

The **Financial** EdgeTM

Queue Guide

090811

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FE-QueueGuide-090811

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With the optional module *Accounting Queue*, you can schedule a sequence of tasks to run automatically and unattended. Because you can set up a queue to run overnight or while you are at lunch, you save time on many tasks. Using *Accounting Queue* frees critical resources — workstations and printers — for other tasks during normal working hours.

Warning: You must have Queue Service installed on a computer in your network to run scheduled queues. This utility regularly checks the database for queues scheduled to run at the current time. For more information about Queue Service, see “Queue Service” on page 6.

You can create a queue to run one time or multiple times, on demand or according to a schedule. You create a queue by adding items one at a time that run sequentially in the order you select. You can view a list of queues scheduled to run and those that have completed running.

If you install Queue Services on *Vista* with User Account Control (UAC) Admin Approval Mode enabled, the UAC Elevation Prompt displays. Contact your system administrator for more information about UAC and entering the necessary credentials.

Accessing and Understanding Accounting Queue

The Queue page in *Administration* is the central location for creating queues in *The Financial Edge*. *Accounting Queue* has a menu bar, toolbar, grid, and tabs to help you create queues with ease. The toolbar and tabs differ somewhat from those elements in other areas of *The Financial Edge*. For more information about common screen elements, see the *Program Basics Guide*.

Above the grid on the Queue page, the action bar has buttons for adding new queues and opening, deleting, validating, scheduling, and finding saved queues. With these buttons you can also view scheduled queues and install Queue Service. The action bar includes commands common throughout *The Financial Edge*. **New Queue**, **Open**, **Delete**, and **Find** function just as they do anywhere else in the program. For more information about common elements, see the *Program Basics Guide*.

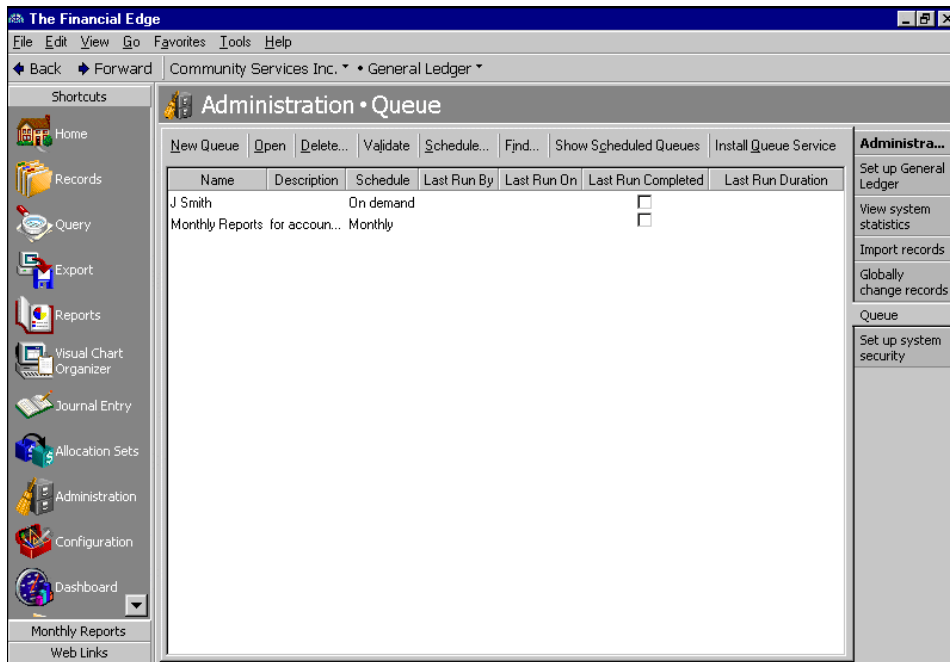
Warning: Deleting a queue permanently removes it from the database. Be sure you have a backup of your database before you delete a queue.

Commands specific to *Accounting Queue* include:

Validate. Click **Validate** to validate items in a queue before the scheduled run time.

Schedule. Select a queue in the grid and click **Schedule** to quickly schedule it to run at a specific time.

Show Scheduled Queues. Click **Show Scheduled Queues** to view a list of scheduled and completed queues.



Finding and Opening Queues

On the navigation bar, click **Administration** and then click **Queue**. This page contains a grid displaying saved queues. On this page you can schedule processes to occur at a time and frequency you select.

Glossary: A queue is a sequence of tasks, such as mailings, queries, and reports, that runs automatically at a selected time.

To add a queue, click **New Queue** on the action bar. To open an existing queue, select a queue in the grid and click **Open** on the action bar. You can create new queues from existing queues. For more information about adding queues, see “Adding a queue” on page 7.

Queue Tabs

You use the tabs to specify parameters for a queue and the information included in the processes when it runs. A queue includes the Queue, Processing, and Miscellaneous tabs. To access the tabs in a queue, select a queue in the grid and click **Open** on the action bar and then select a tab.

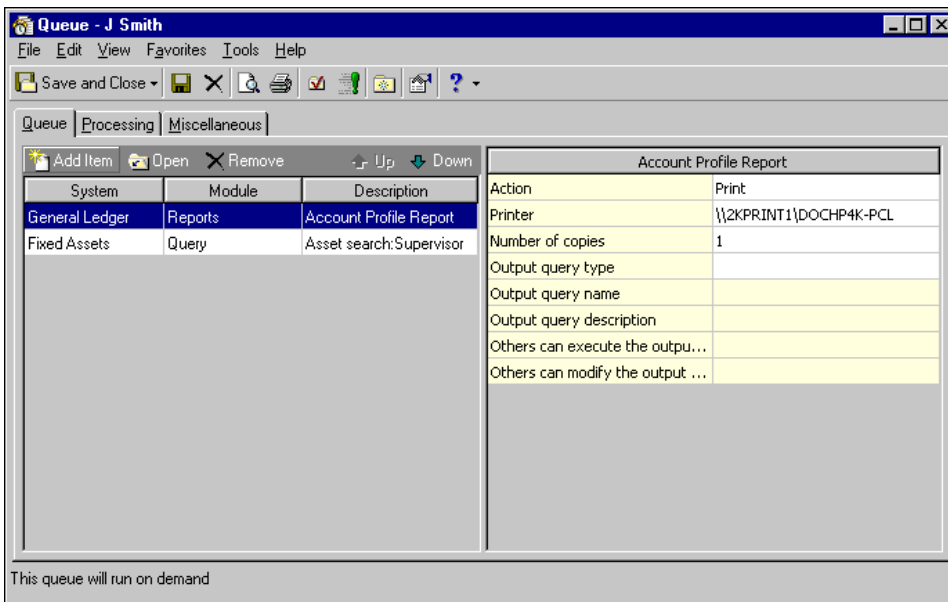
Queue Tab

On the Queue tab you add and select parameters for items in the queue. For example, you can print monthly reports so they are ready to examine when you need them or refresh your dashboard every evening so the latest data appears when you log in each morning.

