

# HOW TO CREATE A REOCCURRING BUDGET vs. ACTUAL BY SMARTKEY MONTHLY REPORT (sent by email)



1. Create a new Run Control (Suggestion: create one for every faculty member, yourself, or for any other meaningful purpose, label reoccurring Run Controls):

- a. Type in a name or identifier without spaces or special characters (make it meaningful)
- b. Click ADD

**Budget vs Actual**

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Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

- 2. Pick **Type of Report**: Summary Report, Account Summary Report and/or Detail Report as desired
- 3. Required: Check box labeled **As of Last Month End**
- 4. Put faculty member's USER ID in PI/PM/RP OperID (CAPITAL letters only, e.g. SDEVOTO, IMUKERJI, COTHON, etc.) or fill in any of the other WFS selection criteria (e.g. Smartkey, Fund, etc.).
- 5. Click RUN

Budget vs Actual Report

Run Control ID: lgrabel\_monthly [Report Manager](#) [Process Monitor](#)

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**WFS Budget vs Actual Period to Date by SmartKey**

Summary Report  
  Account Summary Report  
  Detail Report

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As of Last Month End  
  As of Yesterday  
  Specify

**Specify Fiscal Year & Period**

Fiscal Year: 2014

Reporting Period: 9 {EG: JUL=Period 1, JAN=Period 7}

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**For Report of all Smartkeys Leave This Section Blank**

Fund:

Deptid:

PI/PM/RP OperID:        Program Group:

Smartkey:        Smartkey To:(Range only)

SmartKey In:        Use ';' as separator



## 7. Distribution Detail Page

- a. Type in an Email Subject. Give it a recognizable identifier so you can easily find it.
- b. Type in Message Text
  - i. First line should say something like “PLEASE DO NOT REPLY TO THIS EMAIL. REPLIES TO SYSTEM EMAIL ADDRESSES ARE NOT READ”
- c. Distribute To
  - ii. Click + (plus) button
  - iii. Select ID Type = User
  - iv. Distribution ID
    1. Type in USER ID or search (can send to more than one person-just click + button and select user and add USER ID);
  - v. Click OK

**Distribution Detail**

Process Name: BUD\_ACT  
Process Type: SQR Report  
Folder Name:

**Email Only**

Email Subject:  Email With Log  Email Web Report   
LGRABEL Monthly WFS Smartkey Report

Message Text:  
PLEASE DO NOT REPLY TO THIS EMAIL. REPLIES TO SYSTEM EMAIL ADDRESSES ARE NOT READ  
  
Laura  
  
This is your monthly WFS report showing you the budget status of your smartkeys. And so on.....

Email Address List:

**Distribute To**

| ID Type                   | *Distribution ID             |
|---------------------------|------------------------------|
| User <input type="text"/> | NPETERS <input type="text"/> |
| User <input type="text"/> | LGRABEL <input type="text"/> |

OK Cancel

8. **Back to Process Scheduler Request Page**

- a. Click OK
- b. You know you have done all the steps when you get a Process Instance number in the upper right corner below the RUN button



- c. **Caution: Every time you click OK when the Recurrence field is populated you create another recurring report ... even for the same Run Control. If you do not want two reports then please refer to “How To Stop Reoccurring Reports”.**

9. YOU HAVE DONE IT!

10. Email will be From [WFS-noreply@wesleyan.edu](mailto:WFS-noreply@wesleyan.edu) (reminder you cannot reply to this email)

11. Only active smartkeys (have budgets or transactions) for the fiscal year will be reported

# HOW TO CHANGE REOCCURRING REPORTS

1. To change SELECTION CRITERIA for an existing reoccurring report go into the Budget vs. Actual Report using the Run Control that needs changes:
  - a. Make your changes.
  - b. Click SAVE.
  - c. You're done! You do NOT need to click RUN. The next time the recurring report runs it will use the new selection criteria.

