Finance Systems Management

Date: 1/2016

Scheduling Reports Using Report Caster

Contents

Section 1: Scheduling Published Reports to be delivered via Email
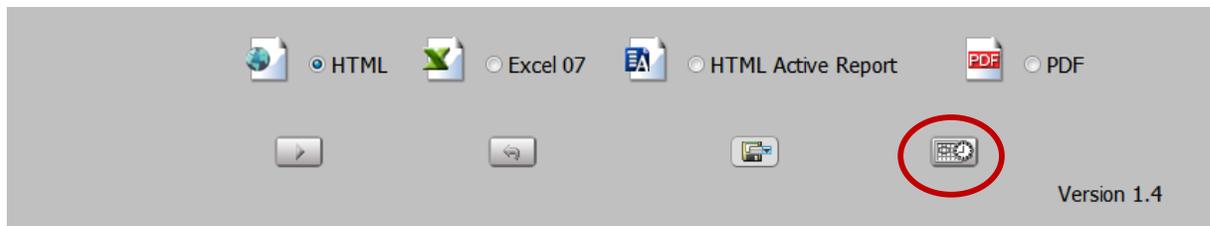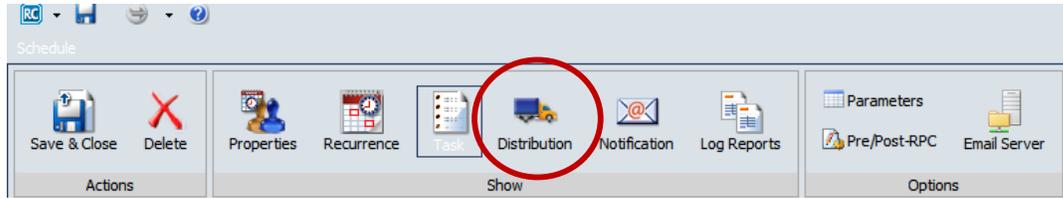
1. Open a published report as normal.

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. Click the "Schedule" button instead of the "Run" button.

3. You can rename the report to your preferred file name by changing the name in the "Save Report As" box.
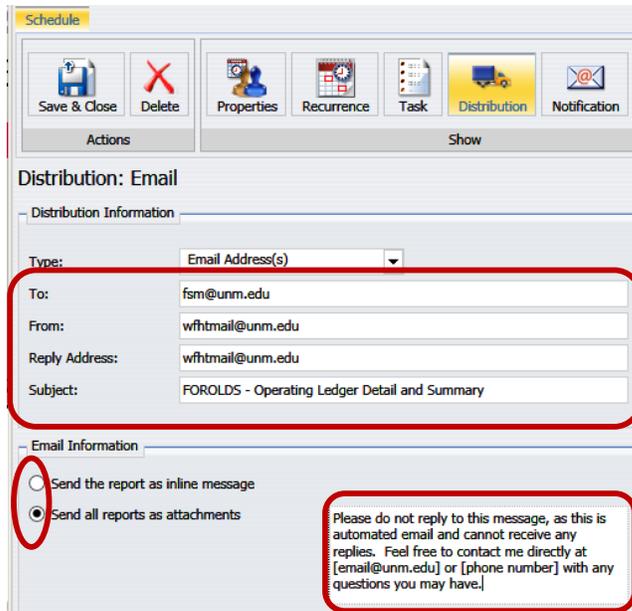
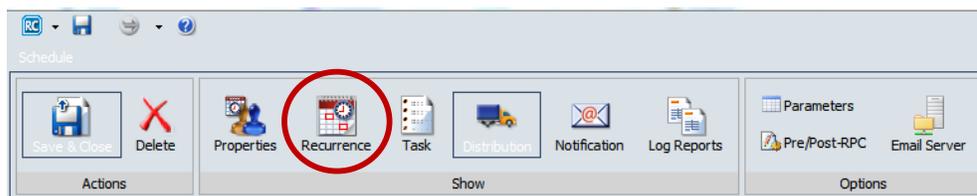4. Click Distribution at the top of the screen.