You can open items in the queue and remove items you no longer run. To view parameters for an item in the queue, select the row in the grid on the left and view settings on the right.

Note: You can refresh dashboards and queries. Because Refresh is the only action you can perform for dashboards, you must select that action when you initially add the item to the queue. For more information about refreshing queries, see the *Query Guide*. For more information about refreshing dashboards, see the *Dashboard Guide for The Financial Edge*.

All actions do not appear for every item in a queue. For example, when you run a global change, the only action you can perform is Change. The only available action for dashboards is Refresh.



Glossary: An item is a specific task in a queue and appears as a row in the grid on the Queue tab. It consists of the system, module, and category for the task.

Add Item. When you click **Add Item** on the toolbar, the Add items to Queue screen appears so you can select an item for the queue. You can select the program, area of *The Financial Edge*, and category and then define the action to take when the queue runs. For more information about adding items to a queue, see “Adding a queue” on page 7.

Open. When you select an item in the grid and click **Open** on the toolbar, the record for the item appears. For example, if you open a Trial Balance Report, the program opens the saved report from *General Ledger*. In the open report, you can view or change parameters just as when you access it from *Reports*.

Remove. To remove an item from a queue, select a row in the grid and click **Remove** on the toolbar. Removing an item from a queue does not delete the item from the database; it simply removes it from being processed in the queue.

Up and Down. To change the order in which the program processes items in the queue, select a row in the grid and click **Up** or **Down** on the toolbar.

Processing Tab

On the Processing tab, you select when and how often the queue runs. You can select what to do if an error occurs and delete one-time queues after they run.

The screenshot shows the 'Queue - reconcile' dialog box with the 'Processing' tab selected. The 'Frequency' dropdown is set to 'Monthly', 'Run as' is 'Supervisor', and 'Run on' is empty. Under the 'Every' section, 'Every 1 month(s) on the Last Day' is selected, with a starting time of '12:00:00 PM'. The 'Queue schedule start date' is '04/01/2005' and the 'End date' is empty. The 'Next queue run date/time' is '04/01/2005 12:00:00 PM'. There are two unchecked checkboxes: 'If an error occurs while running this queue, stop processing' and 'If all items are processed successfully, delete this queue'. A status bar at the bottom indicates 'This queue will run monthly'.

Note: If you select On demand in the **Frequency** field, you can select a schedule later by selecting the queue on the Queue page and clicking **Schedule**.

Frequency. In the **Frequency** field, select On demand, Hourly, Weekly, Monthly, or Semi-monthly. If you select On demand, enter a date and time in the **Next queue run date/time** field.

If you select Hourly, Weekly, Monthly, or Semi-monthly, additional selections appear so you can designate exactly how often the queue runs. For more information about frequency, see “Scheduling Frequency of Queues” on page 16.

Run as. In the **Run as** field, select which user you want to run the queue as.

Run on. In the **Run on** field, you can enter the system from which you want to run the queue.

Queue schedule start date/End date. In the **Queue schedule start date** and **End date** fields, enter the dates the queue should first run and when it should stop running. If you do not enter an end date, the queue runs according to the frequency you select. Based on frequency and start date selections, the date and time for the queue to run again appears in the **Next queue run date/time** field.

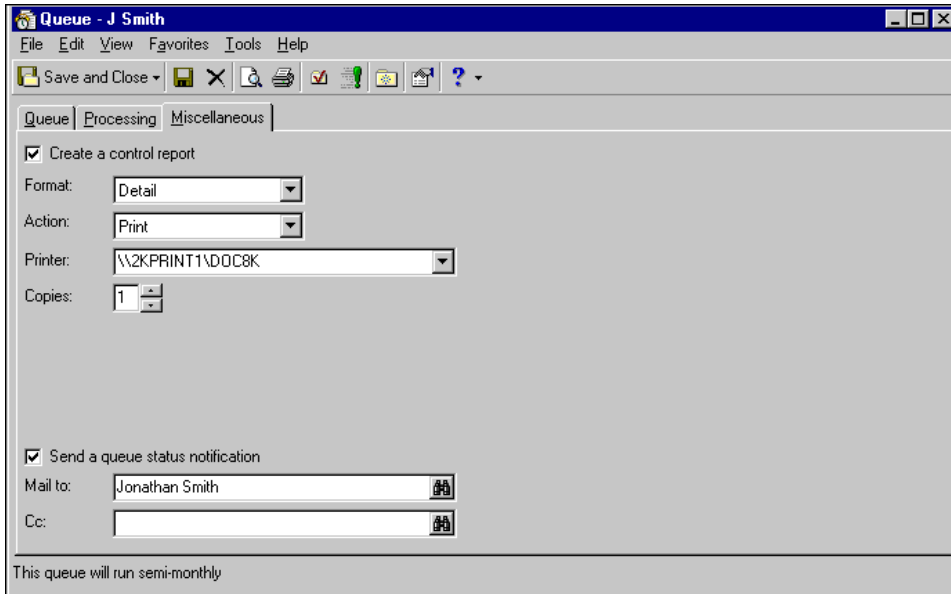
If an error occurs while running this queue, stop processing. To stop the queue if the program encounters an error, mark **If an error occurs while running this queue, stop processing**. If you leave this checkbox unmarked and an error occurs, the program proceeds to the next task in the list.

Warning: Before marking **If all items are processed successfully, delete this queue**, be sure you do not want to save the queue to run again later.

If all items are processed successfully, delete this queue. You can mark **If all items are processed successfully, delete this queue** only if you select On demand in the **Frequency** field.

Miscellaneous Tab

On the Miscellaneous tab, you can print a control report of the queue results and send notification of the status of the queue by email to a designated recipient.



Tip: In Options you can select a default to print a control report. You can also select the default format and action for the control report. For more information about queue options, see the Options chapter in the *Program Basics Guide*.

Create a control report. To create a control report after the queue finishes, mark **Create a control report** and select Detail or Summary in the **Format** field. If you select Detail, all the information from the grid on the Queue tab appears on the report. In the **Action** field, you can select whether to export the report, send the report as email, or print the report.

