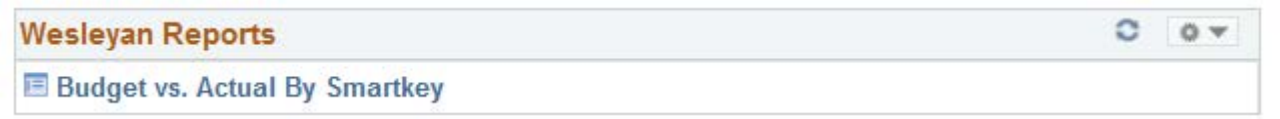# *RECURRING*
BUDGET vs. ACTUAL BY SMARTKEY MONTHLY REPORT

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

Wesleyan Reports

 Budget vs. Actual By Smartkey

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. b. Click ADD

Budget vs Actual

Find an Existing Value | Add a New Value

Run Control ID JMITCHELL_MONTHLY

Add

Find an Existing Value | Add a New Value

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

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

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

6. Process Scheduler Request Page

    a. Recurrence – Choose Budget vs. Actual Monthly from the drop down (runs on the 5th day of the month at 5:30 am). NOTE: if you want to send an immediate email just leave the Recurrence blank (default)

    b. Change the Run Date to the 5th day of the upcoming month. If you do not make this change an email will be sent to all recipients after completing this whole process and also starting on the 5th of every month. Changing the date to the 5th of the upcoming month eliminates the immediate email.

    c. Type – Choose Email from the drop down (Format should be PDF)

    d. Click Distribution

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

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

      a. First line should say something like "PLEASE DO NOT REPLY TO THIS EMAIL. REPLIES TO

         SYSTEM EMAIL ADDRESSES ARE NOT READ"

   c. Distribute To

      a. Click + (plus) button

      b. Select ID Type = User

      c. Distribution ID

         a. Type in USER ID or search (can send to more than one person-just click + button

            and select user and add USER ID);

      d. Click OK

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

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
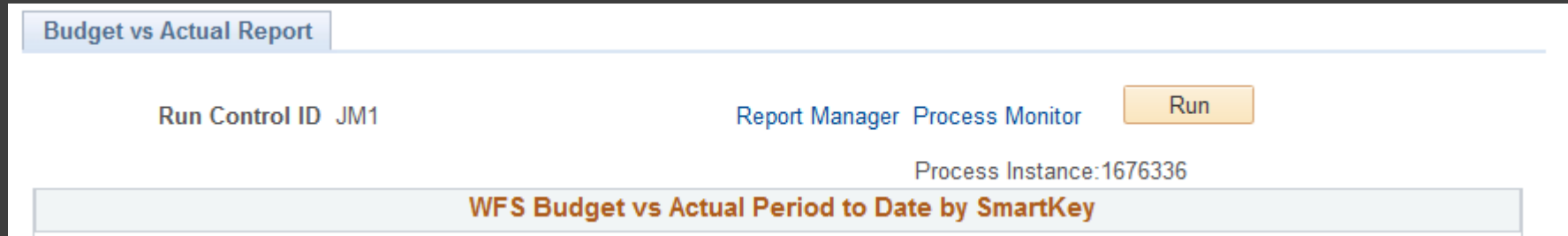
    c.   Caution: Every time you click OK when the Recurrence field is populated you create another recurring report … even for the same Run Control. If you do not want two

        reports then please refer to "How To Stop Reoccurring Reports".

9. YOU HAVE DONE IT!

10. Email will be From pf92prod@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.

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

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

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