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.
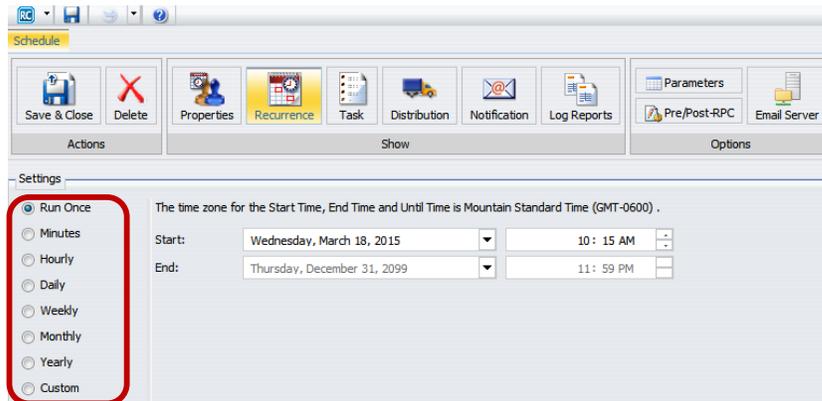
    Note: If you are scheduling a report for anyone other than yourself, it is recommended to provide your contact information in the 'Email Information' section as the recipient will receive the email from "MyReports Email" and not your email address. E.g format: "Please do not reply to this message, as 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."
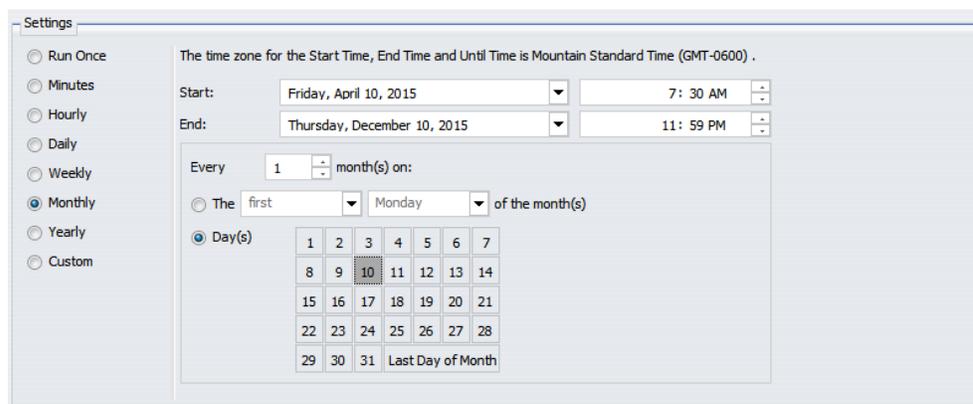

6. Click the appropriate radio button to send the report as an attachment or within the body of the email (as an inline message).

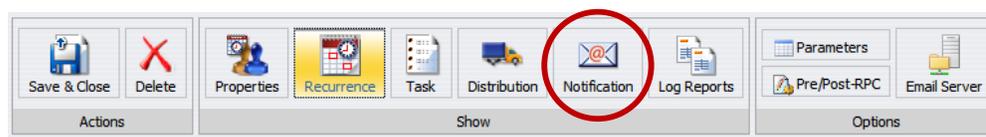7. Click the Recurrence option at the top of the screen.

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

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.

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.
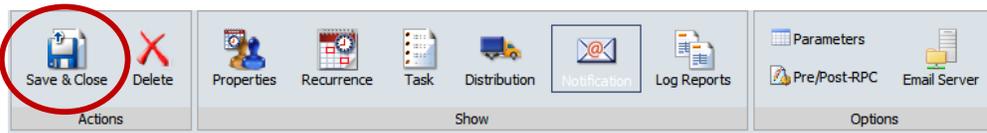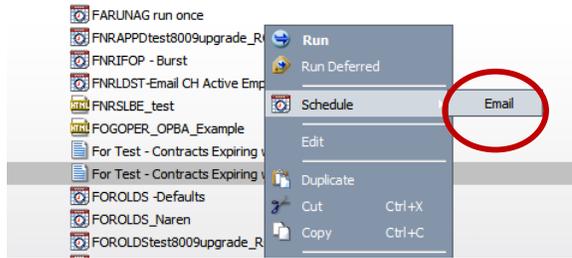

