

Orchid

Training Guide:



Process Scheduler

Work Smarter with Orchid

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Process Scheduler - Overview

Checking the integrity of your Sage 300 data on a regular basis has never been easier! Process Scheduler enables you to schedule when your data is to be checked and maximizes system resource usage by allowing you to automatically perform the checking overnight, whilst the system is not being used. Process Scheduler can also be used to automate running other Sage 300 System processes and Reports.

- Have peace of mind knowing that your data is being checked regularly
- Specify that different companies and modules be checked at different times
- Automate data dumps, loads, custom processes, day end and batch posting
- Manage by exception and opt to receive alerts only when new integrity errors are detected
- Define the path to be taken on the success or failure of individual tasks
- Make use of Windows Scheduler to set up a recurring job so that you don't forget
- Installs as a standard Sage 300 module

Process Scheduler is available in several levels depending on your requirements. Detailed can be found on the Orchid website <https://www.orchid.systems/product/process-scheduler-2>

Level 1: Process Scheduler for Data Integrity, Dumps, Refresh Cubes and Report Runner Crystal Reports.

Level 2: Process Scheduler for Data Integrity, Day End and Posting

Level 3: Advanced Process Scheduler

Installing Process Scheduler

INSTALLATION STEPS

Process Scheduler is installed by executing the EXE program downloaded for installation. InstallShield will execute and guide you through the installation steps, including whether to install documentation.

Before you Start

- Download the program installer for the version of Sage 300 you are running (only available in the Partner area of the Orchid website).
- Before installing Process Scheduler, ensure that all users have logged out of Sage 300.

Installing the files

- Log on to the server where Sage 300 is installed as a user with full administrator rights.
- Run the previously downloaded InstallShield for the module.
- If prompted to re-boot, then do so.

Tip:

Programs are installed in the Sage 300 program folder, in the OZXXA subfolder, where OZ is the 2-letter code for the Orchid module and XX depends on the Sage 300 version you are running:

Example: OZ68A for Process Scheduler version 2021, OZ69A for Version 2022, OZ72A for Version 2025.

Note: REGACC is run automatically as part of the installation process. If some files are locked during the installation, the re-boot is required to unlock all files and complete the installation.

Important! If you install Sage 300 on each workstation, as well as the server, then you must do the same with Process Scheduler. In this case, repeat the above steps for each workstation.

ACTIVATE PROCESS SCHEDULER

Activate Process Scheduler in Sage 300 Administrative Services > Data Activation.

For details on activating modules, refer to the Sage 300 System Manager online Help (choose the Help menu on the Sage 300 desktop) or review the chapter, Setting Up Security, in the *System Manager Administrator Guide*

LICENSE DETAILS

To start using Process Scheduler, you need a valid serial number and license file.

If you don't have a valid license for Process Scheduler, you only see the License screen.

Refer to Process Scheduler License Screen on the next page for details on entering Activation Code.

Enter License Details

The installation doesn't require a serial number anymore. You enter the serial number and activation code in the License screen.

Note: This applies to Sage 300 versions 2019 and above. You need a serial number to install an older version.

After you install the software, you need to activate Process Scheduler in one company using Sage 300 Administrative Services > Data Activation.

There are two options to enter the license details:

USE A 30 DAY TRIAL LICENSE FILE

To generate a 30-day trial license file, enter the serial number provided for your module and Save the details.

AFTER PURCHASING A SUBSCRIPTION OR A PERPETUAL LICENSE

Process Scheduler

If you have purchased the module, enter the serial number and activation code provided by your Sage 300 business partner.

Note: The license applies to all the Sage 300 databases for the same installation. You only need to enter the license details in one company.

Tip: If installing with a 30 day grace period, additional re-installations will not extend the grace period.

UPGRADING FROM A PRIOR VERSION.

1. Download the new version install program from the Orchid website (Business Partner access only)
2. Obtain the serial number and activation code for the new version
3. Backup your existing database and programs as per Sage Upgrade guidelines
4. Execute the EXE program downloaded (as above for a new install).
5. In Sage 300 / Administrative Services / Data Activation, Activate Process Scheduler
6. Enter serial number and activation code in the Process Scheduler License screen. (as above)

MINIMUM REQUIREMENTS

You need to use the same version for the core Sage 300 modules and Process Scheduler. For example, Process Scheduler version 2025 requires Sage 300 System Manager version 2025.

Additional specific Sage 300 modules may be required to enable all functionality. Refer to Orchid Systems's website for details (<https://www.orchid.systems>).

Process Scheduler License Screen

To start using Process Scheduler, you need a valid serial number and license file.

If you don't have a valid license for Process Scheduler, you only see the License screen.

LICENSE SCREEN

You use the Process Scheduler license screen to enter serial number and activation code.

When to use:

- After a new installation or an upgrade to a newer version of Sage 300.
- After a subscription renewal, enter the activation code with the new expiry date.
- View the components of the Orchid module you are licensed for.

How to use:

- Enter the license details, click the **Add** button to create the license file.
- Restart the Sage desktop to enable the new license.

Note: If you have multiple Sage 300 databases, you only need to enter the activation code details in one company. When the licence details are entered on the first company, Process Scheduler creates the OZ69A.lic file, which can then be read by all other companies configured on the same server.

30-day Trial Licence

If you don't have an activation code for Process Scheduler, you can create a 30-day trial license.

In the License screen, enter a serial number for the module, Sage 300 version and edition you are running.

Click the Add button. This create a 30-day trial license.

Tip: If you install a 30-day trial, enter a valid activation code before the trial expiry date to continue using the application.

Subscription Licenses Expiry Date

You can check the subscription expiry date and enter a new activation code after a subscription renewal is processed.

Subscription licenses have an expiry date. To continue using Process Scheduler, you will need to renew the subscription and enter a new Activation code in the module License screen before the expiry date.

Contact your Sage 300 Business Partner for details.

Note: In the four weeks before the expiry date, users receive a warning message when logging into Sage 300 (weekly for the first three weeks and daily in the last week). If you don't renew before the expiry date, the software will become read-only.

TROUBLESHOOTING ACTIVATION CODE

When saving the license information, the following problems may be encountered:

Activation code Invalid – verify the registered company name (displayed during installation) and serial number entered match the details supplied to Orchid Systems when an activation code was requested.

Invalid serial number – the entered serial number is not valid for this product, Sage 300 version and edition.

Important! If the Sage 300 Version or Edition change, a new Serial Number and activation code must be requested from Orchid Systems.

If the company name registered with Sage changes, a new Activation Code must be requested from Orchid Systems.

Refer to detailed troubleshooting tips in Troubleshooting Activation Code,

ACTIVATION CODE AND AVAILABLE FUNCTIONALITY

Depending on the components you are licensed to use, some features described here may not be available for you to use. Some functionality of Process Scheduler is only active if you have purchased the required module component.

The license screen displays what components of the Process Scheduler module are included in the activation code.

Steps for Setting Up Process Scheduler

Step 1: Establish which Sage 300 company (database) is to hold Process Scheduler's master file records

Step 2: Activate Process Scheduler in that company

Step 3: Add Security on the facing page, if required

Step 4: Fill in the Process Scheduler Options on the facing page

Step 5: Fill in the Process Scheduler Companies on page 19 for all companies where Process Scheduler will run a task.

Step 6: Setup Email Messages on page 20

Step 7: Fill in the Process Scheduler Schedules on page 24

Tip:

Create directories to contain

1. Data Integrity log files
2. The Database dumps

Note: These directories can be specified by company/database.

Step 8: Test and review the Log

Step 9: Schedule the Process Scheduler to run at an appropriate time and frequency using the Scheduling the Process Scheduler in Windows Scheduler on page 53

Step 10: Regularly review your Process Scheduler Audit Log on page 61 and check your schedule tasks to ensure your tasks are running as expected

ADD SECURITY

If your Sage 300 system requires user passwords and security profiles, you need to assign user security to Process Scheduler forms.

For information on activating security and setting up security groups, refer to the System Manager online Help (choose the Help menu on the Sage 300 desktop) or review the chapter, "Setting Up Security," in the *System Manager Administrator Guide* (or the *System Manager Setup Guide*

Changing Print Destination

If you want users to be able to change the print destination, permission to Change Print Destination must be assigned from the Administrative Services permissions list in the Security Groups form.

Assigning Process Scheduler security

Using the Security Groups form in the Administrative Services folder, you can assign the following security tasks to OZ forms.

OZ Inquiry – view OZ Setup details.

OZ Setup and Processing – add/modify/delete Process Scheduler details.

Setup Email Templates - can add/modify Process Scheduler Email templates

PROCESS SCHEDULER OPTIONS

Important!

You need to logon to Sage 300 with the ADMIN user credentials to update P/S Options as details are saved in the PS Licence file.

Contact Tab

- On the Contact Tab enter your contact phone and fax numbers.

Processing Tab

Enter the Sage 300 user name and password of the primary Process Scheduler Database. Process Scheduler must be activated in that company. It is the company that stores the details of the schedules.

When Process Scheduler is run from Windows Task Scheduler, all Active Schedules in the company selected on this tab will be run.

In the latest product updates, the details are validated when you save the Options. Process Scheduler supports Sage 300 the Complex passwords selected or not.

Tip: After an upgrade or server move, you generally need to re-save the details in the Processing Tab.

Running schedules in other companies

You can run schedules against multiple Sage 300 companies. Process Scheduler only needs to be activated in one company where the schedules are stored. In most instances, the company is the one that you are currently logged in.

To configure which companies can be included in Schedules, use Process Scheduler > Setup > Companies. Process Scheduler Companies on page 19

Tip: If you change the Active company for Process Scheduler, you will get a warning message.

E-Mail Tab

For details, refer to Process Scheduler Email Tab on the facing page

Email Server: smtp.domain.com:587 Enter the details of the SMTP Server you want to email from.

Port: There is no specific field for the Port in Orchid modules. You can specify a port number after filling in the email server details. After the email server name, enter ":xx" i.e. colon xx where xx is the port number required.

Tip: The default port is generally port 587 with TLS.

Example: smtp.office365.com:587

Email User and Email Password: Enter a correct combination of Email user and password

Note: If using multi-factor authentication and App password, enter the App password you create in the Email Password field. Refer to Using Orchid Modules with Office365 and Multi-Factor Authentication

Email Comes From: Enter the email address to be used when sending email.

Example: Orchid.Systems.Modules@gmail.com . You can also enter it in the format {name} <{address}> e.g. Orchid Systems <Orchid.Systems.Modules@gmail.com>

Note: Depending on the SMTP server you use, this address may need to match the one you enter in the Username field, or may not work unless you set up an email alias. Consult your SMTP server documentation for details about sending email.

Updates Tab

NOTIFY ME WHEN THERE ARE NEW UPDATES IN PROCESS SCHEDULER

Users can now "subscribe" to notifications of updates.

By Default, this option is not selected for end-user serial numbers

The check is stored in the registry and it applies to this Windows user on this computer.

If selected, when starting Sage it will check if there are product updates available for Process Scheduler

If there is a new update, and the user hasn't previously been notified of it, then the Options screen will open automatically on the Updates tab and display details of the new updates.

Tip: The "administrator" or "super user" or "owner" of Sage 300 should have this option turned on. All other users should have it turned off.

CHECK FOR UPDATES AND SUPPORT REQUESTS

You can use "**Check for Updates**" button to view the list of new features and fixes.

To facilitate support, please include the Version and Product Updates you are running when reporting any issues.

Updates are available to be downloaded from the partner area of the [Orchid website Product downloads](#).

PROCESS SCHEDULER EMAIL TAB

The Email tab lets you define your email server. When you fill in the email option on the Process Scheduler Options, it will email directly to your email server using the selected service. You can email documents using 2 methods, SMTP with basic authentication or App password or Microsoft Graph (when using Microsoft Office 365 and SMTP basic authentication is not enabled).

Email Service

SMTP (Simple Mail Transfer Protocol). You can use your own SMTP server, or an SMTP service.

Example: SMTP Email Examples on page 15

Microsoft Graph. This service sends email via Microsoft Office 365. It is generally used when SMTP Basic authentication is not enabled in Office 365.

Refer to Office 365 and Microsoft Graph

Note: Microsoft Graph is available in the latest product updates for Sage 300 versions 2020 and above, since October 2022.

If you don't fill in the SMTP Details, Process Scheduler cannot send emails.

Email Field details

Select the Service you want to use to email and enter the relevant details

Basic Authentication SMTP:

Email Server: `smtp.domain.com:587` Enter the details of the SMTP Server you want to email from.

Port: There is no specific field for the Port in Orchid modules. You can specify a port number after filling in the email server details. After the email server name, enter " :xx" i.e. colon xx where xx is the port number required.

Tip: The default port is generally port 587 with TLS.

Example: `smtp.office365.com:587`

Email User and Email Password: Enter a correct combination of Email user and password

Note: If using multi-factor authentication and App password, enter the App password you create in the Email Password field. Refer to Using Orchid Modules with Office365 and Multi-Factor Authentication

Email Comes From: Enter the email address to be used when sending email.

Example: `Orchid.Systems.Modules@gmail.com` . You can also enter it in the format `{name} <{address}>` e.g. `Orchid Systems <Orchid.Systems.Modules@gmail.com>`

Note: Depending on the SMTP server you use, this address may need to match the one you enter in the Username field, or may not work unless you set up an email alias. Consult your SMTP server documentation for details about sending email.

Microsoft Graph:

This service sends email via Microsoft Office 365 where basic authentication is not enabled to use SMTP. Refer to Office 365 and Microsoft Graph

Tenant ID. Enter the tenant ID (alternatively called the directory ID) from your Microsoft 365 account.

