

ONESOURCE TAX INFORMATION REPORTING

SCHEDULING JOBS

Document Version 2

2018 Thomson Reuters/ONESOURCE. All Rights All Rights Reserved. Proprietary and confidential information of Thomson Reuters. Disclosure, use, or reproduction without the written authorization of TR /S is prohibited. In compliance with the license agreements for the Open Source Libraries leveraged by Thomson Reuters, our customers can obtain copies of these libraries by contacting Customer Support at <https://tax.thomsonreuters.com/support/onesource/customer-center/>.

DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	August 2016	Initial publication.
2	January 8, 2017	Initial publication of new document format.

TABLE OF CONTENTS

About Scheduling Jobs	1
Setting Up User Profile Rights	3
Setting Up a Scheduled Job	5
Viewing the Jobs that Are Scheduled to Run	7
Viewing the Settings Applied to a Scheduled Job	9
Editing the Scheduling Parameters for a Scheduled Job	11
Deleting (or InActivating) a Scheduled Job	13
Rolling Over One or More Scheduled Jobs	15

ABOUT SCHEDULING JOBS

A scheduled job is a batch print file or report that is set up for processing at a later time or at periodic intervals. A batch print file can include original forms, reprinted forms, corrected forms, or an annual state filing. A scheduled report can include a standard or custom report in the **Views & Reports** module.

Scheduling a job for processing can be helpful when, for example, forms are marked for reprint. Rather than individually printing each form, one batch print job that includes only those forms that have been marked for reprint can be scheduled to run each night. After the forms are reprinted, the forms can be distributed.

The tasks users can complete for scheduled jobs include:

- [Setting Up a Scheduled Job \(page 5\)](#)
- [Viewing the Jobs that Are Scheduled to Run \(page 7\)](#)
- [Viewing the Settings Applied to a Scheduled Job \(page 9\)](#)
- [Editing the Scheduling Parameters for a Scheduled Job \(page 11\)](#)
- [Deleting \(or InActivating\) a Scheduled Job \(page 13\)](#)
- [Rolling Over One or More Scheduled Jobs \(page 15\)](#)

SETTING UP USER PROFILE RIGHTS

User profiles are a group of options and user rights assigned by a ONESOURCE Tax Information Reporting administrator and applied to ONESOURCE Tax Information Reporting users. The options and rights assigned in a user profile grant privileges to users so they can use certain modules or features, or perform certain tasks. Before a user can set up scheduled jobs, edit the scheduling parameters for a scheduled job, delete scheduled jobs or rollover scheduled jobs, a ONESOURCE Tax Information Reporting administrator must add or update a user profile then select the **Scheduled Jobs** check box under the **Print/Filing Rights** section on the User Profile page.



SETTING UP A SCHEDULED JOB

To set up a scheduled job:

1. Complete one of the following:

- If you are scheduling a batch print job:
 - a. Click the **Print/Filing** module.
 - b. Click **Forms Print, Reprint/Print w/o Distrib** or **State/Loc Annual Filings** from the Side Menu.
 - c. Make the appropriate print choices for the batch print job you want to schedule.
 - d. Click **Schedule** at the top of the page.
- If you are scheduling a report:
 - a. Click the **Views & Reports** module. For a standard report, open the section that contains the report you want to schedule. For a custom report, click **Custom Views** from the Side Menu then open the section on the Custom Views page that contains the custom report you want to schedule.



Using a custom report may be more beneficial than using a standard report because you can build sliding timeframe filters to limit the results of the report to a certain time range. For example, a standard **Recipient Updates** report returns all of the recipients that were updated since your database was created. However, you want a report that includes only those recipients that were updated the previous day. To create the custom report, build a sliding timeframe filter that contains the Yesterday time constraint. To learn more about creating custom reports with sliding timeframe filters, see the [Create a Custom View](#) in *Learning about the Views & Reports Module*.

- b. Click  for the report you want to schedule.

2. Enter a unique description for the scheduled job in the **Schedule Description** field. You can enter a maximum of 50 characters.



If you schedule a job after submitting a batch print or filing job then the description you enter for the scheduled job replaces the description you entered for the batch print or filing job.

3. Select how often you want the job to run:

- **Once** runs the job only once at a later time.
 - **Daily** runs the job each day at a certain time.
 - **Weekly** runs the job on the same day each week.
 - **Monthly** runs the job on the same day each month.
4. For daily or monthly scheduled jobs, select **Yes** to schedule the job to run on any day of the week except weekends, or select **No** to schedule the job to run on any day of the week including weekends.
 5. Select the start and end dates and times from the **Start Date/Time** and **End Date/Time** drop-down lists. If you are scheduling a job to run only once, you do not need to provide an end date and time.