14. On the save dialog screen, be sure that your My Content folder is selected. Give the schedule a meaningful name and click "Save" to set up the job.
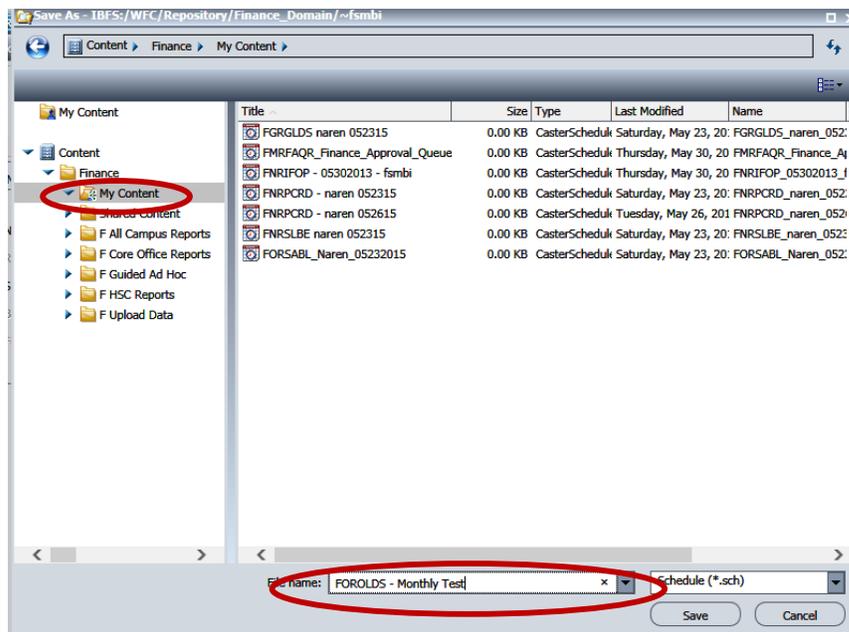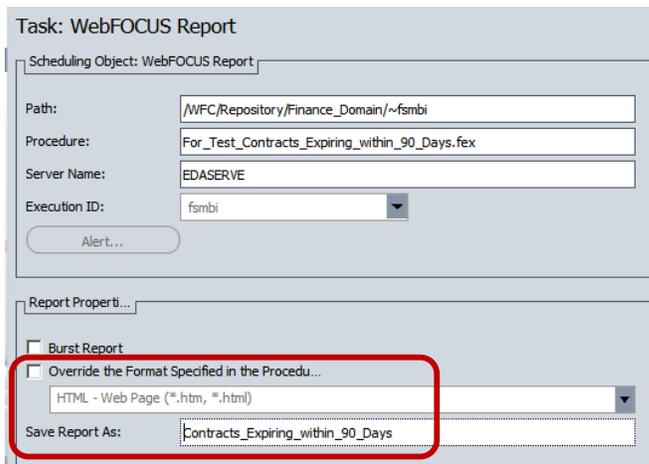

[Click here to return to the top of this document.](#)

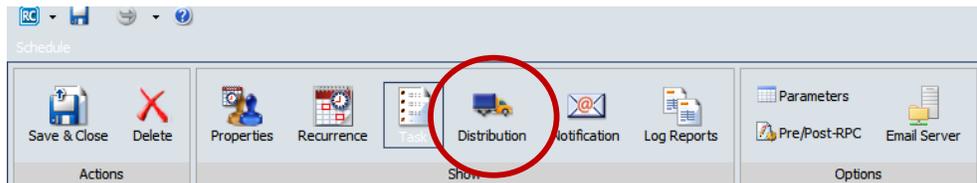**Section 2: Scheduling InfoAssist Reports to be delivered via Email**

1. Right-click your InfoAssist report.

2. Select Schedule → Email from the pop-up menu.

3. To change the report output format, click the "Override the Format Specified in the Procedure" checkbox and choose a format from the dropdown. You can also rename the report file by changing the name in the "Save Report As" box.

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."

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.

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

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.

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.

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 at all.

13. Click Parameters near the top right.

14. Click on each prompt individually and enter your value in the "Value" box.

15. Once you have entered values for all your prompts, click OK in the bottom right.

16. Select Save & Close in the top left once you are finished.

17. 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.

Section 3: Modifying an InfoAssist Report to use dynamic fiscal period / fiscal year values

If you have developed InfoAssist reports which run for a selected period and year, you will need to modify these reports to use the dynamic fiscal period and year variables in order to get the most benefit from ReportCaster on your report.

