

## ABM SCHEDULED TASKS

### Database Housekeeping, Reports, Business Bulletin, Data Checks

ABM allows you to set up various task which can be run at a time and interval that suits you. You can set a report to be produced overnight so that it is printed and ready for your inspection the following morning. The tasks that can be scheduled are as follows.

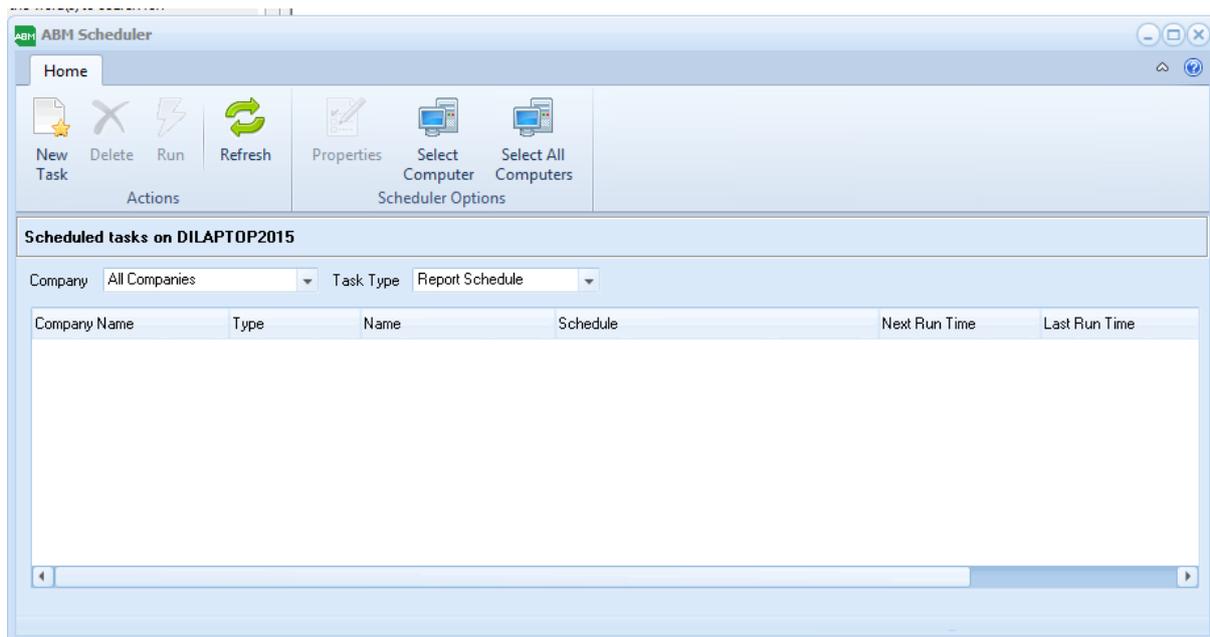
**Database Housekeeping:** You can run a housekeeping procedure which will defrag your indexes and remove any empty space in the database.

**Run a Report:** You can schedule the running of any report which can be printed or stored in PDF format to a location of your choice.

**Run a Business Bulletin:** You can schedule one of your saved Business Bulletins to run at a time and interval that is convenient to you.

**Run a Data Check:** You can schedule a Data Check to run at a specific time, such as overnight, so that it does not hold up normal processing.

To set up a new task select Scheduled Tasks from the Main Menu Bar under Tools. When you select Scheduled Tasks the following screen will appear.

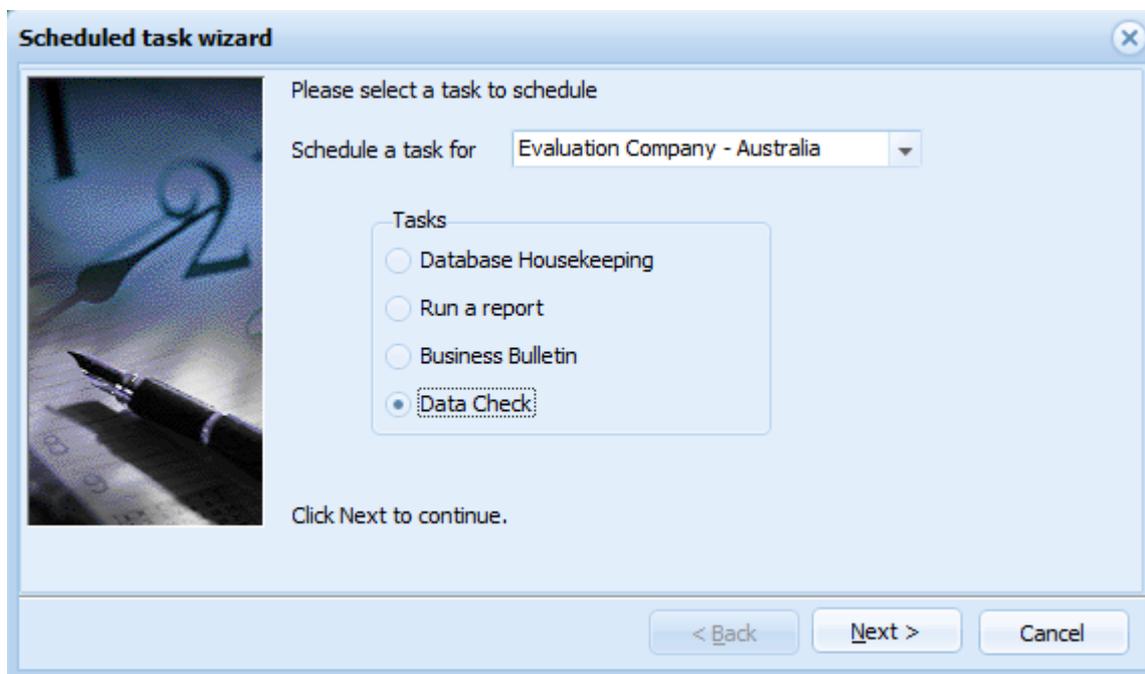


This will show all scheduled tasks, including tasks set by other applications, so that you can ensure you do not schedule a task that will conflict with some other task being run at the same time, such as a backup.

## Scheduling a Data Check

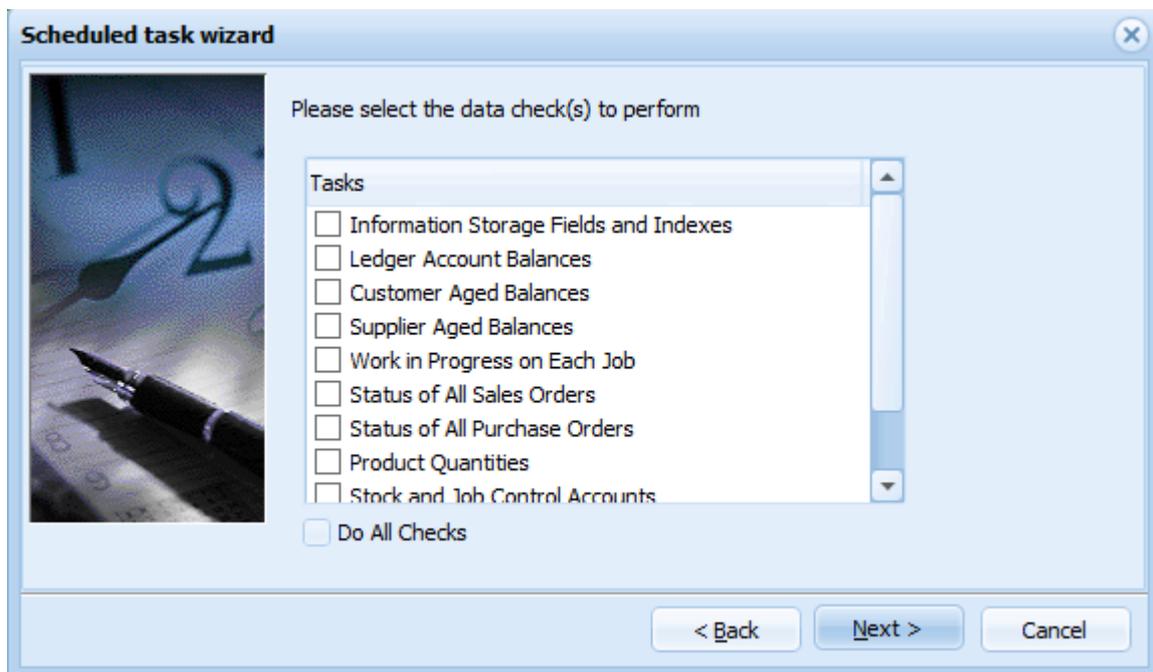
To schedule the running of the Data Check, select Scheduled Tasks and select New Task.

