



# Scheduled Report Enhancement

*ATIMS JMS*

*Release Version 1.11.3 Patch 2*

# Business Need

- ❑ Administration often requests daily reports or stats from line level staff. Fulfilling these requests can become a full time job.
- ❑ The ability to schedule reports to be delivered in automated fashion can free up many man hours of work and provide a consistent set of data.



# ATIMS Solution

- ❑ ATIMS provides a dynamic way to schedule reports.
- ❑ Date entry is presented by reference i.e. “yesterday” or “this month” so that reports where date filters are needed can be made current instead of static.
- ❑ In the current solution, the method in which the scheduling is triggered has been modified. ATIMS needs to perform a one time configuration to turn ON the scheduling feature. Please contact ATIMS staff before first time use.



# Schedule Configuration

- ❑ Reports are scheduled in ADMIN>Interface>Schedule>System Rpts.
- ❑ User(s) must select the report and the category from the drop down and click Create Schedule.

The screenshot shows the ATIMS software interface for scheduling system reports. The top navigation bar includes tabs for User, Global, Master, Housing, System, Operations, Data, Money, Interface, RIMS, and Add On. The 'Interface' tab is active, and the 'Schedule' sub-tab is selected. Below the navigation bar, there are buttons for 'Export', 'Folder Watch', 'SP', 'System Rpts', and 'Custom Rpts'. The main area is titled 'INTERFACE-SCHEDULE SYSTEM REPORTS'. It features two dropdown menus for 'Filter By Category' (set to 'Active Roster') and 'Filter By Category - Report' (set to 'Active Roster - Due for Release List'). There is also an 'SMTP Address' field and a 'Refresh' button. A 'Deleted' checkbox is present, and a 'Create Schedule' button is prominently displayed. Below these elements is a table with columns for 'REPORT', 'S M T W T F S', 'DAY', 'TIME', and 'RECIPIENT'. To the right of the table, there are buttons for 'Clear', 'PDF', and 'Run'. Further down, there are fields for 'Facility', 'Date From', 'Date Thru', and a 'Today' button. Below these are radio buttons for 'Day', 'Week', 'Month', and 'Year', and a 'Charge Flag' dropdown menu. The interface is designed for configuring and scheduling reports within the system.

# Schedule Configuration

- ❑ Enter all required fields.
- ❑ Supports day of the week.
- ❑ Supports Multiple Email Recipients with customizable subject and body.
- ❑ Filters are saved per schedule.

**CRYSTAL SCHEDULE ENTRY**

Category - Report  
Active Roster - Due for Release List

Run Schedule Time  
06:00 \*Schedule Triggers Every 5 Minutes

Weekly  
 Sun  Mon  Tue  Wed  Thu  Fri  Sat

Monthly (1-31)

SMTP Address [Redacted] Outgoing Email Address NoReply@Atims.com

Email Recipient(s)  
MattB@atims.com

Email Subject  
DUE FOR RELEASE LIST

Email body  
THESE INMATES ARE DUE FOR RELEASE TODAY

**Set Filters**

Facility [Dropdown]

Date From 10/24/2016 00:00 Date Thru 10/24/2016 23:59 Today

Day  Week  Month  Year

Date Filter Behavior  
TODAY

Charge Flag [Dropdown]

Buttons: Save and Close, Save, Clear, PDF, Run

# Result

- The report will be delivered via email to the listed recipients at the scheduled time on the scheduled days.