Adding a Filter for Prior Fiscal Period

1. Create a new report or open one of your existing reports.
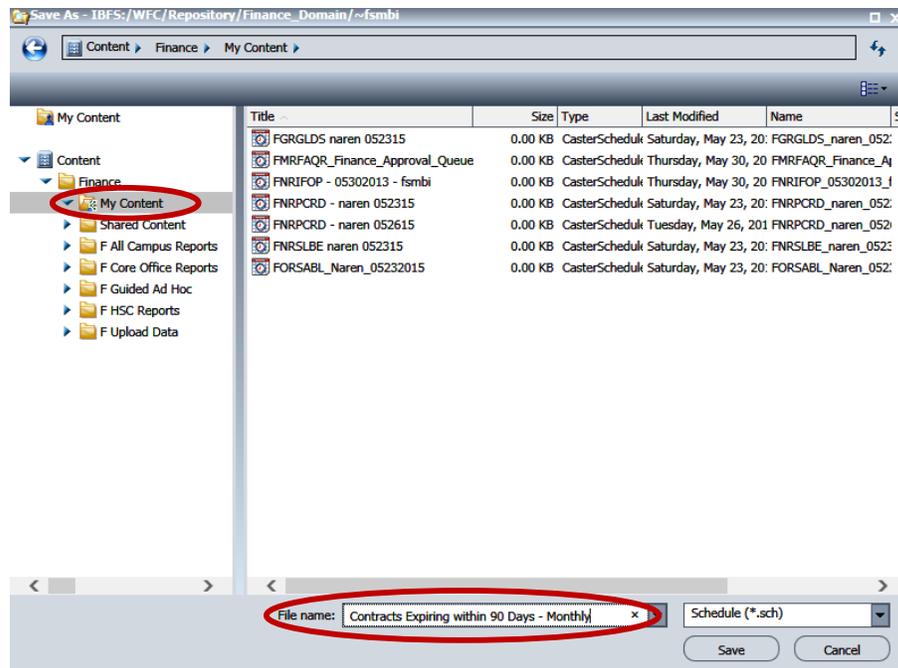2. First determine whether you want June to be evaluated as fiscal period 12 or fiscal period 14. This will determine which global variable you use in your Define.
3. Create a new Define to dynamically pull in prior fiscal period. Give the Field a meaningful name.
4. Change the Format to A2.
5. Enter the following: '&&PRIOR_FSPD12_G' Be sure to include the tick marks. (NOTE> Use '&&PRIOR_FSPD14_G' instead if you want June to be evaluated as fiscal period 14). A full list of the global variables will be provided at the end of this section.
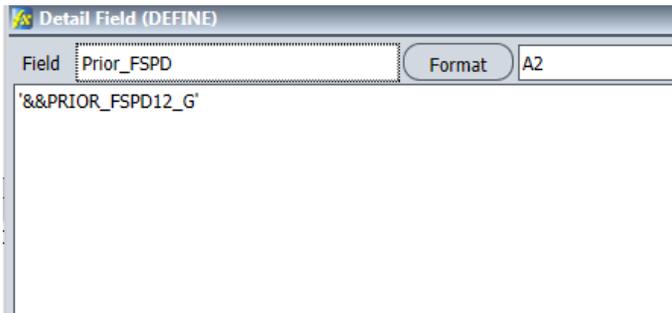
6. Save the Define.
7. Create another Define; this second Define is needed to dynamically get the fiscal year for the prior fiscal period (so that you do not need to update the report when the fiscal year changes).   Again, give the field a meaningful name.
8. Change the Format to A4.
9. Enter the following: '&&PRIOR_FSPD_FSYR_G' Be sure to include the tick marks.
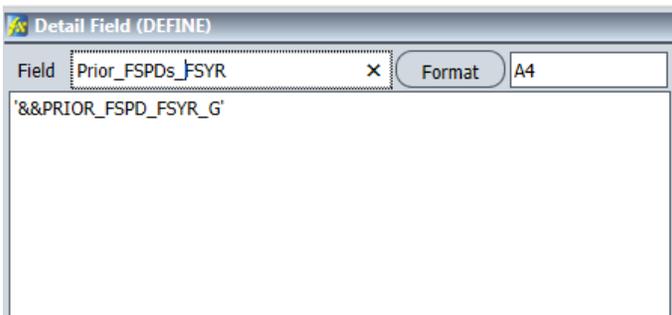
10. You will now need to create Advanced Filters for these fields.
11. If you are modifying an existing report, start by deleting your existing fiscal year and fiscal period filters.
12. On the Data tab, select Advanced Filter.

