Scheduling Published Reports Using ReportCaster

*** Schedule reports to run Monday – Friday between 7:00 AM – 7:00 PM.***

Scheduling Published Reports to be delivered via Email

- 1. Open a published report as normal.
- 2. On the dashboard, enter your selections as normal. Before scheduling the report, run the report once to ensure your selections are returning the expected data. Then, click the "Schedule" button instead of the "Run" button.

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\rightarrow	<i>(</i> 9)	Version 1.4	

3. You can rename the report to your preferred file name by changing the name in the "Save Report As" box.

Task: WebFOCU	JS Report
- Scheduling Object: We	ebFOCUS Report
Path:	/WFC/Repository/Finance_Domain/FEX
Procedure:	FOROLDS_financial_operating_ledger.fex
Server Name:	EDASERVE
Execution ID:	fsmbi
Alert	
Report Properti	
Burst Report	
Override the Forma	at Specified in the Procedu
PDF - Adobe PDF	(*.pdf) 🗸
Save Report As:	FOROLDS_financial_operating_ledger.pdf

4. Click Distribution at the top of the screen.



5. Enter the recipient's email(s) in the "To:" box. Leave the From and Reply Address as the default (wfhtmail@unm.edu) as the Report Caster will fail to deliver the report if you change this to your email address. You can change the email's subject line by modifying the "Subject:" box. Note: If you are scheduling a report for anyone other than yourself, it is recommended to provide your contact information in the 'Email Information' section as the recipient will receive the email from "MyReports Email" and not your email address. E.g format: "Please do not reply to this message, as this is an automated email and cannot receive any replies. Feel free to contact me directly at [email@unm.edu] or [phone number] with any questions you may have."

Save & Close Delete	Properties Recurrence Task Distribution Notification
Actions	Show
Distribution: Email	1
Туре:	Email Address(s)
То:	fsm@unm.edu
From:	wfhtmail@unm.edu
Reply Address:	wfhtmail@unm.edu
Subject:	FOROLDS - Operating Ledger Detail and Summary
Email Information Gend the report as in Gend all reports as at	line message tachments
V	automated email and cannot receive any replies. Feel free to contact me directly at [email@unm.edu] or [phone number] with any questions you may have.

- 6. Click the appropriate radio button to send the report as an attachment or within the body of the email (as an inline message).
- 7. Click the Recurrence option at the top of the screen.

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Schedule	_				
Delete	Properties Recurrence Task	Distribution	Log Reports	Parameters	Email Server
Actions		Show		Option	S

8. Click a radio button on the left side to choose how frequently you want the schedule to run.

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Schedule									
Save & Close	X Delete	Properties	Recurrence	Task	Distribution	Notification	Log Reports	Parameters	Email Server
Actions					Show			Opti	ons
Settings	T	ne time zone fo	r the Start Time,	End Time	and Until Time is	s Mountain Sta	ndard Time (GMT-0	0600) .	
Minutes	St	art:	Wednesday, M	arch 18, 3	2015	-	10: 15 A	M	
Hourly	Er	nd:	Thursday, Dec	ember 31	2099	-	11: 59 P	M H	
Daily									
🔘 Weekly									
Monthly									
Yearly									
Custom	J								

9. After selecting a frequency (e.g. Monthly), choose the start and end dates for your report. You can use the drop-down buttons to find a date, or you can type over the dates. Complete all options for your scheduled frequency.

Run Once	The time zone for	r the St	art T	ime, I	End T	Time a	ind U	ntil Tin	e is Mountain Sta	ndard Time (GMT-060	0).
Minutes	Start:	Friday	/, Ap	ril 10,	, 201	5			•	7: 30 AM	-
Hourly	End:	Thurs	day,	Dece	mbe	r 10, 1	2015		-	11: 59 PM	-
Daily											
Weekly	Every 1	-	, mo	onth(s) on	•					
Monthly	The first		•	• •	Mond	ay		▼ of	the month(s)		
Yearly	Oay(s)	1	2	3	4	5	6	7			
Custom		8	9	10	11	12	13	14			
		15	16	17	18	19	20	21			
		22	23	24	25	26	27	28			
		29	30	31	Las	t Dav	ofM	lonth			

10. Click the Notification option at the top of the screen.



11. Enter your email address in the "Reply Address" box and the "Brief Message To" box. For more detail, enter your email in the "Full Message To" box. Enter text for the email's subject line in the Subject: field; a subject line must be entered as the Report Caster will fail to deliver the notification if you leave the subject blank.

Notification Email	
Notification Type:	On Error
Reply Address:	fsm@unm.edu
Subject:	FOROLDS error
Brief Message To:	fsm@unm.edu
Full Message To:	

- 12. The default notification is "On Error" and will only send you a notification if your report fails to run. Change this to "Always" if you would like to receive a notification regardless of whether the report fails or runs successfully. It is not recommended to change this to "Never", which will not send you an error notification.
- 13. Select Save & Close in the top left once you are finished.



14. On the save dialog screen, be sure that your My Content folder is selected. Give the schedule a meaningful name and click "Save" to set up the job.

