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Category: Technical
 Course: BOS Config.
 Version: 1.1
 Client: Generic
 Software: 2.13.0.0

Configure Automatic Reports

If there are common reports that you frequently use, you can configure them to automatically run and print at a nominated time every day or week.

Hints and Tips

- ✓ If your business is Head Office managed, you must inform SUREfire of the automatic report/s so that when stores are upgraded they don't lose this scheduling (the report is added to the install script; this can be run against all stores to save you manually adding it to each BOS).
- ✓ **Report Setup** lists:
 - all the manual reports located in the **Reports** tab
 - all the reports that run on an automatic schedule; the **Automatic** field is set to **True**.
- ✓ Always **copy** the manual report that you want to automate.
 - Precede the report name with [A] (or similar) to group all the auto reports together.
- ✓ You can multiple automatic schedules for a report.
- ✓ Leave **Report Type** set to **Crystal**.
- ✓ **Automatic Printing** frequency:
 - **Daily**: every day of the week
 - **Weekly**: once a week on the nominated day.
- ✓ If you don't nominate the printer to send the report to, it'll print to the default printer.
 - The Print to **Screen** option isn't used for automated reports.
- ✓ You can select any **Run Time**:
 - The BOS computer and the nominated printer must be powered on; you don't need to be logged into SUREfire.
 - The **Last Run Date** field updates after each time the system has run the report.

Procedure to Automate a Report

1.	From the BOS Reports menu, select Report Setup . <i>*See Hints and Tips if you're a HOS user or a Head Office Managed store.*</i>							
2.	On the Reports tab, select the report from the list. <i>*The report details are populated in the fields.*</i>							
3.	Click .							
4.	In the report Automation Options section, select the Set Automatic Printing check box. <i>*The automation options are now available.*</i>							
5.	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">To run the report:</td> <td style="width: 50%;">then:</td> </tr> <tr> <td>every day Monday – Sunday inclusive</td> <td>select the Automatic Printing option Daily. Select the Run Time.</td> </tr> <tr> <td>once a week</td> <td>select the Automatic Printing option Weekly. Select the Run Time. Select the Week Day you want the report to run.</td> </tr> </table>	To run the report:	then:	every day Monday – Sunday inclusive	select the Automatic Printing option Daily . Select the Run Time .	once a week	select the Automatic Printing option Weekly . Select the Run Time . Select the Week Day you want the report to run.	
To run the report:	then:							
every day Monday – Sunday inclusive	select the Automatic Printing option Daily . Select the Run Time .							
once a week	select the Automatic Printing option Weekly . Select the Run Time . Select the Week Day you want the report to run.							
6.	Select the Print to option Printer .							
7.	Select the Printer Name to send the report to.							
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Hints and Tips

✓ **Parameter Values:**

- The system will use these values each time it runs the report, forward dating by the run frequency selected in step 5.
- Select dynamic dates from the **Date** list (e.g. current, start of week); if you type actual dates, the report will always only return the data for this date.

✓ **Other function options:**

	Only used by SUREfire developers.
	To delete a selected automated report that you no longer want.
	If you select an automatic report, it's sent to the default printer. If you select a manual report, it displays on-screen after you've completed the report parameters screen.

- ✓ The **Surefire Process Monitor** system process actions pending automatic report requests.

- ✓ If your auto report doesn't print on the nominated schedule:

- Double-check you have set the schedule and printer name correctly.
- Manually send a document to the nominated printer, to confirm the printer is functioning correctly. If the print job fails, this indicates a hardware error, not a Surefire error. If the job prints, please contact Surefire Help Desk to investigate further.

8.	<p>Click </p> <p><i>*A second instance of the report is listed in the grid; the Automatic field is set to True.*</i></p>	
9.	<p>Click the Fields tab.</p>	
10.	<p>Select the Parameter Values for the report.</p> <p><i>*Don't change the Field selection on the left; leave it at the system default.*</i></p>	
11.	<p>Click </p> <p><i>*If all the default values are what you want to use, you don't have to press Save.*</i></p>	
12.	<p>To: automate another report</p> <p>then: return to step 2.</p> <hr/> <p>finish</p> <p>click </p>	
13.	<p>On the nominated schedule, collect the automated report/s from the printer.</p>	