Client ID. Enter the client ID (alternatively called the application ID) from your Microsoft 365 account.

Client Secret. Enter the client secret from your Microsoft 365 account.

Tip: This is actually the secret **value**, not the one called Secret ID. It is the one that you only see once when you first create the client secret.

Tip: The client secret is valid for 2 years maximum. You may need to create a new client secret if emailing with MS Graph suddenly stops working.

From Email Address. Enter the email address to be used when sending email.

Examples

Refer to the examples below for detailed settings with commonly used mail providers, such as Office 365 and Gmail.

Example: SMTP Email Examples on page 15

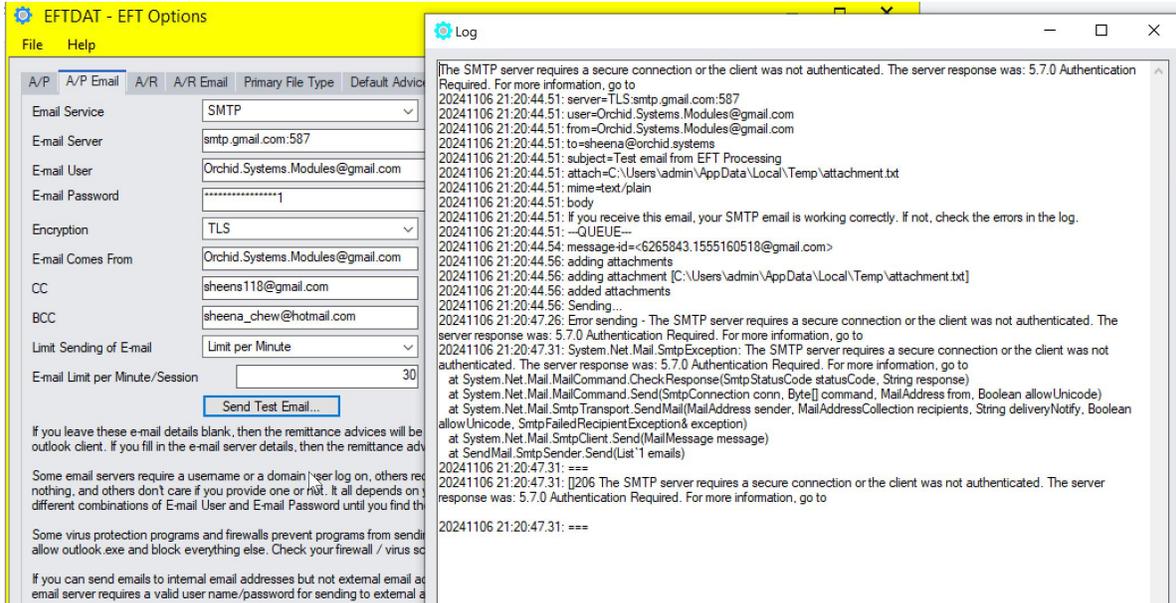
Test Email Configuration

You can use the "Send Test Email..." to check your email settings. You will be prompted to enter an email address to send the test email to.

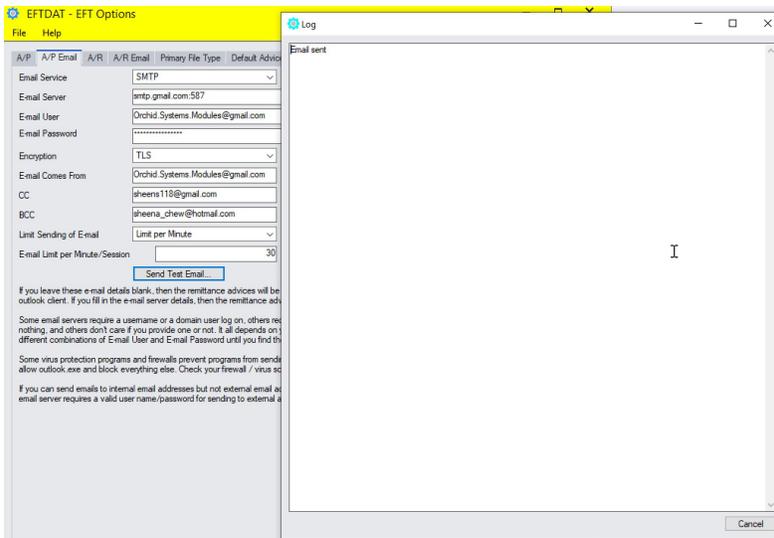
Example:

When the email is sent successfully, you will receive a test email.

If not a log file is displayed with the error encountered.



Email sent successfully example



Test email from EFT Processing



If you receive this email, your SMTP email is working correctly. If not, check the errors in the log.

Example: If you receive this email, your SMTP email is working correctly. If not, check the errors in the log.

Tip: Test sending to an email address in the same domain as your SMTP Server and one outside of your domain.

Tip: CC doesn't work when testing. Even if you configure a CC address in the Email Tab, the test email is only sent to the email address you enter when testing.

Troubleshooting Sending emails

Email Troubleshooting on page 18

SMTP Email Examples

Email with Office 365

You can email from Orchid modules using Office 365. The exact steps depend on your Office 365 configuration. You can choose SMTP with basic authentication, use MFA and App Password, or use Microsoft Graph.

Using Office 365 and MFA

Although Orchid modules don't support 2-step authentication directly, you don't need to turn off MFA to use email using SMTP or DML with SharePoint integration. If you enable MFA, you can use it for all applications that support it.

To use Office 365 to email from Orchid modules and to use Document Management Link and SharePoint integration, users need to create an APP password for use in the Orchid module, as supported by Microsoft.

For details, refer to [Using Orchid Modules with Office365 and Multi-Factor Authentication](#)

Configure Email when using Office 365

When using Office 365 to email, basic SMTP authentication is disabled by default and you need to use Microsoft Graph as the email service.

Refer to [Office 365 and Microsoft Graph](#)

Note:

The details below are left in the documentation if your Office 365 setup supports basic SMTP Authentication and App Passwords.

Email Server -> smtp.office365.com:587

Email User -> username@samplecompany.com

Email Password -> Enter Password

If using Multi-factor Authentication and App Password, enter the App password.

For details, see Using Orchid Modules with Office365 and Multi-Factor Authentication

Encryption: TLS

TLS Version

You don't select a specific TLS version. Orchid uses the .Net SmtpClient class to send emails. The SMTP Client uses the protocol configured on the operating system, based on the .NET version installed.

The email function supports Ssl3, Tls1.0, Tls1.1, Tls1.2 and Tls1.3.

Microsoft has recently stopped support for TLS1.0 and TLS1.1. Support for TLS 1.2 was added to Orchid modules in April 2020 and applies to Sage 300 versions 2018 and above.

Important! If you have any issues emailing, please ensure you download and install the latest product update for your Sage 300 version.

Useful Links

Here is a link to Microsoft documentation on how to allow applications to send email via Office365.
<http://technet.microsoft.com/en-us/library/dn554323.aspx>

Using Gmail

You can configure Orchid modules to email using Gmail.

Since May 2022, you cannot disable 2-step authentication in the Gmail settings and you need to use App Password.

Email Server: smtp.gmail.com:587

Email User: username@gmail.com

Email Password: App password you create for the user emailing.

Encryption: TLS

ORCLTD - EFT Options

File Help

A/R | A/P | Primary Bank | Email | Default Advice | Global FSN | Updates

E-mail Server: TLS:smtp.gmail.com:587

E-mail User: stacysim@gmail.com

E-mail Password: *****

Encryption: TLS

E-mail Comes From: stacysim@gmail.com

CC:

BCC:

Note: In some older versions of Orchid modules, for Google mail to be setup in Outlook/other email application/device (as recipient in CC/BCC), the Google email setting has to have the option of enable POP/IMAP ticked.

When using any other email that has Transport Layer Security (TLS) encryption along with SMTP, you can prefix the email server field with "TLS:".

For e.g.. TLS:securemail.server.net

Using SendGrid

IF USING SENDGRID

Orchid module Email configuration using SendGrid:

Email Server -> smtp:sendgrid.net:587

Email User -> apikey

Email Password -> Enter Password

Encryption: TLS

E-Email Comes From -> the email address associated with the Sendgrid account

Here is a link to SendGrid documentation on integrating with the SMTP API

[Sendgrid: integrating-with-the-smtp-api](#)

Here is a link on How to send email using the SMTP Relay

[SendGrid smtp guide](#)

Using Hotmail

CONFIGURE EMAIL WHEN USING HOTMAIL OR MICROSOFT OUTLOOK.COM

Email Server -> smtp.live.com:587

Email User -> username@hotmail.com

Email Password -> Enter Password

Encryption: TLS

Email Troubleshooting

Failure sending mail

If you get the error message "Failure sending mail" – check that you have entered the correct details in

- The E-mail server field
- The correct combination of email user/password/comes from fields. The combination and number of these fields that are required depends on the configuration of the email server
- The correct encryption method is selected

Port

- If the default port for email (25) is not in use, ensure the port is included in the Email server field separated by a semi-colon (:). For example smtp.office365.com:587 if port "587" is being used for e-mail.

Legacy Authentication

If you are using MFA and App password in Office 365, but are still receiving errors when testing the SMTP email, ensure that Legacy Authentication is not blocked. Refer to Office365 and Legacy Authentication.

TLS Version

You don't select a specific TLS version. Orchid uses the .Net Smtplib class to send emails. The SMTP Client uses the protocol configured on the operating system, based on the .NET version installed.

The email function supports Ssl3, Tls1.0, Tls1.1, Tls1.2 and Tls1.3.

Microsoft has recently stopped support for TLS1.0 and TLS1.1. Support for TLS 1.2 was added to Orchid modules in April 2020 and applies to Sage 300 versions 2018 and above.

Important! If you have any issues emailing, please ensure you download and install the latest product update for your Sage 300 version.

You get the message “E-mail sent”, but no email is received,

In many cases, there is almost no delay the “E-mail sent” message being displayed on the screen after clicking “Send Test E-mail”

- Ensure the virus checker and firewall on all machines where e-mails are to be sent from. They must be set to exclude “..\EL6xA\sendmail.exe”
- If you get a File missing error, check that the anti-virus is not deeming the sendmail.exe a virus threat.
- SMTP Server may include configuration to expect a valid client certificate from the server- /workstations where Sage is installed. Once the certificate is installed on the client, emails can be sent.

You are able to send emails to internal email accounts, but not to external email accounts, the most likely cause is that your email server requires a valid username /password for sending to external addresses and the details entered are not correct.

Note: Check your email server to see if it requires a username/password. Some require it to be blank, for some it does not matter.

Note: Some email servers will allow you to log on as a certain user and send email as anyone, others will only allow you to send email as the logged on user. So if you log on as "Joe", but try to send as admin@testdomain, some email servers won't allow it.

Process Scheduler emailing tips

When using Process Scheduler with Extender or Report Runner, the Process Scheduler email settings are only used if the Schedule is configured to send emails on success or failure.

The Run Information Manager Step uses the SMTP Email configured in Information Manager a> Report Runner and the Run Extender Script action uses the SMTP email configured in Extender.

When using Process Scheduler to email Reports configured in Report Runner, check the email configuration in Information Manager, not just Process Scheduler.

When using Process Scheduler to run Extender scripts that send emails, check the email configuration in Extender Options, not just Process Scheduler.

PROCESS SCHEDULER COMPANIES

Use this form to specify what Companies Process Scheduler is going to work with.

Process Scheduler

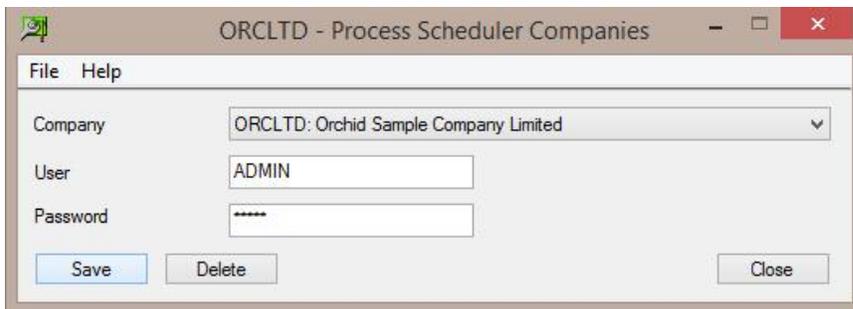
Enter the Sage 300 User name and password used to connect to the database.

Note: Even if you only run schedules in the company configured in P/S Options, you need to enter the credentials in P/S Companies again.

This User Name must have the Sage 300 security rights to execute the actions that the schedule has been set up with. If, for example, the schedule has been set up to run a Day End, and then post the resulting AR, AP and GL Batches, then the User Name must have the Sage 300 security to run a day end and post batches in AR, AP and GL.

In the latest product updates, the details are validated when you save the Options. Process Scheduler supports Sage 300 the Complex passwords selected or not.

Tip: After an upgrade or server move, you generally need to re-save the details in the Processing Tab.



EMAIL MESSAGES

The E-mail Messages form lets you setup an email message that can be attached to Process Scheduler Schedules on page 24

- Use variables (field names) from your company database
- You can identify each e-mail message with a unique 16-character Message ID code.
When you setup the Process Scheduler Schedules you have the option to attach an Email message when you select the option to send an Email.