If you export the control report, the **File name** and **Data format** fields appear so you can select where to send the report. For more information about exporting in *Accounting Queue*, see “Exporting Queue Schedules” on page 19.

If you send the control report as email, the **Mail to** and **Cc** fields appear so you can enter the email addresses of recipients. You can also enter the subject of the message in the **Subject** field. In the **Data format** field, you can select a format for the report, such as comma-separated values, spreadsheet, or *Word* document.

If you mark **Create a control report**, the **Printer** and **Copies** fields appear so you can select a printer and the number of copies to print.

Send a queue status notification. To send a notification the queue is complete, you can mark **Send a queue status notification** and enter e-mail addresses in the **Mail to** and **Cc** fields.

Queue Service

Queue Service is a utility required to run scheduled queues. With Queue Service, a queue can run on a computer without a user being logged in; however, the computer must be turned on for the queue to run. All computers with Queue Service routinely check the database for queues scheduled to run at the current time. The first computer to find a queue at the scheduled start time processes the queue. You cannot designate on which computer a scheduled queue runs if you have the service installed on more than one computer.

Note: Queue Service must be installed to schedule queues. This process regularly checks the database for queues scheduled to run at the current time. A queue can run on a computer without a user being logged in; however, the computer must be turned on for the queue to run.

You can easily install and uninstall this utility by clicking **Install Queue Service** or **Uninstall Queue Service** on the action bar of the Queue page. If your organization runs *The Financial Edge* on a network, we recommend setting up a separate dedicated computer, not a user's computer, to operate as the queue "server". This ensures a user's workstation is not suddenly slowed because it is running another person's queue tasks. Also, it promotes the integrity of your regular server.

Once you install Queue Service, you log on to it with a local system account. For printing and exporting requirements, we recommend you change the service from the default local system account to a user account with full rights.

If you install Queue Services on *Vista* with User Account Control (UAC) Admin Approval Mode enabled, the UAC Elevation Prompt displays. Contact your system administrator for more information about UAC and entering the necessary credentials.

Managing Queues

From the Queue page in *Administration*, you can manage all queue activities. You can add new queues or open saved queues; cancel, validate, and schedule queues; and show scheduled queues.

Warning: Be careful not to click the **Delete** button on the action bar. You may inadvertently delete the entire queue and not just the item.

If you no longer want to run an item in a queue, you can easily remove it. Open the queue, select the item you want to remove, and click **Remove** on the toolbar. Be careful not to click the **Delete** button on the action bar. You may inadvertently remove the entire queue from the database.

You install Queue Service, a utility required to run scheduled queues, from the Queue page. With Queue Service, queues can run on a computer without a user being logged in. Computers with Queue Service routinely check the database for queues scheduled to run. For more information about Queue Service, see "Queue Service" on page 6.

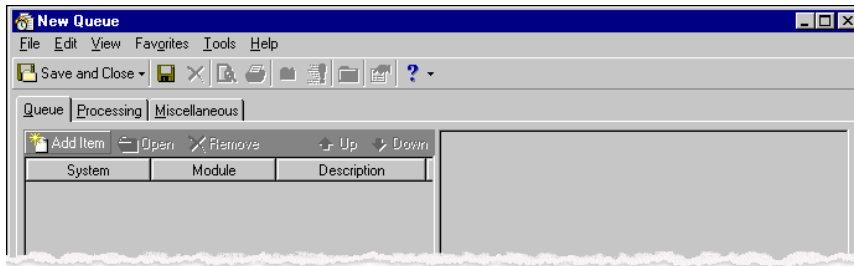
Adding Queues

Adding a queue is a simple process; however, you need to consider the items to include within the same queue according to how often each will run. For example, to print one kind of report at the end of every month and another report to print quarterly, add these items to separate queues so you can use a recurring schedule. The program processes all items in a queue when the queue runs. We encourage you to try these procedures with the sample database before you create your own to use with your data.

▶ Adding a queue

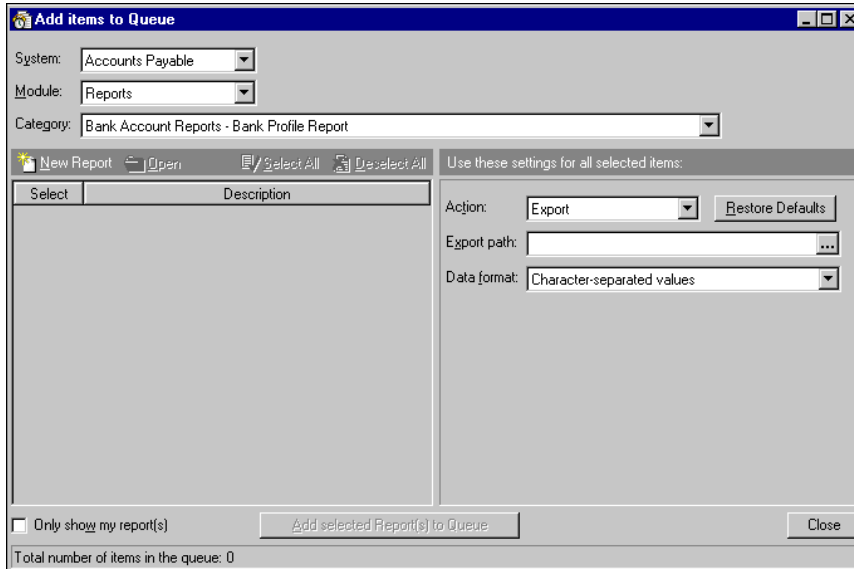
Scenario: Your accounting manager has asked you to send a report by email to him each month. Because you know the report information depends on an established query, you also need to refresh the query before running the report. The manager wants the cash disbursement journal named PreCheck Report in an *Excel* spreadsheet. The query is an account query of fund 02 balances.

1. From the Queue page in *Administration*, click **New Queue** on the action bar. The New Queue screen appears.



Tip: The settings on the Add items to Queue screen default to options selected on the Administration tab in Options. For more information about defining options, see the Options chapter of the *Program Basics Guide for The Financial Edge*.

2. On the action bar, click **Add Item**. The Add items to Queue screen appears.



Note: Depending on the programs you have, you can select from “Accounts Payable”, “Accounts Receivable”, “Cash Receipts”, “Fixed Assets”, “General Ledger” and “Student Billing” in the **System** field.