Step 1:



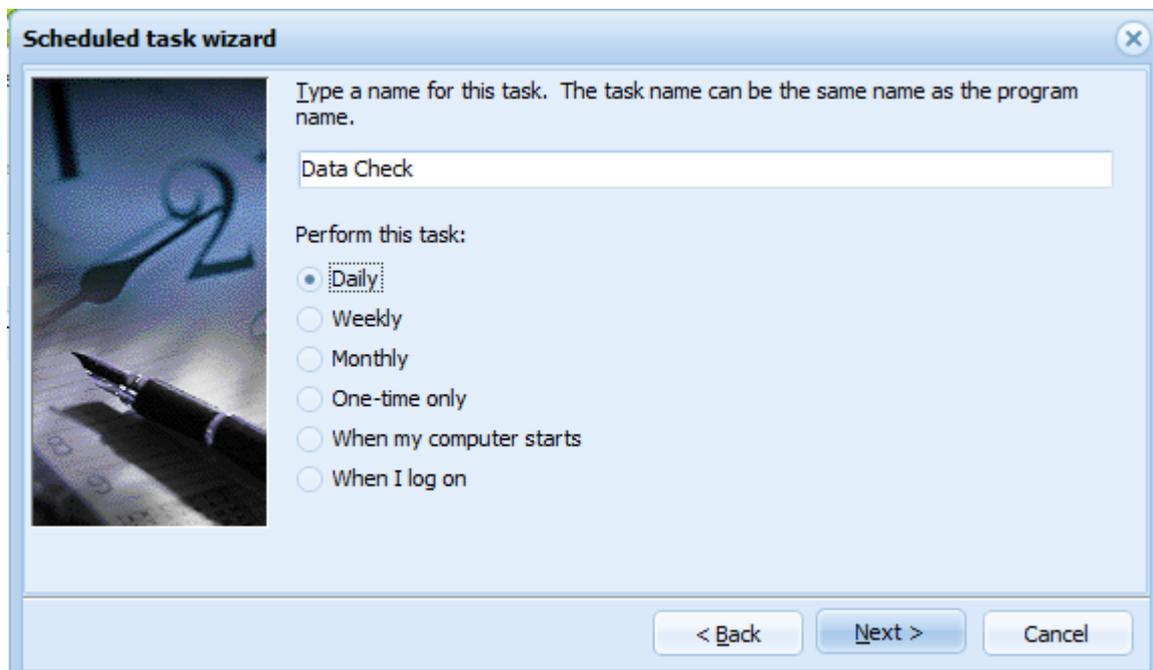
Select the company for which you wish to run the data check. The company is available from the drop-down list and select Data Check. When you have finished select Next. Note: If you select Scheduled Tasks from the Tools menu within the company database, then you will not need to select the company, and that option will not be visible.

Step 2:



Select the Data Check option you wish to run or select Do All Checks.

**Step 3.**



Scheduled task wizard

Select the time and day you want this task to start.

Start time:  
11:04:47 AM

Perform this task:

Every day

Every 1 days

Start date:  
2/12/2016

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Enter the name you wish to assign to this task. You can also select the interval you wish this task to be run, such as daily or weekly.

#### Step 4.

Scheduled task wizard

Select the time and day you want this task to start.

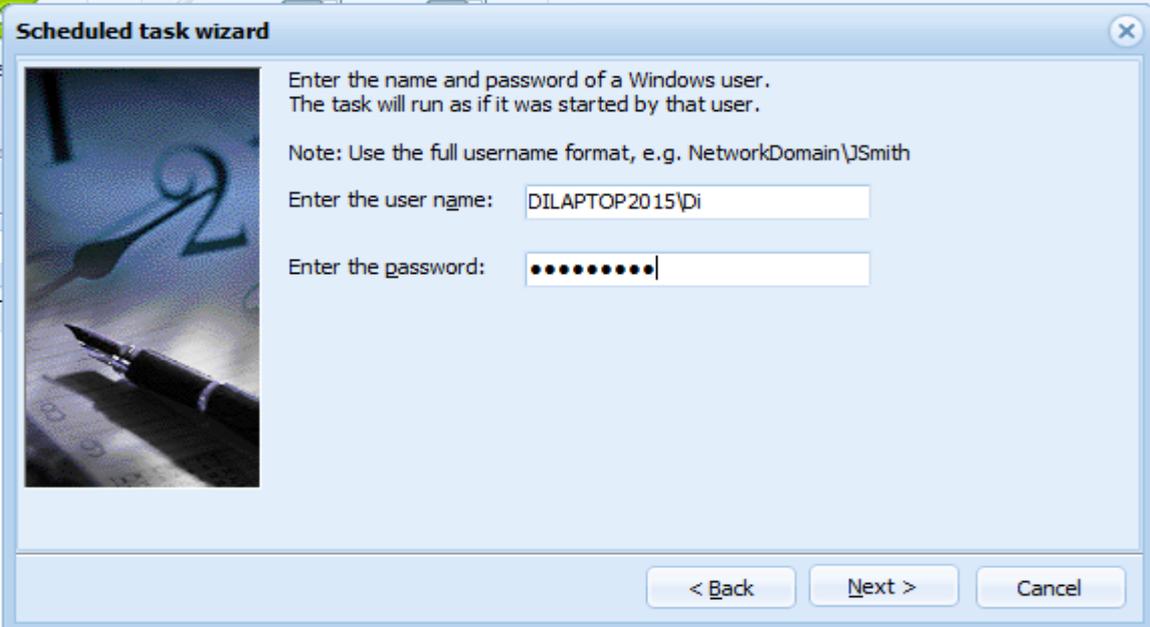
Start time:  
10:59:16 AM

Start date:  
2/12/2016

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Enter the start time and frequency you wish to run the data check. You can also select the day of the week that the data check is to be run.

## Step 5.



**Scheduled task wizard**

Enter the name and password of a Windows user.  
The task will run as if it was started by that user.