13. Any existing filters will be displayed. Select New Filter.
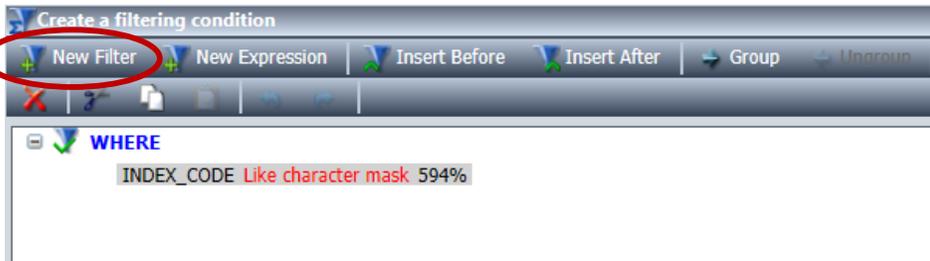
14. Click the <Field> drop-down. Scroll to the FISCAL_YEAR field in your table.
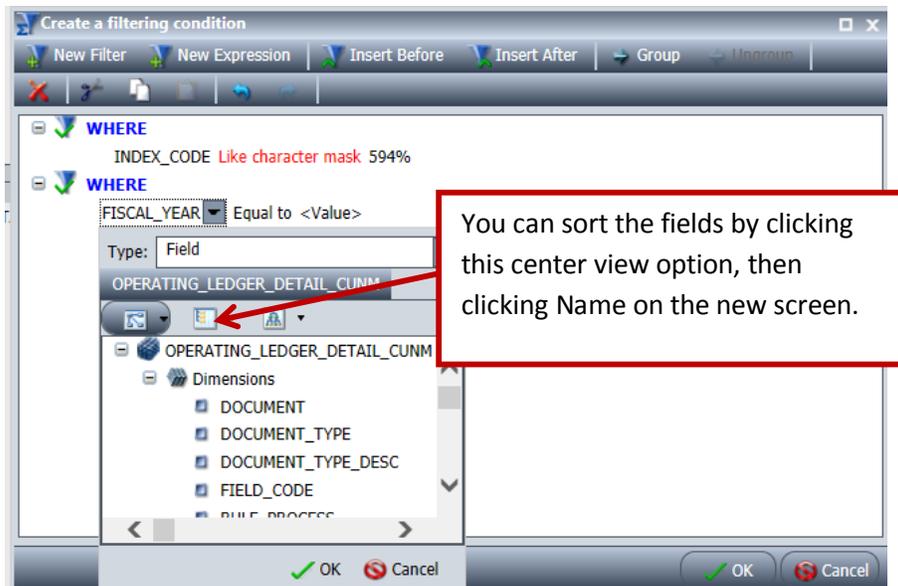
You can sort the fields by clicking this center view option, then clicking Name on the new screen.

