

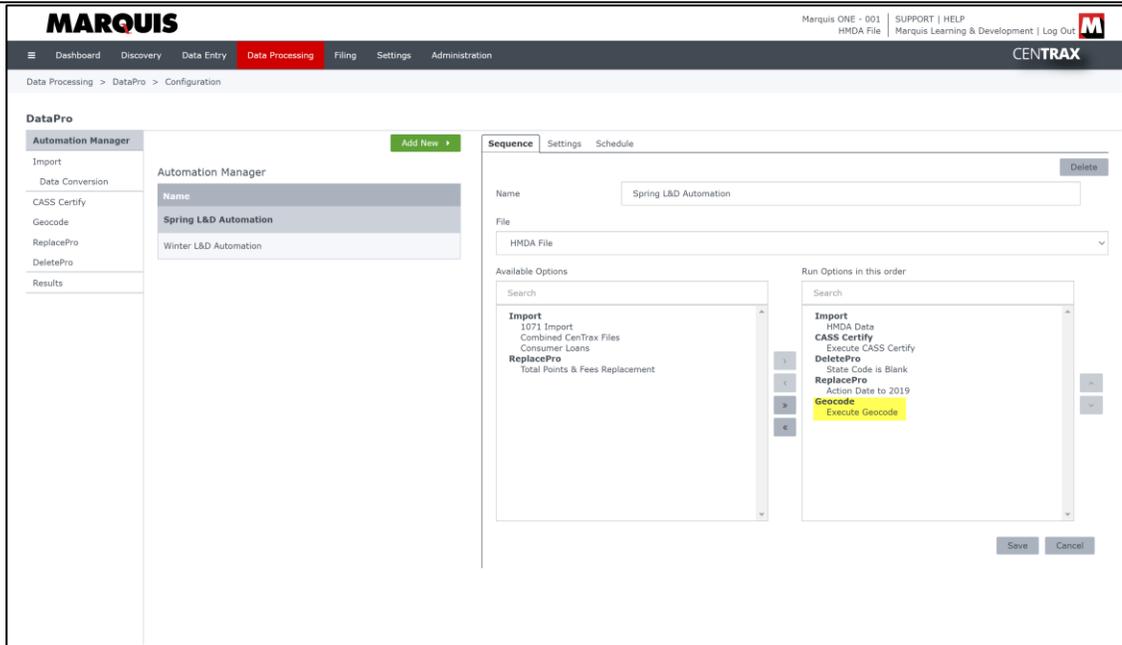
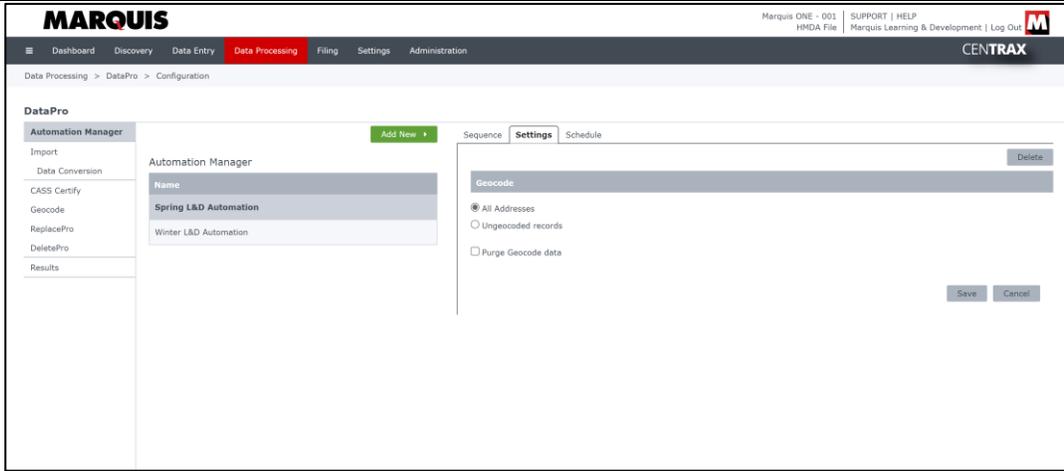
# MARQUIS