3. In the **System** field, select “General Ledger”.
4. In the **Module** field, select “Query”.
5. In the **Category** field, select “Account”. Saved account queries appear in the grid on the left of the screen.

6. In the **Description** column, mark the checkbox in the **Select** column next to “Fund 02 Balances”.

Select	Description
<input type="checkbox"/>	Account search:barton
<input type="checkbox"/>	Account search:jeff
<input type="checkbox"/>	Account search:ryan
<input type="checkbox"/>	Account search:Supervisor
<input checked="" type="checkbox"/>	Fund 02 Balances
<input type="checkbox"/>	Income Statement Accounts
<input type="checkbox"/>	Project Balances

7. In the **Use these settings for all selected items** frame, select “Refresh” in the **Action** field and click **Add Selected Query(s) to Queue**. For more information about selecting the action for an item, see “Selecting Queue Actions” on page 11.

Note: If you add the query after you add the report, but the query should be refreshed before the report runs, you can use the **Up** and **Down** arrow buttons to move the order of the items. The queue starts processing items at the top and goes down the list.

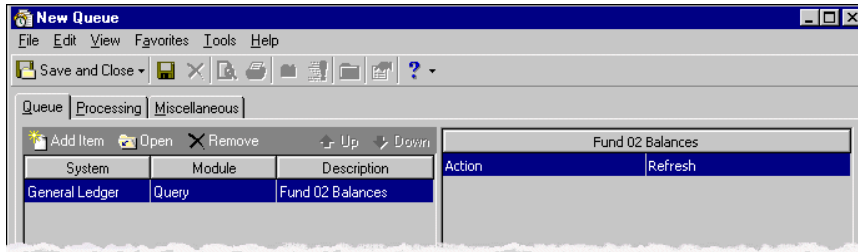
8. To add the report to the queue, in the **System** field, select “Accounts Payable”.
9. In the **Module** field, select “Reports”.
10. In the **Category** field, select “Vendor Reports – Cash Disbursement Journals”. Saved cash disbursement journal reports appear in the grid on the left of the Add items to Queue screen.
11. In the **Description** column, mark the checkbox in the **Select** column next to “PreCheck Report”.
12. In the **Use these settings for all selected items** frame, select “Send as mail” in the **Action** field.
13. In the **Mail to** field, enter your accounting manager’s email address or click the binoculars to search for the address.
- In the **Subject** field, enter “PreCheck Report Info”.
14. In the **Data format** field, select “Excel 5.0”.

Select	Description
<input checked="" type="checkbox"/>	PreCheck Report

15. Click **Add Selected Report(s) to Queue**.

Note: We recommend you review selections for each item added to the queue by selecting the item on the left and viewing them on the right. To edit selections, click **Open** on the action bar. To remove a selection from the queue, click **Remove**.

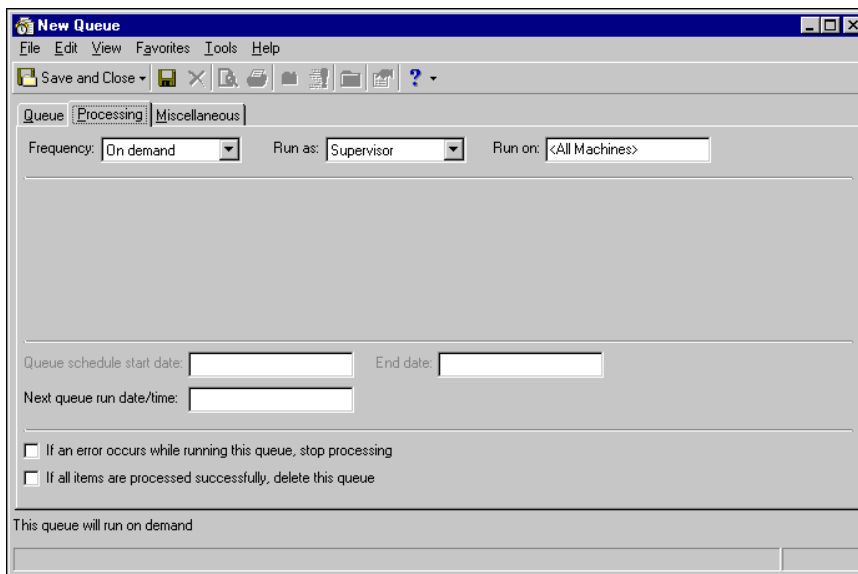
- Click **Close**. You return to the Queue tab, and the report appears in the grid.



- Select the Processing tab.

Note: If you select On demand in the **Frequency** field, you can select a schedule later by selecting the queue on the Queue page and clicking **Schedule**.

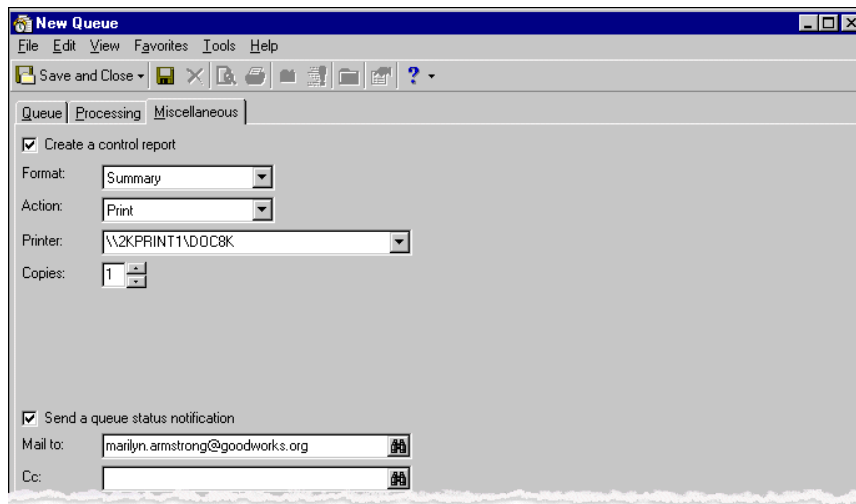
- In the **Frequency** field, select “Monthly”. In the fields that appear, select the day and time to run the queue.
- Because the program should refresh the query with no errors before running the report, mark **If an error occurs while running this queue, stop processing**. If you leave this checkbox unmarked, the program stops processing the task in which the error is encountered and begins processing the next task.



