



# Process Scheduler



Sage Tech Partner

## “Run your critical business processes automatically and unattended”

### Why use Process Scheduler?

Process Scheduler removes the need for operations staff to manually kick off & monitor recurring Sage 300 processes.

- Avoid resource conflicts by executing critical processes outside business hours
- Have confidence that your data is being checked and backed up on a regular basis
- Status notifications and error alerts can be automatically emailed for peace of mind
- Detailed history logs let you report on the success or failure of scheduled actions at any time

Easy to learn and use, with the standard Sage 300 look and feel, Process Scheduler lets you create and run complex schedules without requiring any coding.

 Combine Process Scheduler with **Report Runner** and **Info-Explorer** to automate the execution, refresh, and distribution of reports and cubes

THESE RECURRING PROCESSES TAKE CARE OF THEMSELVES, LEAVING ME TO FOCUS ON IMPORTANT ISSUES.



### Flexible Setup

Set up multiple schedules as recurring jobs, taking advantage of the flexible scheduling capability provided by Windows Task Scheduler.

- Specify what happens next upon the success or failure of any scheduled action
- Define email templates for use when sending status notifications
- Choose to send email alerts whenever a schedule completes, or only if errors occur

 Orchid Process Scheduler works like a charm! Awesome product. The client loves it.

BRIAN MCINTYRE, DSD-CRM SOFTWARE, WINNIPEG, CANADA

O11 - Process Scheduler Schedules

File Help

Schedule ID: DAYEND

Description: Day end in ORCLTD, ORCIN2, ORCIN3 and ORCIN4

Active

Send e-mail: Only if errors

Email To: Orchid.Systems.Modules@gmail.com

Email CC:

Message ID: DAYENDERROR

Company:

Lin...	Step Number	Q	Company	Action	Next step on er...	Next step on success	Date last run	Time last run	Last status	Number of errors	Last log
1	1		ORCLTD	Run I/C day end	10	5	8/10/2019	16:25:47	Success	0	
2	5		ORCLTD	Post all system batches	10	10	8/10/2019	16:27:53	Success	0	
3	10		ORCIN2	Run I/C day end	20	15	8/10/2019	16:28:47	Success	0	
4	15		ORCIN2	Post all system batches	20	20	8/10/2019	16:29:27	Success	0	
5	20		ORCIN3	Run I/C day end	30	25	8/10/2019	16:29:32	Success	0	
6	25		ORCIN3	Post all system batches	30	30	8/10/2019	16:29:40	Success	0	
7	30		ORCIN4	Run I/C day end	0	35	8/10/2019	16:29:42	Success	0	
8	35		ORCIN4	Post all system batches	0	0	8/10/2019	16:29:49	Success	0	

Save Delete Run Audit Log Detail... Close

Schedule to Run a Day End, and post Day End batches, for multiple companies

# Work *smarter* with Orchid

## Data Integrity & Management

Schedule Sage 300 to check the integrity of your data unattended, and send alerts when new errors are detected. Automate your data storage and backup regime.

- Specify which companies and which modules must be checked
- Maintain a history of previous integrity check results, and optionally clear old logs
- Automatically dump your data for backup
- Check disk space, and email operations staff if below a threshold
- Keep your testing and reporting databases up to date with overnight refreshes

## System Process Automation

Automate the execution of tasks related to standard accounting cycles and other Sage 300 processes. Typical examples include:

- Running day ends, and optionally posting batches
- Managing the closing and opening of fiscal periods
- Executing custom processes and programs
- Notification of changes to active Sage 300 Modules and Product Update details

 Use Process Scheduler to run **Extender** scripts for time-based custom integrations, audits, and notifications (e.g. low stock alerts)

## Edition Guide

Choose between these three Process Scheduler Levels, and upgrade if your requirements change.

These are summaries of the actions supported by different levels. Refer to the Orchid Systems website for a detailed, comprehensive list.

### Level 1

Supported actions include:

- Data Integrity checks
- Database dumps & disk space checks
- Run Report Runner for Crystal Reports
- Refresh Info-Explorer cubes
- Run Extender scripts & send emails
- Active Module notifications

### Level 2 (Day End & Posting)

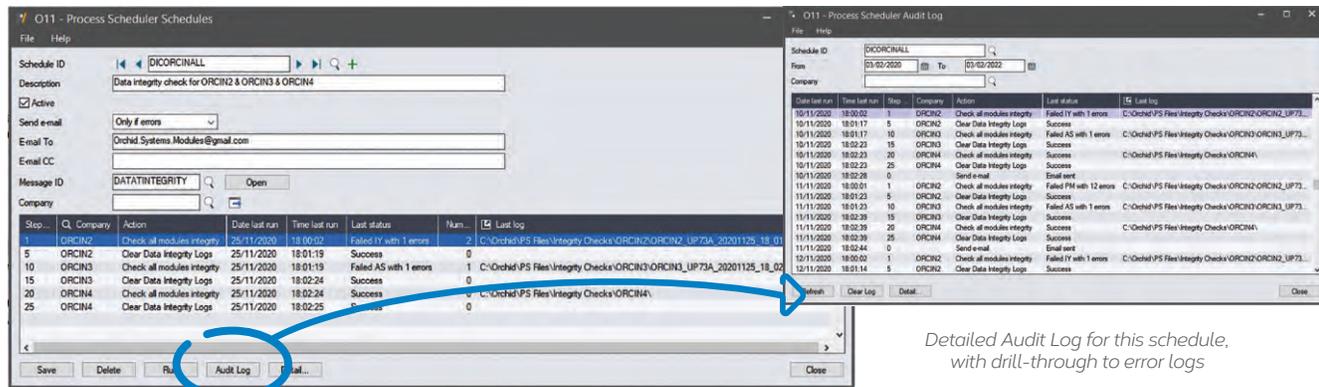
Includes all Level 1 Actions, plus:

- Run Day End (IC and PO)
- Post AR/AP/GL batches
- Post IC documents
- Post PJC documents
- Post System batches

### Level 3 (Advanced Actions)

Includes all Level 1 & 2 Actions, plus:

- Database Load & Copy
- Run Program (Wait or Don't Wait)
- GL Consolidations Export & Import
- Run Report Runner for GL Financial Reports
- Open or Close Period
- Open Year



*Detailed Audit Log for this schedule, with drill-through to error logs*

Schedule to run Integrity Checks and clear old logs

## More Information

Further information about Process Scheduler, including videos, is available from Orchid's Website: [www.orchid.systems/products/process-scheduler](http://www.orchid.systems/products/process-scheduler).

## Minimum Requirements

Process Scheduler requires Sage 300 System Manager. Users can upgrade from one level to the next. Features relate to the latest supported version.

## Contact your Sage Software Solution Provider

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