Create a Scheduled Task
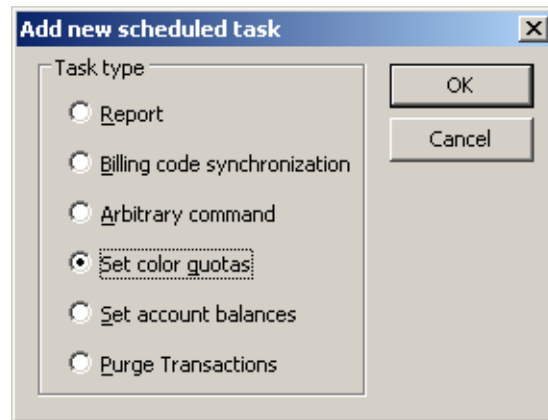
Instructor Led Training
Chapter 3 – Exercise L

Topics include:

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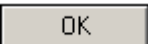▪ Schedule an Account Balance Reset

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 [OK] button.

Add new scheduled task

Task type
- ○ Report
- ○ Billing code synchronization
- ○ Arbitrary command
- ● Set color quotas
- ○ Set account balances
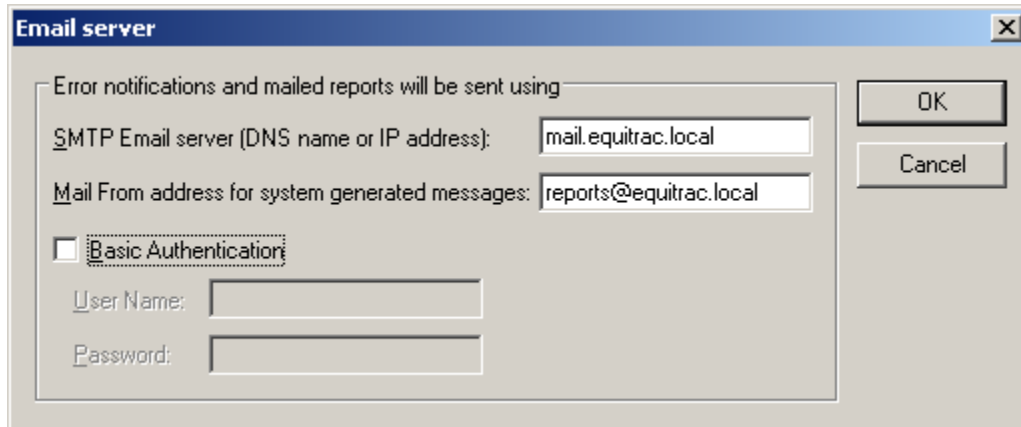- ○ Purge Transactions

[OK]
[Cancel]

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**.
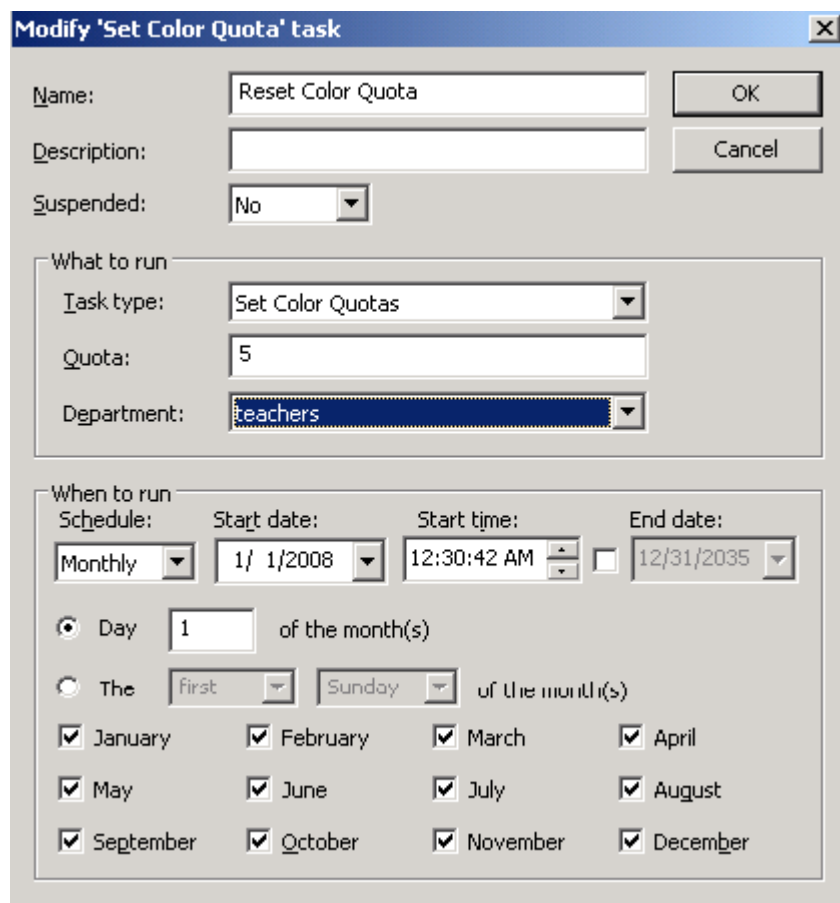
11. Click the **Start date** drop-down arrow and select **the first day of the next month**.

