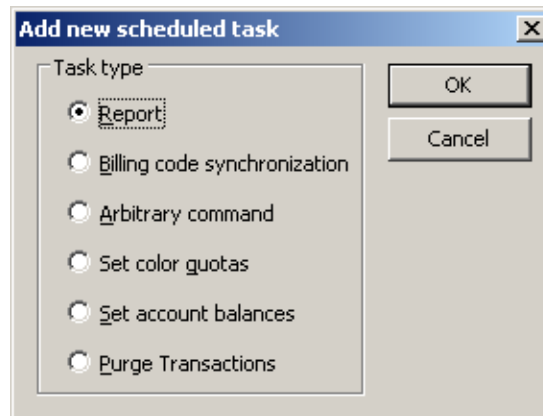
1. In **Equitrac System Manager**, click  **Configuration** in the left pane.
2. In the **Network environment** section in the right pane, click **Mail server**; the Email server dialog box appears.


The 'Email server' dialog box has a title bar with a close button. It contains a group box with the text 'Error notifications and mailed reports will be sent using'. Below this are two text input fields: 'SMTP Email server (DNS name or IP address):' with the value 'mail.equitrac.local' and 'Mail From address for system generated messages:' with the value 'reports@equitrac.local'. There is a checkbox labeled 'Basic Authentication' which is currently unchecked. Below the checkbox are two more text input fields: 'User Name:' and 'Password:'. To the right of the group box are 'OK' and 'Cancel' buttons.

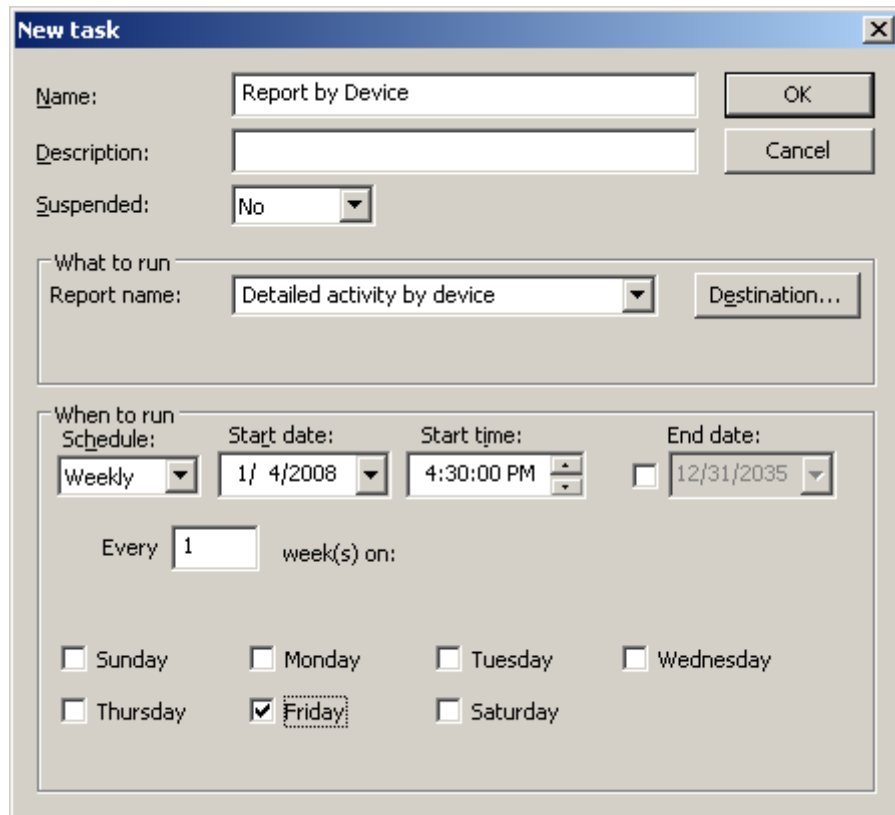
3. Type the values as displayed in the **SMTP Email server...** and **Mail From....** fields above.
4. Click the  button.

### ***Schedule a Report***

1. Start **Equitrac System Manager** and click  **Scheduled tasks** in the left pane.
2. In the right pane, click <**Add...**> to create a new scheduled task.
3. In the Add new scheduled task dialog box, click the **Report** radio button.
4. Click the  button.

