

# Reports – Timed Automation

## Overview

The **Timed Automation** feature is used to schedule reports to run automatically. These reports can then be setup to either be emailed or saved to the computer. All reports are in PDF format.

- You choose one workstation that will be responsible for running these. Edge **must** be left open or the reports will not run at the prescribed time. If a scheduled time is missed, next time the Edge is opened on this computer the reports will run.
- We strongly recommend setting this up on your server computer or a back-office workstation.
- We recommend you choose a computer that is not used for regular POS use so as to not interfere with conducting business.
- This feature only works with memorized reports.
- **Multi-store users:** You can run this from any location.

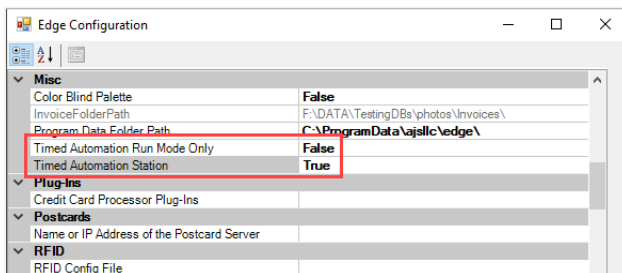
## Setup

### Designate a Timed Automation Station

You must designate one computer to be responsible for running the reports. The computer must be left on and Edge must be running at the scheduled time or the reports will not generate. If a scheduled runtime is missed, it will catch up and generate the reports next time Edge is opened.

To designate a station:

1. Go to the computer you wish to use.
2. In Edge, click **Administrative > Configuration**.
3. Find the **Misc** section and locate the settings **Timed Automation Station** and **Timed Automation Run Mode Only**.



4. Set **Time Automation Station** to **True** to designate this workstation to run reports. Remember that it must be left on.
  - a. Optionally, set **Timed Automation Run Mode Only** to **True** to run Edge in a special mode that does not require a license. You will still need to leave Edge open and it will run in a mode that disables all other functionality, but it will not count against your active workstation licenses.

5. Click **OK** to save your changes.
6. Restart The Edge.

## Memorized Reports

This feature works exclusively with memorized reports. The report must be memorized prior to proceeding.

To memorize a report:

1. Click on the desired report.
2. Set your report criteria.
3. Click **Presets > Memorize This Report**.
4. Complete the form and click **OK** to save your report.

[Click here for more information on memorizing reports.](#)

## Email Configuration

If you intend to email reports, you must have your email settings configured. This feature utilizes the **Internal** email settings found here: **Administrative > Email Settings > Internal**.

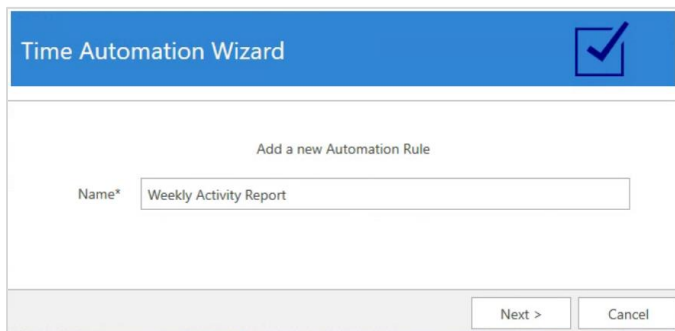
[Click here for more information on configuring email settings.](#)

## Working with Timed Automation Rules

### Creating

To create a **Timed Automation Rule**:

1. Click **Administrative > Automation Rules**.
2. At the bottom, click the **Add Timed Rule** button. This will open the **Timed Automation Wizard**.
3. Enter a **Name** for this rule and click **Next**.



The screenshot shows a dialog box titled "Time Automation Wizard" with a blue header bar containing a white checkmark icon. Below the header, the text "Add a new Automation Rule" is centered. A text input field labeled "Name\*" contains the text "Weekly Activity Report". At the bottom of the dialog, there are two buttons: "Next >" and "Cancel".

4. Choose whether you want to **Email** or **Save** the reports on a timer, then click **Next**.

5. Use the **Report** drop-down to choose which memorized report you want to schedule.

6. Your next options will differ depending on whether you chose to **Email** or **Save** the reports. Click **Next** after completing one of the following:

- a. If you selected **Email**, choose an **Associate** and click **Add to Emails** to add their email address in the **Emails** section. Alternatively, you can type any email address directly into that section as well.

- b. If you selected **Save**, use the **Location** drop-down to choose where to save the reports.

These options control how the report is saved.

<b>Put All Reports in Specified Location</b>	Report will be saved directly to the location specified.
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<b>Prefix Report Name</b>	Report will be saved directly to the location specified and anything typed into the field here will be prepended to the report file name.
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**Add Folder Based on Run Date**

A new folder will be created in the location specified. This folder will be named after the run date, i.e., 01\_25\_2022, and the report will be saved within this folder.

- This next screen is where you set the schedule. Enter a **Run** time at the top, then determine whether you want to run this on a **Daily** or **Monthly** basis.

- Click **Save Rule** after setting the schedule, then click **Finish**.

## Running

Once setup, the rules will automatically run on the designated schedule.

Remember, you **must** leave the computer on and the Edge open on the station you designated as the **Timed Automation Station**. If the Edge is not running, the rules will not run and no reports will be generated.

If a scheduled run is missed because the Edge is not running, it will automatically run the next time the Edge is opened on that computer.

## Viewing

To view all rules:

- Click **Administrative > Automation Rules**.
- A list of all active rules will be displayed.

Rule Type	Rule Trigger	Is Active	Store	Rule Name
Timed Report Run Automation	Automation on a Timer	Yes	All	Weekly Activity Report
Timed Report Run Automation	Automation on a Timer	Yes	All	End of Month Report
Timed Report Run Automation	Automation on a Timer	Yes	All	Weekly Customer Thank You
Timed Report Run Automation	Automation on a Timer	Yes	All	Weekly Attendance
Timed Report Run Automation	Automation on a Timer	Yes	All	Monthly Commission
Timed Report Run Automation	Automation on a Timer	Yes	All	Next Week Customer Occasion

Show Deleted

3. Note that **Task Rules** also appear here; utilize the **Rule Type** filter at the top left if you only want to view **Timed Automation** rules.
4. Deleted rules will be hidden; use the **Show Deleted** checkbox to view them.

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## Deleting/Undeleting

To delete a rule:

1. Click **Administrative > Automation Rules**.
2. Select the rule you wish to delete.
3. Click the **Delete Rule** button. Deleted rules will appear as **Inactive** and will be in red font.

To undelete (reactivate) a rule:

1. Click **Administrative > Automation Rules**.
2. Select the rule you wish to undelete and click **Edit Rule**.
3. The **Timed Automation Wizard** will appear. Click **Next** until you reach the end of the wizard, then click **Finish**. Completing the wizard again in this manner will undelete (reactivate) the rule.