12. Adjust the **Start time** field to **12:30 AM**; do not set an End date.

13. Click the [OK] button.

Modify 'Set Color Quota' task

Name: Reset Color Quota
Description:
Suspended: No

What to run
Task type: Set Color Quotas
Quota: 5
Department: teachers

When to run
Schedule: Monthly   Start date: 1/ 1/2008   Start time: 12:30:42 AM   □ End date: 12/31/2035
- ● Day 1 of the month(s)
- ○ The first Sunday of the month(s)

☑ January   ☑ February   ☑ March   ☑ April
☑ May   ☑ June   ☑ July   ☑ August
☑ September   ☑ October   ☑ November   ☑ December

[OK]
[Cancel]
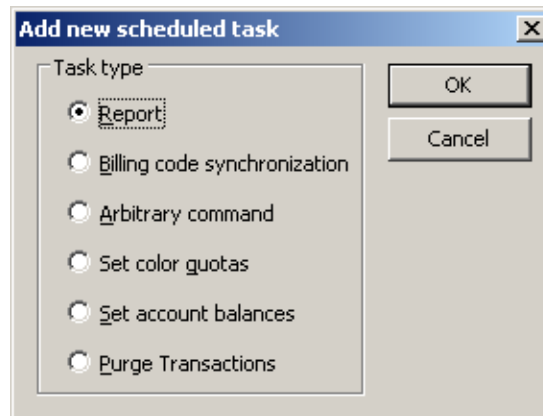
Configure Email Options for Scheduled Reports

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.