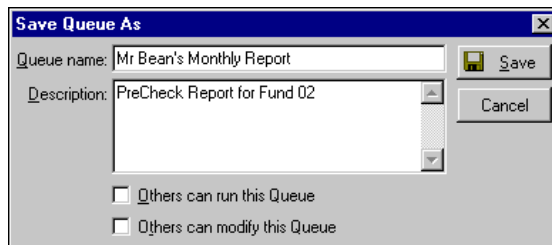
- Select the Miscellaneous tab.
- To view a control report containing results after the queue runs, mark **Create a control report**.
- In the **Format** field, select “Summary”.
- In the **Action** field, select “Print”, and select your printer in the **Printer** field. In the **Copies** field, select the number of copies to print.

Note: The queue status notification indicates whether the program processes each item in the queue successfully. If the queue fails, the email provides a reason.

24. To be notified by email when the queue finishes processing, mark **Send a queue status notification**. In the **Mail to** field, enter your email address.



25. To save the queue, click **Save and Close**. The Save Queue As screen appears. In the **Queue name** and **Description** fields, enter a name and description for the queue.



26. Click **Save**. The program saves the new queue, and you return to the Queue page. The queue appears in the grid and is ready to run as scheduled.

Selecting Queue Actions

When you add an item to a queue, you must select an action for the item. For example, when you add a report, you can select to export or print the report or send it as email when the queue runs.

All actions do not appear for every item in a queue. For example, when you make a global change, the only available action is Change. The only action for dashboards is Refresh. Actions and the areas of **The Financial Edge** in which you can perform them include:

- Change — Globally change records in *Administration* (For more information about globally changing records, see the Global Change chapter of the *Administration Guide for The Financial Edge*.)
- Import — Import records in *Administration* (For more information about importing, see the *Import Guide*.)
- Export — *Mail, Reports, Query*
- Send as Mail — *Mail, Reports, Query*
- Print — *Mail, Reports, Query*
- Update — *Plug-ins* (For more information about plug-ins, see the Program Basics chapter of the *Program Basics Guide*.)
- Refresh — *Query, Dashboard* (For more information about queries, see the *The Query Guide*. For more information about dashboards, see *The Dashboard Guide for The Financial Edge*.)

Note: You can allocate funds only if you have the optional module *Allocation Management*.

- Allocate — *Allocation Sets* (For more information about allocation sets, see the *The Allocation Management Guide*.)
- Post — Post to **General Ledger** in *Administration* (For more information about posting to **General Ledger**, see the *Administration Guide for The Financial Edge*.)

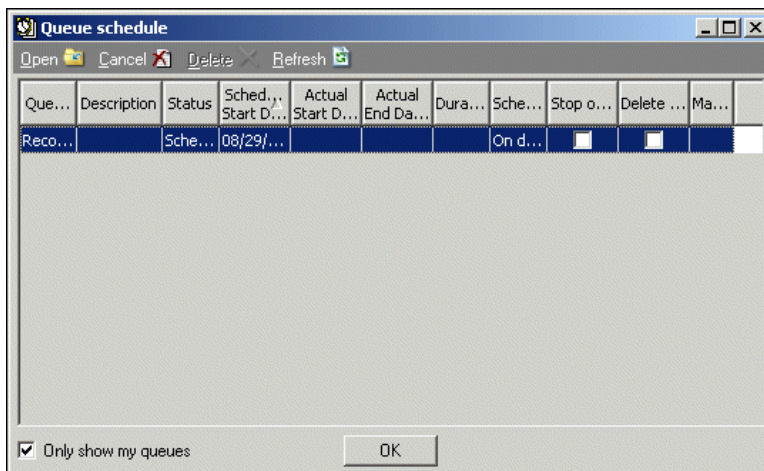
Deleting and Canceling Queues

You can delete a queue or cancel a queue without deleting it. Deleting permanently removes the queue from the database. To delete a queue, select a queue from the grid on the Queue page and click **Delete** on the toolbar. We strongly recommend you cancel a queue rather than delete it. Deleting a queue permanently removes it from the database. Be sure you have a backup of your database before you delete any record in *The Financial Edge*.

Canceling a queue

Warning: If you run a queue on demand and do not want to save it, you can mark **If all items are processed successfully, delete this queue**. Before marking the checkbox to delete the queue, be sure you do not want to save it to run again later.

1. From the Queue page, click **Show Scheduled Queues** on the toolbar. The Show Scheduled Queues screen appears.



Note: To limit the queues appearing in the grid, mark **Only show my queues**.

2. Select the queue to cancel and click **Cancel** on the action bar. The status of the queue changes from “Scheduled” to “Cancelled” and remains in your database.

Managing Queue Information

In *Accounting Queue*, you can validate queues, print profile reports, and view scheduling information. To quickly open a recently accessed queue, select **File, Recently Accessed Queues** from the menu bar on the Queue page or from an open queue and open the queue from the list.

Warning: We strongly recommend you preview any report before printing it. You can view and make changes to selections before printing.

You can view the name and description of actions selected for each item in a queue, export queue information, and print a list of queues and profile reports.

Validating Queues

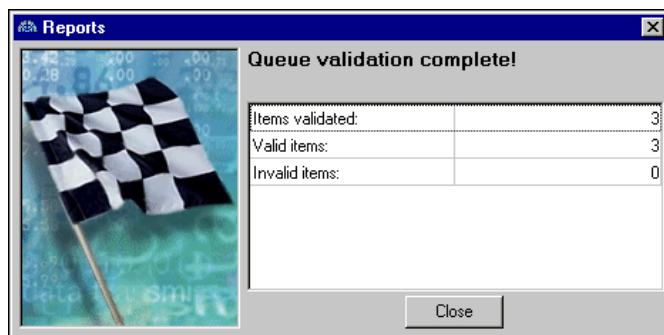
When you validate a queue, *The Financial Edge* examines all information entered in the queue to determine whether any data entry errors exist. For example, the program checks to see that:

- Required fields are present.
- Paths for all export file names are valid.
- Printers for all printed information are present.
- Output queries do not have duplicate names.
- Export files do not have duplicate names.

► Validating a queue

Tip: The program automatically validates items in a queue when it processes them, but you can validate items before the scheduled run time.

1. On the Queue page, select a queue in the grid and click **Validate** on the action bar. A status bar appears, showing the progress of the validation.
2. When the program finishes validating the queue, a screen displays the number of items validated in the queue and the number of valid and invalid items in the queue.



