

# Margill Loan Manager

## Automatic / Overnight Tasks

Automatic tasks, also known as “Overnight tasks”, allow the system to perform certain operations which are done once a day when Margill Loan Manager (MLM) is launched. These tasks, such as the **daily total computations** and **alerts**, for large databases, could add many minutes when launching MLM.

These operations can be programmed in order to be generated outside normal business hours thus eliminating some waiting time. Moreover, it is possible to set an **automatic backup** of the MLM data at 1:00 AM, for example, without having the program running. The server or computer where MLM is installed must of course be on or in sleep mode and the backup folder must be accessible. Automatic tasks allow the generation of **reports**, Alerts and automatic **emails** to be generated and sent to the Borrowers at another time than overnight. They can even be programmed many times per day, as needed. This then:

- avoids the need to send emails in the middle of the night which can be lost in the “mass” of emails received during the night by the borrowers.
- allows the notification of a MLM user that the condition of one of the Alerts was met on that same day. This way, the user can immediately intervene instead of being advised only on the next day.

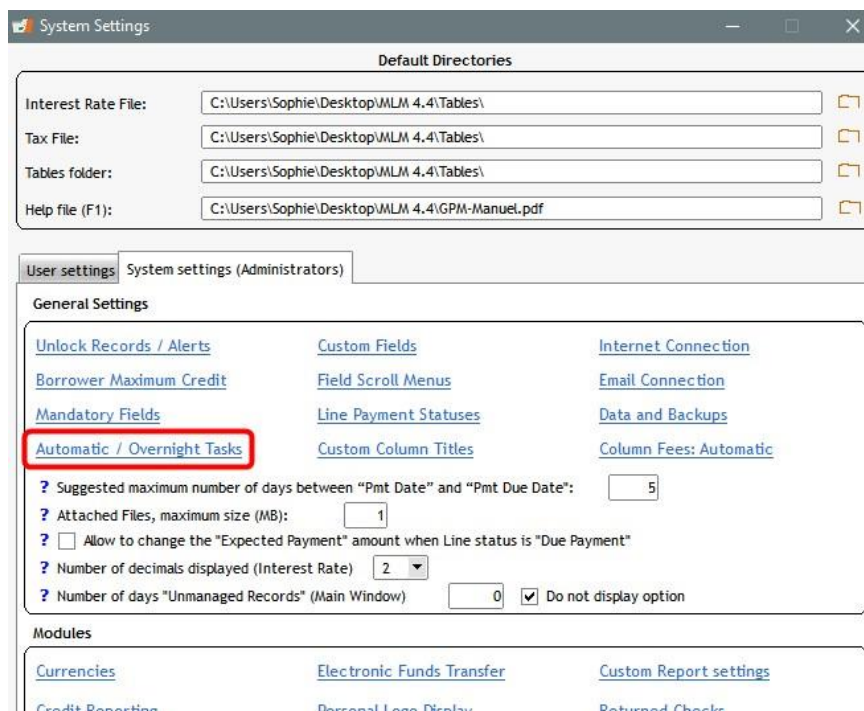
With “MLM\_Overnight\_tasks.exe” and the “Windows Task Manager”, tasks can be set to be performed in the background at the right time and with no need of human intervention.

Steps for setting automatic tasks:

1. [Select tasks to be done in MLM via “MLM\\_Overnight\\_tasks.exe”](#)
2. [Schedule automatic tasks with the Windows “Task Manager”](#)
  - Particular task conditions

