HSBC*net* Automated File Delivery Service

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Creating schedules using HSBC*net* Automated File Delivery

The Automated File Delivery (AFD) tool allows you to schedule reports and files to be sent to your HSBC*net* computer or email account at specified times.

You can set different schedules to send reports at different times of the day. The schedules are flexible, but keep in mind that you should only create as many schedules as you need to avoid overloading your workstation with too many reports.

How do I create a new schedule?

You can create different schedules to meet your business needs.

> **To create a schedule:**
> 1. Under the **Automated File Delivery** menu, select **Create New Schedule – Reports and File Download**. The AFD Schedule Maintenance tab will open in HSBC*net*.
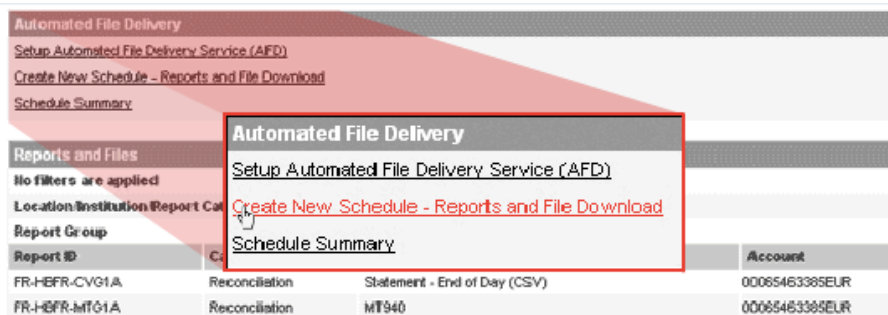
> 2. Under **Schedule Details**, enter the **Short Name** and **Schedule Name**.
>   - The **Short Name** is used to identify and search for your schedule.
>   - The **Schedule Name** is used to identify and describe your schedule.

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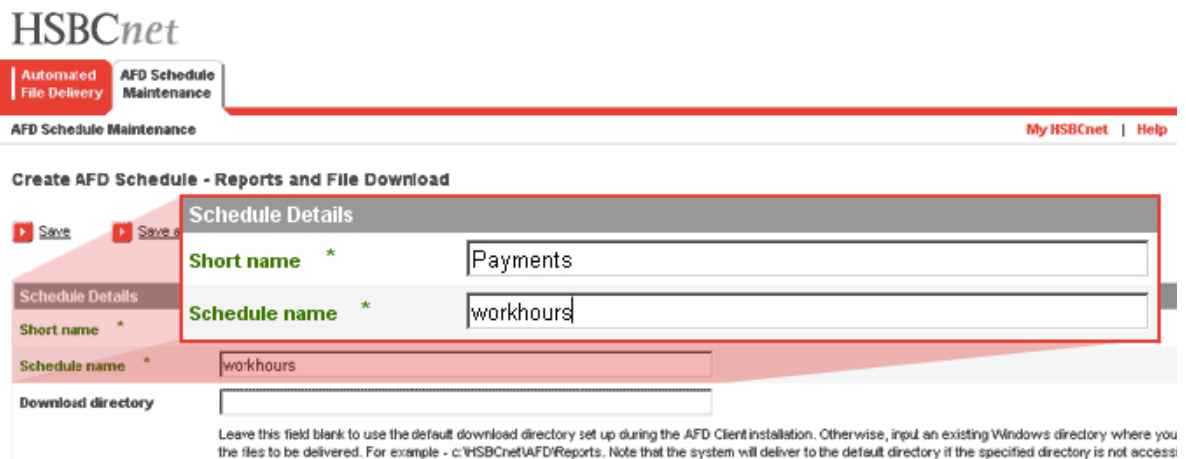
3. Enter the required schedule details (marked with an asterisk *):
   - **Receive reports**: How you will receive the reports by email.
   - **Schedule frequency**: How often the schedule will run.
   - **Generate report**: What time the schedule will run.
   - **Time zone**: Your desired time zone.

4. In the **Report Summary List**, select the reports you want the schedule to download. You can find reports created by *Report Writer* in the **Customised Reports** tab.

   Tip! Select all available reports or clear all selected reports using the **Select All** and **Clear All** buttons at the top and bottom of the **Report Summary List**.

5. Click **Save**. You will be taken to a page that summarizes your schedule details (see next). The schedule will start running at the next specified time.

   Note: To save your settings as a draft, click **Save as Incomplete**.

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How do I specify where my reports are saved?

Your reports will be saved to the default directory specified during set-up. You can specify a different directory to save your reports in the **Schedule Details**.

To specify where your reports are saved:
1. Create a new schedule.
2. Under **Schedule Details** > **Download directory**, enter your desired directory path.
3. Enter the remaining schedule details and click **Save**. The schedule will begin running at the next specified time and reports will be delivered to the new directory.

   Note: If the new directory is inaccessible, files will be saved to the default directory.

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How do I specify how many emails I receive?

You can choose to receive your scheduled reports bundled in one email, or individually in separate emails.

To specify how many emails you receive:
1. Create a new schedule.
2. Under **Schedule Details** > **Receive Reports**, choose to receive reports **In Bulk** or **Individually**:
   - To receive all reports in one email, select **In Bulk**. Choose this option If your schedule will download only a few reports and files.
   - To download many reports and files from a single schedule, select **Individually**. This will avoid slowing down the system with a large file transfer.
3. Enter the remaining schedule details and click **Save**. The schedule will begin running at the next specified time.

How do I specify how often I receive reports?

You can select whether your schedule runs daily, weekly, or monthly.