Note: Use the full username format, e.g. NetworkDomain\JSmith

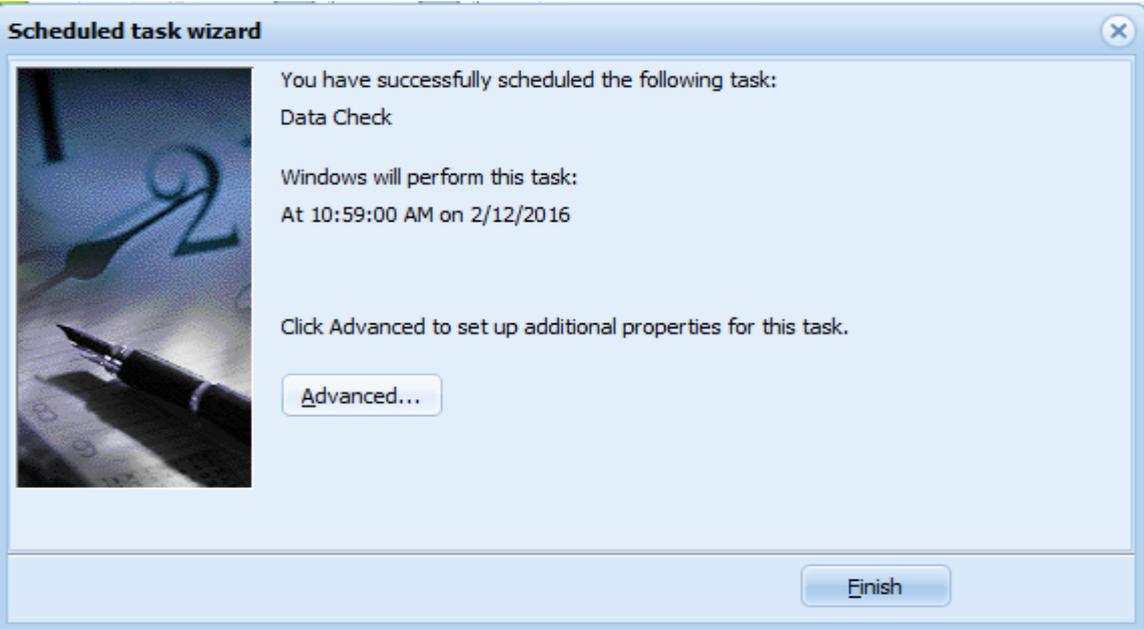
Enter the user name: DILAPTOP2015\Di

Enter the password: ●●●●●●●●●●

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Enter the windows username and password. Note this is the username that applies to the computer where the task will be run from.

## Step 6.



**Scheduled task wizard**

You have successfully scheduled the following task:  
Data Check

Windows will perform this task:  
At 10:59:00 AM on 2/12/2016

Click Advanced to set up additional properties for this task.

Advanced...

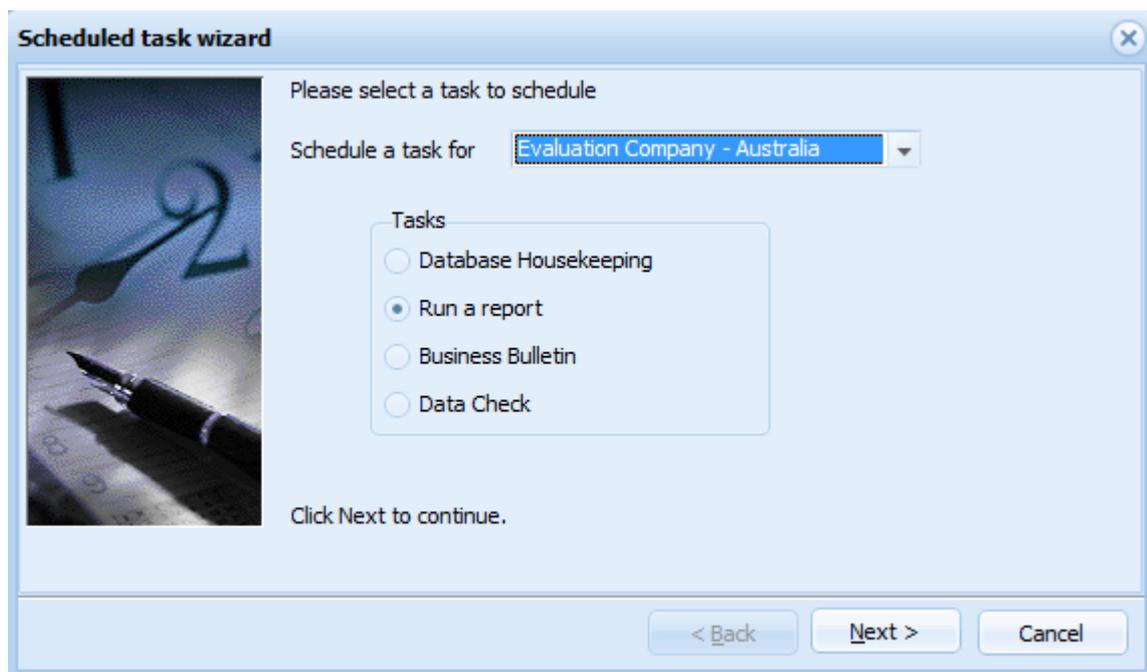
Finish

Select Finish to save the scheduled task.

## Schedule a Report

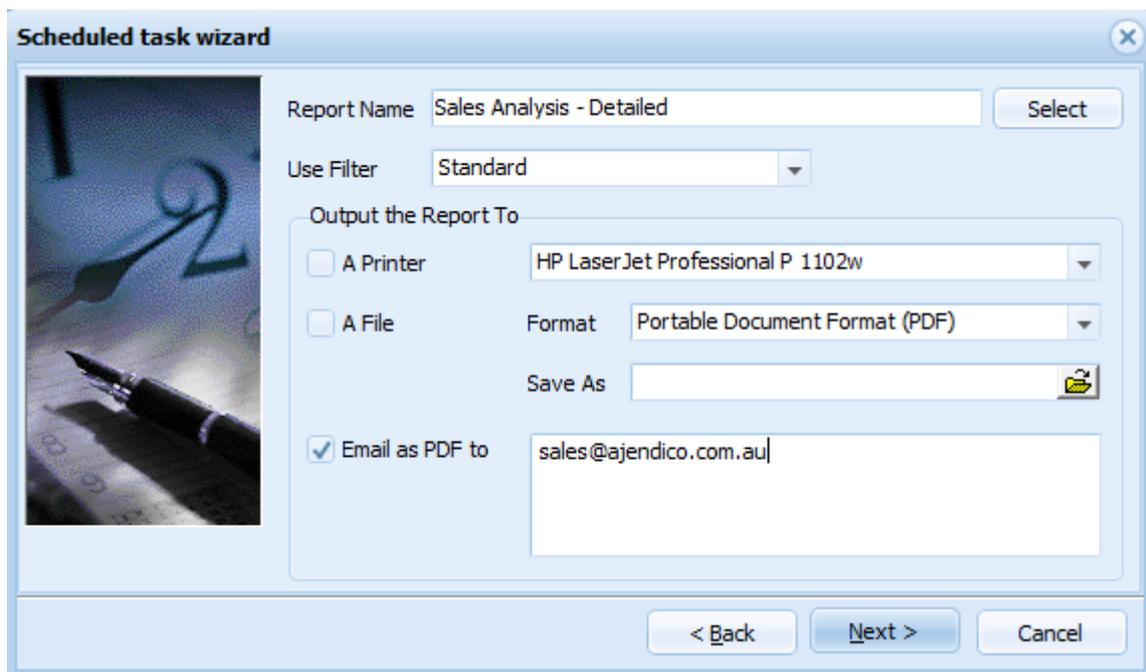
To add a report to be scheduled to run at a particular time, select Scheduled Tasks and select New Task.

Step 1.



Select the company for which you wish to run a report. The company is available from the drop down list and select Run Report. When you have finished select Next. Note: If you select Scheduled Tasks from the Tools menu within the company database, then you will not need to select the company, and that option will not be visible.

Step 2.



Report Name: Select the report name. From the select key you can choose a report from your Report List. Select the category of report you wish to choose. Example: Customer, and then select the required report from the list.

Use Filter: If you have a filter set for this report you can choose this filter, otherwise, select All Records. See [Customising Reports](#)

Output: Select whether you wish to print the report or create a PDF file which can be retrieved and printed later.

E-mail as PDF to: If you wish to have the report sent in PDF format to a specific e-mail address, or a group of e-mail addresses, then enter the e-mail address. If selecting a group of e-mail addresses, then enter each address on a separate line.

### Step 3.

**Scheduled task wizard**

Type a name for this task. The task name can be the same name as the program name.