Fields and controls

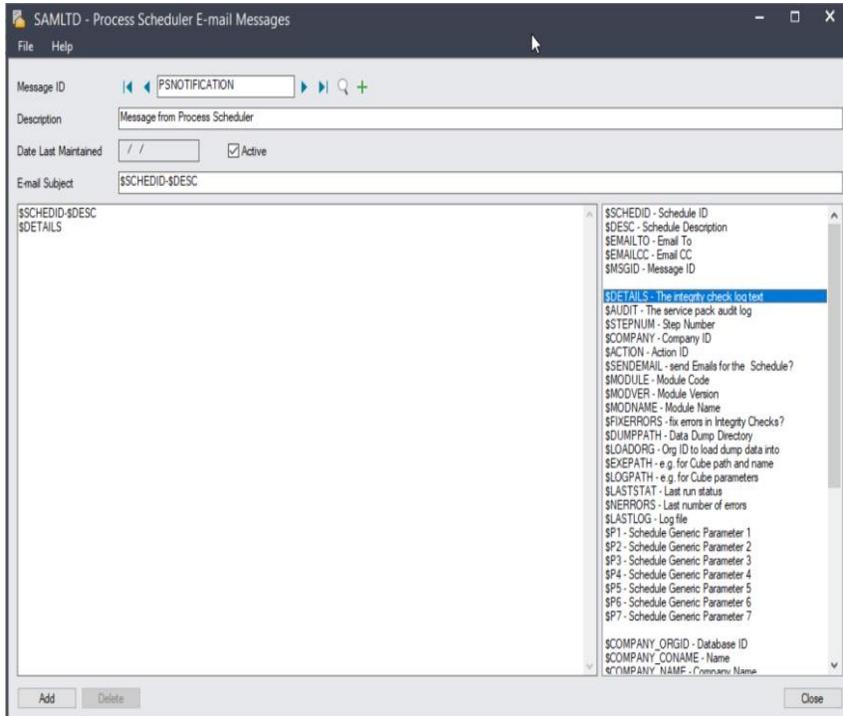
To create an e-mail message that you can use when emailing results of Schedules run in Process Scheduler

- Choose E-mail Messages from the Process Scheduler Setup folder.
- Complete the fields on the form.
- Enter the body of the e-mail message.
- Use field names, preceded by a dollar sign, to identify variable information that you want to

include with the message.

- Click Add or Save when you are satisfied with your message.

Tip: You can double click on the fields on the right hand-side panel to add them to the body of the email (on the left hand-side panel). This includes Scheduler header field, like Schedule ID and Description, Detail step values, like Step number and Sage 300 Company fields. You can also copy and paste from the example below.



Variables for messages that you send with e-mail

Fields from the schedule header - OZSCHEDH:

- \$SCHEDID - Schedule ID
- \$DESC - Schedule Description
- \$EMAILTO
- \$EMAILCC
- \$MSGID

Fields from the schedule details - OZSCHEDD:

- \$AUDIT - the service pack audit log when the action is set to "Sage 300Service Pack Audit"

Process Scheduler

\$DETAILS - the integrity check log text when the action is set to "Check integrity" or "Check all module integrity"

\$STEPNUM - Step number

\$COMPANY - Sage 300 Database ID

\$ACTION - Action name

\$SENDEMAIL

\$MODULE

\$MODVER

\$MODNAME

\$FIXERRORS

\$DUMPPATH

\$LOADORG

\$EXEPATH - e.g. for the Info Explorer cube path and name

\$LOGPATH - e.g. for the Info Explorer cube parameters

\$LASTSTAT - Last run status

\$NERRORS - Last number of errors

\$LASTLOG - Log file (for data integrity)

\$ATTACHLOG - Attaches the latest log file to the email. When used in the PS Header, all log files for all the steps are attached.

Tip: This is mainly designed to be used with Run Extender Scripts steps, when the script generates a log file.

\$P1 TO \$P7 ARE USED OPTIONALLY FOR CERTAIN ACTIONS. E.G.

\$P1 - In the Check Disk Space action, sends the Available disk space parameter in the schedule below which the email is triggered.

\$P2 - in the Check Disk Space action, includes the Available disk space on the server path specified in the schedule.

\$P3

\$P4

\$P5

\$P6

\$P7

COMPANY VARIABLES:

\$COMPANY_ORGID
\$COMPANY_CONAME
\$COMPANY_ADDR01
\$COMPANY_ADDR02
\$COMPANY_ADDR03
\$COMPANY_ADDR04
\$COMPANY_CITY
\$COMPANY_STATE
\$COMPANY_POSTAL
\$COMPANY_COUNTRY
\$COMPANY_LOCTYPE
\$COMPANY_LOCCODE
\$COMPANY_PHONE
\$COMPANY_FAX
\$COMPANY_CONTACT
\$COMPANY_CNTRYCODE
\$COMPANY_BRANCH
\$COMPANY_HOMECUR
\$COMPANY_REPORTCUR
\$COMPANY_TAXNBR
\$COMPANY_LEGALNAME
\$COMPANY_BRN

Example: Refresh Info Explorer Cube

If you want to include the cube path and the parameters to an email message to be sent by Process Scheduler after the refresh, you can use the following variables in the Email Message subject and body.

\$EXEPATH - for the cube path and name.

\$LOGPATH = parameters

Check Disk Space

The drive being checked is : \$EXEPATH

The available disk space is \$P2 which is less than \$P1

Data Integrity:

There has been a change in the number of integrity errors in schedule : \$SCHEDID

Description : \$DESC

Details : \$Details

Tip: To attach the data integrity log file to the email, select \$DETAILS in the email body.

Process Scheduler Schedules

When to use

Use this screen to configure schedules and to run and view logs. A schedule needs at least one step.

Note:

Click Run to test the schedule and view the log file. or Audit Log to view the logs from prior runs.

SCHEDULE FIELDS AND CONTROLS**DESCRIPTION**

Specify a description for the schedule

ACTIVE

Tick to make the schedule active

SEND E-MAIL

This option applies to the full schedule. Choose: Always / Only if error / Don't Send

Tip: If setting up a schedule with multiple steps, you can send e-mails for each step. In such cases, select to send an email Only if error and choose a Message ID to report the schedule error.

EMAIL TO AND EMAIL CC: .

Enter the email address/addresses required

If more than one address is required, separate the e-mail addresses with a semi-colon “;”

SELECT A MESSAGE ID

Required if Send email is set to Always or Errors

For details, refer to Email Messages on page 20

COMPANY.

Enter a company if setting up a schedule to run Data Integrity check.

If you select a company here and click the go button, all the modules will be inserted in to the schedule lines for a data integrity check. Alternatively, you can add lines into the schedule manually

Detail schedule steps

Important! The fields depend on the action selected and the available actions depend on the level of Process Scheduler included in your activation code.

Tip: Use the Detail screen to create Schedules - It is suggested to use F9 to Zoom on the detail screen to view the details required for the specific action selected.

DETAIL LINES FIELDS AND CONTROLS

STEP NUMBER

The step number must be 1..9999, and must not be duplicated.

Step number 1 is required

Tip: Number the steps in 5 or 10 increment- This will let you add new steps in future without having to update all steps numbers.

COMPANY

Specify the company required.

Note: This does not apply to some actions, like Check Disk space, Run Extender Script or Refresh Info-Explorer Cube.

NEXT STEP ON ERROR AND NEXT STEP ON SUCCESS.

These must be filled in appropriately. If you want the next step to stop, enter "0"

ACTION

Choose from the list of available actions and expand the action to view details specific to each action.

WITH LEVEL 1 PROCESS SCHEDULER ACTIVATION CODE

Level 1 - Process Scheduler for Data Integrity

- Check all Modules integrity and Check Integrity - For details on setup, refer to PS Schedule - Data Integrity Action on page 37
- Clear Integrity Logs: This clears old integrity logs. All logs cleared which are older than "x" days - which is entered on the action
- Dump database: Saves a dump of the database in a defined folder.

The screenshot displays two windows from the ORCLTD - Process Scheduler application. The 'Setup (Schedules)' window shows a list of schedules:

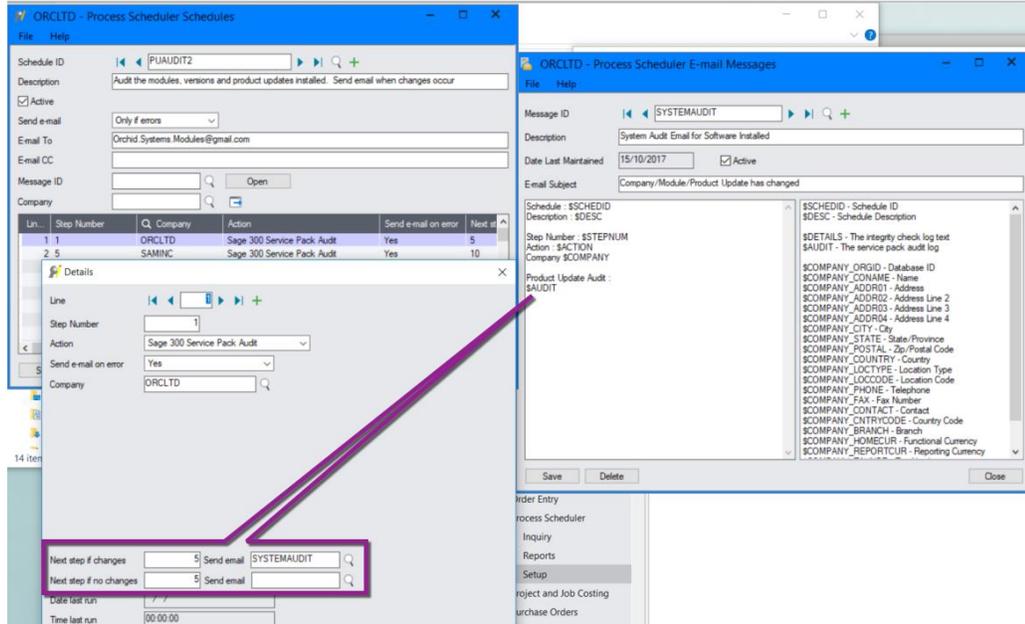
Lin...	Step Number	Company	Action
1	1	ORCLTD	Dump database
2	5	SAMINC	Dump database
3	1	ORCLTD	Dump database
4	5	SAMINC	Dump database
5	1	ORCLTD	Dump database
6	5	SAMINC	Dump database

The 'ORCLTD - Process Scheduler E-mail Messages' window shows details for a message with ID 'DATABASEDUMP'. The description is 'Database dump error email message'. The date last maintained is '14/07/2020' and it is marked as 'Active'. The email subject is 'There has been an error in \$\$CHEDIID - \$DESC'. The message body contains variables like \$\$STEPNUM, \$COMPANY, \$ACTION, and \$DUMPPATH.

The 'ORCLTD - Process Scheduler Schedules' window shows details for a schedule with ID 'DATABASEDUMP2'. The description is 'Dump ORCLTD'. It is marked as 'Active' and 'Send e-mail' is set to 'Only if errors'. The email is sent to 'Orchid.Systems.Modules@gmail.com'. The DB dump path is 'C:\Orchid\PS Files\Database Dumps\ORCLTD (year) (month) (day).zip'. The 'Next step on error' is set to '5' and 'Send email' is 'DATABASEDUMP'.

- Sage 300 Service Pack Audit: schedule to notify you if the Sage 300 Service Pack changes- Sends a list of all Sage 300 modules and Product updates activated in the database.

Tip: Use "next step on change" to send an email only when any details change.

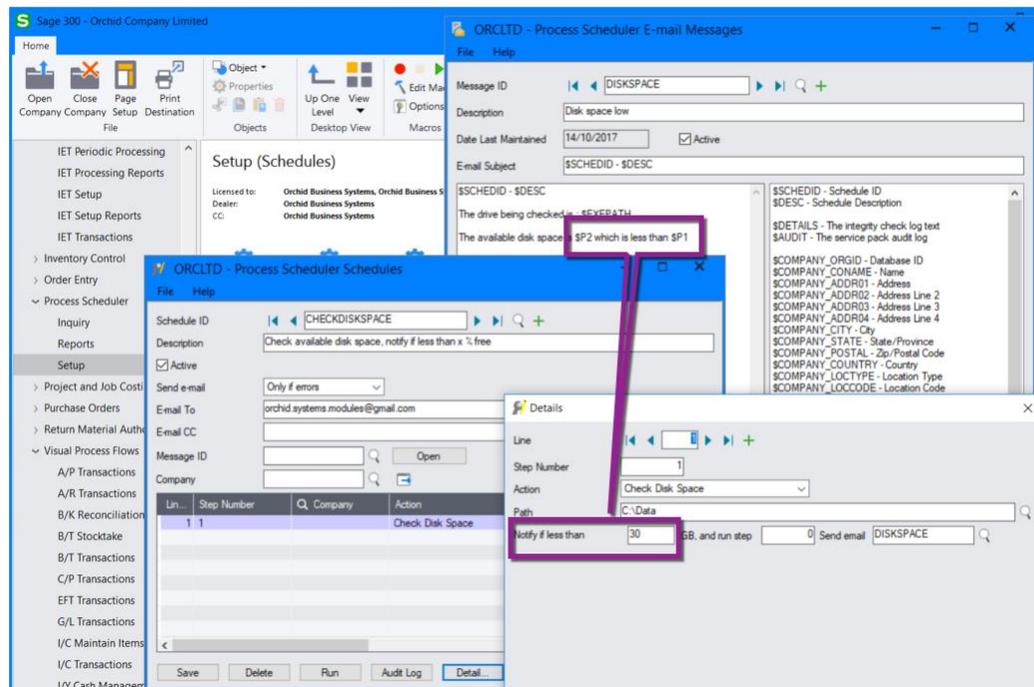


- Run Schedule: will run another Process Scheduler Schedule.

Tip: Use this option to create a schedule in Task Scheduler that will run multiple Process Scheduler Schedules at the same time. This lets you configure only one task in Windows Task Scheduler.