3. To return to the Queue page, click **Close**.

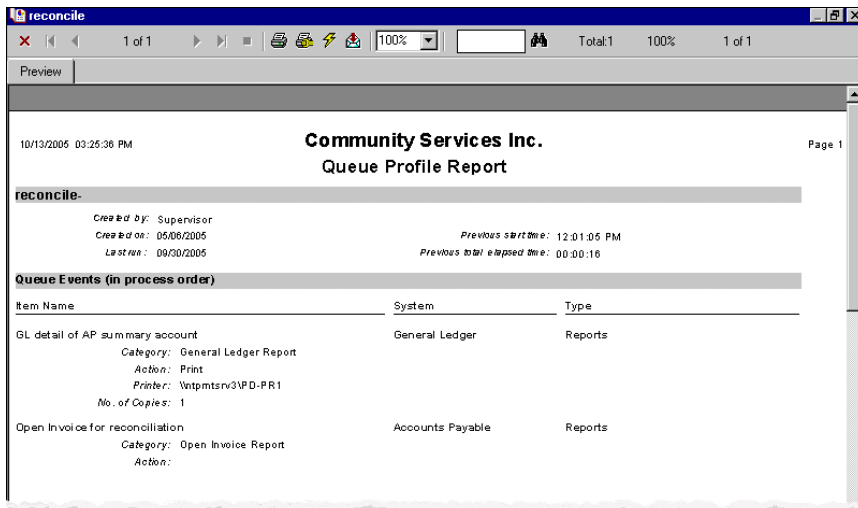
Printing Queue Profile Reports

From an open queue, you can preview or print a summary of selections made for the queue. The reports lists each item in the order it is to be processed. Details appear for each item, such as the category and action. Other information in the report includes who created the queue, dates the queue was created and last run, and the previous start time.

► Printing a queue profile report

1. From an open queue, click the **Preview** button on the action bar. For more information about opening a queue, see “Accessing and Understanding Accounting Queue” on page 2.

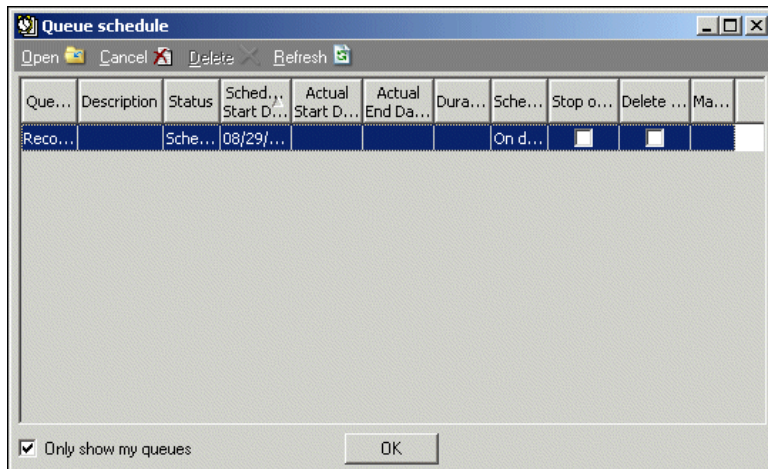
- The preview screen for the Queue Profile Report appears so you can view specific information about the queue.



- When you finish viewing, close the screen to return to the queue.
- To print the profile report, click the **Print** button on the toolbar. The program prints the report on your selected printer. For more information about setting up printers to use in *Accounting Queue*, see the Program Basics chapter of the *Program Basics Guide*.

Viewing Schedule Information

On the Queue page, you can view information about scheduled queues that have not run yet and for completed queues. To view queue names, statuses, and other information, click **Show Scheduled Queues** on the action bar. The Queue schedule screen appears. It is for informational purposes only; you cannot add or edit data on this screen. To edit a queue, you can open it from this screen and save your changes. For more information about opening a queue, see “Accessing and Understanding Accounting Queue” on page 2.



Scheduling Queues

You can create and save queues to run recurring tasks according to a specific schedule. For example, if you run an Open Invoice Report at the end of every month, you can create and schedule a queue to run the report automatically on the last day of each month.

Warning: You must have Queue Service installed on a computer in your network to run scheduled queues. This utility regularly checks the database for queues scheduled to run at the current time. For more information about this utility, see “Queue Service” on page 6.

When running a scheduled queue, the program applies security rights of the person who originally adds the queue. Even if a different person edits or runs the queue, the program uses the security rights of the original creator. Therefore, you may consider not allowing anyone else to run or modify a queue that you create. If you do not allow others to run the queue, you can still run it on a server computer because you initiate the schedule.

Any security rights or restrictions you have for mailings and reports or for viewing, editing, adding, or deleting remain in effect when a queue runs. For example, if you have rights to view only certain accounts, you can run reports on only those accounts. For more information about security, see the Security chapter of the *Administration Guide for The Financial Edge*.

Scheduling Requirements

We have identified several requirements to ensure a queue that runs smoothly and successfully. We strongly encourage you to review and complete these requirements before creating a queue.

Warning: You cannot designate the computer on which a scheduled queue runs if you are on a network and Queue Service is installed on more than one computer. If selected queue actions depend on a specific computer, use **Run Now**.

Queue Service. You must install Queue Service on at least one computer in your network. We recommend installing Queue Service on a separate computer, not a user’s computer, to operate as the Queue server. You can easily install and uninstall this utility by clicking **Install Queue Service** or **Uninstall Queue Service** on the action bar of the Queue page.

Power. At least one computer with Queue Service installed must have its power turned on at the time the queue is scheduled.

Windows. The computer with Queue Service installed must have Internet Information Services (IIS) and its subcomponent SMTP installed.

Note: If you use a local printer and are not using a standalone computer, we recommend using **Run Now** instead of scheduling the queue.

Printing. If actions include printing and you are on a network, you must select an accessible printer. Otherwise, if the scheduled queue runs on a computer without the selected local printer, the program cannot run the queue successfully.

Sending email. If actions include sending email, be sure you have entered the address correctly. When you create a queue to send as email, the program validates addresses if:

- The addresses are in your address book.
- Microsoft *Outlook* is running at the time you save the queue.
- The cdo.dll is installed on your computer.

Warning: The port 25 setting must be set up by a system administrator or an IT technician before you send mail during a scheduled queue run.

If you send an email outside your organization's internal mail system during a queue run, you must have port 25 open. This enables mail to be sent beyond your organization's firewall. In lieu of opening port 25, you can send email to an internal address and set the email to be forwarded from there. If you are unsure about port 25 settings, contact your system administrator or IT technician.

Exporting. If actions include exporting, the location in which you save the export file must be a shared file on your network. If you designate a location on a hard drive (for example, C:\), the program saves the export file to the hard drive of the computer that ran the queue and you may not be able to access it easily later.