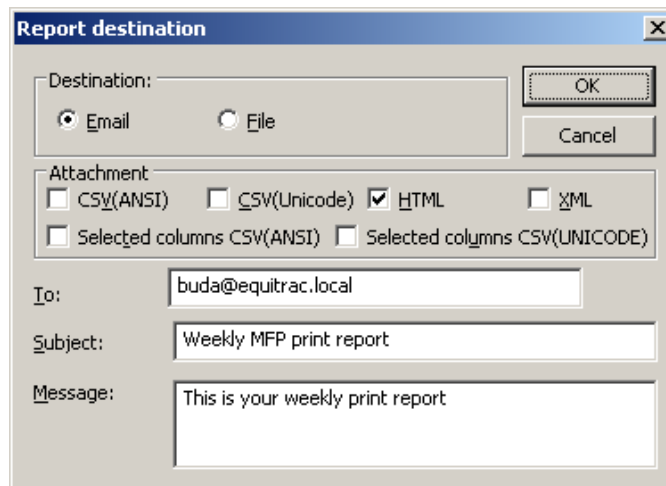
The 'Add new scheduled task' dialog box has a title bar with a close button. It contains a group box labeled 'Task type'. Inside this group box are six radio buttons: 'Report' (which is selected), 'Billing code synchronization', 'Arbitrary command', 'Set color quotas', 'Set account balances', and 'Purge Transactions'. To the right of the group box are 'OK' and 'Cancel' buttons.

5. In the New task dialog box, type **Report by Device** in the **Name** field.
6. Click the **Report name** drop-down arrow and select **Detailed Activity by device**.
7. Click the **When to run Schedule** drop-down arrow and select **weekly**.
8. Click the **Start date** drop-down arrow and select **first Friday of the next month**.
9. Adjust the value in the **Start time** field to **4:30 pm**; do not specify an End date.
10. Click to clear the check box from every day of the week **EXCEPT** Friday.
11. Click the  button.


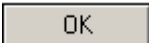


The 'New task' dialog box is shown. The 'Name' field contains 'Report by Device'. The 'Description' field is empty. The 'Suspended' dropdown is set to 'No'. Under 'What to run', the 'Report name' dropdown is set to 'Detailed activity by device' and the 'Destination...' button is visible. Under 'When to run', the 'Schedule' dropdown is set to 'Weekly', the 'Start date' is '1/ 4/2008', the 'Start time' is '4:30:00 PM', and the 'End date' is '12/31/2035'. Below this, it says 'Every 1 week(s) on:'. There are checkboxes for each day of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday (checked), and Saturday.


12. Modify the fields in the Report destination dialog box as follows:

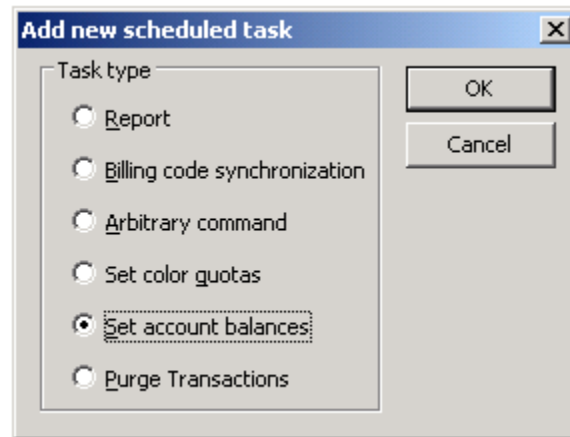



The 'Report destination' dialog box is shown. The 'Destination' section has 'Email' selected with a radio button. The 'Attachment' section has checkboxes for 'CSV(ANSI)', 'CSV(Unicode)', 'HTML' (checked), and 'XML'. There are also checkboxes for 'Selected columns CSV(ANSI)' and 'Selected columns CSV(UNICODE)'. The 'To:' field contains 'buda@equitrac.local'. The 'Subject:' field contains 'Weekly MFP print report'. The 'Message:' field contains 'This is your weekly print report'.

13. Click the  button.
14. In the New task dialog box, click the  button; the scheduled report appears on the list.

**Schedule an Account Balance Reset**

1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click  **Scheduled tasks**.
3. In the right pane, click **<Add...>** to create a new scheduled task.
4. In the Add new scheduled task dialog box, click the **Set account balances** radio button.



5. In the New task dialog box, type **Reset Account Balances** in the **Name** field.
6. Click the **Task Type** drop-down arrow and select **Set balance**.
7. In the **Account** field, type **20.00**.
8. Leave Department set to **<All Users>**.
9. Click the **When to run Schedule** drop-down arrow and select **Monthly**.
10. Click the **Start date** drop-down arrow and select **the first day of the next month**.
11. Adjust the **Start time** field to **12:30 AM**; do not set an End date.
12. Click the  button.