- Check Disk space: enter the file path and the available disk space and the email template.

If the available disk space is less than the configured value when the schedule is run, an email is sent.



Requirement! The following actions require other Orchid modules

Refer to the linked topics for detailed steps to configure those actions.

- Run Extender Script in Process Scheduler on page 49 - *** Requires Orchid Extender
- Refresh Information Manager Cube (deprecated - Use this action if you want to schedule a refresh of an Information Manager Cube (.cub) file. Information Manager Cubes (.cub) are used with the Information Manager V5.4 cube viewer.)
- Refresh and Distribute Info-Explorer Cube automatically on page 45 *** Requires Orchid Info Explorer
- Schedule I/M Report Runner on page 43 *** requires Orchid Information Manager Report Runner

WITH LEVEL 2 PROCESS SCHEDULER ACTIVATION CODE

Level 2 - Process Scheduler for Data Integrity, Day End and Posting

- Run I/C Day End
- Run P/O Day End - used in Sage 300 databases where P/O is activated, but not I/C.

Note: Any day end triggered by third party modules that subclass I/C Day End (e.g. Technisoft Service Manager or MIsys) will automatically run when the Run Day End action is run from Process Scheduler

- Post AR System Batches : It will post all external batches in Accounts Receivable where the Source Application is OE or PM (Project and Job Costing).
- Post AP System Batches: It will post all external batches in Accounts Payable where the Source Application PO or PM (Project and Job Costing).
- Post G/L System Batches: Process Scheduler will post all subledger batches in the General Ledger.
- Post All System Batches

Note:

System Batches are selected as follows:

- For A/R, External batches where the Source Application is Order Entry or Project and Job Costing (SRCEAPPL is OE or PM).
 - For A/P, External batches where the Source Application is Purchase Order or Project and Job Costing (SRCEAPPL is PO or PM).
 - For G/L it is all subledger batches.
- Post AR Ready to Post Batches
 - Post AP Ready to Post Batches
 - Post G/L Ready to Post Batches
 - Post All Ready to Post Batches
 - Post all AR Batches
 - Post all AP Batches
 - Post all G/L Batches

 - Post all Batches
 - Post I/C Receipts
 - Post I/C Shipments
 - Post I/C Transfers
 - Post I/C Assemblies
 - Post PJC Timecards
 - Post PJC Equipment Usage
 - Post PJC Charges
 - Post PJC Costs
 - Post PJC Revenue Estimates
 - Post PJC Material Usage
 - Post PJC Material Returns
 - Post PJC Material Allocation

WITH LEVEL 3 PROCESS SCHEDULER ACTIVATION CODE

Level 3 - Advanced Process Scheduler

- **Load Database** : Specify the Database you need to load into and the Database Dump path. This action can be used in conjunction with Dump Database.
- **Copy Database** : Specify the source database (From Company) and the target Database (To company) from the databases configured in Process Scheduler.
- **Run AVB Macro (discontinued)**

Important! Support for AVBs has been discontinued due to security changes in recent versions of Windows. The option to run AVBs has been left in for those sites running older versions of Windows.

Note: For Run AVB Macro, Process Scheduler will create a session using the organization user id and password specified in the Process Scheduler / [Setup / Companies](#) screen for the Company specified on the task row and then execute the AVB as specified in the executable path.

Note: If you have a user X logged in to Windows and the task runs as user X then scheduling AVB macros should work. If the Windows scheduler task runs when the user is not logged in to Windows then scheduling AVB macros may not work. It is more reliable to schedule EXEs rather than AVBs.

- **Run Program (Wait)** and **Run Program (Don't Wait)**: For details, refer to Process Scheduler Schedules- Run Program on page 34.
- **G/L Consolidation Export**: For details, refer to G/L Consolidation Export on page 33
- **G/L Consolidation Import**: For details, refer to G/L Consolidation Import on page 34
- **Open Year** : Open Year allows you to open all periods in the next Fiscal Year in the Common Services Fiscal Calendar. The appropriate sub ledger must also be selected.

Note: This action doesn't run the G/L Create New Year.

- **Open Next Period:** Process Scheduler will find the latest open period and open the next period. Open Next Period allows you to “open” the subsequent period (the one after the latest open period, independently of the Close period process). The appropriate sub ledger must also be selected.
- **Close earliest Open Period:** Allows you to “close” the earliest open period. The appropriate sub ledger must also be selected. It is independent of the Close Period action.
- **Close/Open Period:** Close/Open Period allows you to “close” the latest open period, and “open” the current one, based on today's date. The appropriate sub ledger must also be selected.

Requirement! The following actions require other Orchid modules

- **Run Financial Report Group :** For details, refer to Run Financial Report on page 40 (FR) *** Requires Orchid Information Manager - Report Runner

DEPENDING ON THE ACTION SPECIFIED, OTHER DETAILS MAY BE ENTERED ON THE SCHEDULE LINE :

- **Send Email on Error:** Options : On change - This applies to integrity checks only and will only create an e-mail line if the number of errors has changed since the last integrity check.

Note: You will only have this option if you select “Send e-mail” as “only if error” on the schedule.

- **Send.** Send Full Log or Send Summary Log.
- **Fix errors.** Only applicable to integrity check tasks.
- **Dump path.** Only applicable to dump database task
- **Load company.** Only applicable to Load database tasks and copy company task
- **Executable path.** Only applicable to Run Program (wait), Run Program (don't wait) and [Run AVB Macro](#) tasks
- When you use Run Program or Run Program (wait) you can pass in the [parameters](#) for Command Line and Working Directory.
- When you run an Extender Script, you select a script that has been uploaded in Extender and you can pass parameters to be read and used by the script. Refer to Extender documentation for details.

Tips:

Some fields are Automatically Maintained (Date last run, Time last run, Last Status and Number of Errors).

Last Log- Open the last log for the selected action if the action creates a log file (Data integrity, Posting batch).

RUN AVB MACROS

Important! Support for AVBs has been discontinued due to security changes in recent versions of Windows. The option to run AVBs has been left in for those sites running older versions of Windows.

Note: For Run AVB Macro Process Scheduler will create a session using the organization user id and password specified in the Process Scheduler / [Setup / Companies](#) screen for the Company specified on the task row and then execute the AVB as specified in the executable path.

Note: If you have a user X logged in to Windows and the task runs as user X then scheduling AVB macros should work. If the Windows scheduler task runs when the user is not logged in to Windows then scheduling AVB macros may not work. It is more reliable to schedule EXEs rather than AVBs.

G/L CONSOLIDATION EXPORT

In order to set up an action to Export G/L Consolidation files from an Sage 300 company, select the action "G/L Consolidation Export" and select the required company from which to export G/L Consolidation files. Then fill in the parameters required :

Export Folder : Browse or enter the export folder to which the files will be exported

Process ID : Enter the G/L Consolidation Process ID which has been defined in the company from which the G/L consolidation Export has been configured to export. It is in the G/L Consolidation Process ID where you define the export rules : the unit id, the data types, the transactions, any specific criteria, currency rules and mapping tables.

Export : Select one of Current Period / Previous Period. This option relates to those Process ID's where the Export method is any method other than Posting Sequence.

Tip:

When using this action, it is suggested to print the related report.

Process Scheduler Print GL Consolidation Log on page 62

G/L CONSOLIDATION IMPORT

In order to set up an action to Import G/L Consolidation files from a Sage 300 company, select the action "G/L Consolidation Import" and select the required company into which to import G/L Consolidation files. Then fill in the parameters required :

Import Folder : Browse or enter the import folder from which the files will be imported

Import Method : Select one of Net Changes / Balances / Financial Period / Posting Sequence or All.

Import : Depending on the Import Method, Select one of Current Period / Previous period.

CLOSE EARLIEST OPEN PERIOD

Allows you to "close" the earliest open period. The appropriate sub ledger must also be selected. It is independent of the Close Period action.

CLOSE/OPEN PERIOD

Close/Open Period allows you to "close" the previous open period, and "open" the current one, based on today's date. The appropriate sub ledger must also be selected.

OPEN NEXT PERIOD

Process Scheduler will find the latest open period and open the next period.

Open Next Period allows you to "open" the subsequent period (the one after the latest open period, independently of the Close period process). The appropriate sub ledger must also be selected.

OPEN YEAR

Open Year allows you to open the next Fiscal Year. It opens all fiscal periods for the current year.

PROCESS SCHEDULER SCHEDULES- RUN PROGRAM

When running a program in the Process Scheduler, you have two options:

- Run Program (don't wait): you can either start the program and proceed immediately to the next step in the schedule. You use this if the steps are independent and can run simultaneously.
- Run Program (wait): you can start the program and wait for it to finish before moving on to the next step in the schedule. You use this if the steps need to be executed in sequence.

Note: If there's only one step in the schedule, both options function similarly.

Passing Parameters to the program

When you use Run Program or Run Program (wait) you can pass in parameters in the Command line that can be used by the Program.

-d %ORGID%

-u %USER%

-p %PASSWORD%

At the time of running, Process Scheduler will pass in the company, user id and password as specified in "company" on the row, and as entered in the "Companies" screen.

Log files

You can use Process Scheduler to email the log file from the program

For Run Program (wait) only

-l %LOGFILE%

With the logfile, Process Scheduler will create the file and pass in the name to the external program. If the external program writes something back into that file, then Process Scheduler will read this back and include what is in the file in the e-mail if the step is configured to send an email.

The first line of the LOG file in the format LASTSTAT | NERRORS | LASTLOG (fields separated by a | pipe character) is used to flag the step as success/failure.

If the LASTSTAT field is OK then the step is considered successful. The NERRORS field is displayed in the "Number of errors" field and the LASTLOG field is displayed in the Last log field on the Schedule step.

If the program does not write a LASTSTAT | NERRORS | LASTLOG to the log file, then the program return value is used instead. 0 means success, non-zero means failed.

Examples Process

The following sample Schedules include Tips for using Process Scheduler for data integrity as well as sample schedules for use with Orchid Information Manager or Info Explorer modules:

PS Schedule - Data Integrity Action	37
Run Financial Report	40
Schedule I/M Report Runner	43
Refresh and Distribute Info-Explorer Cube automatically	45
Run Extender Script in Process Scheduler	49

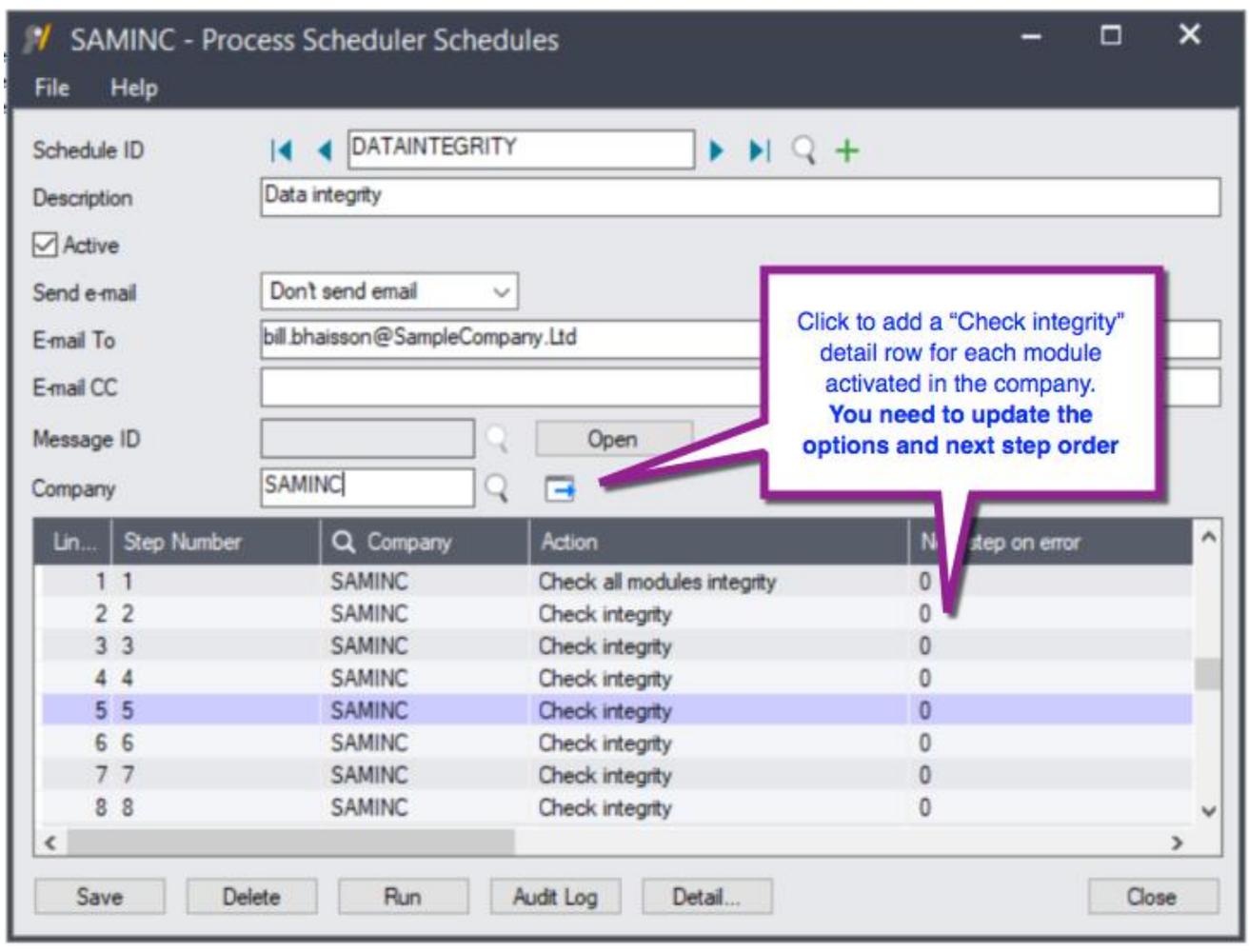
PS SCHEDULE - DATA INTEGRITY ACTION

Tip: To Check Data integrity for all modules in a company, select a company on the Schedule Screen and click the go button. 

