# **Configuring Automation Schedules**

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This guide explains how to set up automated scripts to streamline workflows. It is intended for system administrators.

In aACE, you can configure automation schedules that run in the background. These schedules can automatically update the system in various ways, such as checking for incoming email, updating accounting balances, posting job costs, updating inventory and pending POs, sending system notices, and more.

The out-of-the-box aACE 6 automation schedules cover most high-priority functionality for most organizations. The best timing for running these scripts can vary. You can easily change the frequency of an automation schedule.

### Changing the Frequency of an Automation Schedule

- 1. Navigate from Main Menu > System Admin > System Preferences > Automation Schedules tab.
- 2. Click the **Schedule Setup** tab and locate the desired Schedule Script.
- 3. Update the frequency, using the following settings:

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Su	Schedule S				(	Group	_		very	On Days	Between Hou		
9	8751	Retrieve Incoming Emails				E	8	1	Minutes	SMTWTFS	12:00 AM	11:59 PM	×
	8751	Send Outgoing Emails				E	8	1	Plinates	SMTWTES	12:00 AM	11:59 PM	ж
	8751	Process Web Orders				A	8	10	Minutes	SMTWTFS	12:00 AM	11:59 PM	ж
1	4337	Update Inventory Balances					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	4353	Update Accounting Balances					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	4399	Update Job Costs					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	9924	Update Job Budget Balances					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	9937	Update Jobs					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	10823	Update Tasks					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	10869	Update Leads					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
-	10873	Update Orders					8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
-	4352	Update Fulfillment				F	8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
	4802	Update Manually Adjusted Tas	k Anchors			F	8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
	4960	Auto-Incomplete Tasks				F	8	30	Minutes	SMTWTFS	12:00 AM	11:59 PM	ж
1	8757	Denormalized Data Updates				D		1	Minutes	SMTWTFS	12:00 AM	11:59 PM	ж
1	9333	Sync Order Editor Records				Е	8	10	Minutes	SMTWTFS	6:00 AM	10:00 PM	ж
	9306	Update Running Time Clock Er	tries			С	8	1	Minutes	SMTWTFS	12:00 AM	11:59 PM	ж
1	8898	Refresh Related Record Indica	tors			в	8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	30

- List Adjustment Arrows ( ) Hover your mouse cursor over the row numbers to the left to see the List Adjustment Arrow. Click and drag to move an entry higher or lower in the list. Scripts higher in the list run before other scripts in the same group scheduled for the same time.
- Group Organize scripts in various ways (e.g. by related functionality, by processing times, etc).
   Note: You can view the status and exact timing of your groups from the FM Server

Timer Schedules tab (see <u>below</u>).

 Script Parameter ( ) – Enter FileMaker coding to specify which records should be updated when the script runs.

Example: The script to re-authorize credit cards could include a parameter to identify credit card records past a certain timeframe (e.g. DaysOld=40).

- **Run Every...** Enter the number and time measurement for when the script should run. You can also assign a calculated timeframe for it to run (e.g. Last Day of Month).
- **On Days...** Click the field and mark the flags for the days of the week when the script should run.
- **Between Hours...** Enter the hours when the script should run.
- aACE Schedule Scripts ( \_ ) Displays the list of recognized schedule scripts that exist behind-the-scenes. This list informs the drop-down value list in the Schedule Script entry fields. Lines that are grayed out represent schedule scripts that exist, but have not been added to the Schedule Setup portal yet.

When you click out of the Schedule Setup portal, aACE automatically commits the adjustments you make.

# **FM Server Timer Schedules**

This tab provides additional information on the status and exact timing of your <u>Script</u> <u>Schedule Groups (https://aace6.knowledgeowl.com/help/installing-configuring-aace-fms19#ConfigureScriptSchedules</u>). You can view the last automation schedule that was run in each group, as well as the current status of the various cycles. In addition, you can put a temporary pause on all automation schedules by clicking the link to Halt Timers on Server.

<ul> <li>Server Schedul</li> </ul>	es		Shipping Setup		Oldest serve	er schedule cycle: 1 minute
Schedule Status		FM Server	Timer Schedules	)		
Schedule Script			Last Run	Last Process Run	Status	Halt Timers on Serve
aACE 6 Automation			< 1 minute	Update Accounting Balances	Paused for 15 seconds	ж
aACE 6 Automation			< 1 minute	Send Pending Notices	Paused for 15 seconds	×
aACE 6 Automation			< 1 minute	Update Inventory Balances	Paused for 15 seconds	×
aACE 6 Automation			< 1 minute	Denormalized Data Updates	Paused for 15 seconds	×
aACE 6 Automation			1 minute	Sync Order Editor Records	Running Sync Order Editor Records	×
aACE 6 Automation			< 1 minute	Update Orders	Paused for 15 seconds	х
aACE 6 Automation	Cycle G		< 1 minute		Starting cycle	ж

For specific questions about the timing of your automation schedules, contact aACE advisor. They can guide you through additional configurations.

### Manually Running a Schedule Script

On the Schedule Status tab, each automation schedule includes a RUN link to the right. Clicking this link displays a prompt to either run the script locally or on the server. In nearly all cases, running the script on the server is the appropriate selection.

# **Activating New Schedule Scripts**

You can activate additional FileMaker scripts at the Automation Schedules screen. For new, custom scripts, contact your aACE advisor.

- 1. Navigate from Main Menu > System Admin > System Preferences > Automation Schedules.
- 2. Click the **Schedule Setup** tab, then scroll down to the first blank row.
- 3. Click the **Schedule Script** field, then select the desired script.

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6	8885	Auto-Opdate Cost Rates			A	00		Days	SMTWTFS	4:00 AM	5:00 AM	x
7 7	4430		Update Current Period/Fiscal Year					Days	SMTWTPS	12:00 AM	12:00 AM	x
×	8602	Auto-Generate Progress Billing Invoices				8		Davs	SMTWTFS	4:00 AM	6:00 AM	×
1		Auto-Generate Recurring Transactions						Days	SMTWTFS	3:00 AM	11:59 PM	×
	4669	Auto-Generate Daily Timesheets						Days	SMTWTFS	12:00 AM	11:59 PM	×
1	4621	Send Important Date Notifications						Davs	SMTWTFS	12:00 AM	11:59 PM	×
2 1						8		Days	SMTWTFS	3:00 AM	4:00 AM	×
3	Auto-Generate Daily Timesheets Auto-Generate Progress Billing Invoices				A	8		Days	SMTWTFS	4:00 AM	6:00 AM	×
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- 4. Specify the frequency for the script (as explained above).
- 5. Mark the flag in the **On** column.

When you click out of the Schedule Setup portal, aACE automatically commits any adjustments made to the Schedule Setup.