Saving and Batching Reports

Reports from any Gold module may be batched rather than printed straight away.

An example of the use of batches would be to batch all reports that are required at the Sales Ledger month end. The queue could then be started at the end of a working day and left to run overnight, or queued to run after the system copy, leaving the printer free for others to use during the day.

To batch reports a Batch Queue needs to be setup, reports may then be batched into the queue to be run using the Batch Process routine.

Batch Queue Maintenance
(System Management, Utilities)

Batch Queues are a method of grouping these reports so that several may be printed together either when the batch is processed manually or, using the Timings, at specified times.

As many different Batch Queues as required may be created by this program, for example a queue could be created for each module or a queue for daily, weekly or monthly reports.

Details
Enter the Batch details.

Key Entry Fields (# = Indicates the default setting)

Batch Option	Up to 3 characters	Enter a valid Batch Queue code in Amend mode or, in Insert mode, enter a new code.
Description	Up to 30 characters	Enter a description for the batch, for example "Sales Ledger Month End Reports".
Delete Request	No # Yes	Select "Yes" to delete the reports from the queue after printing.
Type	Report # Update	Select "Report" for a batch of reports.

Note - if specific dates are entered when the report is batched then it should be removed after printing. If system verified dates such as SME (Sales Ledger Month End date) then the queue can be run each month without changes as the system will interpret the correct dates to use.

Timing
Unless the batch is to be run manually, setup a timing schedule.


Key Entry Fields (# = Indicates the default setting)

Run	Manual # Daily Weekly Monthly	Select how often to run the batch.
Day of the Month		If running monthly, enter the day of the month to run the batch.

Recur every X weeks		If running weekly, enter the number of weeks, i.e. 2 to run every 2 weeks.
Run Every X Hours		If running daily or weekly, enter the number of hours to leave between processing if required.
Run On	Monday Tuesday Wednesday Thursday Friday	If running weekly, select the day(s) of the week for the batch to be run on.
Run At:		Enter up to 5 times to run the batch each day.
Run-time Date		If required enter run time dates. **Note**: it is recommended that the dates be set on the report as it is batched.

Batching Reports

Each report has additional functions: Save, Batch, Reset and Default.

- **Save** – After making selections for report ranges and criteria these may be saved with this function so that they become the default settings each time the report is run in future for the current user.

- **Batch** – Use this function instead of printing the report straight away, it may be queued so that it can be printed at a later time. Other reports may be added to the same queue to be printed together.
  A valid printer must be selected when batching, batches may not be printed to the screen.
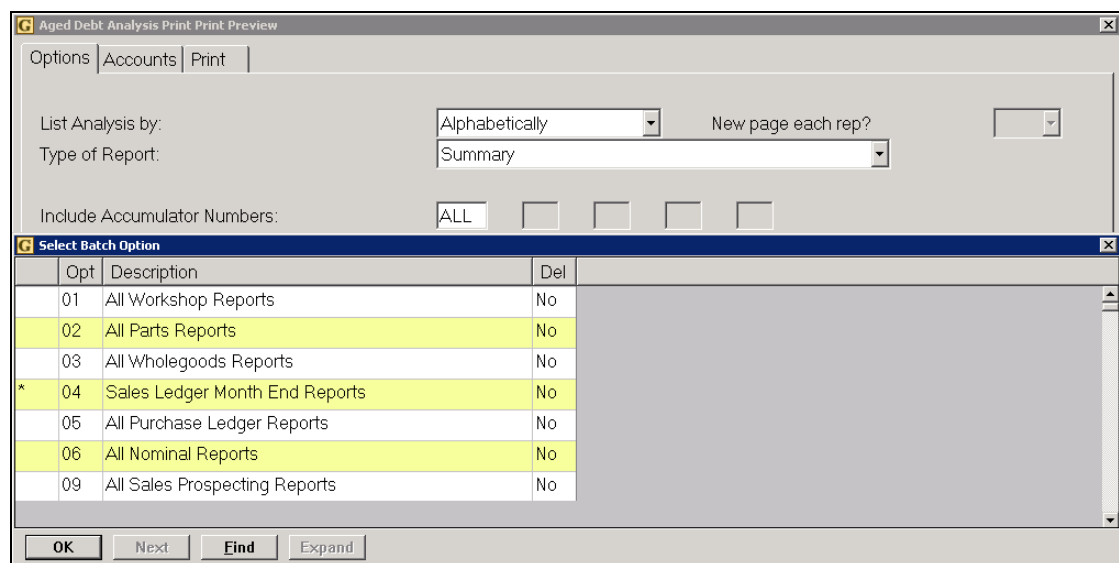
An asterisk/star * next to the Batch function indicates that that report has previously been batched. If the batch is selected again and the same queue specified the original batch parameters are displayed.

"Print Batch Selection Details" - the criteria used may be printed along with the report.

- **Reset** – If report ranges and criteria have been previously saved this function will revert to the system defaults settings for the current report run. This does not remove the users saved settings, which will be presented next time the report is run.

- **Default** – This function will revert any save report criteria to the system defaults. This is a permanent change and any previously saved options will be removed.

Dates

If a report is batched using a specifically entered date range, e.g. 01/01/04 to 31/12/04 it will always print using that date range. To enable the batch to be printed with current dates each time two options may be used:

- **Codes** – codes for the month begin and month end dates may be used, e.g. SMB-SME or PMB-PME, the system will interpret these dates for the appropriate month.

- **Run Time** – as an alternative the report dates may be entered as RTB-RTE, Run Time Begin to Run Time End. If these codes are used a prompt to enter the required date range will be prompted when the batch is run.

When the required reports have been added to the Batch Queue the Batch Request program needs to be run.

Batch Request Maintenance
(System Management, Utilities)

This program allows a batch to be started manually, printing all reports in the batch.

- Enter a valid Batch Queue code or press <Enter> for a selection list.
- Highlighting a report in the queue and pressing <Enter> allows the details to be viewed or amended.
- Details that may be changed are Company number, Depot number, Printer number and number of copies.

Process
This function will start the batch immediately. Reports will be printed in the order on the screen using the printer number specified when the report was put to the batch.
Amending the line before the batch is processed allows this printer to be changed.
No further user intervention should be required unless Run Time Dates have been used.
Refer to the *Batch Queue Control* option for more information on Run Time Dates.

Move Up
This function allows the order of the items in the batch to be changed. In the case of reports the order on the screen reflects the order in which they are printed. Reports may be Moved Up the list with this function to alter the print order.

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Move Down
This function allows the order of the items in the batch to be changed. In the case of
reports the order on the screen reflects the order in which they are printed. Reports
may be Moved Down the list with this function to alter the print order.

Emailing a Batch of Reports
It is possible to email a batch of reports to a customer or a supplier. Internal staff
members could be set up as a supplier or customer record in order to email a batch of
reports to them.

Within the batch request maintenance program the batch queue can be edited and the
printer number changed from a network printer to printer 92 for email.

Additional fields then allow selection of "Supplier" or "Customer" followed by an account
number.

This will email directly to the email address on the supplier or customer record.

If a Contact Code is also added the email address for the contact will be used instead.