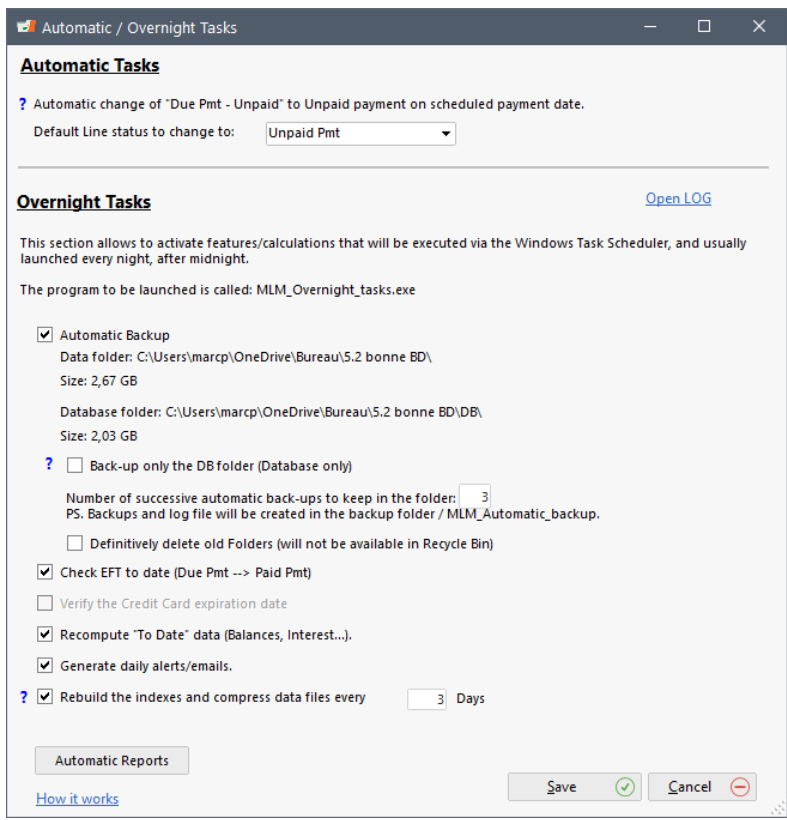
### 1. Select tasks to be performed in MLM via “MLM\_Overnight\_tasks.exe”

Go to Settings > System settings (Administrators). Click on “Automatic / Overnight Tasks”



In this window, the Administrator decides which tasks are to be accomplished.

Apart from the automatic backup, unchecked tasks in this window and/or unplanned in the Windows Task Manager will be generated automatically, by default, every time MLM is launched. Automatic backups can only be created with this tool.



The “MLM\_Overnight\_tasks.exe” application can be launched automatically for one or more of the following tasks:

- **Automatic backup**

All MLM data (usually under MLM Data) will be saved. This is a backup that can become quite large eventually. The complete software installation folder is NOT included in the backup. It will only be backed up if the DB folder is in this MLM installation folder.

If the “Back up the DB folder only (Database only)” sub-option is activated, only this folder will be backed-up thus taking up less space. Other data not specifically included in the DB folder will be excluded.

In addition, the Administrator can decide on the number of automatic successive backups to be saved.

Unless otherwise specified in the “Data and Backup” window (Tools > Settings > System settings (Administrator)), the backup copies will be automatically saved in the “MLM\_Automatic\_backup” folder.

- **Check EFT to date (Due Pmt --> Paid Pmt)**

This option automatically updates Records with pre-authorized payments that were submitted to the EFT provider via the “[Pre-authorized payments](#)” tool: the “Due Pmt” Line status is changed to “Paid Pmt” (or as chosen by the Administrator in System settings > [Electronic Funds Transfer](#)).



- **Recompute "To Date" data (Balances, Interest...)**

These calculations can be generated starting at midnight in order to be already updated when users access MLM. Many minutes of waiting can be avoided this way.

- **Generate daily Alerts / Emails**

Alerts and automatic emails (accessible via the Line status Alerts) can be generated during the night and/or one or more times per day, as needed.

**NOTE:** In order for daily alerts and automatic emails to be generated whether **OR NOT** at the same time as the other tasks, the "Generate Daily Alerts / Emails" box must be checked. When planning tasks in Windows, it will be possible to set separate tasks at different times and frequencies, as needed.

