

## Report Scheduler Directions

### Report Scheduler Steps:

1. Add a Report Packet
2. Add a Distribution Member
3. Create a Report Scheduler Event

### Step 1: Adding (and Reviewing) Report Packets

#### To add a report packet

Select “Report Scheduler ~ Add Report Packet”

The “New Report Packet” screen will appear.

1. Enter Name for Report Packet.
2. Enter Description for Report Packet.
3. Click “Save”.

#### To modify an existing report packet

Select “Report Scheduler ~ Review Report Packet”

The “Report Packet” filter will appear.

1. Leave the filter blank.
2. Click “Submit”.
3. Select the Report Packet you would like to review from the Report Packet Window.

- 
4. Add report files to the packet, as needed:
    - a. Click “Add Report Files” (A list of available reports will appear).
    - b. Select the report files you want to add to the report packet, then click “Ok”. The “File or Script” grid on the Report packet screen will reflect the files you added.
    - c. Click the “Filter” button next to the file to choose the filter options for this report.
    - d. If needed, use the “Row Control” buttons to move or delete the reports in the “File or Script” grid.
  5. In the “Options” section of the Report Packet screen, select the options you want to apply to the report packet.
    - a. Zip file(s): Select this option to zip the report, otherwise the files may be too large to go through your email server.
    - b. Combine: You can choose to combine into 1 .xls file or 1 .pdf file.

6. Update Scheduler Event Records. Select this check box and choose “Save” if you made any changes to the report packet and you want the changes to reflect in Report Scheduler Events that already been setup with this packet.

## **Step 2: Adding (and Reviewing) Distribution Members**

### **To add a Distribution Member**

Select “Report Scheduler ~ Add Distribution Member”

The “New Report Member” screen will appear.

1. Click the “Employee” link on the New Distribution Member screen. Select the employee who will receive the generated report packet, then choose ok. This contact information will automatically populate from the employee record.
2. Replace the system generated code in the “Code” field with a unique code for the distribution member.
3. In the “Property” section fill in the relevant property codes and count (# of copies).
  - a. You can add up to five properties at a time, and then you must click “Save” in order to display additional rows.
  - b. If you select a property list and choose the “Consolidate” button, it will consolidate all of the properties in that list into one report.
  - c. If you select a property list and do not choose “Consolidate”, when you hit “Save” it will list each property individually in the Property section.
  - d. If you select the checkbox for “Packet per Property”, the system will create a separate PDF for each property.
4. In the “Report Packets” section, choose the report packet you would like to associate with this member.
5. Choose “Save”.

### **To modify an existing Distribution Member**

Select “Report Scheduler ~ Review Distribution Member”

The “Distribution Member” filter will appear.

1. Leave the filter blank
2. Click “Submit”
3. Select the Distribution Member you would like to review from the Distribution Member Window
4. Make changes as appropriate, then choose “Save”.



610-331-6019



michelle@mmconsultingsolutions.net



www.mmconsultingsolutions.net



1577 Wiltshire Village Drive, Wellington, FL 33414

### **Step 3: Adding (and Reviewing) Report Scheduler Events**

#### **To add a Report Scheduler Event**

Select “Report Scheduler ~ Add Scheduler Event”

The “Create New Scheduler Event” screen will appear.

1. Select “Member”
2. Select “Report Packet”
3. Click Submit

The “Report Scheduler Event” Screen will appear. The options are prefilled with information from the associated Member and Report Packet.

#### **To modify an existing Report Scheduler Event**

Select “Report Scheduler ~ Review Scheduler Event”

The “Report Scheduler Event” filter will appear.

1. Leave the filter blank
2. Click “Submit”
3. Select the Report Scheduler Event you wish to run/modify

- 
4. Change any options necessary to run your reports
    - a. Change email address to your email address
    - b. Change filters on files as necessary
    - c. Click “Run Now” to generate reports
  5. To schedule a report to automatically run on a specific day
    - a. Click on the “Dates” button (the Scheduler Event Dates screen will appear)
    - b. Fill in the appropriate options in the “Date Generator” section to run each day/week/month
    - c. Click “Go” to populate the dates in the Scheduler.
    - d. Click “Save”
    - e. Click “Close”

*Note: Each client is unique. Please contact MM Consulting Solutions if you would like to develop a custom solution for your business.*