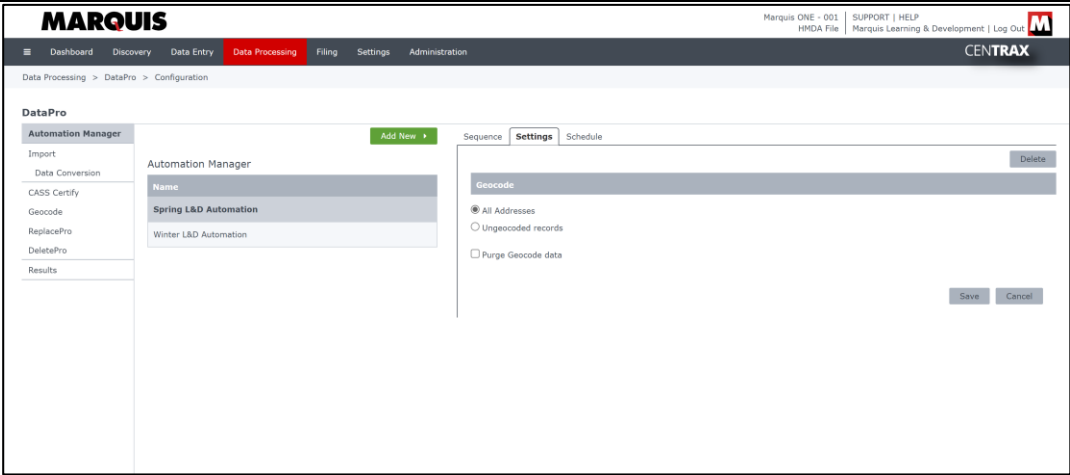
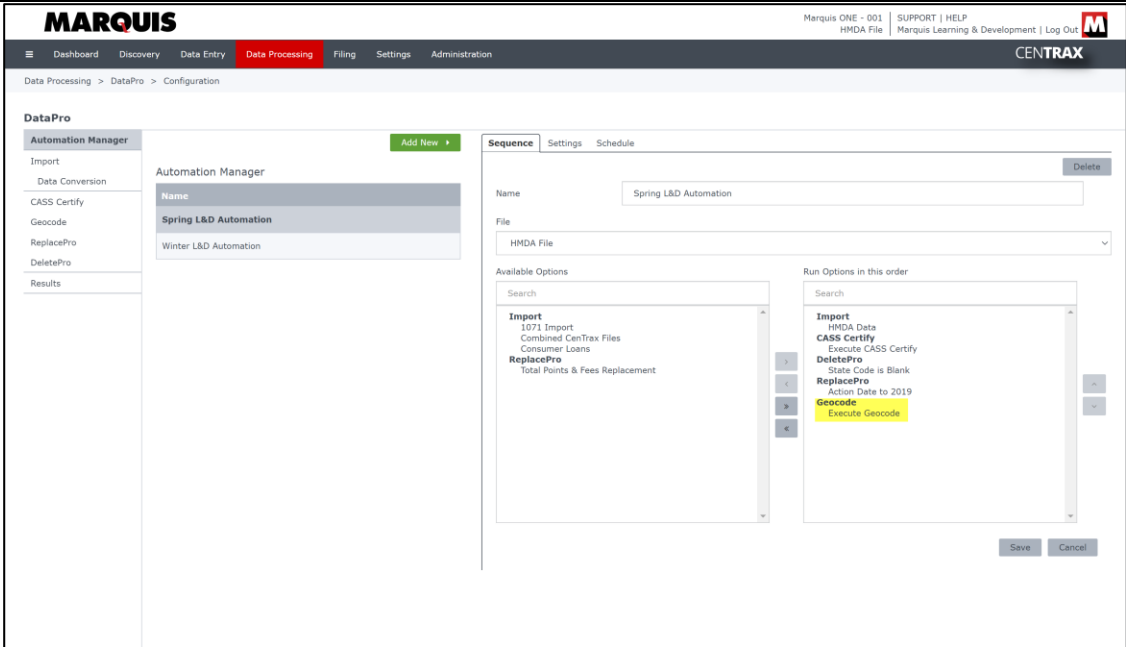