Budget vs Actual Report

Run Control ID: lgrabel\_monthly [Report Manager](#) [Process Monitor](#) [Run](#)

WFS Budget vs Actual Period to Date by SmartKey

Summary Report  Account Summary Report  Detail Report

As of Last Month End  As of Yesterday  Specify

Specify Fiscal Year & Period

Fiscal Year: 2014

Reporting Period: 9 (EG: JUL=Period 1, JAN=Period 7)

For Report of all Smartkeys Leave This Section Blank

Fund:

Deptid:

PI/PM/RP OperID: LGRABEL  Program Group:

Smartkey:  Smartkey To:(Range only)

SmartKey In:  Use ';' as separator

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Add](#) [Update/Display](#)

2. To change the EMAIL TEXT or RECIPEINT LIST for an existing reoccurring report go into the Budget vs. Actual Report using the Run Control that needs changes.
  - a. Click RUN.
  - b. IMPORTANT: Please note that the Recurrence defaults to blank when you come back in. **You must reenter the Recurrence and adjust the Run Date.**
  - c. Click Distribution on the Process Scheduler Request page. Make your changes.
  - d. Click OK.
  - e. Click OK again.
  - f. IMPORTANT: You have just created an ADDITIONAL recurrent report! Please refer to the next section on How To Stop Reoccurring Reports to cancel the previous version of your report.

# HOW TO STOP REOCCURRING REPORTS

1. Go back to the Budget vs. Actual Report using any Run Control
2. Click on **Process Monitor**

Budget vs Actual Report

Run Control ID: LGRABEL\_MONTHLY [Report Manager](#) [Process Monitor](#) [Run](#)

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WFS Budget vs Actual Period to Date by SmartKey

Summary Report  Account Summary Report  Detail Report

As of Last Month End  As of Yesterday  Specify

Specify Fiscal Year & Period

Fiscal Year: 2014  
Reporting Period: 8 {EG: JUL=Period 1, JAN=Period 7}

3. Find processes by selecting:
  - Type: SQR Report
  - Name: BUD\_ACT
  - Last: 30 Days
4. Click SAVE and these values will be there any time you return to this page.
5. Click Refresh to see your processes
6. The rows with the **Green Circular Arrow** and a Run Status = Queued are your reoccurring reports. They should have a date in the future.
  - a. Click on the **Details** link

Process List [Server List](#)

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View Process Request For

User: NPETERS Type: SQR Report Last: 30 Days [Refresh](#)

Server: Name: BUD\_ACT Instance: to

Run Status: Distribution Status:  Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-4 of 4](#) | [Last](#)

| Select                   | Instance | Seq. | Process Type | Process Name | User    | Run Date/Time            | Run Status | Distribution Status | Details                 |
|--------------------------|----------|------|--------------|--------------|---------|--------------------------|------------|---------------------|-------------------------|
| <input type="checkbox"/> | 1135155  |      | SQR Report   | BUD_ACT      | NPETERS | 04/05/2014 5:30:00AM EDT | Queued     | N/A                 | <a href="#">Details</a> |

7. Process Details Page:
  - a. **Check** the Run Control associated with the line
  - b. Click Cancel Request, and then click OK to stop this recurrence.

Process Detail

Process

Instance: 1135155 Type: SQR Report  
Name: BUD\_ACT Description: Budget vs Actual Rep by Smrky  
Run Status: Cancel Distribution Status: N/A

Run [Update Process](#)

Run Control ID: LGRABEL\_MONTHLY  Hold Request  
Location: Server  Queue Request  
Server:  Cancel Request  
Recurrence: Budget vs Actual Monthly  Delete Request  
 Restart Request

Data/Time [Actions](#)

Request Created On: 03/26/2014 3:10:22PM EDT [Parameters](#) Transfer  
Run Anytime After: 04/05/2014 5:30:00AM EDT [Message Log](#)  
Began Process At: Batch Timings  
Ended Process At: [View Log/Trace](#)

[OK](#) [Cancel](#)