- **Rebuild the indexes and compress data files every X days**

After reindexing, index access is optimized. Reindexing may be required following the loss or alteration of the index file. This loss or alteration can render the application unusable, unstable or simply much slower than usual. Possible causes of loss or corruption of the index: Technical problem (power outage...), abnormal shutdown, physical removal of an index file. Indexation sometimes increase the database's speed.

With this option, you can automate the reindexation process which could be performed every week for example. There is no need to reindex daily.

**For the reindexing to run correctly overnight, it is imperative that all instances of MLM are closed. Please ensure that all users have closed the software at the end of the day.**

- **Automatic Reports**

This module allows you to set up reports that can be launched automatically using the Windows Task Scheduler.

The Automatic Report Setup window allows you to produce "Record List" reports and "Transaction Reports" (including all desired fields) based on the relevant dates, in the format that suits you, including all Records or certain Records from an Advanced Query and saving the files generated in the specified location.

**In order for the report(s) to be produced, the REPORTS argument (see page 8 – "Particular task conditions" section) must be activated: REPORTS=1 or 2, 3, 4 etc.**

**Automatic export to Salesforce**

By checking this box, the data contained in the Salesforce "report" will be transferred to the [Salesforce application](#).

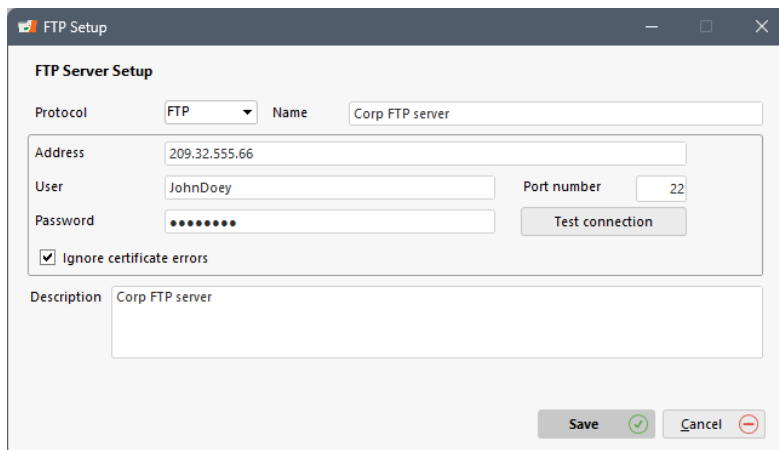
In order for this option to be available, it is necessary to create a "Record List" report and include Salesforce mapping information.

**"Send to" tab**

The "Send to" tab allows you to automatically send an email including the desired report to a recipient, the first in the list, and the following in certified copy. Simply select the email template from the drop-down list and enter the email addresses.

The report can also be placed automatically in a folder on a FTP server. For an FTP server, still under the "Send

to" tab, "FTP Server" section, using the "New" button, configure the FTP server and test the connection using the "Test connection" button:



## 2. Schedule automatic tasks with the Windows "Task Scheduler"

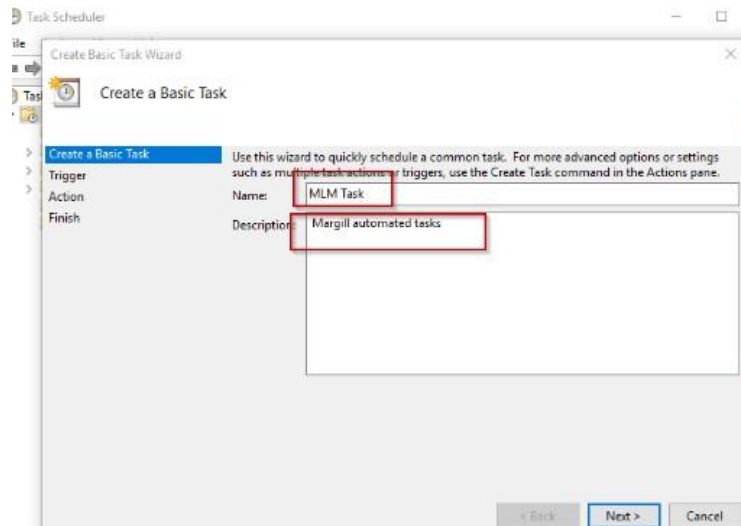
The *MLM\_Overnight\_tasks.exe* file (application) included with the software must be launched automatically in order to perform one or more of the chosen tasks described above in ["Select the tasks to perform in MLM..."](#).