All the modules will be inserted in to the schedule lines for a data integrity check.

You can then adjust the configuration for each module to determine what data to check/fix.

On the summary grid, you also need to update the Next step on error / Next Step on Success so that all the lines are included in the Schedule.



The screenshot shows the 'SAMINC - Process Scheduler Schedules' window. The 'Schedule ID' is 'DATAINTEGRITY' and the 'Description' is 'Data integrity'. The 'Active' checkbox is checked. The 'Send e-mail' dropdown is set to 'Don't send email'. The 'Email To' field contains 'bill.bhaisson@SampleCompany.Ltd'. The 'Company' field is set to 'SAMINC'. A callout box points to the 'Go' button (a square with a right-pointing arrow) and contains the text: 'Click to add a "Check integrity" detail row for each module activated in the company. You need to update the options and next step order'. Below the form is a table with the following data:

Lin...	Step Number	Company	Action	N	step on error
1	1	SAMINC	Check all modules integrity	0	
2	2	SAMINC	Check integrity	0	
3	3	SAMINC	Check integrity	0	
4	4	SAMINC	Check integrity	0	
5	5	SAMINC	Check integrity	0	
6	6	SAMINC	Check integrity	0	
7	7	SAMINC	Check integrity	0	
8	8	SAMINC	Check integrity	0	

At the bottom of the window are buttons for 'Save', 'Delete', 'Run', 'Audit Log', 'Detail...', and 'Close'.

Schedule detail Line options:

Send Email on Error: Setting Email Notifications for Data Integrity Actions:

Process Scheduler

Schedule setting Line Setting

Always n/a
 Yes - Sends an email
 No - Doesn't send an email

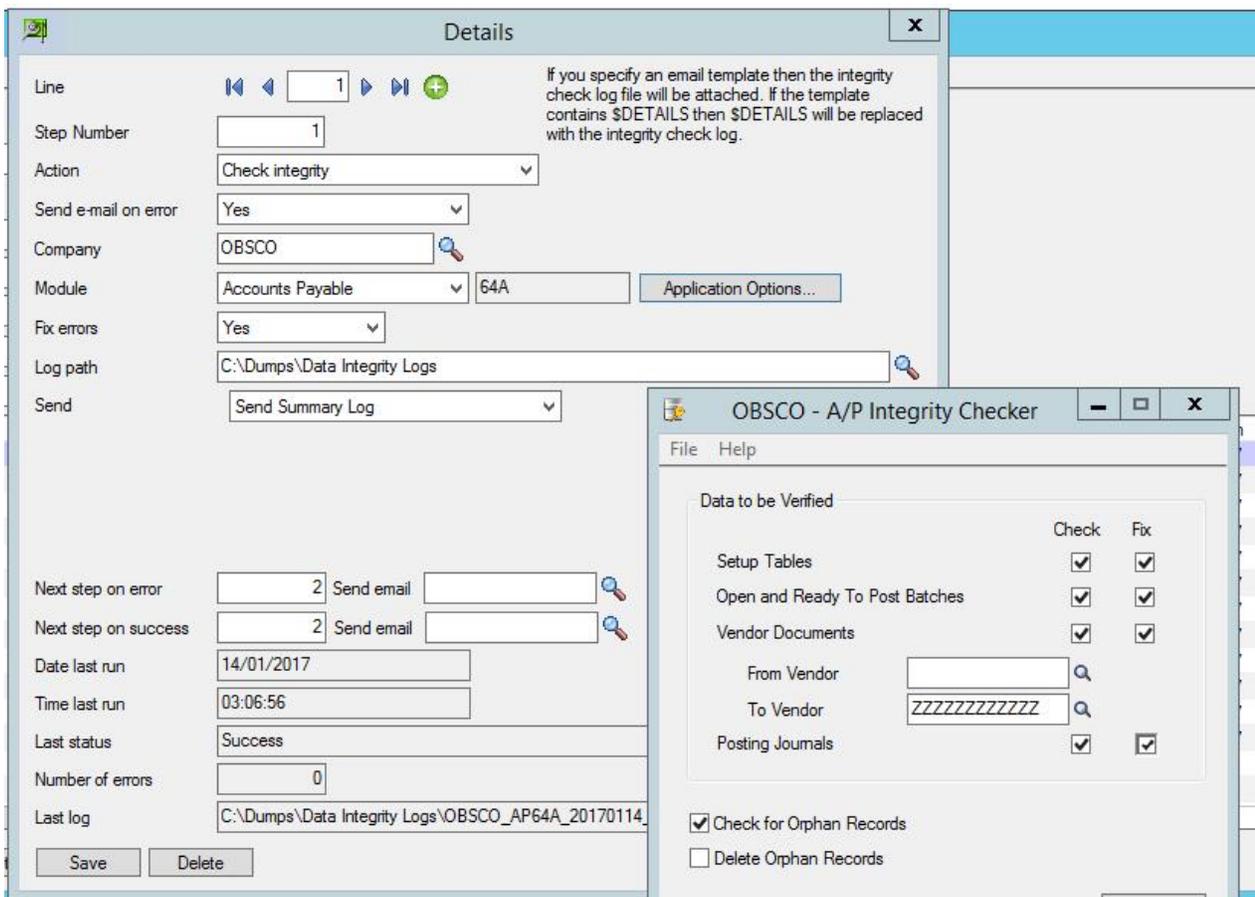
Only if errors On Change - will only create an e-mail line if the number of errors has changed since the last integrity check. This setting is useful if you have some modules with errors that cannot be fixed and you only want to be notified if new errors occur.

Don't Send Errors

Module / Application Options: Select the Sage 300 Module to check the data integrity for. By default, all components of the data integrity are run. Use Application Options to amend what data to check / fix for each module.

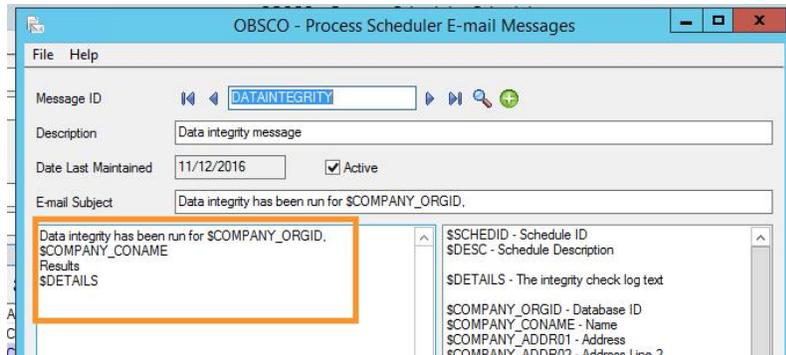
Fix errors. Only applicable to integrity check tasks. Yes/No option. This works in conjunction with the options ticked under Application Options.

Last log – drill to the last log created by the integrity check for this module



To include the Data integrity log in the email sent by Process Scheduler, use an email message that contains the \$DETAILS field.

Refer to See Email Messages on page 20



Tip: You can have a step to Check the module integrity followed by a step to "Clear Data Integrity Logs" on success to ensure the log folder only includes the latest results.

RUN FINANCIAL REPORT

Note: Excel should be installed on the server where Process Scheduler is run/scheduled in Windows Scheduler. You also need to run a Sage 300 workstation setup if the schedule doesn't run on the Sage 300 application server.

The following steps are required to schedule a financial report :

Requirement! Information Manager Report Runner needs to be activated and configured. Process Scheduler Level 3 is required.

Log into a Sage 300 database with an existing install of Process Scheduler.

- Go to the schedules screen and create a new schedule

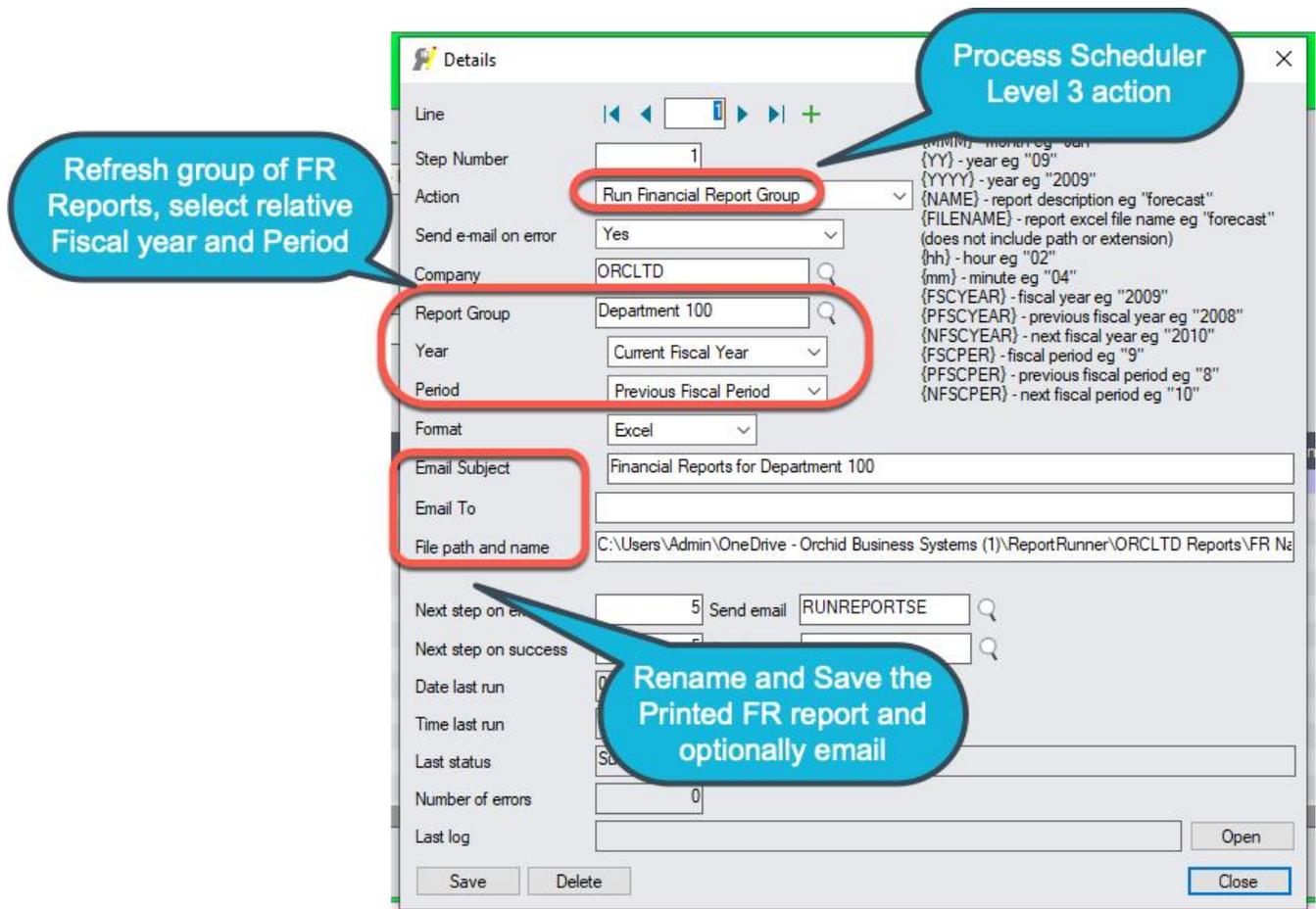
Note: Use the detail screen (F9 Zoom) to setup a schedule to Run Financial Report

For the Action specify Run Financial Report Group

- Specify the company and report group name from IM Report Runner
- Define the parameters Year, Period, File name
- Define the e-mail subject and address

All reports in the group will use the same configuration.

Tip: You can add another "Run Financial Report Group" Action for another Report Group with different parameters.



EMAIL is optional

FILE path and NAME:

You can include the following fields in the filename:

{NAME} - Report description configured in Financial Report Runner e.g. "Dept 100 forecast"

{FILENAME} - Source file name (without the path and the xls extension)

{DD} - day e.g. "05"

{D} - day e.g. "5"

{MM} - month e.g. "01"

{M} - month e.g. "1"

{MMM} - month e.g. "Jan"

{YY} - year e.g. "09"

{YYYY} - year e.g. "2009"

{hh} - hour e.g. "02"

{h} - hour e.g. "2"

{mm} - minute e.g. "04"

{m} - minute e.g. "4"

Tip: Consider if you want the file overwritten in each run or you need a unique file name everytime the Financial Report is refreshed in selecting the variable names.

{FSCYEAR} - fiscal year eg "2009"

{PFSCYEAR} - previous fiscal year eg "2008"

{NFSCYEAR} - next fiscal year eg "2010"

{FSCPER} - fiscal period eg "9"

{PFSCPER} - previous fiscal period eg "8"

{NFSCPER} - next fiscal period eg "10"

SCHEDULE I/M REPORT RUNNER

You can use Process Scheduler Level 1 to run s**Crystal report** that have been set up in **Information Manager - Report Runner**.