Sales Analysis Daily

Perform this task:

Daily

Weekly

Monthly

One-time only

When my computer starts

When I log on

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Enter the name of the task. Example: Daily Debtor Balance and enter the frequency for the report to be run.

#### Step 4.

**Scheduled task wizard**

Select the time and day you want this task to start.

Start time:

11:09:30 AM

Perform this task:

Every day

Every 1 days

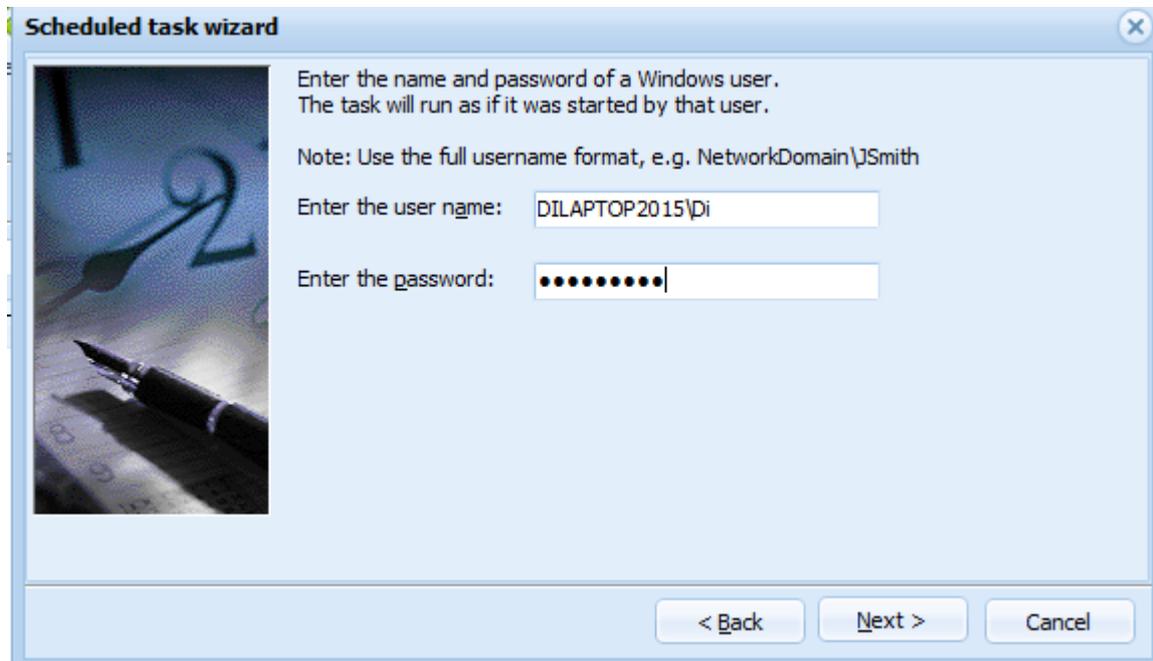
Start date:

2/12/2016

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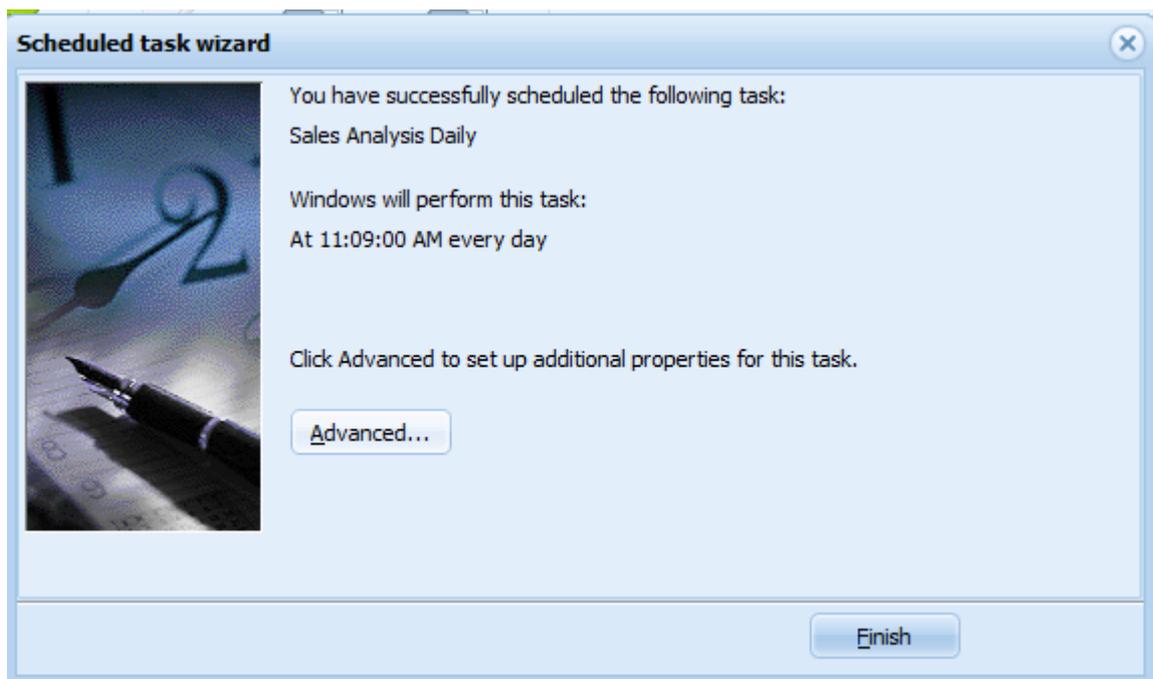
Enter the start time and date you wish this report to be run.

### Step 5.



Enter the windows username and password. Note this is the username that applies to the computer where the task will be run from.

### Step 6.

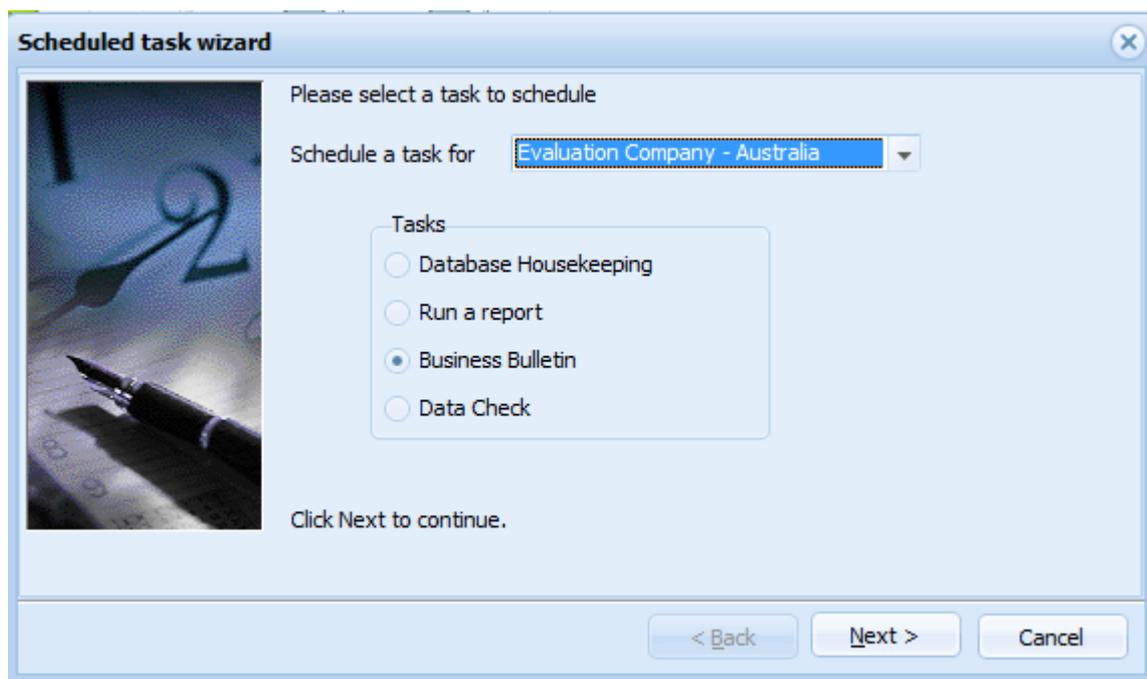


Select Finish to save the scheduled task.