### How to set and launch this application in Windows:

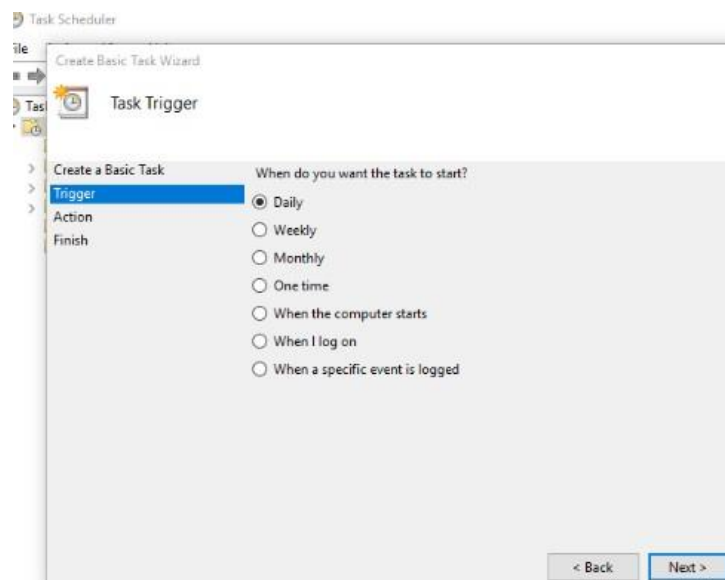
In the Windows File Manager, go to Control Panel > Systems and Security > Administration Tools > Task Scheduler. Click on "Create Basic Task..." (or "Create Task" which requires a little more experience):



Enter a name and a description for the task and click on "Next".

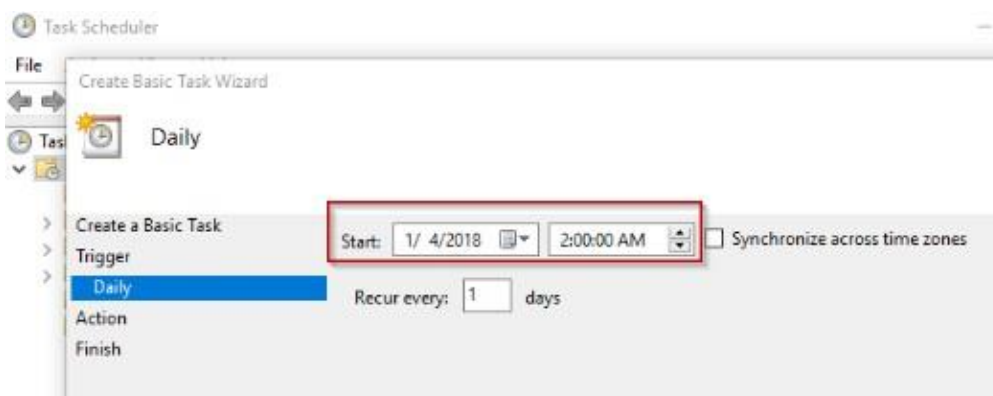


Select the frequency at which the task is to be accomplished and click “Next”. Daily is the most common frequency.