The date and time you enter is for Central Time (CT).

6. If you subscribe to the SFTP feature, select the **SFTP the report automatically to my account's Outbox** check box to place the resulting output file in your SFTP outbound folder.
7. Click **Schedule** to submit the job.
8. If you are scheduling a report, select the format of the report from the **Output file as** drop-down list. You can select one of the following:
 - Text to format the report as a pipe-delimited text file.
 - Excel 97 to format the report in the Microsoft® Excel® 97 file format.
 - Excel 2007 to format the report in the Microsoft Excel 2007 file format.
9. Click **Submit**.

After the scheduled time elapses, you can download the completed job using the Files Available For Download page. You can also view all of the jobs in your database that are scheduled to run from the Scheduled Jobs page.

VIEWING THE JOBS THAT ARE SCHEDULED TO RUN

To view the jobs that are scheduled to run:

1. Complete one of the following:
 - For scheduled batch print jobs, click the **Print/Filing** module.
 - For scheduled reports, click the **Views & Reports** module.
2. Click **Scheduled Jobs** from the Side Menu. The Scheduled Jobs page displays. The scheduled jobs are listed under the **Scheduled Job Management** and **Scheduled Jobs List** sections.

The **Scheduled Job Management** section displays the scheduled jobs for the tax year you launched in to. The following graphic shows the column to use to rollover a scheduled job from one tax year to the next:

<input type="checkbox"/>	Delete	Schedule Description	Status	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Edit Schedule
<input type="checkbox"/>		Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58	Edit
<input type="checkbox"/>		Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58	Edit

The following graphic shows the column to use to delete (or inactivate) a scheduled job:

<input type="checkbox"/>	Delete	Schedule Description	Status	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Edit Schedule
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58	Edit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58	Edit

The following graphic shows the column to use to edit the scheduling parameters of a scheduled job:

<input type="checkbox"/>	Delete	Schedule Description	Status	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Edit Schedule
<input checked="" type="checkbox"/>		Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58	Edit
<input checked="" type="checkbox"/>		Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58	Edit

As shown in the graphic below, the **Scheduled Jobs List** section displays all of the active scheduled jobs, regardless of the tax year you launched in to. You can use this section to view the settings applied to a scheduled job.

Scheduled Jobs List									Maximize Restore
Description	Batch Id	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Tax Year
test	1490	BatchPrint - Original	11/18/2011 02:30:00 PM	11/18/2011 02:30:00 PM	Weekly	No	11/11/2011 02:30:00 PM	8	2010
WEEKLY BATCH PRINT	2454	BatchPrint - Original	03/08/2012 09:30:00 AM	03/29/2012 09:30:00 AM	Weekly	No	Never	1	2011

In both sections, the columns that contain information about the scheduled jobs and the dates and times they are scheduled to run include:

COLUMN	DESCRIPTION
Description	Displays the description entered when the scheduled job was set up.
Event	Displays the scheduled job type. Scheduled job types include Batch Print-Original, Batch Print-Correction or Annual State Filing.
Next Scheduled	Displays the date and time when processing starts for the next scheduled job.
Schedule Until	Displays the end date of the scheduled batch job. N/A displays for any job that is scheduled to be completed only once.
Frequency	Displays how often the batch job is scheduled to run. Frequencies include Once, Daily, Weekly or Monthly.
Weekdays Only	Displays whether the scheduled job will be run on weekdays only.
Last Run	Displays the last time the scheduled job was processed.
Times Scheduled	Displays the number of times the scheduled job has been processed.

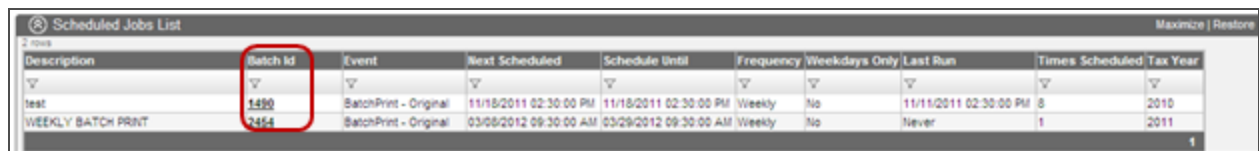
VIEWING THE SETTINGS APPLIED TO A SCHEDULED JOB

Viewing the settings (or batch parameters) applied to a scheduled job can be helpful, for example, in identifying why a record was excluded from the scheduled job and if new settings need to be applied to the scheduled job.

 You cannot edit the batch parameters for a scheduled job.

