

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

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](#)

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: Program Group:

Smartkey: Smartkey To:(Range only)

SmartKey In: Use ';' as separator

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: NPETERS Run Control ID: LGRABEL_MONTHLY

Server Name: Run Date: 04/05/2014

Recurrence: Budget vs Actu Run Time: 5:30:00AM

Time Zone:

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 <input type="text"/>	PDF <input type="text"/>	Distribution

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	NPETERS
User	LGRABEL

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 (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:

PII/PM/RP OperID: 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](#)

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](#)

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	Details

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](#)