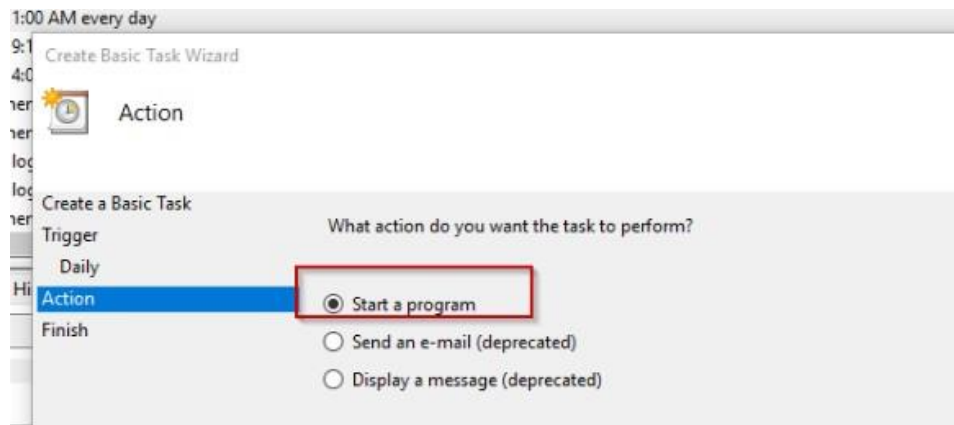


Had you chosen “Create Task” (instead of “Create Basic Task”), many more options would have been available including running tasks more than once a day. This could be useful to automatically send data to a third-party system such as a Customer Relations Management (CRM) to provide balances or other data on an hourly basis for example. Microsoft Task Scheduler allows tasks to be run every 5 minutes if needed. This is not recommended since will drain system resources.

Choose the start date and time at which the task is to be accomplished and click “Next”.

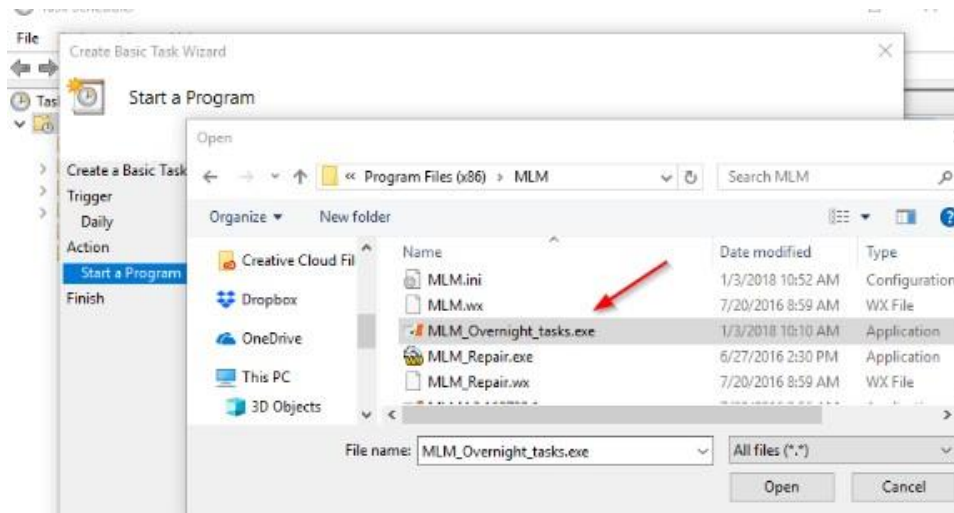


Select the “Start a program” Action and click “Next”.

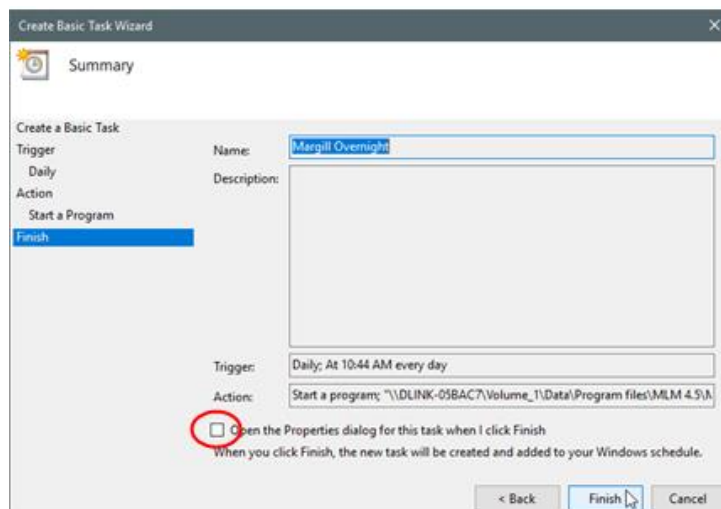


In the “Start a program” window, click on “Browse”.