Email server

Error notifications and mailed reports will be sent using

SMTP Email server (DNS name or IP address): mail.equitrac.local

Mail From address for system generated messages: reports@equitrac.local

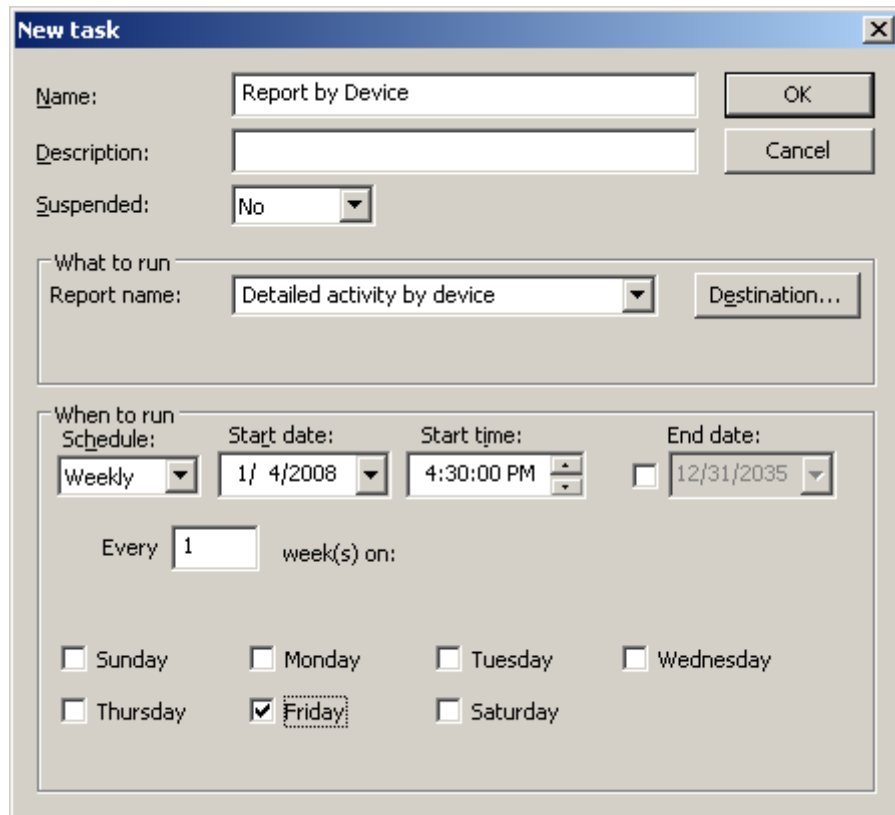☐ Basic Authentication

User Name:

Password:

OK   Cancel

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

4. Click the [OK] 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.
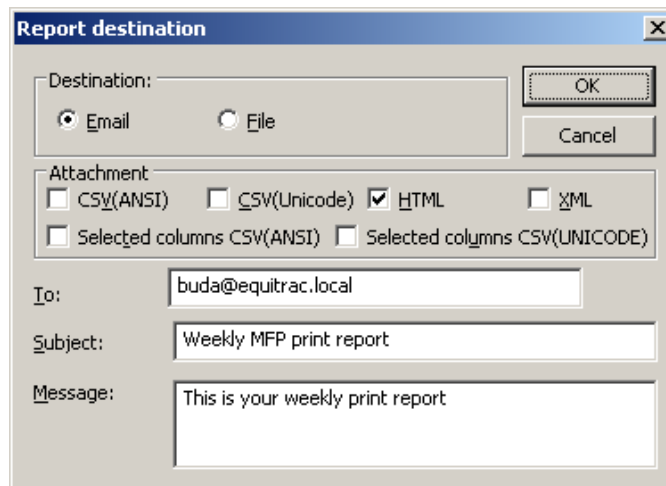
4. Click the [OK] button.

Add new scheduled task

Task type

◉ Report

○ Billing code synchronization

○ Arbitrary command

○ Set color quotas

○ Set account balances

○ Purge Transactions

OK   Cancel

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.

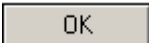10. Click to clear the check box from every day of the week **EXCEPT** Friday.

11. Click the **Destination...** button.

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

13. Click the **OK** button.

14. In the New task dialog box, click the **OK** 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.
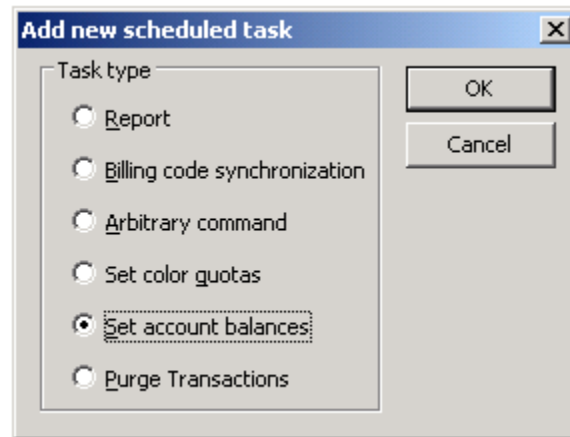
5. In the New task dialog box, type **Reset Account Balances** in the **Name** field.

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 OK button.