### Scheduling a Business Bulletin

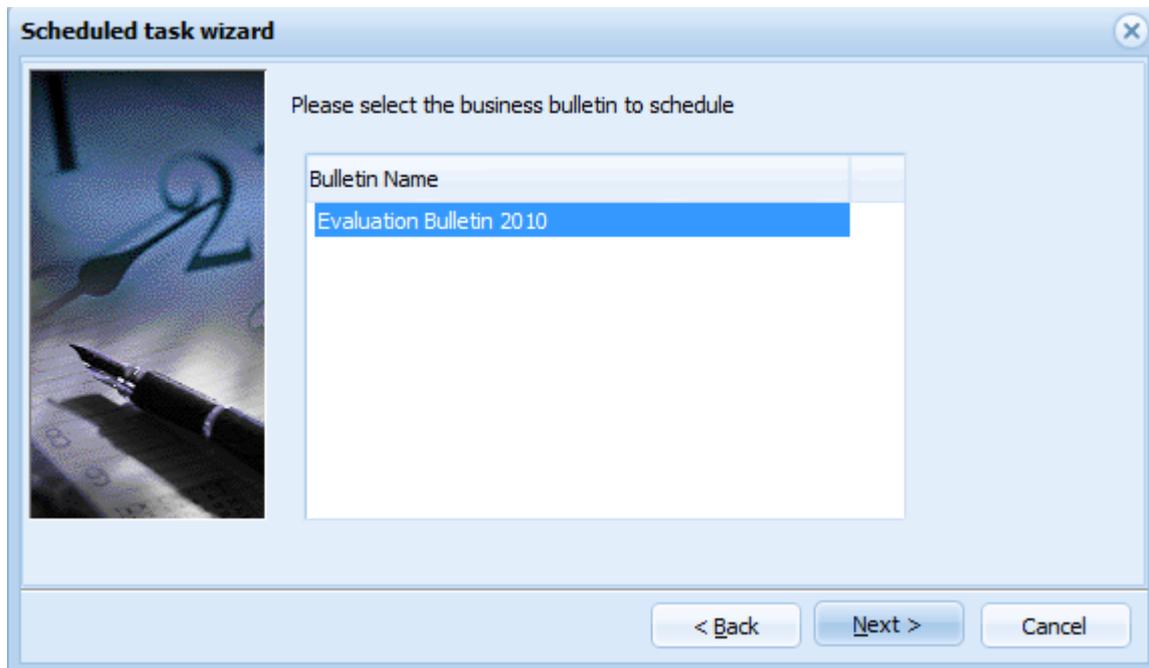
To schedule the running of a Business Bulletin at a particular time, select Scheduled Tasks and select New Task.

#### Step 1.



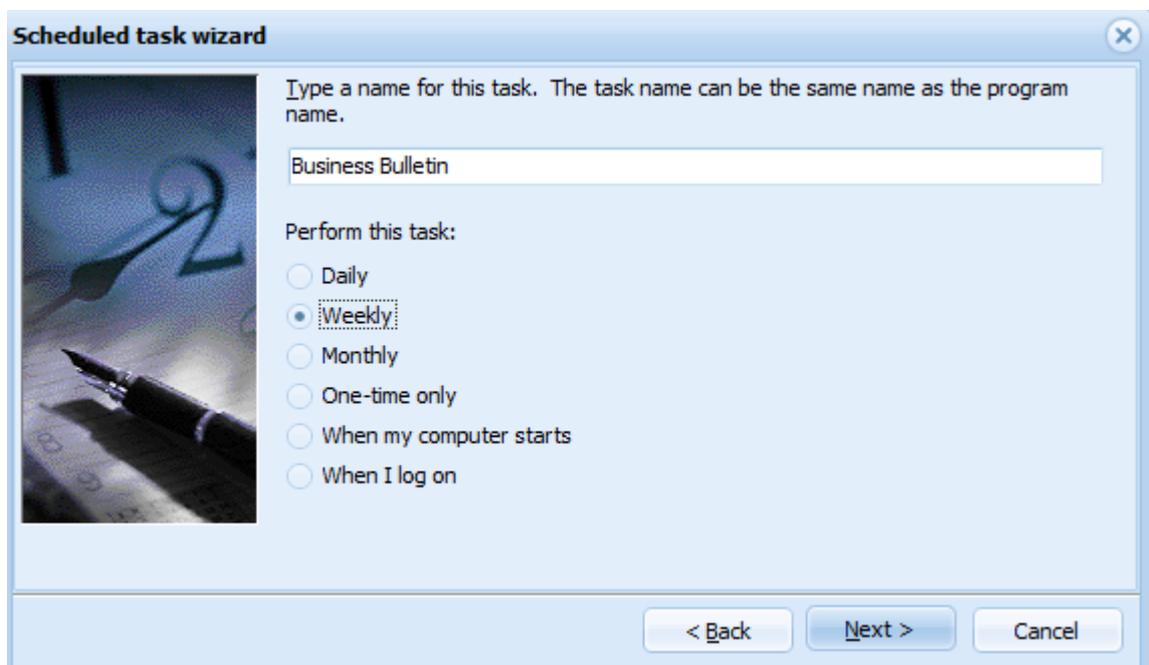
Select the company for which you wish to run the Business Bulletin. The company is available from the drop-down list and select Business Bulletin. When you have finished, select Next. Note: If you select Scheduled Tasks from the Tools menu within the company database, then you will not need to select the company, and that option will not be visible.

#### Step 2.



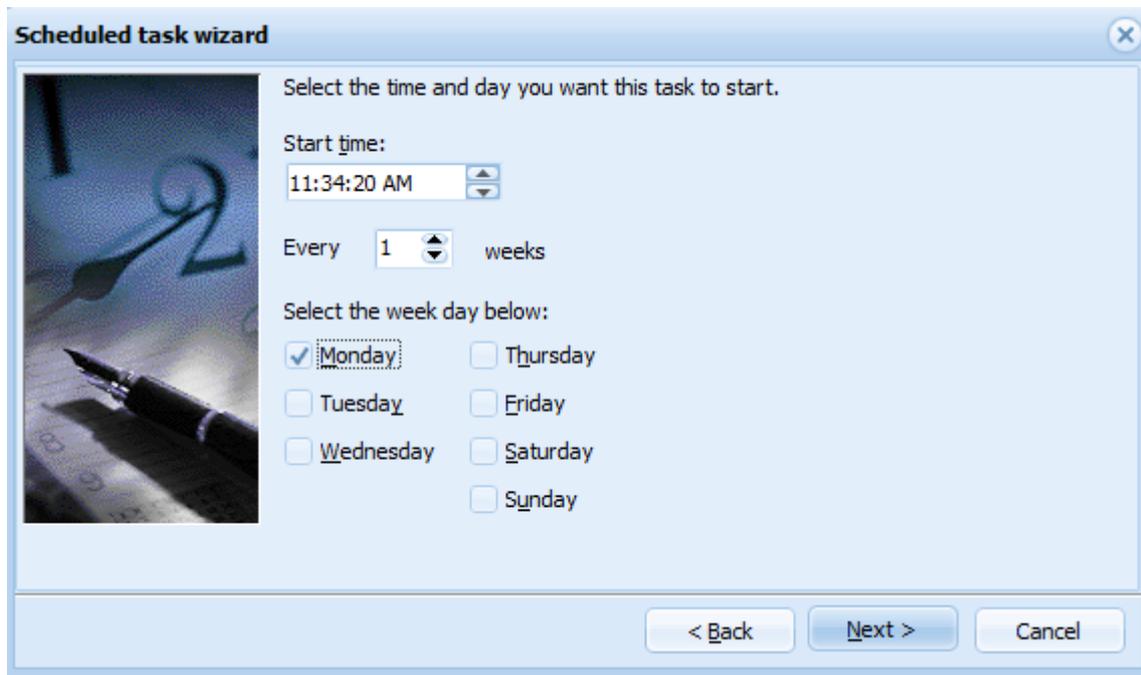
Select the required Bulletin from the list.