Select the file named “MLM\_Overnight\_tasks.exe” located in the MLM installation folder. Click on “Open”.

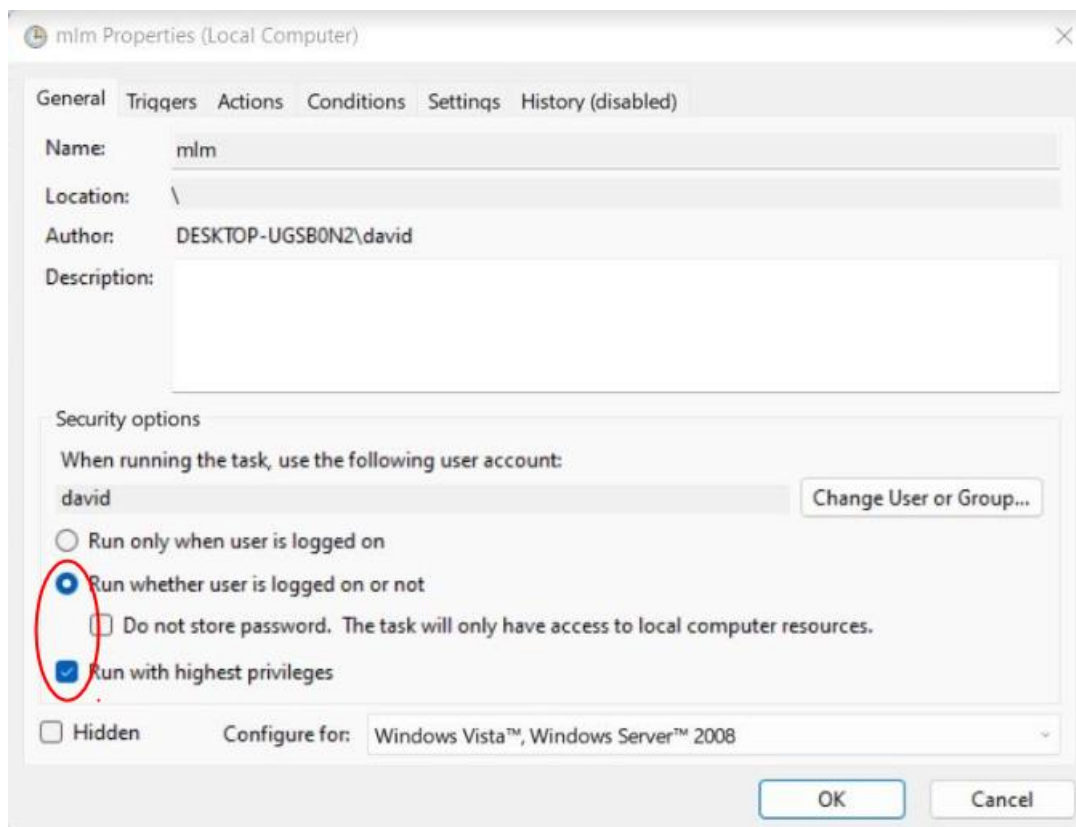


Once the file is chosen, click on “Next” and “Finish”.



The task is now configured and will be started at the next planned time and date. IMPORTANT: Notice in the image above, the

“Open the Properties dialog for this task when I click Finish”. It is recommended to check this box in order to set a few more settings. The two settings circled below may have to be checked. Please see with your IT manager.



These options are also accessible under the General tab in the Task Properties (accessible by double clicking on the task itself in the main Windows Task Scheduler window).

