Process Scheduler

For Sage 300 (Accpac)

OrchidSystems

sage
Development Partner Endorsed
Development Partner Gold

Automated scheduling of critical business processes
Peace of mind with integrity checking and error notification
Use with Info-Explorer to refresh and email cubes

WHAT IS PROCESS SCHEDULER?

Process Scheduler, from Orchid Systems, enables you to schedule when your Sage 300 (Accpac) data is checked and backed up, and to schedule automation of other processes as required.

It maximizes system resource usage by allowing you to automatically perform tasks overnight, when the system is not otherwise being used. All schedules are tracked, and a history of the scheduled actions - success or failure - can be reported on at any time.

Checking the integrity of your Sage 300 data and running processes on a regular basis has never been easier!

BUSINESS SCENARIO EXAMPLES
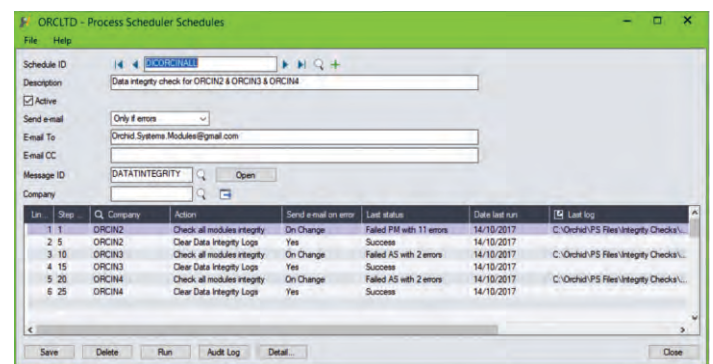
DATA INTEGRITY PROCESSES AUTOMATED

- Schedule Sage 300 to check your data integrity unattended.
- Send alerts when new errors are detected.
- Specify which companies and which modules must be checked.
- Keep a history of results of past integrity checks and optionally clear old logs.
- Keep up-to-date test and reporting databases by loading your data into different databases overnight.

SYSTEM PROCESSES AUTOMATED

- Run day end, and optionally post batches.
- Post AR, AP, GL, IC and PJC batches.
- Automatically dump your data for backup.
- Copy/load your data for testing and reporting.
- Schedule custom processes and programs.
- Schedule GL Consolidation Export and Import.
- Reconcile GL Consolidation Import and Export.
- Automate notification of changes to active Sage 300 ERP Modules and Product Update details – per company.
- Close last fiscal period and open next fiscal period, open new fiscal year.
- Check disk space on a nominated drive, and send an email if less than x% is free.
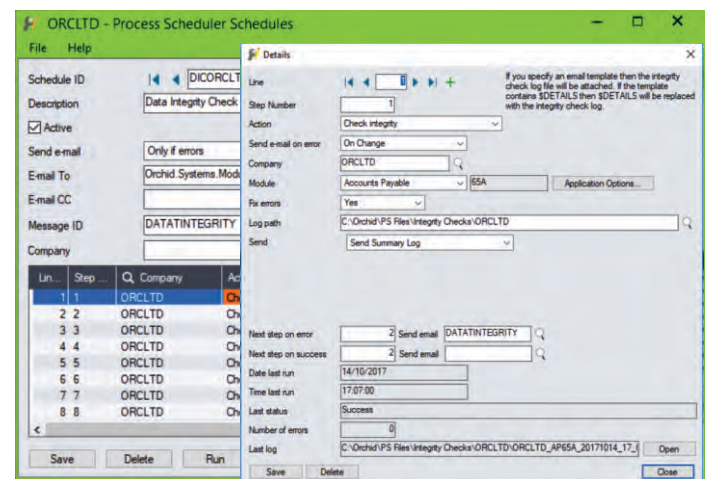
REPORTING PROCESSES AUTOMATED

- Schedule Crystal Reports or Sage 300 Financial Reports (in conjunction with Orchid Report Runner).
- Refresh Info-Explorer Cubes (in conjunction with Orchid Info-Explorer) and email to specific users.

Use with Orchid **Report Runner** to schedule Crystal Reports or Sage 300 Financial Reports

Schedule to check integrity of all modules in ORCIN2, ORCIN3, ORCIN4 and clear old integrity logs

BENEFITS

- System integrity: your data is being checked on a regular, recurring basis.
- Peace of mind: critical business data checked automatically, email notification of failed actions.
- Improved data security: automate backups through Sage 300's DBDump utility.
- Save time: automating important routine processes.
- Efficient use of resources: run day end, post batches and run custom processes overnight.
- Easy to use: create and run complex schedules with no programming.
- Easy to learn: with the look and feel of a Sage 300 module.

Integrity Check Schedule showing a detail step for AP Integrity step

AVAILABLE IN THREE EDITIONS

LEVEL 1. Process Scheduler for Data Integrity, Crystal Reports, Cubes and Active Modules, Product Update Notifications.