### Step 3.



Enter the name of the task. Example: My Business Bulletin and enter the frequency for the bulletin to be run.

### Step 4.



Scheduled task wizard

Select the time and day you want this task to start.

Start time:  
11:34:20 AM

Every 1 weeks

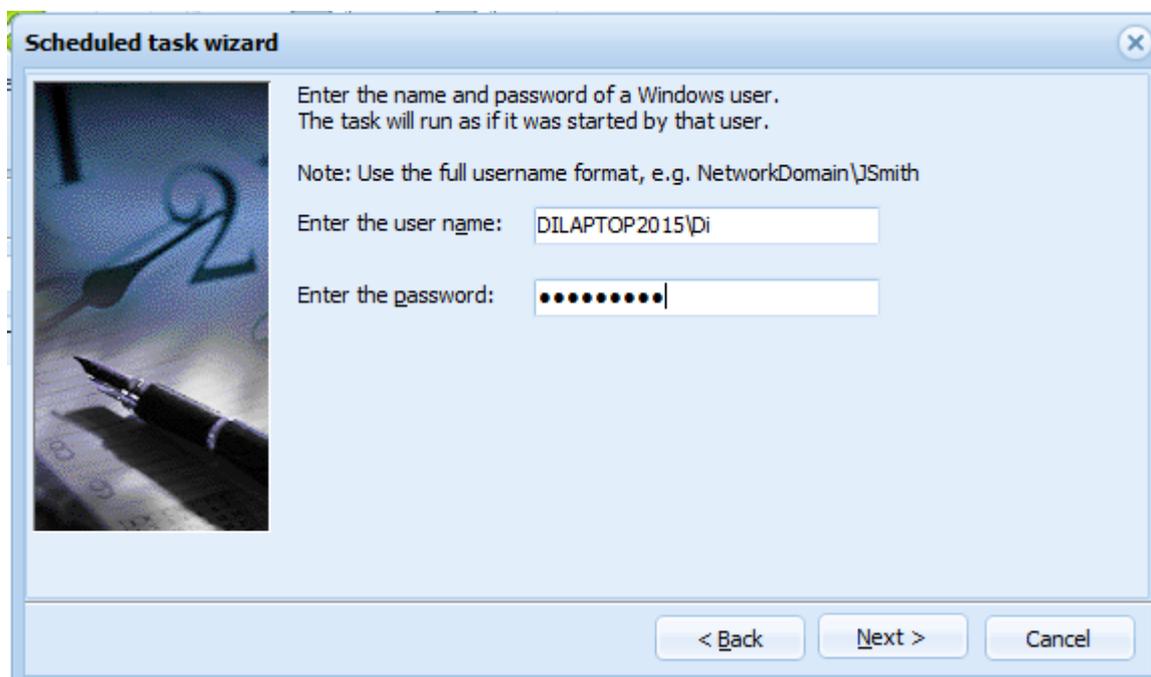
Select the week day below:

Monday  Thursday  
 Tuesday  Friday  
 Wednesday  Saturday  
 Sunday

< Back Next > Cancel

Enter the start time and date you wish this bulletin to be run.

### Step 5.



Scheduled task wizard

Enter the name and password of a Windows user.  
The task will run as if it was started by that user.

Note: Use the full username format, e.g. NetworkDomain\JSmith

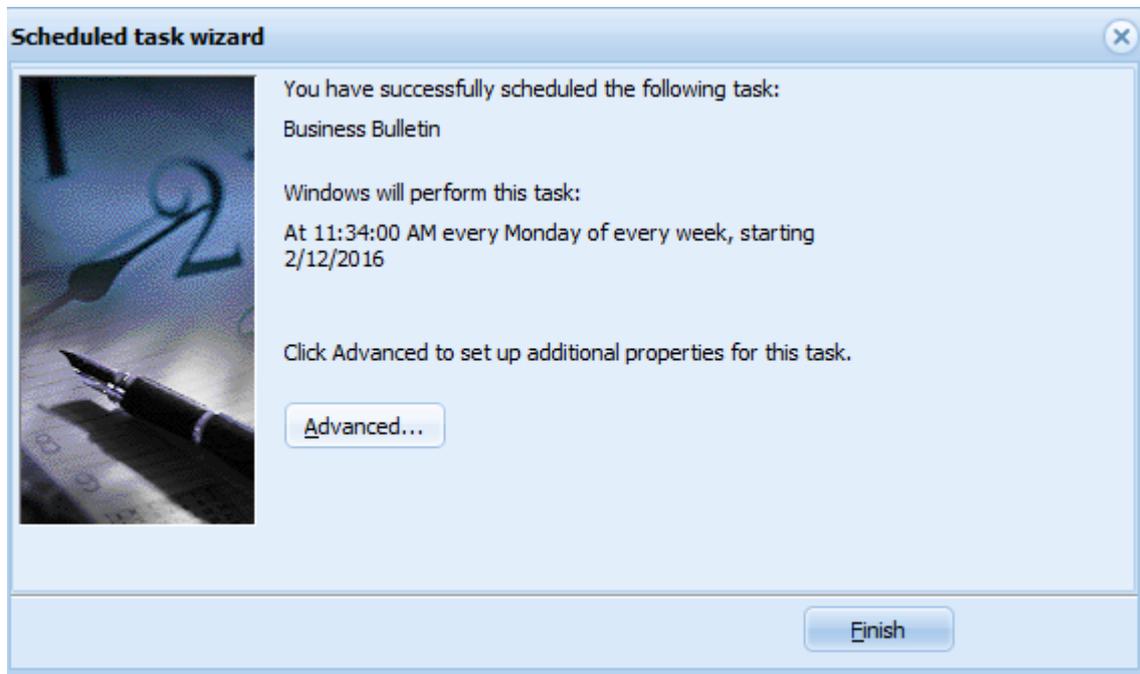
Enter the user name: DILAPTOP2015\Di

Enter the password: ●●●●●●●●●●

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Enter the windows username and password. **Note** this is the username that applies to the computer where the task will be run from.