### Particular task conditions

It is possible to set several automatic tasks with different frequencies to perform particular operations. For example, make a backup copy once a day after midnight without generating the automatic Alerts / Emails. Or generate only the automatic Alerts / Emails at certain times of the day without doing the backup and without recalculating the totals.

It is possible to generate the tasks in 3 modes with these execution settings.

Mode	Settings	Effect
General	(None)	All tasks checked in the "Maintenance and Automatic Tasks" settings window will be generated without exception.
Alerts only	<i>AlertsOnly</i>	Only the "Generate daily Alerts / Emails" task will be performed when this setting is configured. <b>Warning:</b> the "Generate daily Alerts / Emails" option must be activated in MLM for this setting to work. Simply adding this argument is not sufficient.
Without alerts	<i>NO_Alerts</i>	All tasks checked in the overnight / automatic tasks settings will be performed, except the Alerts / Emails.
Reports choice	<i>REPORTS=x</i> x is report Identifier Example: REPORTS=1	Only the "Automatic reports" task will be performed when this setting is configured. By adding the unique report identifier, followed by a semicolon if there are several to generate during this task. Example: REPORTS=1;3;5;6

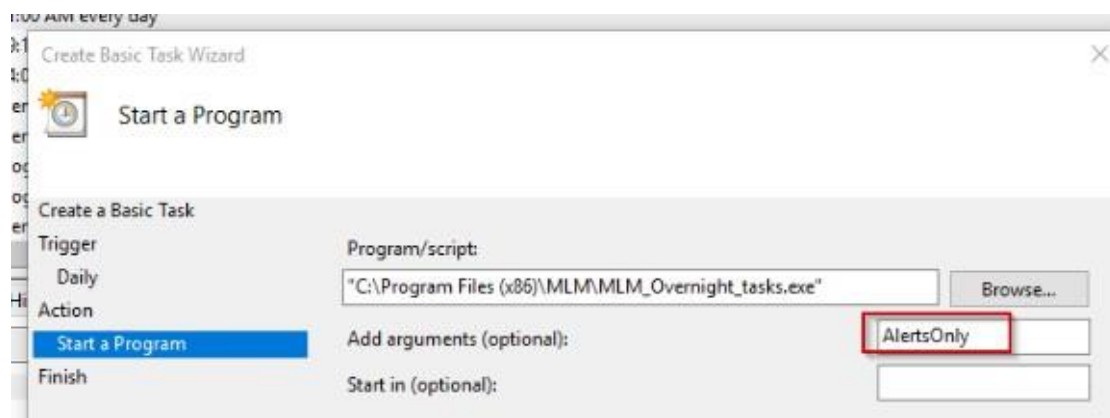


		<b>The argument is compulsory for the report(s) to be produced.</b>
VoPay Pre-validation EFT	VOPAY	<p>The “Check Submissions progress” button on the EFT Transmission window would ordinarily be used for EFT pre-validation.</p> <p>On the other hand, if a large batch of EFT transactions are simultaneously sent to VoPay, the processing time may become high for pre-validation. It is then possible to check the submission progress via an Overnight Task. Issues will then be reported in the Overnight Tasks log file.</p> <p>This Task will query VoPay for the transactions status and these will be updated in Margill as accepted or declined EFTs. Declined transactions will then be reported in the Overnight Tasks log file and a user will need to contact the Borrower to manage the payment.</p>

In the following example, at 12:30 PM, each day, the “Generate daily Alerts / Emails” task will be performed. During the night, at 1:00 AM, every day, the other automatic tasks that were chosen in the MLM settings will be performed:

Launch Screen Grasp_First	Ready	When the task is created or modified
MLM Alerts	Ready	At 12:30 PM every day
MLM Task	Ready	At 1:00 AM every day
MySQLNotifierTask	Ready	At 9:19 AM every Tuesday every 4 weeks, sta

In order to add the “AlertsOnly” or “NO\_Alerts” conditions to a task in the Windows Task Manager, simply add the argument in the window for this purpose during the “Start a program” step:



**WARNING: the arguments must be written with the precise texts above in order to work.**

**Suggested scenario:**

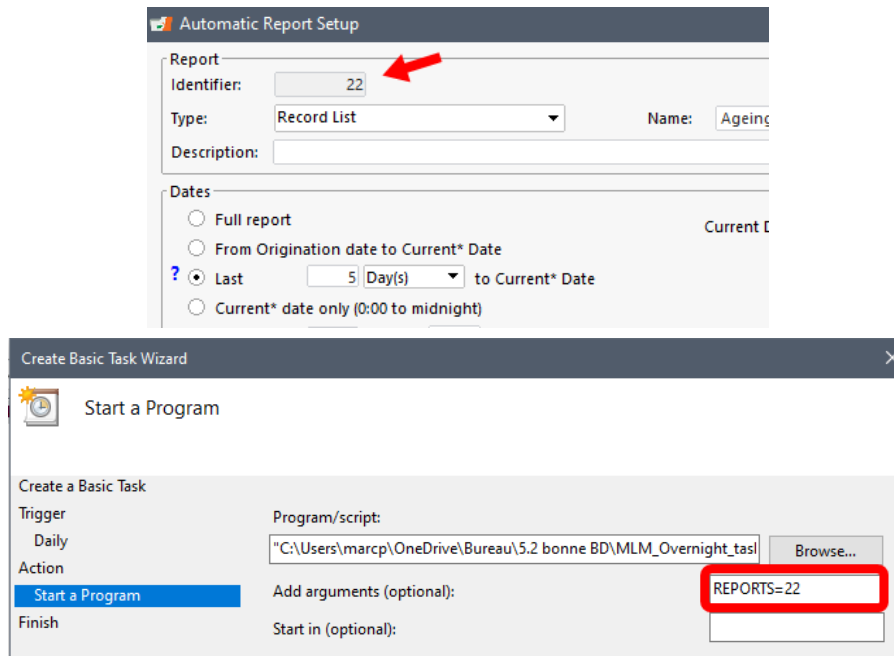
We would possibly want this:

1. Do a backup copy and calculate the totals once a day. This task can be performed after midnight.
2. Launch the Alerts and send automatic emails at the start of the work day (not during the night). This, in order to prevent emails (notifying borrowers of payments that will be collected in their bank accounts) from being lost in the “mass” of emails received by the borrower overnight.
3. Perhaps, also, for new loans created during the day, that the automatic emails to the borrower be sent the same day and not the next.

This way, three or four tasks would configured in Windows:

1. At midnight with the argument No\_Alerts
2. At 7:00 A.M. with the argument AlertsOnly
3. At 1:00 P.M. with the argument AlertsOnly
- 3 bis. At 4:00 P.M. with the argument AlertsOnly

To add the "REPORTS =" argument to a task in the Windows Task Scheduler, all you need to do is add the report's unique identifier number you wish to generate automatically in the window provided for this purpose during the "Start a program" step:



### Log of tasks performed

The "Open LOG" link (top right) allows the user to see the tasks completed and errors (in pink).

It is suggested to review this history occasionally, especially to ensure backups have been completed.

The screenshot shows the 'Overnight Tasks Log' window. It contains a table with the following columns: Date, Start Time, End task Time, Task type, Success, Message, Error, Error time, and Error message. The table lists various tasks such as 'ToDateCalc', 'Backup', and 'Alerts' with their respective start and end times and success status. A row for 'Backup' on 12/21/2017 at 16:40:53 is highlighted in pink, indicating an error. The error message states: 'Backup failed, error message below. Erreur pendant la copie du fichier \\DLINK-05BAC7\Volume\_1\Data\Program files\MLM 4.4\\*. \* vers C:\Users\Marc Gelinas\Desktop\DLINK-05BAC7\Volume\_1\Backups\_MLM\_Autome...'. At the bottom, there are buttons for 'Delete message' and 'Exit', and a note: '\* Mouse right clic to export'.

Last updated: June 28, 2023