To ensure all network locations are accessible, when exporting or printing we recommend you change the service from the default local system account to a user account with full rights.

Scheduling Frequency of Queues

You can schedule queues on the Processing tab of an open queue. For more information about this tab, see "Processing Tab" on page 5. You can select a specific frequency: hourly, weekly, monthly, or semi-monthly. If you run a particular queue only sporadically, you can select to process it on demand.

Tip: To run a queue without opening it, right-click the queue and select **Run Now**.

If you set up a recurring queue, you can schedule the time of day the queue starts processing. You must also select the first scheduled start date. If you select an end date, the queue will not run past this date. If you do not enter an end date, the queue runs indefinitely, in compliance with the other frequency information you select.

Note: If you select On demand in the **Frequency** field, you can select a schedule later by selecting the queue on the Queue page and clicking **Schedule**.

According to the frequency information you select, the next run time for the queue defaults in the **Next queue run date/time** field. You can check this at any time; the program updates the date and time after each queue runs.

► Scheduling a recurring queue

In this example, we schedule a queue to run quarterly on the last day of the month at 7:00 p.m.

Warning: You must have Queue Service installed on a computer in your network to run scheduled queues. This utility regularly checks the database for queues scheduled to run at the current time. For more information about this utility, see "Queue Service" on page 6.

1. From an open queue, select the Processing tab.
2. In the **Frequency** field, select "Monthly".

3. Mark the second option and select values in the empty fields: **Every [3] month(s) on the [Last] [Day], starting at [7:00:00 pm].**

Tip: To run an open queue immediately, select **Tools, Run** or click the **Run** button on the action bar. The queue runs immediately on your computer and closes automatically.

4. In the **Queue schedule start date** field, enter “08/31/2003”. The queue will run on August 31. “08/31/2003”, the next scheduled time for the queue to run, appears automatically in the **Next queue run date/time** field. You cannot edit this field. You can make changes only to the **Frequency** and **Queue schedule start date** fields.

In the **End date** field, enter the date you want the queue to stop running automatically. If you leave this field empty, the queue runs according to schedule indefinitely.

5. Click **Save and Close** to save your changes and return to the Queue page.

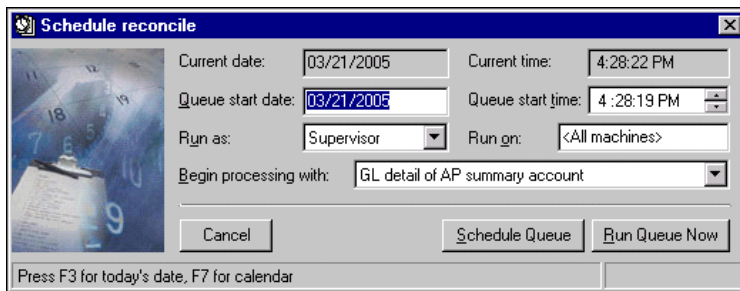
► Scheduling a queue for one run time

On the Queue page, you can quickly schedule a queue to run at a specific time.

Warning: You must have Queue Service installed on a computer in your network to run scheduled queues. This utility regularly checks the database for queues scheduled to run at the current time. For more information about this utility, see “Queue Service” on page 6.

1. On the Queue page, select the queue to run and click **Schedule** on the toolbar. The schedule screen for the selected queue appears.
2. In the **Queue start date** field, enter the date to run the queue.
3. In the **Queue start time** field, edit the time to start the queue. You can click in each section (hour, minute, second) and enter the changes or use the arrow buttons to select a start time.

- If the queue contains more than one item, in the **Begin processing with** field, select the item to process first.



Note: To run the queue immediately, click **Run Queue Now**.

- Click **Schedule Queue**. You return to the Queue page, and the queue will run at the time you entered.

Sharing Queue Information

You can use information from queues in other software applications or by printing hard copies. For example, you can export the queue or the schedule to Microsoft *Excel* or *Crystal Reports*. For more information about setting up printers to use in *Accounting Queue*, see the Program Basics chapter of the *Program Basics Guide*.

Exporting Queues

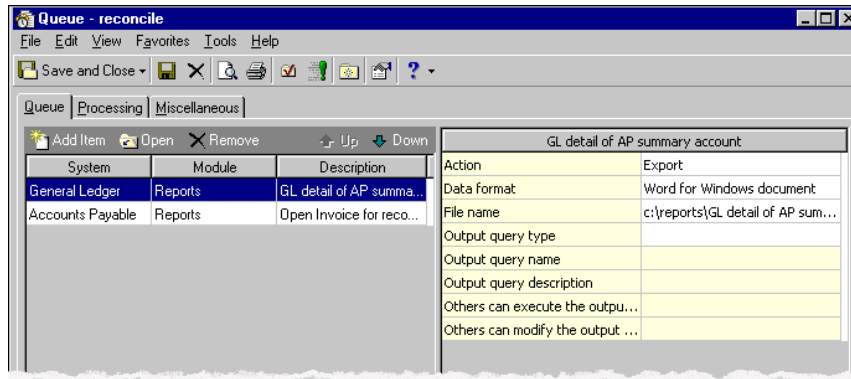
If you select Export as an action, you can use the information from a queue in another software application, such as Microsoft *Excel*. Exporting sends the information from the database to another software application using a data file. For more information about exporting in *The Financial Edge*, see the *Export Guide*.

► Exporting a queue

Note: You can export queries, mailings, and reports.

- On the Queue tab of an open queue, select the item to export.
- In the **Action** row in the grid on the right, select "Export".
- In the **Data format** row, select a format for the data file.
- In the **File name** row, enter a file name or click the ellipsis to browse for the folder in which to save the export file.

Depending on the type of information you export, additional selections vary.



- To save your selections, click the **Save** button on the action bar. The next time the queue runs, the program exports the information to the file you selected.

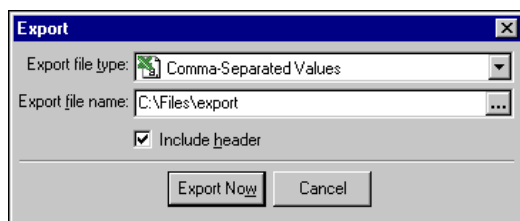
Exporting Queue Schedules

You can export a queue schedule into a worksheet or other database application.

▶ Exporting a queue schedule to a worksheet

Tip: To export to *Excel*, select a queue in the grid and right-click. Select **Export Queue Grid to Excel** from the submenu, and *Excel* automatically displays the schedule information.