To view the settings applied to a scheduled job:

1. Complete one of the following:
 - For scheduled batch print jobs, click the **Print/Filing** module.
 - For scheduled reports, click the **Views & Reports** module.
2. Click **Scheduled Jobs** from the Side Menu.
3. Under the **Scheduled Jobs List** section, click the **Batch Id** link for the scheduled job.



Description	Batch Id	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Tax Year
test	1490	BatchPrint - Original	11/18/2011 02:30:00 PM	11/18/2011 02:30:00 PM	Weekly	No	11/15/2011 02:30:00 PM	8	2010
WEEKLY BATCH PRINT	7454	BatchPrint - Original	03/08/2012 09:30:00 AM	03/29/2012 09:30:00 AM	Weekly	No	Never	1	2011

The Batch Parameters page displays, showing you the settings that were applied to the scheduled job.

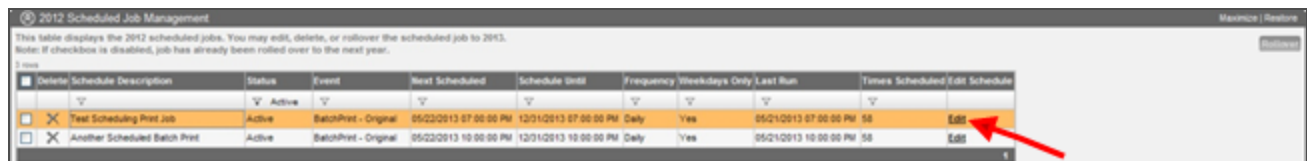
EDITING THE SCHEDULING PARAMETERS FOR A SCHEDULED JOB

The scheduling parameters include the information that ONESOURCE Tax Information Reporting uses to determine how often to process your scheduled job. Scheduling parameters include the description of the scheduled job, the interval or frequency of the scheduled job, and the start and end dates for the scheduled job.

You can edit the scheduling parameters for only one scheduled job at a time. ONESOURCE Tax Information Reporting does not allow you to edit the scheduling parameters for multiple scheduled jobs. If you need to make scheduling changes to a group of scheduled jobs but are concerned that the jobs will run before the changes can be made, you can temporarily delete (or inactivate) the scheduled jobs then make the changes to each job. The scheduled job becomes active again after you click **Schedule**.

To edit the scheduling parameters for a scheduled job:

1. Complete one of the following:
 - For scheduled batch print jobs, click the **Print/Filing** module.
 - For scheduled reports, click the **Views & Reports** module.
2. Click **Scheduled Jobs** from the Side Menu.
3. Under the **Scheduled Job Management** section, click the **Edit** link for the scheduled report you want to edit the scheduling parameters for.



Delete	Schedule Description	Status	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Edit	Schedule
<input type="checkbox"/>	Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58	Edit	Schedule
<input type="checkbox"/>	Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58	Edit	Schedule

The Create/Edit Scheduled Batch-Webpage Dialog page displays. From this page, you can change the scheduled job's originally-set options, such as the description of the scheduled job, how often the scheduled job runs, and the start and end dates and times for the scheduled job.



The date and time you set is for Central Time (CT).

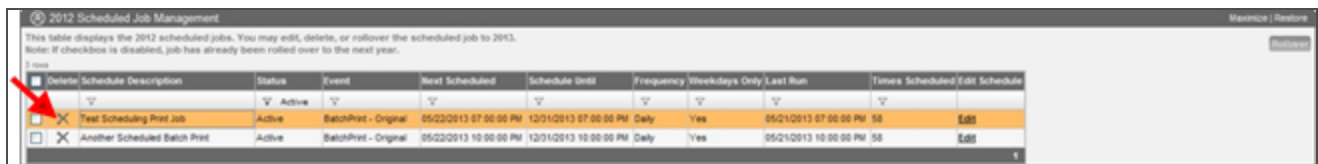
4. Click **Schedule** after you make changes to the scheduling parameters. The Scheduled Job page is refreshed and displays the changes you made.

DELETING (OR INACTIVATING) A SCHEDULED JOB

Scheduled jobs are not deleted in ONESOURCE Tax Information Reporting . Rather, the status of a scheduled job is changed from active to inactive when a ONESOURCE Tax Information Reporting user deletes a scheduled job.

To delete (or inactivate) a scheduled job:

1. Complete one of the following:
 - For scheduled batch print jobs, click the **Print/Filing** module.
 - For scheduled reports, click the **Views & Reports** module.
2. From the Side Menu, click **Scheduled Jobs**. The Scheduled Jobs page displays.
3. Under the **Scheduled Job Management** section, click **Delete** for the scheduled job you want to delete.