15. After selecting fiscal year, click OK.

16. Click <Value>.
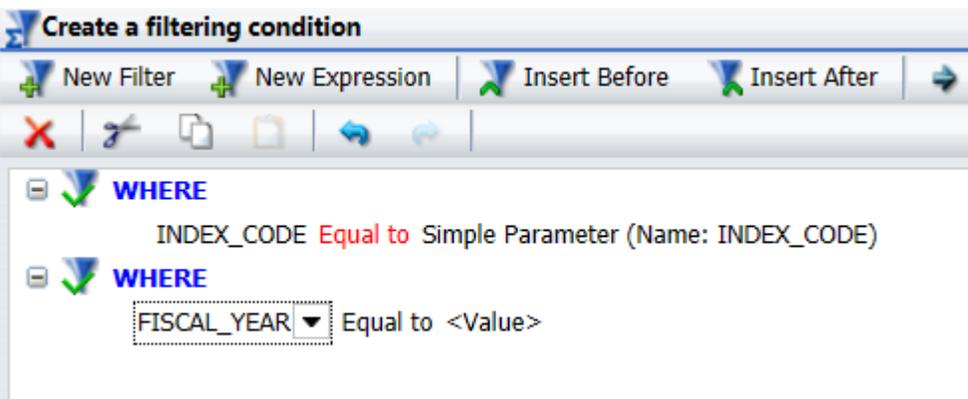
17. Select Field from the Type drop-down menu.
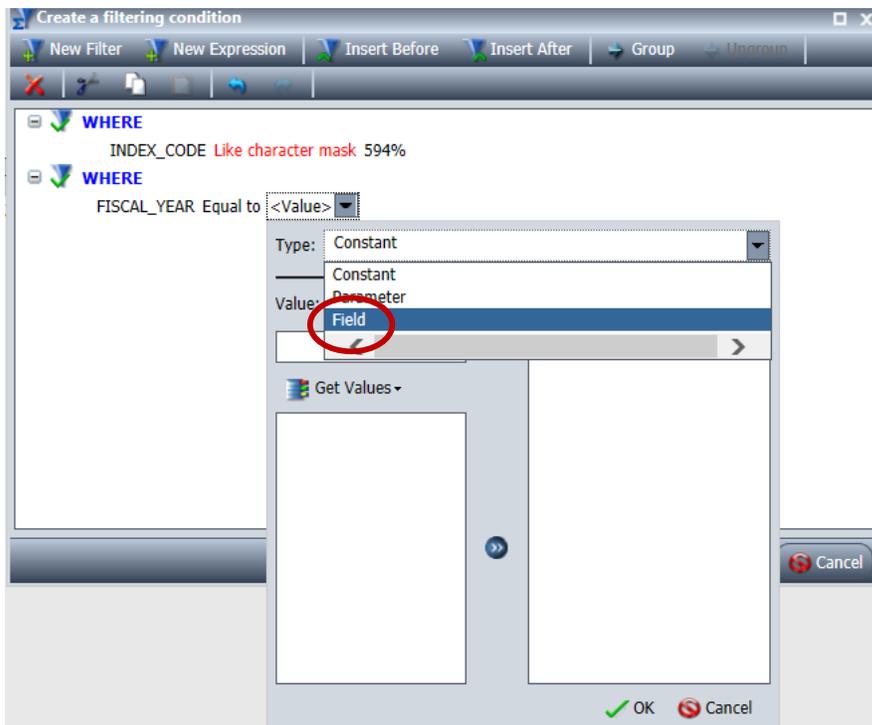
18. Locate the field you defined for fiscal year. It should be near the bottom, right above the Measures/Properties.
19. Once you've selected it, hit OK.
20. Your screen should now resemble the below. Note that you can change the "Equal to" by clicking it and selecting a different comparison (e.g. Less Than).
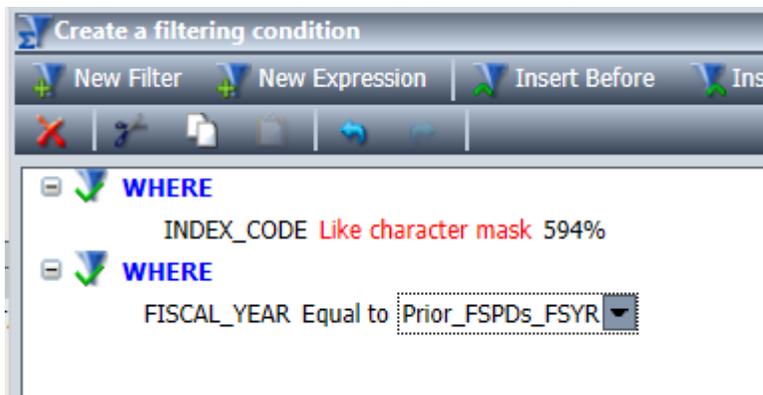
21. Follow the same process to create a filter for the prior fiscal period. Your screen should now resemble the below (you may see additional filters depending on how your report was set up). **Note that you need both the FISCAL_YEAR _and_ FISCAL_PERIOD filters in order for this to function properly.**
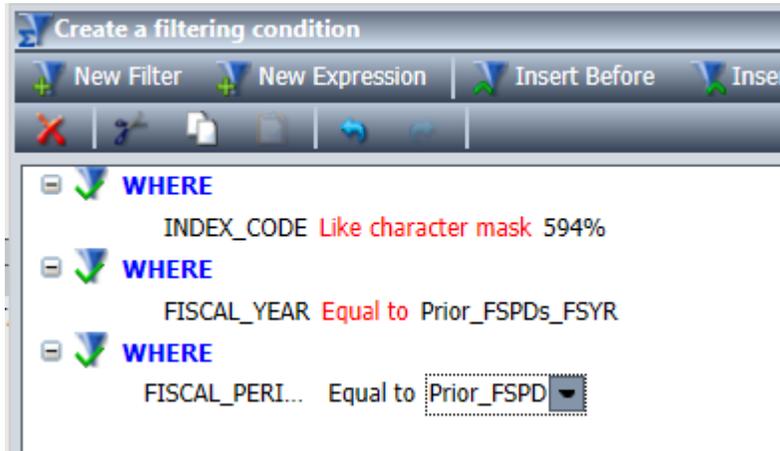
22. It is recommended to display fiscal year and fiscal period the first time you run the report so that you are able to verify that the report is pulling information correctly. If everything has been set up properly, you will no longer need to update the parameters for prior period and fiscal year; the report will automatically grab information for the prior period each time it is run.

List of Global Variables that you can use in your reports. Be sure to always include ticks when using these!

Variable Name	Use in your Define When…	Format	Advanced Filter: Compare to…
&&PRIOR_FSPD12_G	You want your report to run based on the prior fiscal period. You want June to be defined as fiscal period 12.	A2	Fiscal Period field in the table – normally called FISCAL_PERIOD
&&PRIOR_FSPD14_G	You want your report to run based on the prior fiscal period. You want June to be defined as fiscal period 14.	A2	Fiscal Period field in the table – normally called FISCAL_PERIOD
&&PRIOR_FSPD_FSYR_G	You want your report to run based on the prior fiscal period. You must have a separate define for this variable in order for your report to automatically update for fiscal year changes.	A4	Fiscal Year field in the table – normally called FISCAL_YEAR
&&CURR_FSPD12_G	You want your report to run based on the current fiscal period. You want June to be defined as fiscal period 12.	A2	Fiscal Period field in the table – normally called FISCAL_PERIOD
&&CURR_FSPD14_G	You want your report to run based on the current fiscal period. You want June to be defined as fiscal period 14.	A2	Fiscal Period field in the table – normally called FISCAL_PERIOD
&&CURR_FSPD_FSYR_G	You want your report to run based on the current fiscal period. You must have a separate define for	A4	Fiscal Year field in the table – normally called FISCAL_YEAR