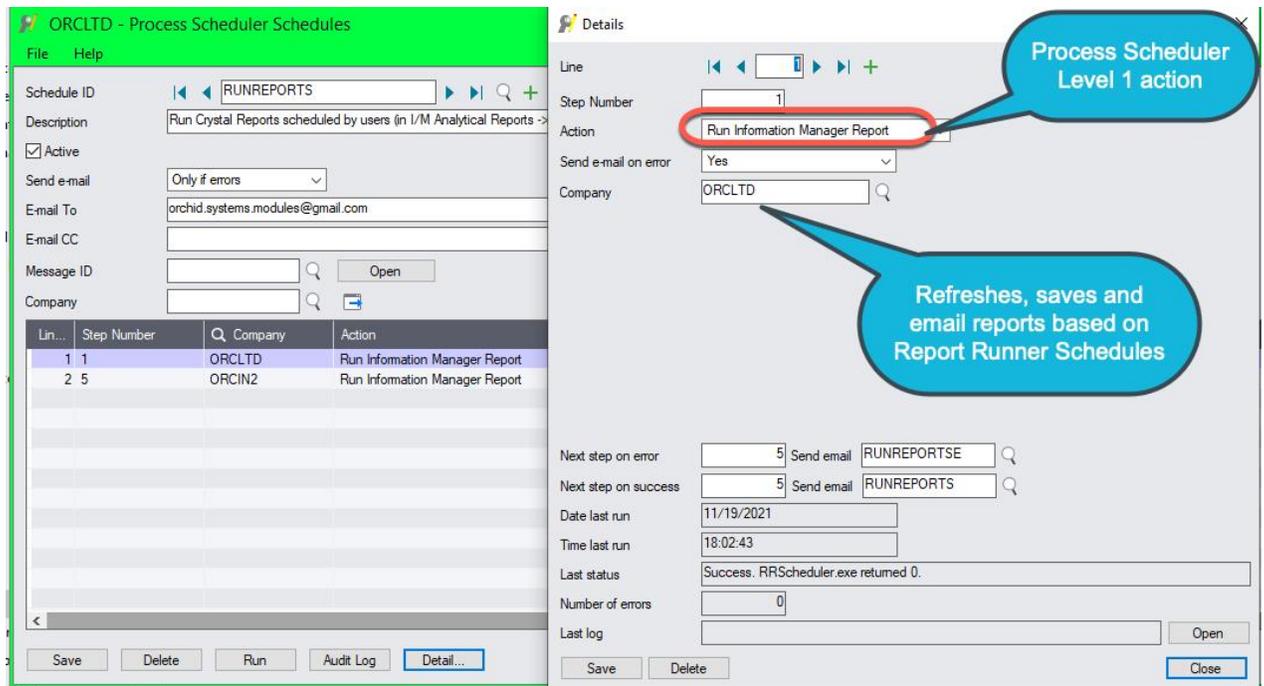
Requirement! Information Manager Report Runner needs to be activated and configured.

Choose the Action "Run Information Manager Report".

When started, this action will check if any user has scheduled a Crystal Report set up in Information Manager - Report Runner to run on or before the current date/time - and if so, will run the report.

Note:

There is no way to select only a group of reports with Report Runner Analytical Reports. If you want to run some reports at a certain time and not other reports, you need to set up different schedules in Report Runner.



Note: The steps below need to be done in Sage 300 Administration Services and in Information Manager. Refer to Information Manager documentation for details.

Step 1: Initial Setup:

- In Administrative Services in Customization Directories – add a Customization Directory
- Add User: use * for ALL Users

Process Scheduler

Company ID: Select The Company Code from the list provided

Customization Directory:

Then in Information Manager Setup > Options > Report Runner Tab

Refer to Configure Report Runner Tab in I/M Setup / Options

Note: If this is not setup, or are not the same, the Report Runner will not be able to save the report in the customization directory.

Step 2: . Create the report(s) in Information Manager - Report Runner Designer. Refer to Information Manager - Report Runner help for details.

Refer to Print or Schedule a Report Runner Report (I/M Analytical Reports / Report Runner)

REFRESH AND DISTRIBUTE INFO-EXPLORER CUBE AUTOMATICALLY

Configure Emailing options in Process Scheduler / Setup / Options.

Requirement! Info Explorer needs to be installed on the server where Process Scheduler runs from.

Create a new Schedule.

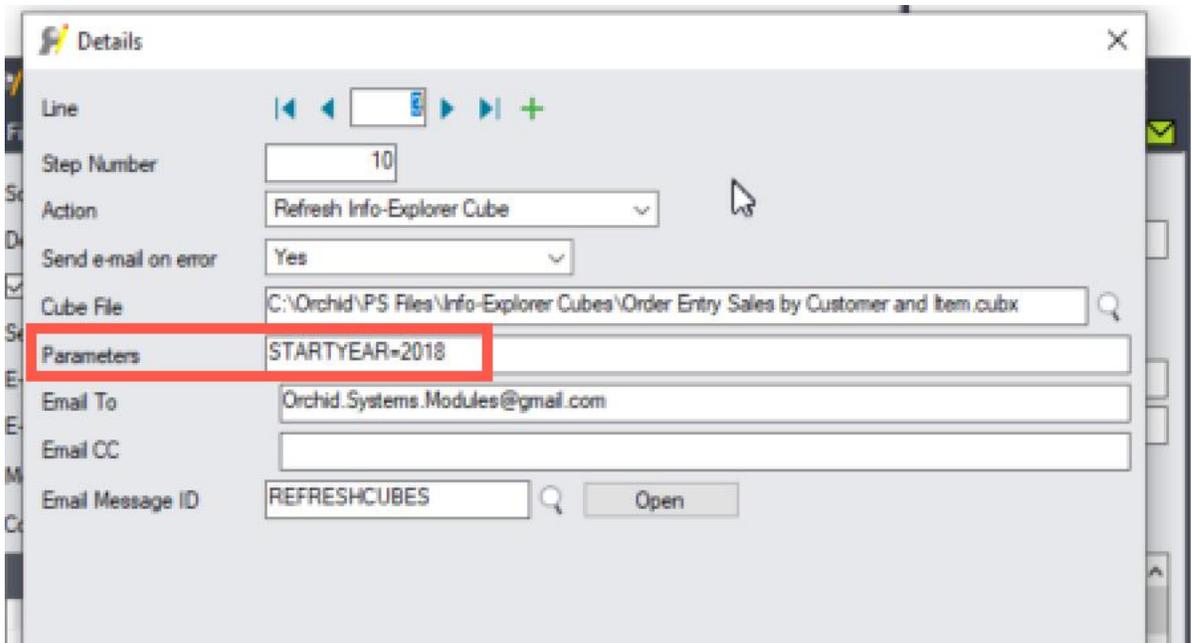
Use the "Refresh Info-Explorer Cube" action if you want to schedule a refresh of an Info-Explorer (.cubx) file. Info-Explorer cubes are used with Info Explorer viewer.

1. In the "Cube File" text box, you can browse or find to specify the full path and file name of the Info-Explorer cube you want to refresh.

In the "Parameters" text box, you specify any parameters required for the particular cube. For example if the cube has one parameter STARTYEAR, you would complete the text box as follows:

STARTYEAR=2018

If the cube has 2 parameters, FiscalYear and FiscalPeriod, you would set the Parameters field to FiscalYear=2020 FiscalPeriod=09



Tip:

If your InfoExplorer cube has a cube or refresh password assigned to it (ie you can only open the cube if you enter the password or you can only refresh the query if you enter the password), you need to specify the password(s) in a parameter in the Process Scheduler step.

- For the refresh password in Process Scheduler, specify it in the Parameters field, eg
/REFRESHPASSWORD=password
- If the cube file has a password then you specify that in Parameters as **/PASSWORD-D=password**
- If the cube has both passwords defined, then the parameter fields should contain
/PASSWORD=password /REFRESHPASSWORD=password

The screenshot shows a 'Details' window for a process step. The fields are as follows:

- Line: 1
- Step Number: 1
- Action: Refresh Info-Explorer Cube
- Send e-mail on error: Yes
- Cube File: F:\Orchid Support\InfoExplorer\OE Sales by customer and item.cubx
- Parameters: /REFRESHPASSWORD=orchid
- Email To: nathalie@orchid.systems
- Email CC: (empty)
- Email Message ID: CUBE
- Next step on error: 0
- Next step on success: 0
- Date last run: 27/05/2017
- Time last run: 11:17:49
- Last status: Success. Program returned 0.
- Number of errors: 0

2.If you want to email the refreshed cube to users, Select an existing Email Template or Click Open next to the Email Message ID field to create a new Message Template.

See Email Messages on page 20

Save the Schedule

3. Add a line for each cube you want to refresh.

4. To schedule the Refresh to take place regularly, use Windows Task Scheduler to schedule the action.

The program to be scheduled is located in the Sage 300 Programs directory under the OZXXA sub-directory and is called OZProcessScheduler.exe.

Process Scheduler

i.e. ..\OZxxA\OZProcessScheduler.exe (i.e. OZ72A\OZProcessScheduler.exe for version 2025)

Note: In earlier versions of Sage 300 prior to version 2022, the scheduler was called OZIntegrityCheck.exe.

You will pass the Schedule ID to the exe as per details Scheduling the Process Scheduler in Windows Scheduler on page 53

RUN EXTENDER SCRIPT IN PROCESS SCHEDULER

Requirement! Process Scheduler Level 1 can be configured to run Extender scripts to automate processes and time-based alerts.

Extender includes three sample scripts to send the following alerts

1. AR Customer Aging Email Notification
2. OE Check Order Has Shipped Today
3. PO Check Order Is Received Today

Example scripts

1. AR Customer Aging Email Notification.

Put AR Customer on hold if

- a. The AR total outstanding balance is greater than the customer's credit limit or
- b. The aging periods 1..4 have a balance greater than zero

And send an e-mail to a nominated email address to alert them of this on-hold customer

2. OE Check Order has shipped Today.

Send an email to a nominated email address if

- a. Any OE Orders expected ship date is equal to the system date and
- b. No shipments were posted against this order on the system date

3. PO Check Orders is Received Today.

Send an email to a nominated email address if

- a. Any PO Orders expected receipt date is equal to the system date and
- b. No receipts were posted against this purchase order on the system date

See Also

To setup Extender scripts in Process Scheduler, refer to Steps for Setting Up Process Scheduler on page 8
To write scripts designed to be run in Process Scheduler, Extender and Process Scheduler

Using Process Scheduler

You can run a schedule from Process Scheduler > Setup > Schedule, select the schedule you want to run and select RUN.

You can also run the OZIntegrityChecker.exe from Task Scheduler.

In all scenarios, you can generate log files for auditing or troubleshooting purposes.

For details, select the topics below.

Running Schedule in Sage 300	50
Scheduling the Process Scheduler in Windows Scheduler	53
Creating a log file with Process Scheduler	60
Process Scheduler Audit Log	61

RUNNING SCHEDULE IN SAGE 300

Run on the Schedule screen

The Process Scheduler Schedule can either be run by clicking on the "Run" button within the Process Scheduler Schedules screen within Sage 300.

When you use the "Run" button in Sage 300, a log of the schedule is displayed on the screen.

Tip:

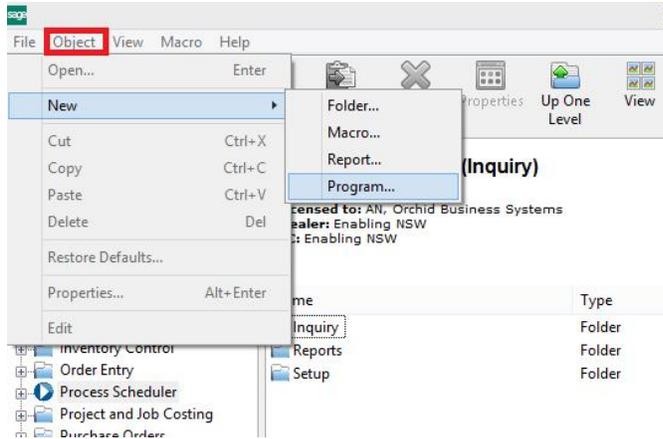
It can be copied and pasted in an email or a file to be sent to Orchid for support if required.
Use the Open Log button to open the log in Notepad. It makes troubleshooting easier.

Add an icon to the Sage Desktop

Alternatively the Process Scheduler can be run from the Process Scheduler Icon on the Sage 300 Desktop, with the schedule as the parameter

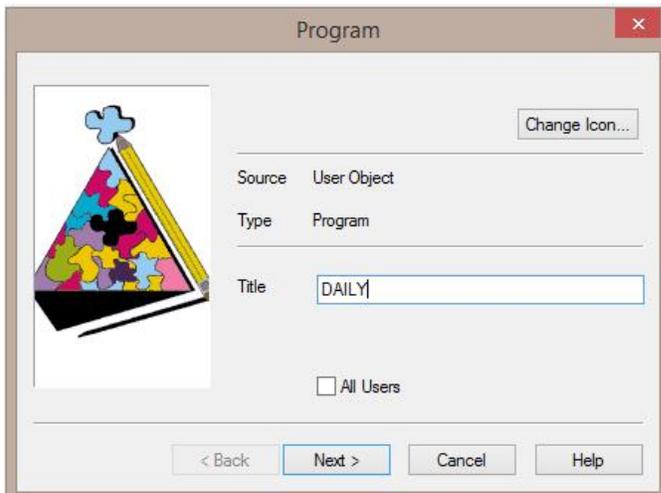
Add a new program to your Sage 300 desktop and look for OZIntegrityCheck.exe in the OX68A folder of your Sage 300 installation.

Argument is your schedule name.