Actions available for selection:

- Check integrity of a single module
- Check integrity of all modules in a company
- Dump database
- Refresh Info-Explorer Cube
- Run Report Runner for Crystal Reports
- Optionally send email alerts (Always, or Only if Errors)

- Clear Data Integrity Log
- Sage 300 Service Pack Audit (document active modules & service packs)
- Check disk space
- Send email
- Run Extender Script

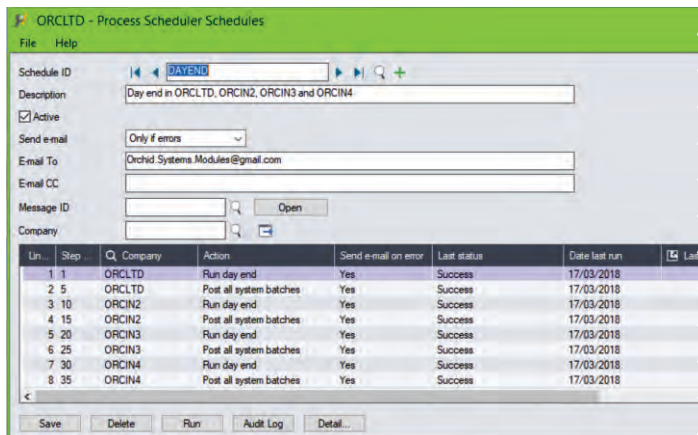**LEVEL 2.** Process Scheduler for Day End and Posting.

Actions available for selection (in addition to all Level 1 actions):

- Run Day End
- Post AR, AP or GL System Batches
- Post All System Batches
- Post AR, AP or GL Ready to Post Batches
- Post All Ready to Post Batches
- Post All AR, AP or GL Batches
- Post All Batches
- Post IC Receipts or Shipments
- Post IC Adjustments
- Post IC Internal Usage

- Post IC Transfers
- Post IC Assemblies
- Post All IC Documents
- Post PJC Timecards
- Post PJC Equipment Usage
- Post PJC Charges or Costs
- Post PJC Revenue Estimates
- Post PJC Material Usage
- Post PJC Material Returns
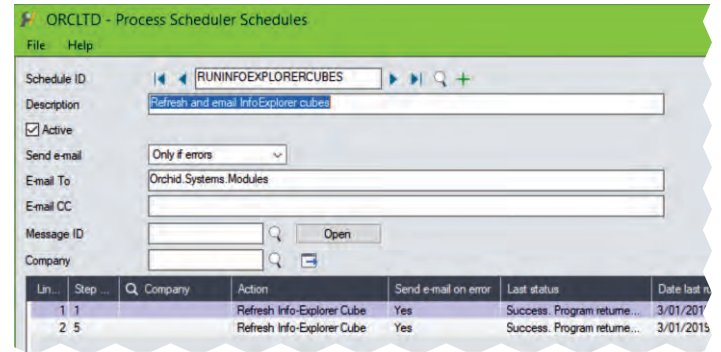- Post PJC Material Allocation
- Post All PJC documents

LEVEL 3. Advanced Process Scheduler.

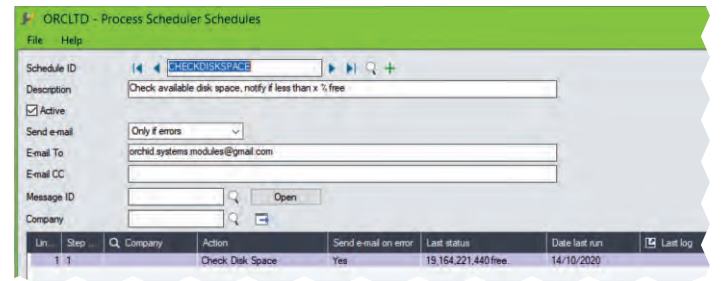Actions available for selection (in addition to all Level 1 and 2 actions):

- Load Database
- Copy Database
- Run Program (Wait)
- Run Program (Don't Wait)
- GL Consolidation Export
- GL Consolidation Import

- Run Report Runner Financial Report Group
- Open period, close period
- Open year
- Close Earliest Open Period

Schedule to refresh Info-Explorer cubes

Schedule to check disk space

FEATURES

- Set up multiple Schedules as recurring jobs.
- Define logic to specify what happens next on success and failure of a task.
- Define email templates to be used when sending status emails from Schedules.
- Allows you to make use of the flexible scheduling capability of Windows Task Scheduler
- Developed in the Sage 300 SDK: Consistent Sage 300 look and feel; installs as a standard Sage 300 module; standard Sage 300 security, customization capabilities, data integrity checking and more!

EDITION GUIDE

LEVEL 1. Process Scheduler for Data Integrity, Crystal Reports, Cubes and Active Modules, Product Update Notifications

LEVEL 2. Day End and Posting (plus all Level 1 actions)

LEVEL 3. Advanced Process Scheduler (plus all Level 1 and 2 actions)

LEVEL ONE
LEVEL TWO
LEVEL THREE

Run day end and post system batches for multiple companies

MINIMUM REQUIREMENTS

Process Scheduler 2020 requires Sage 300 2020 System Manager.

Contact your Sage Software Solution Provider.