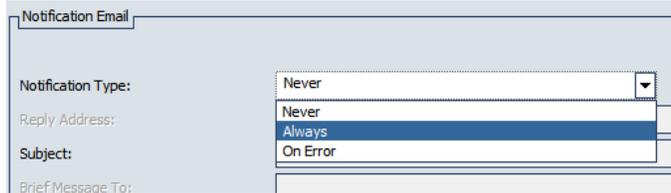|			
	this variable in order for your report to automatically update for fiscal year changes.		
&&PRIOR_CALYR_G	You want your report to run based on the prior calendar year. This will determine the prior calendar year based on today's date, so you should only use this if pulling data for a full calendar year.	A4	Calendar Year field in the table – normally called CALENDAR_YEAR
&&CURR_CALYR_G	You want your report to run based on the current calendar year. This will determine the current calendar year based on today's date, so you should only use this if pulling data for a full calendar year.	A4	Calendar Year field in the table – normally called CALENDAR_YEAR
&&PRIOR_FSYR_G	You want your report to run based on the prior fiscal year. This will determine the prior fiscal year based on today's date, so you should only use this if pulling data for a full fiscal year.	A4	Fiscal Year field in the table – normally called FISCAL_YEAR
&&CURR_FSYR_G	You want your report to run based on the current fiscal year. This will determine the current fiscal year based on today's date, so you should only use this if pulling data for a full fiscal year.	A4	Fiscal Year field in the table – normally called FISCAL_YEAR
&&PRIOR_FSPD_CALYR_G	You want your report to run based on the prior *fiscal period* and also have a filter for *calendar year*. You must have a separate define for this variable (instead of the &&PRIOR_FSPD_FSYR_G) in order for your report to automatically update for calendar year changes.	A4	Calendar Year field in the table – normally called CALENDAR_YEAR
&&CURR_FSPD_CALYR_G	You want your report to run based on the current *fiscal period* and also have a filter for *calendar year*. You must have a separate define for this variable (instead of the &&CURR_FSPD_FSYR_G) in order for your report to automatically update for calendar year changes.	A4	Calendar Year field in the table – normally called CALENDAR_YEAR