- On the Queue page, select a queue in the grid and right-click. Select **Export Queue Grid** from the submenu. The Export screen appears.
- In the **Export file type** field, select a file type. In the **Export file name** field, enter the location to save the file or click the ellipsis to browse to the folder.



- Click **Export Now**. The program exports the information to the location you entered, and you return to the Queue page.

Sending Queue Results as Email

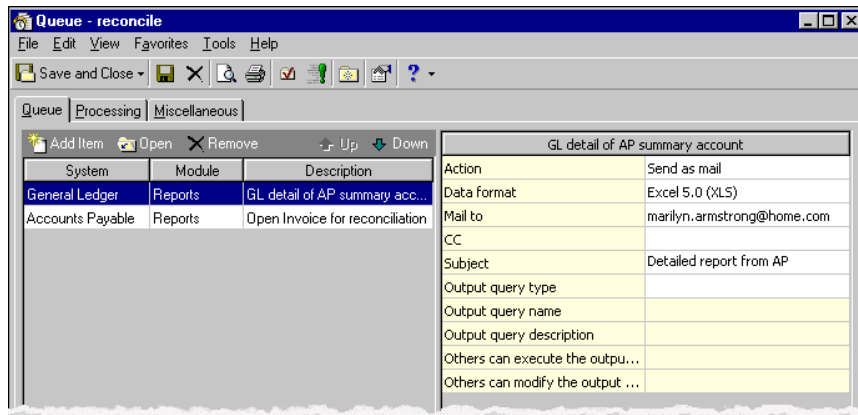
In *The Financial Edge*, you can share information with other people through email. For example, you can send the information from a report to another user for further analysis or to use in other applications. When you send information through email, you perform two functions: changing the format of the information to a data file and sending this data file to another person.

▶ Sending queue results as email

Note: You can send queries, mailings, and reports as email.

1. On the Queue tab of an open queue, select the item to send as email. For more information about opening queues, see “Finding and Opening Queues” on page 3.
2. In the **Action** row in the grid on the right, select “Send as mail”.
3. In the **Data format** row, select a format for the file.
4. In the **Mail to** row, enter an email address or click the binoculars to search for the address.

To send the email to another recipient, enter a second email address in the **Cc:** field. Enter any additional information about the message in the **Subject** field.



5. To save your selections, click the **Save** button. The next time the queue runs, the program sends the selected information as email.

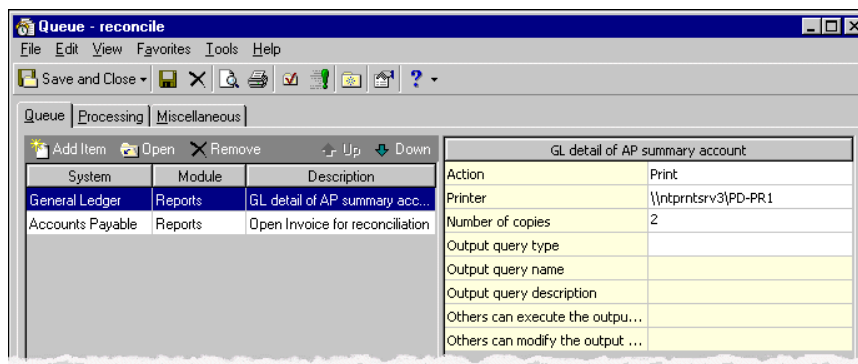
Printing from Queues

If you select Print as an action, the program prints a hard copy of the information processed. For more information about setting up printers to use in *Accounting Queue*, see the *Program Basics Guide*.

Printing from a queue

Note: You can print mailings, reports, and queries.

1. On the Queue tab of an open queue, select the item to print. For more information about opening queues, see “Finding and Opening Queues” on page 3.
2. In the **Action** row in the grid on the right, select “Print”.
3. In the **Printer** row, select the printer to use.
4. In the **Number of copies** row, enter the number of copies to print.



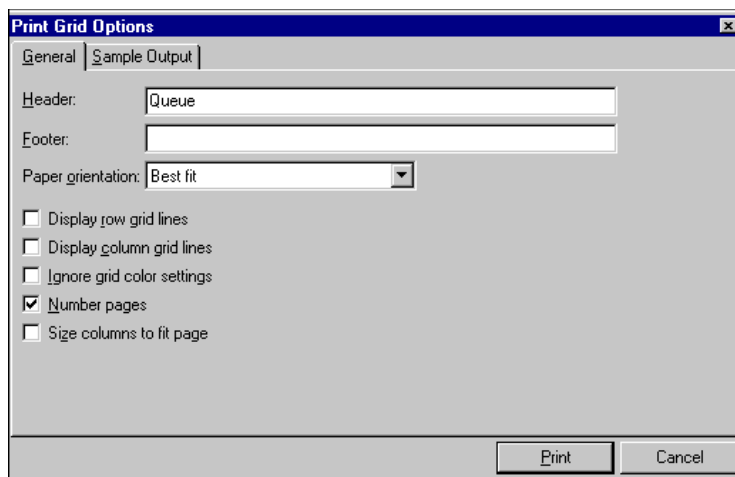
- To save your selections, click the **Save** button on the action bar. The next time the queue runs, the program prints the information from the selected item.

Printing Queue Schedules

You can print a hard copy of queue schedule information. For more information about setting up printers, see the Program Basics chapter of the *Program Basics Guide*.

▶ Printing a queue schedule

- On the Queue page, select a queue in the grid and right-click and select **Print** from the submenu. The Print Grid Options screen opens to the General tab.
- In the **Header** field, “Queue” appears automatically. You can leave this default or enter your own heading.
- In the **Footer** field, enter information to appear at the bottom of each page.
- In the **Paper orientation** field, select “Best fit”, “Portrait”, “Landscape”, or “Use printer default”.
- To show lines between rows on the report, mark **Display row grid lines**.
To show lines between columns on the report, mark **Display column grid lines**.
- To print in black instead of with colors selected in Options, mark **Ignore grid color settings**. For more information about selecting colors, see the Options chapter of the *Program Basics Guide*.
- To print without page numbers, unmark **Number pages**.
- To stretch the columns so the report fills the page horizontally, mark **Size columns to fit page**.



Note: Select the Sample Output tab to view what the report will look like when it prints. You can return to the General tab to make changes.

- When you finish making selections, click **Print**. Information from the schedule prints on the selected printer, and you return to the Queue page.

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