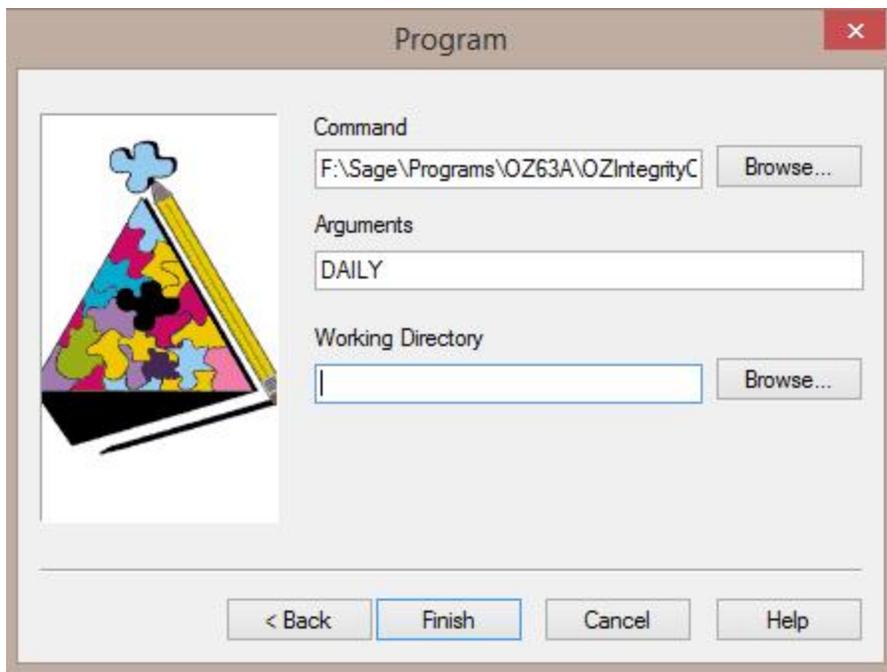
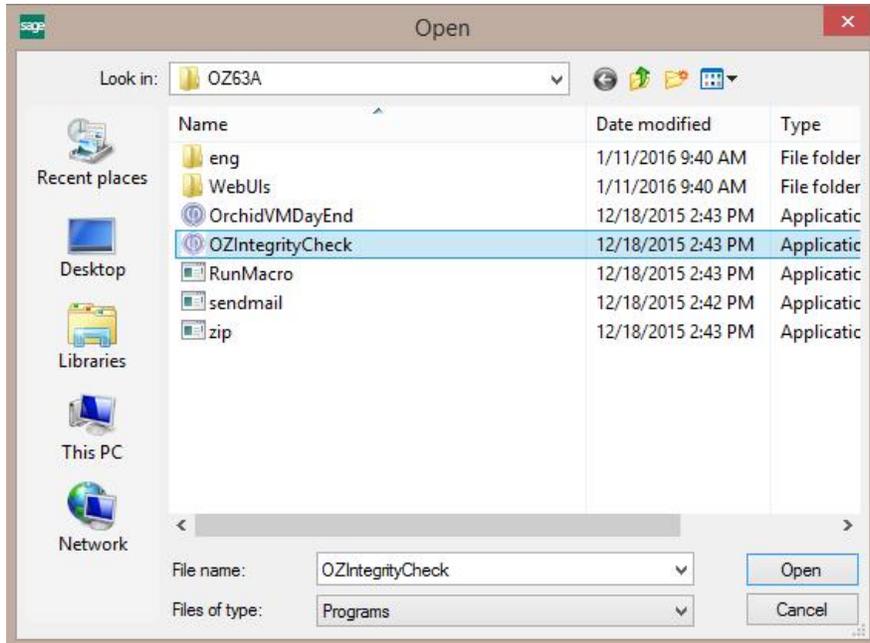


DETAILED STEPS

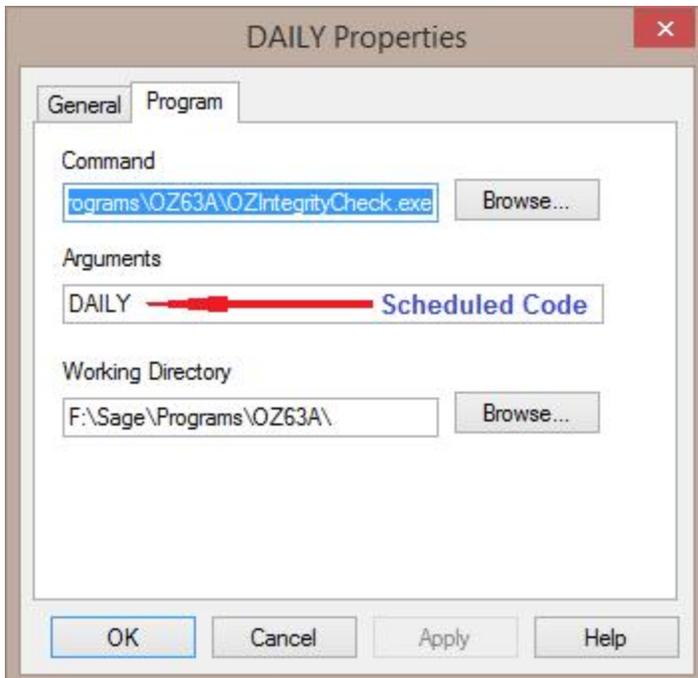
Specify the "name" which will appear on your desktop



Process Scheduler



Reviewing an existing desktop program, open the icon on the Sage Desktop and check the Argument



SCHEDULING THE PROCESS SCHEDULER IN WINDOWS SCHEDULER

The Process Scheduler Schedule can either be run by clicking on the "Run" button within the Process Scheduler Schedules screen within Sage 300 or it can be scheduled through the Windows Scheduler.

The program to be scheduled is located in the Sage 300 Programs directory under the OZXXA sub-directory and is called OZProcessScheduler.exe.

i.e. ..\OZxxA\OZProcessScheduler.exe (i.e. OZ72A\OZProcessScheduler.exe for version 2025)

Note: In earlier versions of Sage 300 prior to version 2022, the scheduler was called OZIntegrityCheck.exe.

The Windows Scheduler allows you to schedule Process Scheduler to run daily, weekly, monthly, one time only, when the computer starts or when you log in. You can also select the time and day you want the recurring task to start.

You can also set up multiple instances of a recurring task - for example you may need to run certain Schedules twice a day. Finally you will be asked to enter user ID and password information.

If the functionality of the Windows Scheduler is inadequate (for example you may only want it to run if certain criteria has been met) then third party Schedulers can be used.

User Account Note:

Process Scheduler

When scheduling using the Windows Scheduler, ensure the account under which the schedule is going to run has

- Access to Sage 300
- It is suggested to use UNC path in the schedules to avoid drive mappings issues. If you are not using UNC Path, the user needs to have the same drive mappings as have been used in schedules.
- Access to the drives referred to as part of the schedules (for example a Dump – the account will need write access to the dump folder)
- The account will need read/write to the ..\Sage\SITE folder in order to connect to the Sage 300 company.
- Ensure you use a network user with a password that does not expire. If you need to reset the password periodically, you will need to maintain the passwords here too.

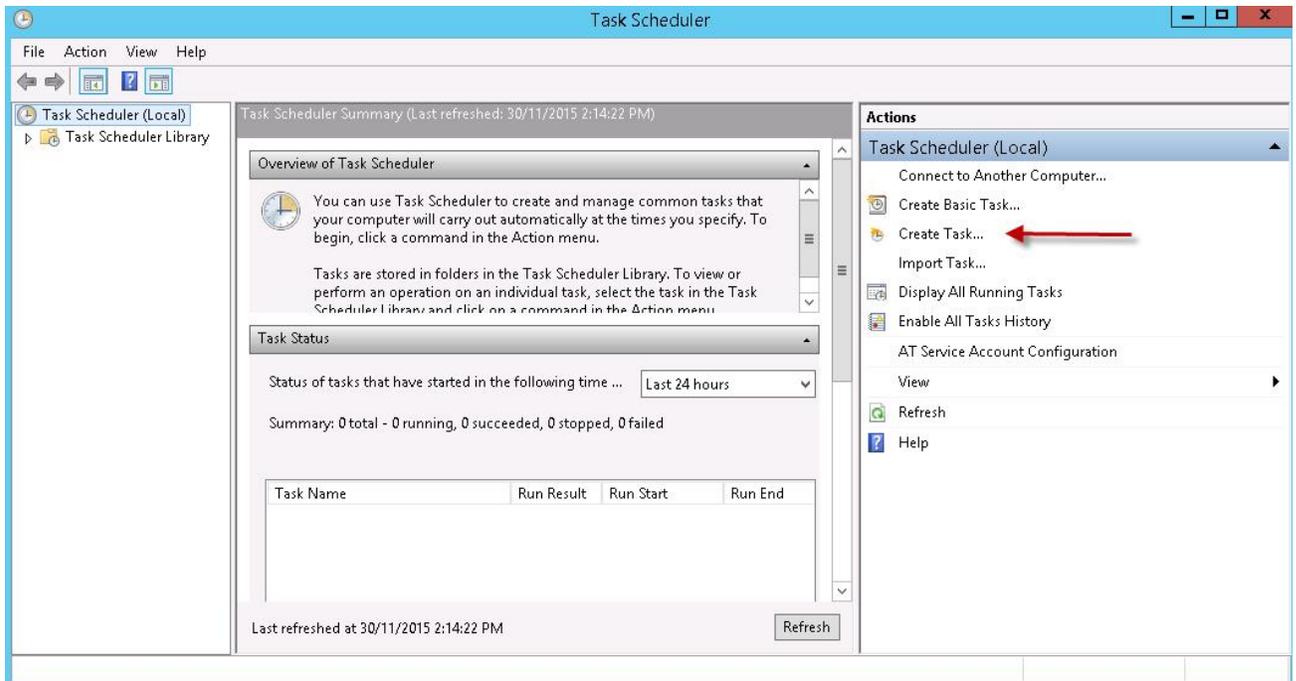
Important! If the Windows Task Scheduler is being used on a machine where the Sage 300 programs have not been installed, then you need to do a Sage 300 workstation setup on the machine before the scheduled tasks will run.

Tip: To create a log file when running Schedules, See Creating a log file with Process Scheduler on page 60

CREATING TASK IN WINDOWS SERVER 2012 OR WINDOWS SERVER 2016 TASK SCHEDULER

The scheduler is accessed through the Control Panel/Administrative Tools/Task Scheduler

From the Actions panel, select the option to "Create Task"



Choose Create a task - for example DAILY

a) Set the network user name and password that this scheduled task will run under. Ensure you are able to log on to the network as this user and start Sage 300. This network user needs to have sufficient rights to the Sage site directory to log on to a Sage 300 company.

Tip: Select to "Run whether user is logged on or not".

Create Task

General Triggers Actions Conditions Settings

Name: DAILY

Location: \

Author: SYDVS02\Administrator

Description:

Security options

When running the task, use the following user account:
SYDVS02\Administrator Change User or Group...

Run only when user is logged on

Run whether user is logged on or not

Do not store password. The task will only have access to local computer resources.

Run with highest privileges

Hidden

Configure for: Windows Server 2012 R2

OK Cancel

Add a trigger to define when the schedule runs. You can add multiple triggers if required.

New Trigger

Begin the task: On a schedule

Settings

One time

Daily

Weekly

Monthly

Start: 30/11/2015 10:00:00 PM Synchronize across time zones

Recur every: 1 days

Advanced settings

Delay task for up to (random delay): 1 hour

Repeat task every: 1 hour for a duration of: 1 day

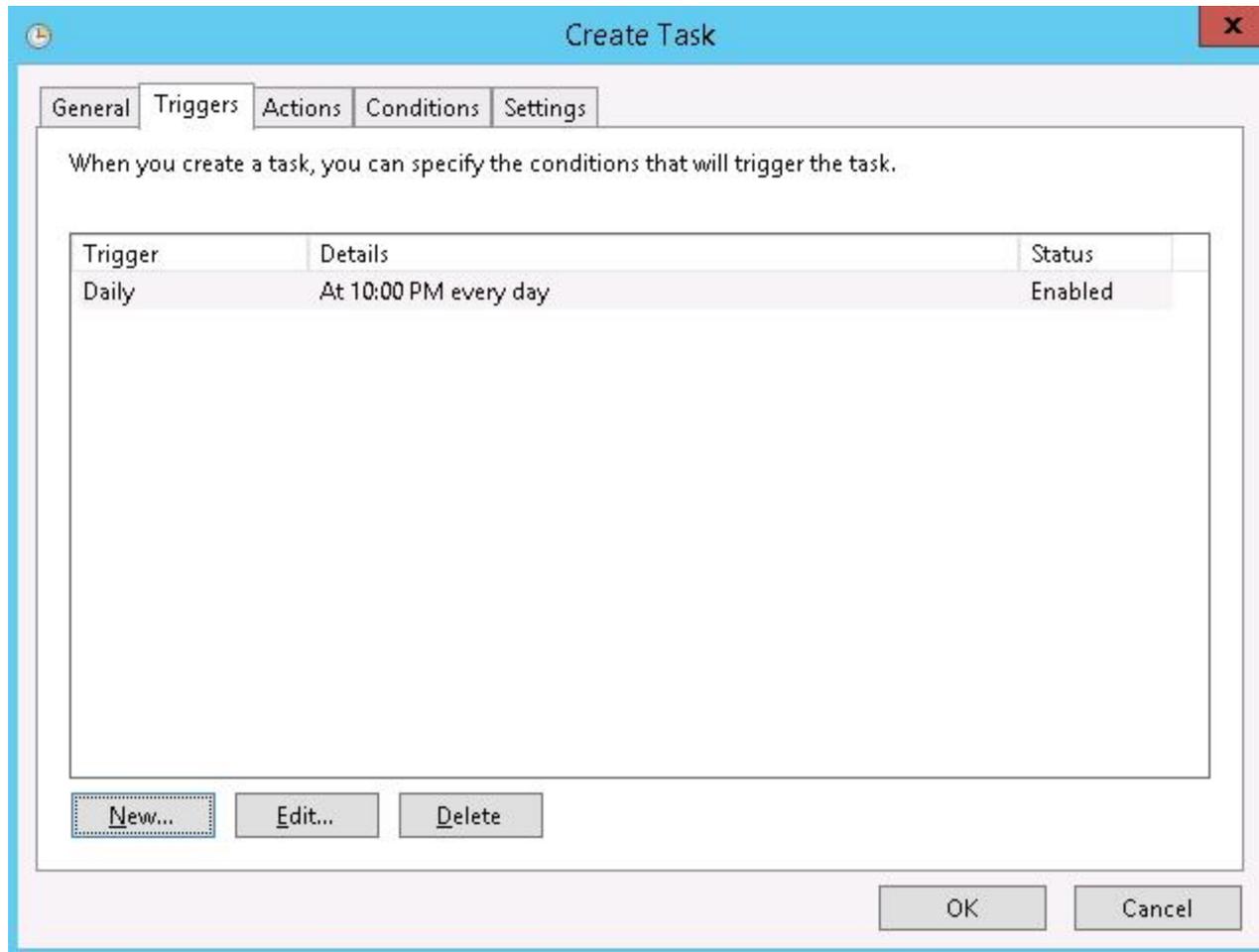
Stop all running tasks at end of repetition duration