**Step 6.**

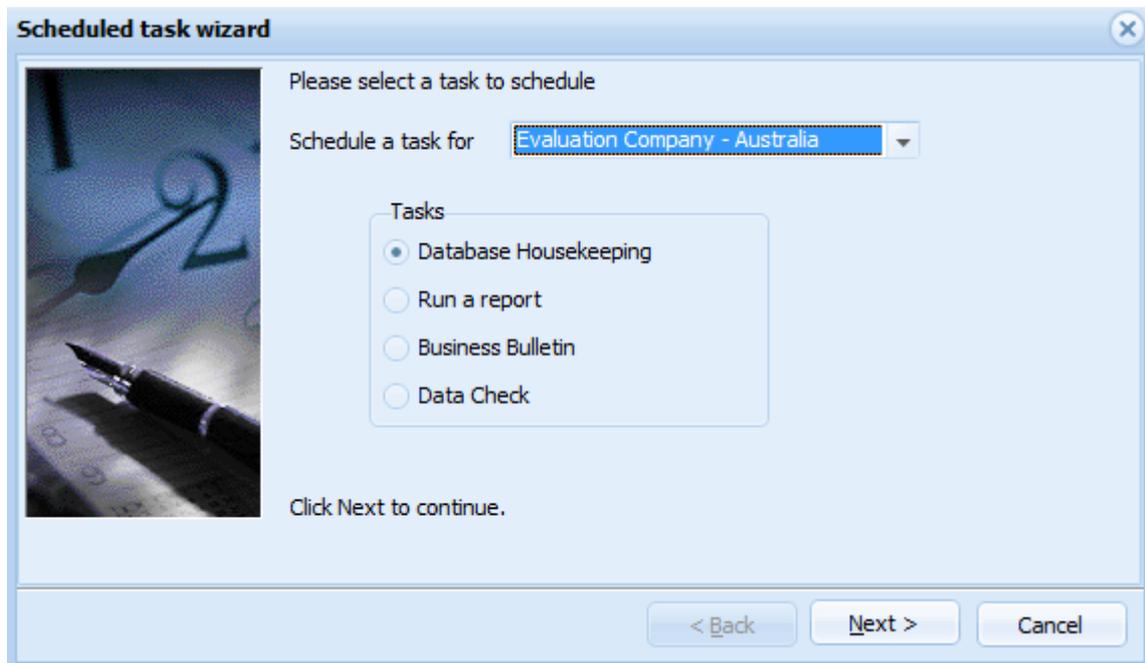


Select Finish to save the scheduled task.

**Database Housekeeping**

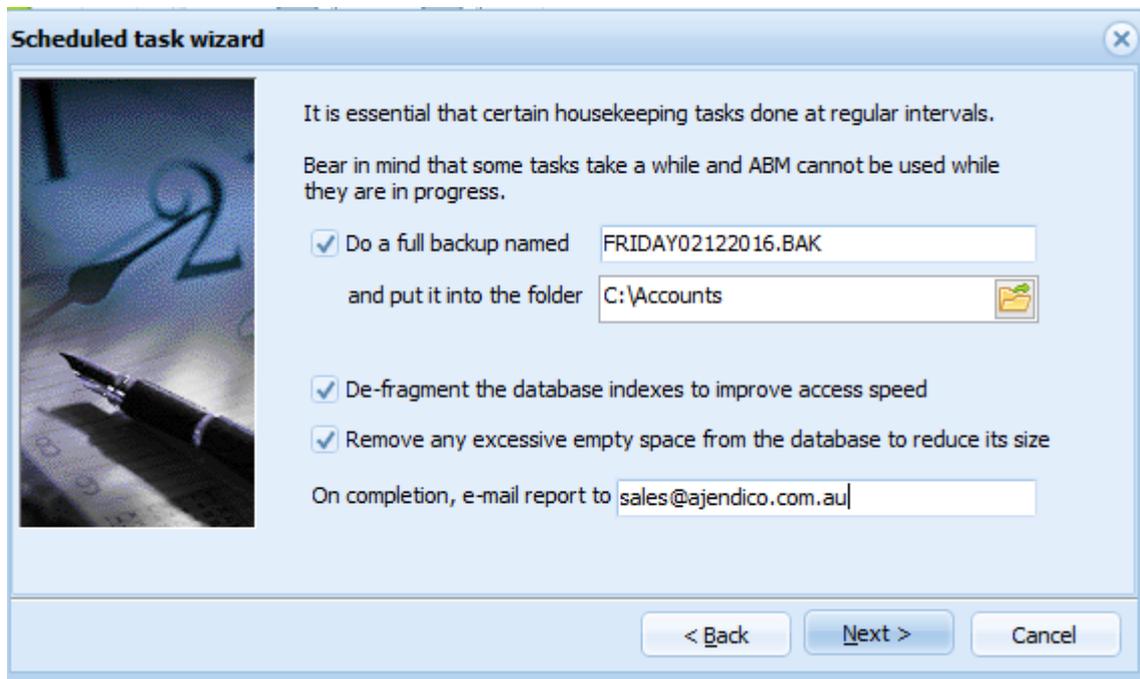
To Create a new Housekeeping plan select Scheduled Tasks and select New Task.

**Step 1:**



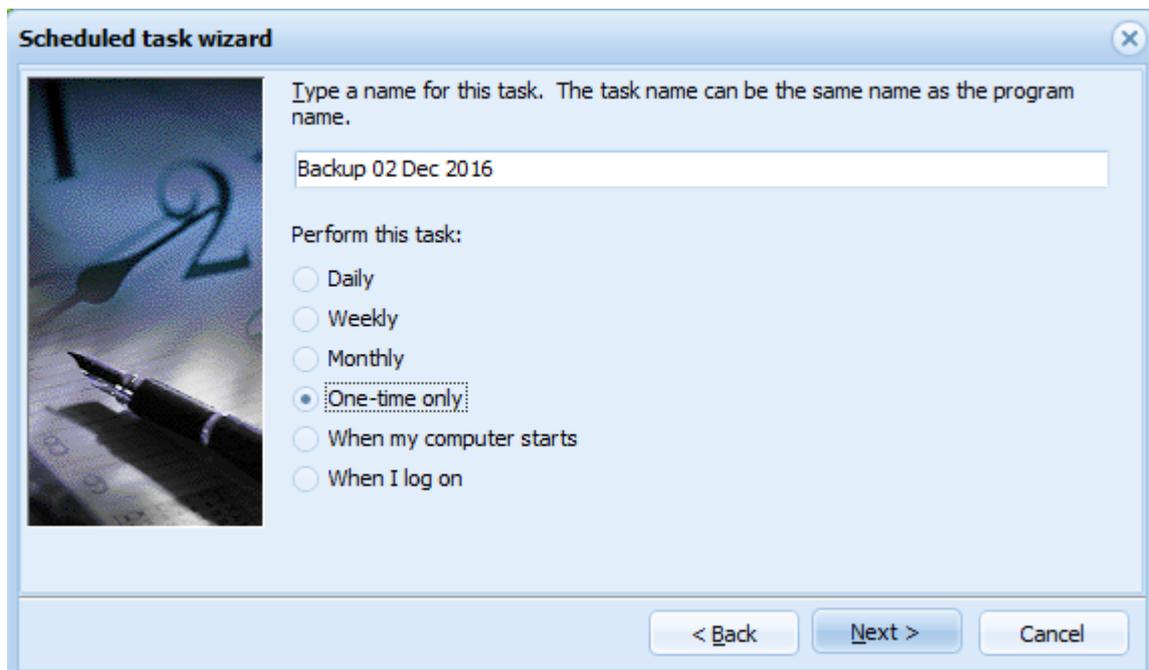
Select the company for which the housekeeping plan is to be run. The company is available from the drop-down list and select Database Housekeeping. When you have finished select Next. Note: If you select Scheduled Tasks from the Tools menu within the company database, then you will not need to select the company, and that option will not be visible.