<b>CNX607</b>	<b>DataPro - Automation Manager</b>
	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.
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>CenTrax NEXT</b>
	The active <b>Institution</b> and <b>File</b> will display in the upper right-hand section to the left of the name of the user logged in.
<b>Step 2</b>	Click <b>Data Processing</b>
<b>Step 3</b>	Click <b>DataPro</b>
<b>Step 4</b>	Click <b>Automation Manager</b> from the menu on the left hand side
<b>Note:</b> 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.	
<b>Step 5</b>	To create a new Automation process, click the green <b>Add New</b> button
<b>Step 6</b>	Establish the <b>Sequence</b> settings
6.1	Click the drop-down arrow next to <b>File</b> to select the CenTrax Next File
	Within the <b>Available Options</b> box will be a list of all available options; including Imports, ReplacePros, DeletePros as well as the Geocode and CASS processes
<b>Step 7</b>	Select the desired <b>Options</b> to be processed in this Automation
7.1	To select an <b>Import Definition</b> , double click on the desired import name
7.2	To select a <b>ReplacePro(s)</b> , double click on each desired replace name
7.3	To select a <b>DeletePro(s)</b> , double click on each desired delete name
7.4	To select the <b>Geocode</b> process, double click on <b>Execute Geocode</b>
7.5	To select the <b>CASS</b> process, double click on <b>Execute CASS Certify</b>
	Once the desired options are moved over, they can be rearranged to the desired order
<b>Step 8</b>	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

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<b>Step 9</b>	To <b>remove</b> 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 <b>Save</b>
	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 <b>Step 10</b> for processing the Automation.

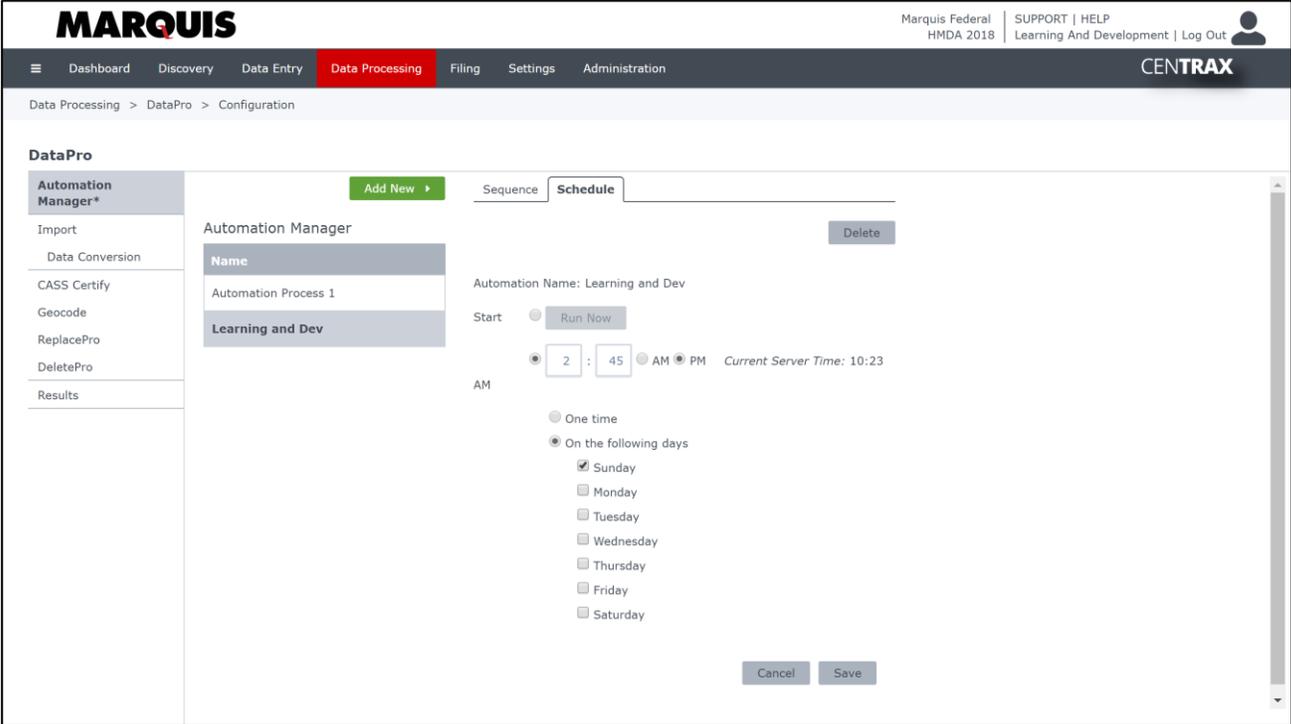
**Note:** For CenTrax NEXT versions 1.4.6 and later, an additional **Settings** tab is available within the Automation Manager, for automations including a geocode. Use the desired radio button within the **Settings** tab to designate the desired Geocode selection - Geocode all Addresses or only the Ungeocoded records. Also note for the Settings tab to be available, the geocode process must be included in the sequence.



<b>Step 10</b>	Establish the <b>Schedule</b> settings
10.1	Click on the <b>Schedule</b> tab
<b>Step 11</b>	To <b>Run Now</b> , click on the first radial dial to enable the Run Now button

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11.1	Click the <b>Run Now</b> button
11.2	Once it has finished, click on the <b>Results</b> menu item located on the left-hand side of the page
<b>Step 12</b>	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 <b>One time</b> or <b>On the following days</b>
12.5	Place a check mark in the desired days if <b>One time</b> is NOT selected

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