To specify when your schedule runs:
1. Create a new schedule.
2. Under **Schedule Details** > **Schedule Frequency**, select how often you want the schedule to run using the drop-down menu:
   - **Daily**: Monday to Friday are automatically selected, with Saturday and Sunday as optional. You can change these settings by checking and unchecking the boxes next to each day.
   - **Weekly**: You can select to receive your reports on one or more days weekly by checking and unchecking the boxes next to each day.
   - **Month-end**: You will receive a report on the last calendar day of each month.
3. Enter the remaining schedule details and click **Save**. The schedule will begin running at the next specified time.

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How do I set up recurring schedules?
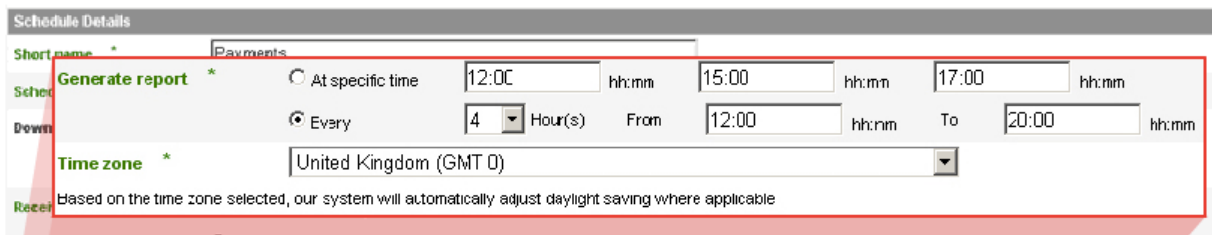
You can create a recurring schedule that runs every few hours within a given time period.

To create a recurring schedule:
1. Create a new schedule.
2. Under **Schedule Details** > **Generate Report**, enter how often you would like to run the schedule (Every X hours) and the time period when you would like the reports to be generated.

   Note: Each schedule can run a maximum of 8 times within a given time period.

3. Specify your time zone.
4. Enter the remaining schedule details and click **Save**. The schedule will begin running at the next specified time.

Viewing and modifying schedules using HSBC*net* Automated File Delivery

You can view your existing schedules by selecting **Schedule Summary** under the **Automated File Delivery** menu. From here, you can view, copy, delete, pause and reactivate your schedules.

- **To view schedule details**, click on the schedule's **Short name**.
- **To view schedule activity details**, click on the schedule's **Status**.

Tip! Use the **Quick Search** tool on the right of the screen to find a particular schedule.

How do I modify my existing schedules?

You can modify existing schedules by changing the schedule's settings.

To modify a schedule:
1. In the **Schedule Summary**, click on the **Action arrow** of the schedule you want to modify.

2. Select **Modify**. The **AFD Schedule Maintenance** tab will open in the browser.
3. Make your desired changes and click **Save** to apply the changes to your schedule.

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How do I create a new schedule from an existing one?

If you want to reuse a schedule's settings, you can create a new schedule from an existing one.

To create a new schedule from an existing one:
1. In the **Schedule Summary**, click on the **Action arrow** of the schedule you want to copy.

Short name	Schedule name	Type	Frequency	At time	Next activation	Status	Action
Payments	workhours	Schedule Download	Daily – Mo Tu We Th Fr	Every 4 hour (s) 12:00 - 20:00	17/02/2006 12:00	Active	▸

2. Select **Copy**. The **AFD Schedule Maintenance** tab will open in the browser.
3. Make any desired changes and click **Save** to apply the changes to your new schedule.

How do I delete a schedule?

If you no longer need a schedule, you can delete it.

To delete a schedule:
1. In the **Schedule Summary**, click on the **Action arrow** of the schedule you want to delete.

Short name	Schedule name	Type	Frequency	At time	Next activation	Status	Action
Payments	workhours	Schedule Download	Daily – Mo Tu We Th Fr	Every 4 hour (s) 12:00 - 20:00	17/02/2006 12:00	Active	▸

2. Select **Delete**. The system will ask for confirmation.
3. Provide confirmation and the schedule will be deleted.

How do I pause a schedule?

If you no longer need a schedule, but would like to save the settings for future use, you can pause it.

To pause a schedule:
1. In the **Schedule Summary**, click on the **Action arrow** of the schedule you want to pause.

Short name	Schedule name	Type	Frequency	At time	Next activation	Status	Action
Payments	workhours	Schedule Download	Daily – Mo Tu We Th Fr	Every 4 hour (s) 12:00 - 20:00	17/02/2006 12:00	Active	▸

2. Select **Suspend**. The system will ask for confirmation.
3. Provide confirmation and the schedule will be suspended.

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How do I reactivate a paused schedule?

If you want to resume a paused schedule, you can reactivate it.

To restart a paused schedule:
1. In the **Schedule Summary**, click on the **Action arrow** of the schedule you want to reactivate.

Short name	Schedule name	Type	Frequency	At time	Next activation	Status	Action
Payments	workhours	Schedule Download	Daily – Mo Tu We Th Fr	Every 4 hour (s) 12:00 - 20:00	17/02/2006 12:00	Active	▶

2. Select **Reactivate**. The system will ask for confirmation.
3. Provide confirmation and the schedule will begin running at the next specified time.

Installation and troubleshooting

How do I set up my Automatic File Delivery Service?

If this is your first time using the Automatic File Delivery tool on HSBC*net*, contact your System Administrator to set up the service for you.

What if I can't find the report I need in the Report List?

If the report you're looking for is not in the **Report Summary List** under the **Standard Reports** tab or the **Customised Reports** tab, contact your System Administrator to see if you have authorized access to that particular report.

Why doesn't my schedule create new reports?

The Automated File Delivery schedule only delivers reports that physically reside under the **Reports and File Download** tool; it does not create new reports. To create a new report, see HSBC*net*'s Reports and File Download documentation.

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