**Step 2:**



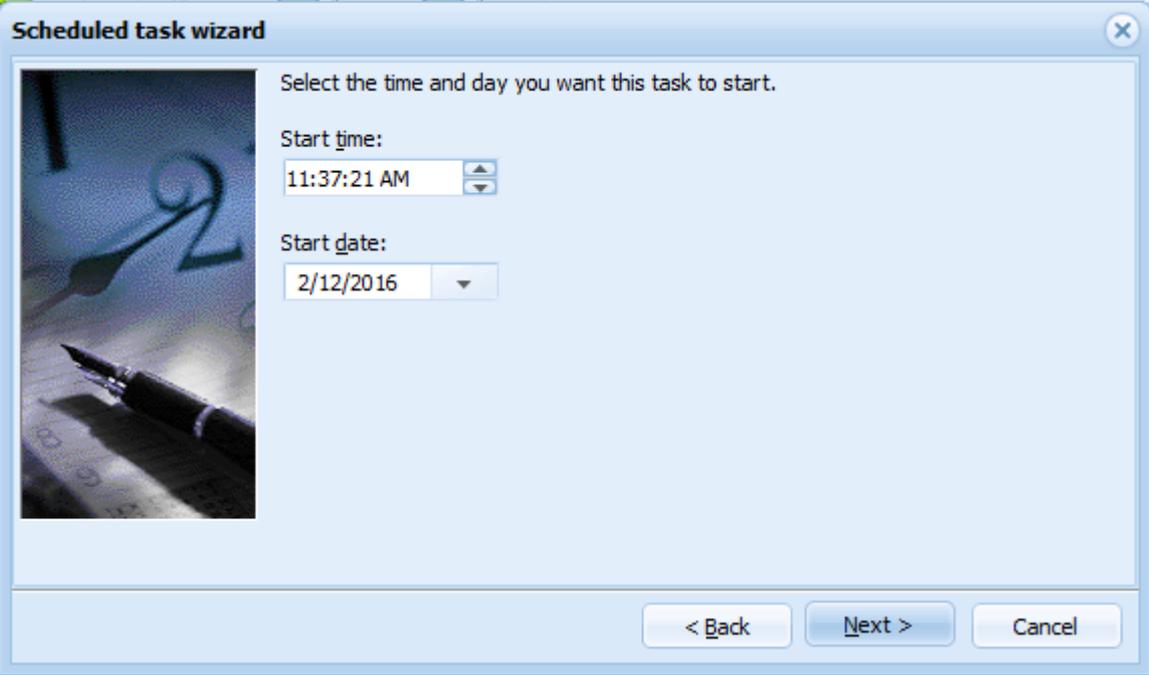
Enter a file name for your backup together with the folder the backup is to be stored in.

### Step 3.



Enter the name you wish to assign to this task. You can also select the interval you wish this task to be run, such as daily or weekly.

#### Step 4.



Scheduled task wizard

Select the time and day you want this task to start.

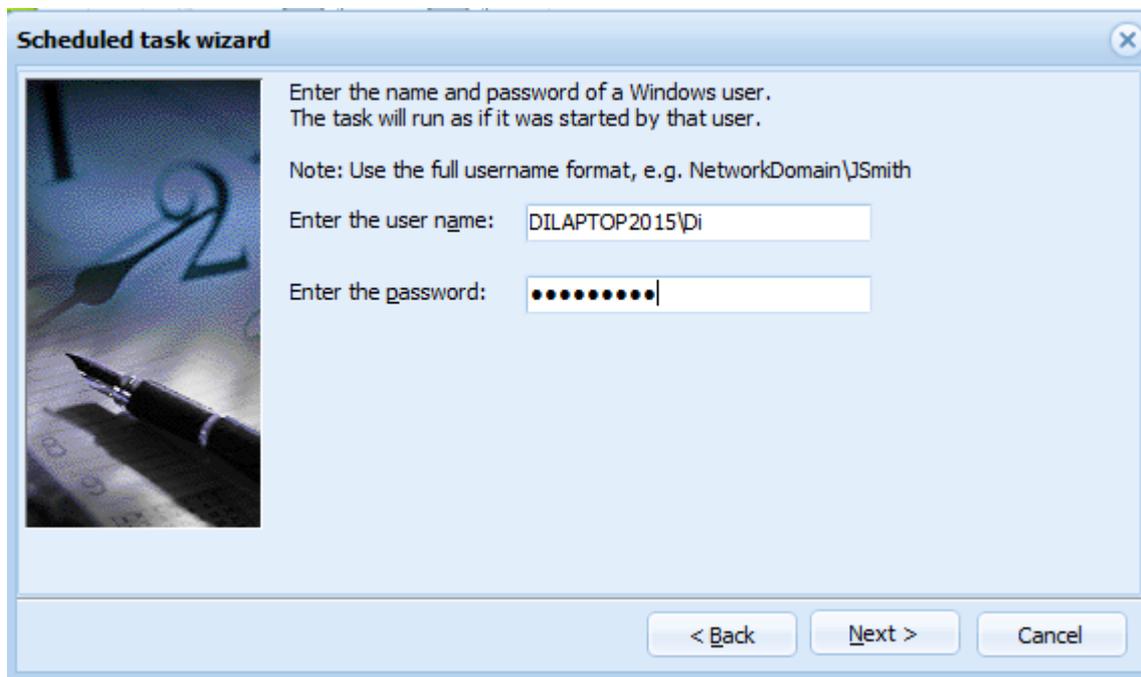
Start time:  
11:37:21 AM

Start date:  
2/12/2016

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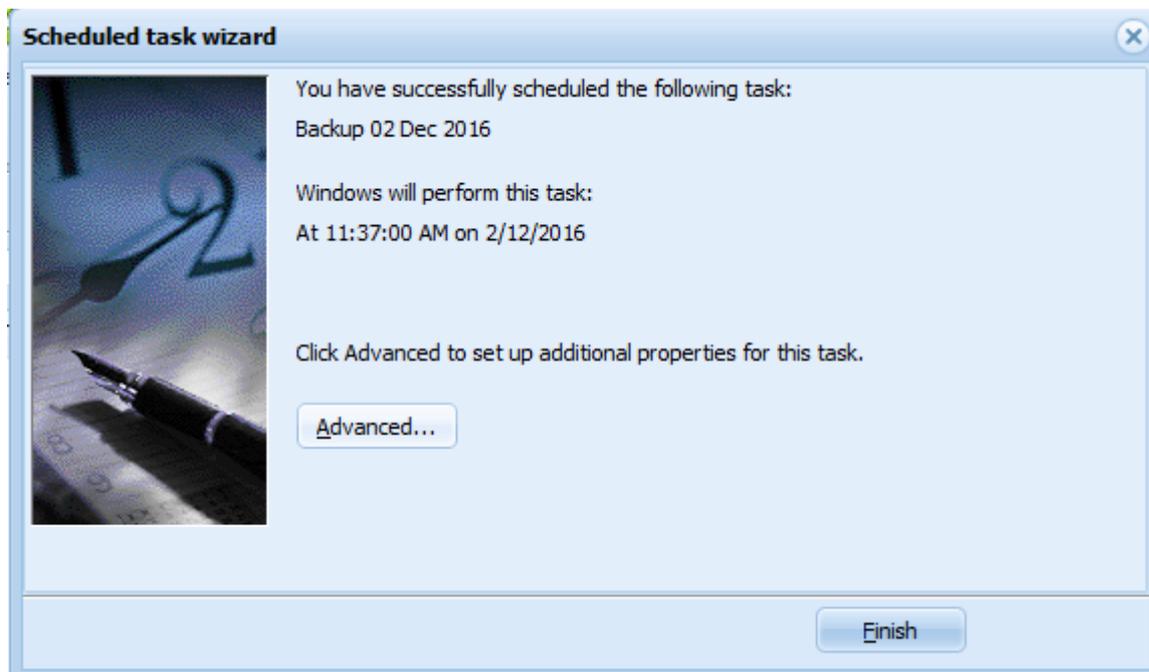
Enter the start time and date you wish this housekeeping plan to commence.

#### Step 5.



Enter the windows username and password. **Note** this is the username that applies to the computer from where the task will be run.

### Step 6.



Select Finish to save the scheduled task.

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## **Error: Unable to delete task – the target computer may be offline**

This error message can happen when a scheduled task is created within ABM and the ABM or Windows user no longer exists or their workstation where the task was created is not on line or no longer exists

To remove unwanted tasks, if you are not able to delete them from the ABM menu, the data can be removed from the following tables in the database

We recommend you backup the database first then remove the items for the specific users from these tables

SCHEDULETASKS

SCHEDULEREPORTS

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