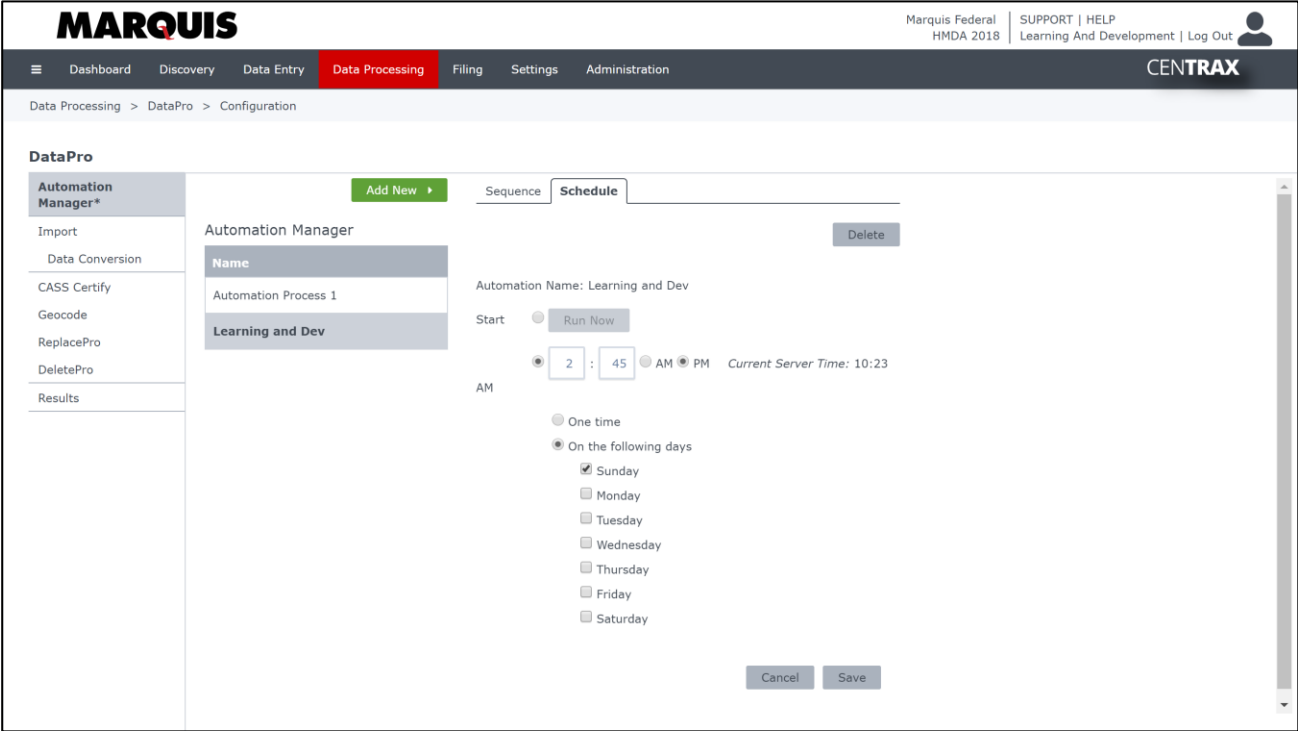
CNX607	DataPro – Automation Manager
	The Automation Manager allows for automating all of the different DataPro processes in any desired order to reduce the number of clicks and make the process easier and more efficient.
Order of Steps	Tasks
Step 1	Log into CenTrax NEXT
	The active Institution and File will display in the upper right-hand section to the left of the name of the user logged in.
Step 2	Click Data Processing
Step 3	Click DataPro
Step 4	Click Automation Manager from the menu on the left hand side
Note: Any processes such as deletions or replacements cannot be created within the Automation Manager window. They must be setup within their own menus. If any processes are added after an Automation Manager process is created, they can simply be added at any time and the processes rearranged to work in the desired order.	
Step 5	To create a new Automation process, click the green Add New button
Step 6	Establish the Sequence settings
6.1	Click the drop-down arrow next to File to select the CenTrax Next File
	Within the Available Options box will be a list of all available options; including Imports, ReplacePros, DeletePros as well as the Geocode and CASS processes
Step 7	Select the desired Options to be processed in this Automation
7.1	To select an Import Definition , double click on the desired import name
7.2	To select a ReplacePro(s) , double click on each desired replace name
7.3	To select a DeletePro(s) , double click on each desired delete name
7.4	To select the Geocode process, double click on Execute Geocode
7.5	To select the CASS process, double click on Execute CASS Certify
	Once the desired options are moved over, they can be rearranged to the desired order
Step 8	To re-order an option, click on it within the list
8.1	Click the up or down arrows located to the right of the box until the option is in the desired order

MARQUIS

Step 9	To remove an option from the selection, double click on it in the right-hand box
9.1	When the desired options and order have been defined, click Save
	Clicking Save will complete the setup for the Automation option order but will not process or establish a schedule for the Automation Item. Continue to Step 10 for processing the Automation.
Note: For CenTrax NEXT versions 1.4.6 and later, an additional Settings tab is available within the Automation Manager, for automations including a geocode. Use the desired radio button within the Settings tab to designate the desired Geocode selection – Geocode all Addresses or only the Ungeocoded records. Also note for the Settings tab to be available, the geocode process must be included in the sequence.	
	
	
Step 10	Establish the Schedule settings
10.1	Click on the Schedule tab
Step 11	To Run Now , click on the first radial dial to enable the Run Now button

MARQUIS

11.1	Click the Run Now button
11.2	Once it has finished, click on the Results menu item located on the left-hand side of the page
Step 12	To schedule a time frame for when the process should run, click the radial dial next to the clock boxes
12.1	Type in the hour
12.2	Type in the minute
12.3	Select AM or PM
12.4	Next, choose One time or On the following days
12.5	Place a check mark in the desired days if One time is NOT selected

Step 13	Click Save once the selections have been made
	
Step 14	After the process has run at the scheduled time, click the Results menu item located on the left-hand side of the page to see the results of the completed process
Step 15	To process the Automation at once, click Automation Manager from the menu on the left-hand side
15.1	Click on the Automation within the list
15.2	Click on the Schedule tab
15.3	Click on the first radial dial to enable the Run Now button
15.4	Click the Run Now button
15.5	Once it has finished, click on the Results menu item located on the left-hand side of the page
Step 16	To Edit an Automation, click on the desired Automation in the list
16.1	Make the necessary changes on the Sequence tab
16.2	Make the necessary changes on the Schedule tab
16.3	Click Save to retain the changes
Step 17	To Delete an Automation, click on the Automation within the list
17.1	Click the Delete button in the upper right-hand side of the setup page
17.2	Click Yes to the confirmation message