Stop task if it runs longer than: 3 days

Expire: 30/11/2016 2:20:06 PM Synchronize across time zones

Enabled

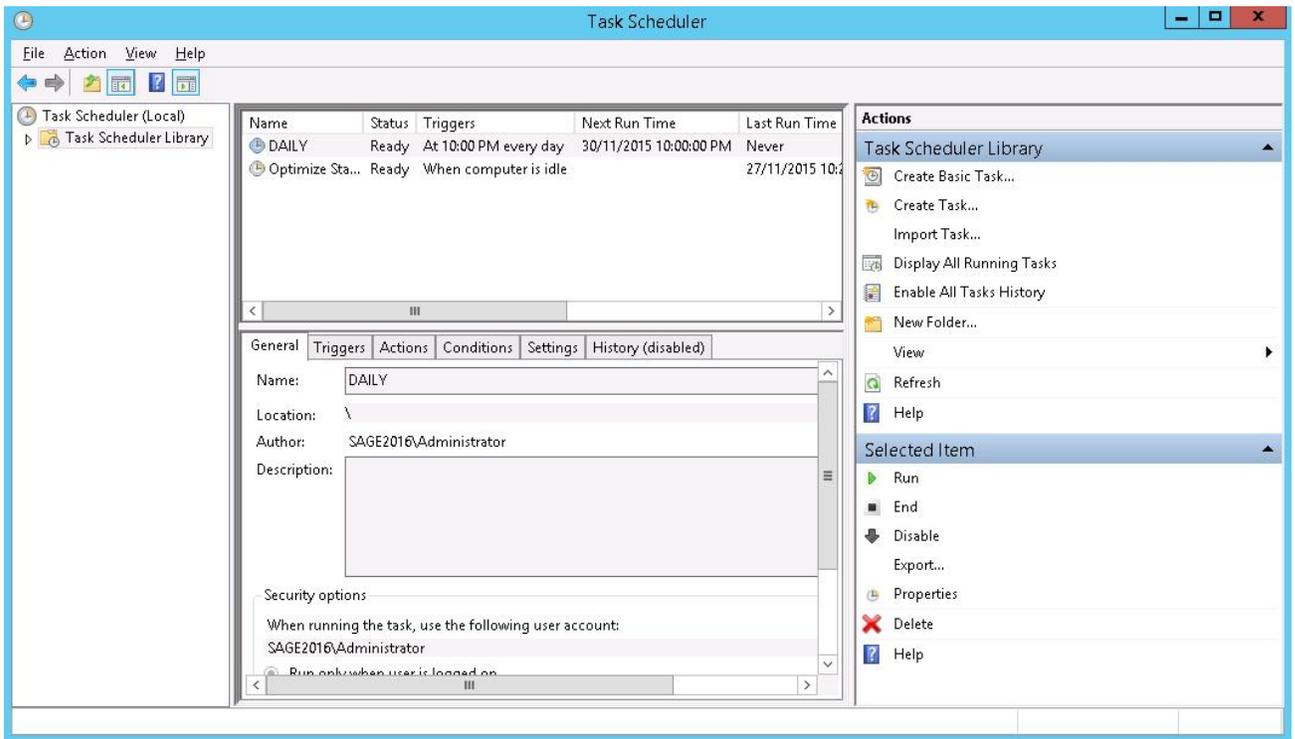
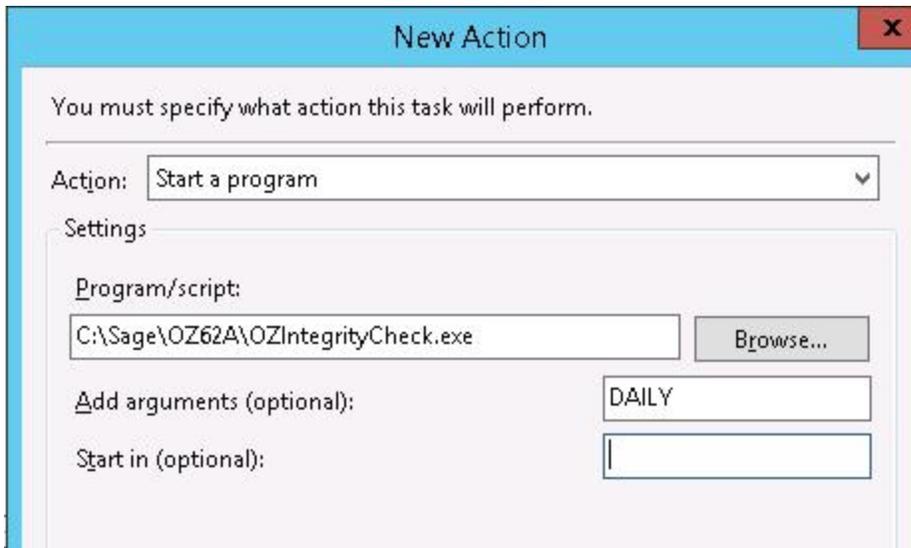
OK Cancel



Add an action to define what runs.

b) Browse to the `..\sage software\sage300\OZXXa\` directory and double click on the `OZProcessScheduler.exe`

c) Fill in the Schedule ID to be scheduled, for example `RUNREPORTS`. This parameter is mandatory for Process Scheduler



Windows Scheduler Error Status Codes

Process Scheduler Integrity Check returns the following error status codes in the windows scheduler > Task Scheduler Library > Last Run Result.

OZProcessScheduler.exe returns different values on error:

Process Scheduler

- 0 = no error (schedule run ok)
- 101 (0x65) = cannot open session - check username and password in Options
- 102 (0x66) = schedule does not exist or subscription expired
- 103 (0x67) = cannot open database - check username and password in Companies

The last run result of the scheduled task shows the status of the last time this particular scheduled task ran

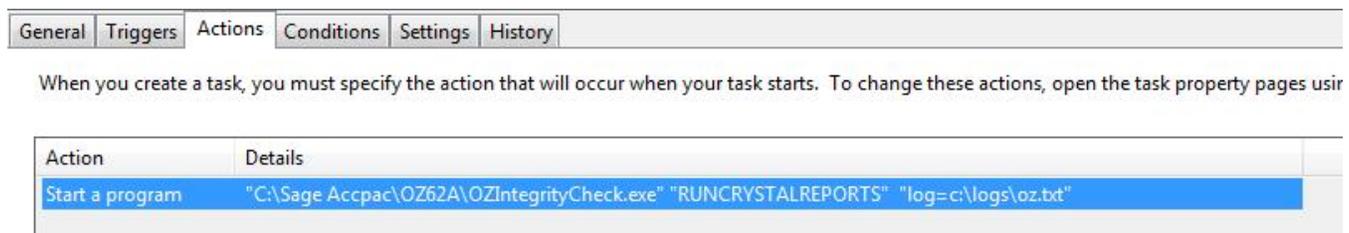
CREATING A LOG FILE WITH PROCESS SCHEDULER

In Windows Task Scheduler – Actions, set the details to run OZProcessScheduler.exe, separated by one space follow with ScheduleID and separated with one space follow with location and name of the log file.

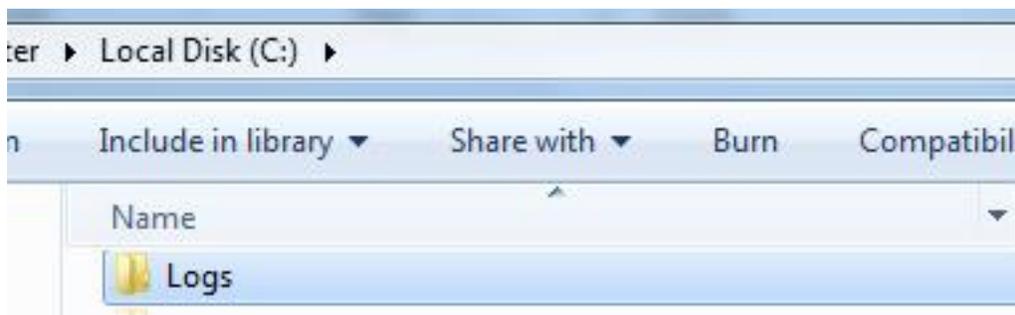
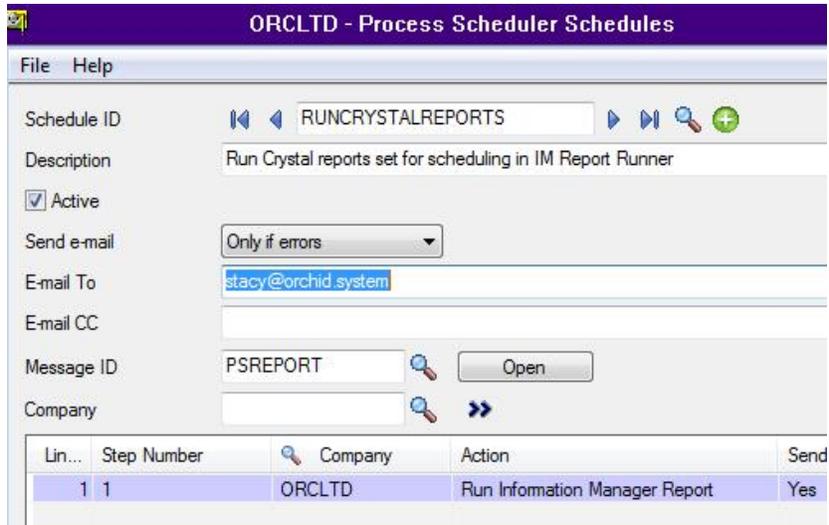
Eg: "C:\Sage 300\OZxxA\OZProcessScheduler.exe" "RUNCRYSTALREPORTS" "log=C:\logs\oz.txt"

Note: Ensure the Logs folder is exist in the drive - C:\logs\.

If copying the path from an email, ensure the quotes are not updated by your email client as curly quotes.



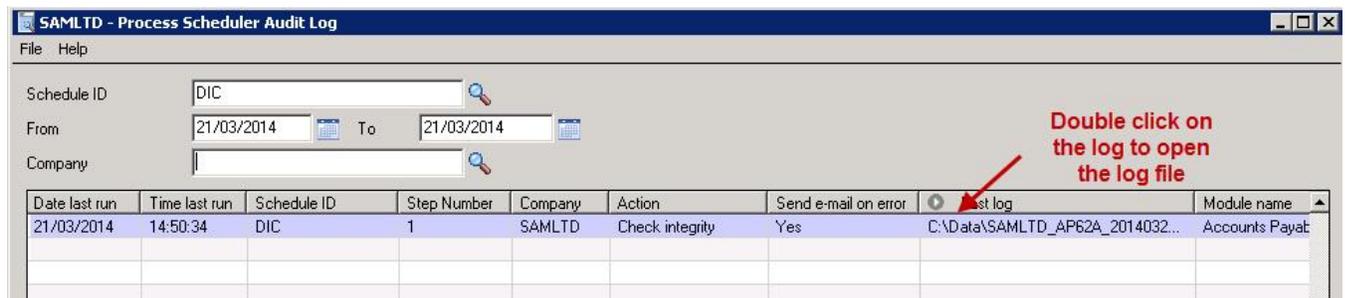
RUNCRYSTALREPORTS is a schedule name in Process Scheduler.



PROCESS SCHEDULER AUDIT LOG

This screen shows the actions run, and the status. The audit log can be filtered by schedule, date and company.

You can also drill to the integrity check log for each of the steps to view the errors at the time of running.



In the process scheduler Audit Log – the “clear log” button clears filtered items.

Process Scheduler Reports

Process Scheduler Print Schedules	62
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PROCESS SCHEDULER PRINT SCHEDULES

The Schedules report lists the actions and the relevant parameters for the actions for each schedule. You can print the report for a range of Schedules.

Information printed on the report

- For the range of schedules selected
- For each schedule, the actions and their parameters are printed

PROCESS SCHEDULER PRINT GL CONSOLIDATION LOG

The G/L Consolidation Log report lists the audit log entries which relate to G/L Consolidation imports and exports.

Information printed on the report

- For the date range specified, all G/L Consolidation export and import actions are listed
- For each export and import action, a total of the debits and credits exported/imported is shown - for reconciliation purposes



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