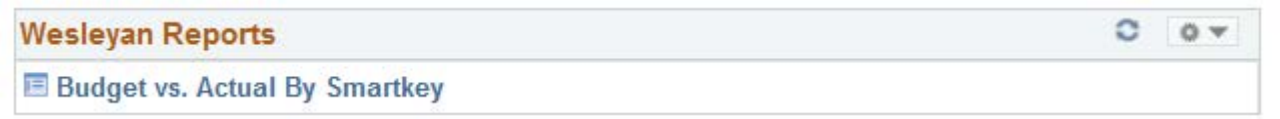


RECURRING
BUDGET vs. ACTUAL BY SMARTKEY MONTHLY REPORT

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

A screenshot of a web form titled "Budget vs Actual". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a text input field labeled "Run Control ID" containing the text "JMITCHELL_MONTHLY". Underneath the input field is a yellow "Add" button. At the bottom of the form, there are two links: "Find an Existing Value" and "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

Budget vs Actual Report

Run Control ID JM1 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: 2016

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

For Report of all Smartkeys Leave This Section Blank Use ';' as separator for 'In' fields

Fund: 100 Fund In: _____

Deptid: 1295 Deptid In: _____

PI/PM/RP OperID: _____ Program Group: _____

Smartkey: _____ Smartkey To:(Range only) _____

SmartKey In: _____ Use ';' as separator

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

Process Scheduler Request

User ID JMITCHELL01 Run Control ID JM1

Server Name Run Date 05/12/2016

Recurrence Budget vs Actual Monthly Run Time 5:30:00AM

Time Zone

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Budget vs Actual Rep by Smrtky	BUD_ACT	SQR Report	Email	PDF	Distribution

OK Cancel

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

Distribution Detail

Process Name: BUD_ACT

Process Type: SQR Report

Folder Name: WESLEYAN (Wesleyan Reports)

Retention Days: 180

Email Only

Email Subject: Monthly WFS Smartkey Report

Email With Log: Email Web Report:

Message Text

PLEASE DO NOT REPLY TO THIS EMAIL. REPLIES TO SYSTEM EMAIL ADDRESSES ARE NOT READ

Email Address List

Distribute To

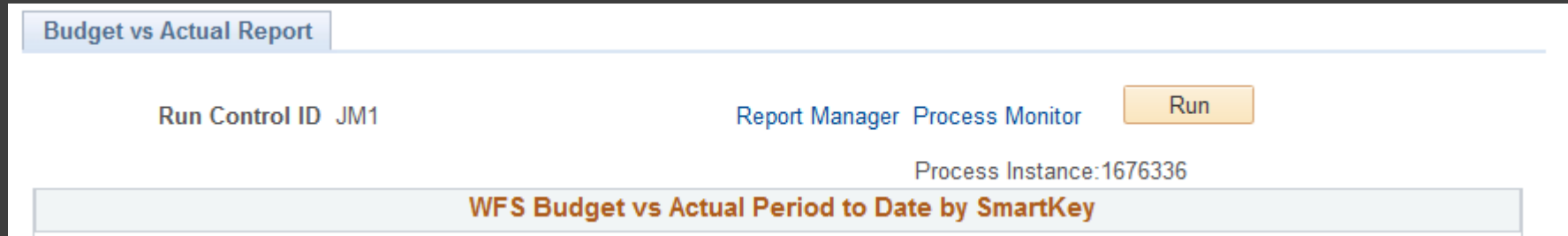
*ID Type	*Distribution ID
User	JMITCHELL01
User	PSILVA
User	SCHYUNG

OK Cancel

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.

The screenshot displays the 'Budget vs Actual Report' configuration page. At the top, it shows 'Run Control ID JM1' and a 'Run' button. The main title is 'WFS Budget vs Actual Period to Date by SmartKey'. Below this, there are three report type options: 'Summary Report' (checked), 'Account Summary Report', and 'Detail Report'. Under 'Summary Report', there are three sub-options: 'As of Last Month End' (checked), 'As of Yesterday', and 'Specify'. A 'Specify Fiscal Year & Period' box contains 'Fiscal Year: 2016' and 'Reporting Period: 10' with a note '{EG: JUL=Period 1, JAN=Period 7}'. Below this is a section for 'For Report of all Smartkeys Leave This Section Blank' with a note 'Use ;' as separator for 'In' fields'. It includes fields for 'Fund: 100', 'Fund In:', 'Deptid: 1295', 'Deptid In:', 'PI/PM/RP OperID:', 'Program Group:', 'Smartkey:', 'Smartkey To:(Range only)', and 'SmartKey In:'. Each field has a search icon and a dropdown arrow.

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.