Delete	Schedule Description	Status	Event	Next Scheduled	Schedule Unit	Frequency	Weekdays Only	Last Run	Times Scheduled/Edit Schedule
<input checked="" type="checkbox"/>	Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58
<input type="checkbox"/>	Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58

4. Click OK when the message asking if you are sure you want to delete the scheduled job displays. The Scheduled Jobs page is refreshed, and the scheduled job is removed from the **Scheduled Job Management** section.



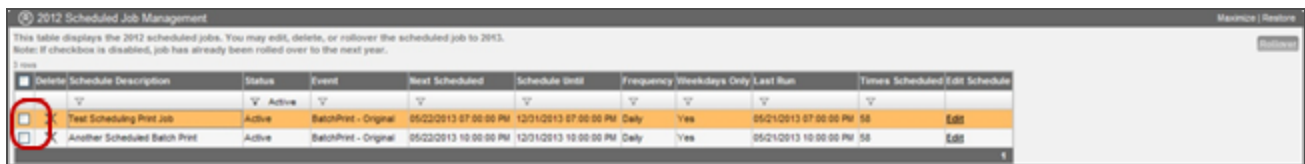
To view the inactive scheduled jobs for your database, change the filter for the **Status** column under the **Scheduled Job Management** section on the Scheduled Jobs page to Inactive. To activate an inactive job, click the **Edit** link, set the scheduling parameters (if necessary) then click **Schedule**.

ROLLING OVER ONE OR MORE SCHEDULED JOBS

When you roll over a scheduled job, you apply the scheduled job to the next tax year. This can help you work more efficiently because you do not need to spend time setting up the same scheduled job for processing in the new tax year.

To rollover one or more scheduled jobs from one tax year to the next:

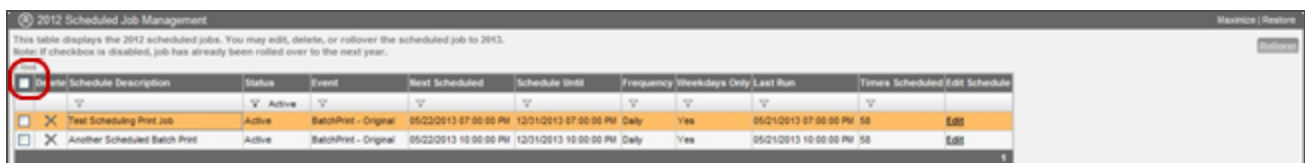
1. Complete one of the following:
 - For scheduled batch print jobs, click the **Print/Filing** module.
 - For scheduled reports, click the **Views & Reports** module to view the scheduled reports.
2. Click **Scheduled Jobs** from the Side Menu.
3. Under the **Scheduled Job Management** section, select the check box in the leftmost column for each scheduled job you want to rollover. The following graphic shows the check boxes for the listed scheduled jobs:



The screenshot shows the '2012 Scheduled Job Management' interface. It features a table with columns: Delete, Schedule Description, Status, Event, Next Scheduled, Schedule Until, Frequency, Weekdays Only, Last Run, Times Scheduled, and Edit Schedule. Two jobs are listed: 'Test Scheduling Print Job' and 'Another Scheduled Batch Print'. Both have checkboxes in the 'Delete' column, which are circled in red. A 'Rollover' button is visible in the top right corner.

Delete	Schedule Description	Status	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Edit Schedule
<input type="checkbox"/>	Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58	Edit
<input type="checkbox"/>	Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58	Edit

As shown in the following graphic, selecting the check box in the leftmost column heading allows you to rollover all of the listed scheduled jobs:



This screenshot is similar to the previous one, but the checkbox in the 'Delete' column header is selected (checked) and circled in red. The 'Rollover' button remains in the top right corner.

<input checked="" type="checkbox"/>	Schedule Description	Status	Event	Next Scheduled	Schedule Until	Frequency	Weekdays Only	Last Run	Times Scheduled	Edit Schedule
<input type="checkbox"/>	Test Scheduling Print Job	Active	BatchPrint - Original	05/22/2013 07:00:00 PM	12/31/2013 07:00:00 PM	Daily	Yes	05/21/2013 07:00:00 PM	58	Edit
<input type="checkbox"/>	Another Scheduled Batch Print	Active	BatchPrint - Original	05/22/2013 10:00:00 PM	12/31/2013 10:00:00 PM	Daily	Yes	05/21/2013 10:00:00 PM	58	Edit

4. Click **Rollover** located in the top right corner of the section. The job(s) you selected is rolled to the next year. The list of scheduled jobs in the **Scheduled Jobs List** section is updated to include the rolled-over scheduled job(s).