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Section 4: Troubleshooting

Issue	Resolution
The recipient did not receive the scheduled report.	Please see "Viewing the schedule log" under "How can I tell whether a scheduled report was delivered to the intended recipient". If the log indicates that the report was delivered successfully, ask the recipient to verify that you are on their Safe Senders list and have them check their Junk Mail folder. You can also re-run the schedule at any time by right-clicking it and selecting Run. This should deliver a new copy of the report to them.
How can I tell whether a scheduled report was delivered to the intended recipient?	There are several options for handling this. You may view the log view, include your own email address on the distribution so that you receive a copy at the same time as the intended recipient, or set up a notification. You will need to determine what works best for your needs. **Viewing the schedule log (recommended):** 1. Right-click the schedule and select View Log. 2. Leave the option as "Last Executed" and click OK. 3. Scroll all the way to the bottom of the log file. 4. Near the bottom, you should see a message indicating whether the report was distributed. **Setting up a notification:** When setting up a schedule, follow the below steps to set up a notification:
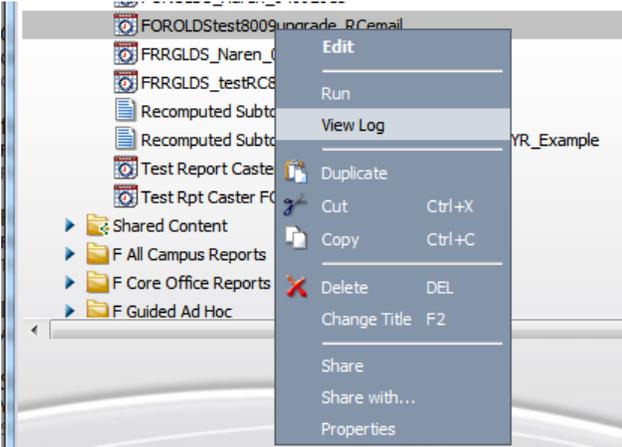
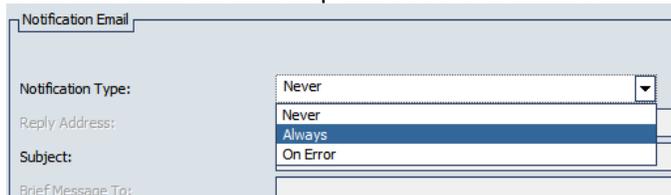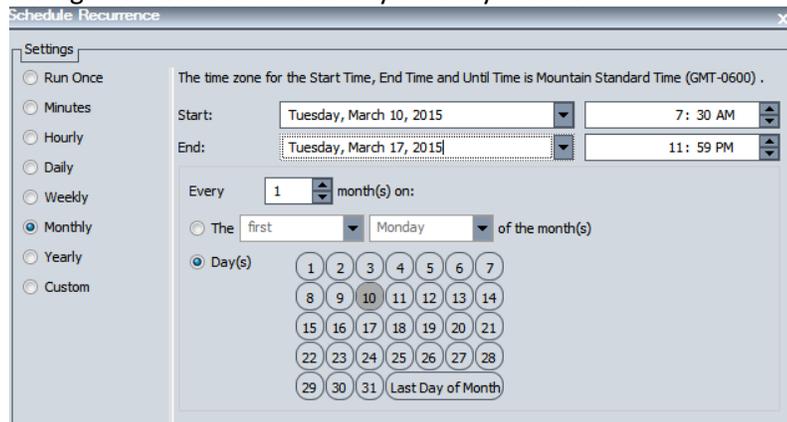|	
	1. Click the Notification icon. 2. Select a Notification Type from the drop-down menu. Choose "On Error" to be notified only if the report does not process correctly; choose "Always" to be notified whether the report is successful or not. *Notification Email* Notification Type: Never ▾ / Never / Always / On Error Reply Address: Subject: Brief Message To: 3. Enter your email address in "Reply Address:". Depending on how much detail you want in the notification message, enter your email address in "Brief Message To:" or "Full Message To:" – or both. 4. 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. 5. Complete setting up the report schedule as normal. If you are modifying an existing schedule, follow the below steps: 1. Right-click the report schedule and select Edit. 2. Click the Notification icon. 3. Select a Notification Type from the drop-down menu. Choose "On Error" to be notified only if the report does not process correctly; choose "Always" to be notified whether the report is successful or not. *Notification Email* Notification Type: Never ▾ / Never / Always / On Error Reply Address: Subject: Brief Message To: 4. Enter your email address in "Reply Address:". Depending on how much detail you want in the notification message, enter your email address in "Brief Message To:" or "Full Message To:" – or both. 5. 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. 6. Click Save & Close.
I set up a notification on my email Report Schedule but I don't understand the email I received.	If you elected to receive a brief message, look at the Job Description at the end of the line. ⤺ Reply ⤺ Reply All → Forward Tue 3/17/2015 12:00 PM cmattos@unm.edu Email test FNRLDST To Christie Herman ⓘ We removed extra line breaks from this message. Schedule ID: S672b7a84s4115s4381sa29asd2cdb472cee0 **Job Description: 03132015 FNRLDST test RC email 8009 Completed successfully** If you elected to receive a full message, scroll to the bottom of the email and look for text saying whether the file was distributed.

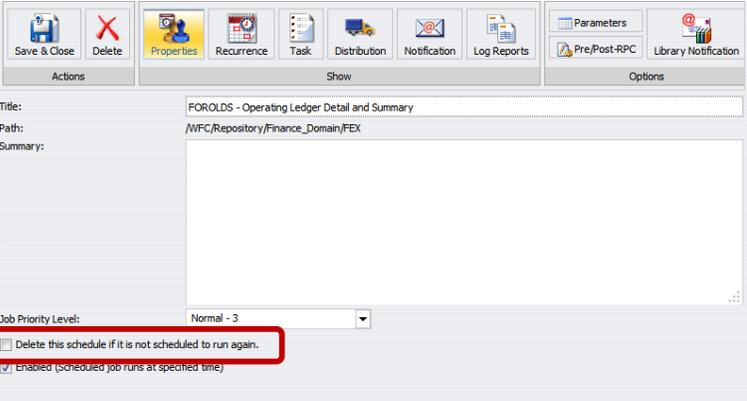|	
I don't need to receive my report any longer; how do I cancel the schedule?.	You can permanently delete the report schedule by right-clicking the report schedule and selecting Delete. If you just want to prevent the schedule from running (but don't want to permanently delete it), follow the below steps. 1. Right-click the report schedule and select Edit. 2. Click the Recurrences icon. 3. Double-click the option in the table. 4. Change the end date to reflect yesterday's date.
I want to change the values (parameters)	If you need to change the parameters on your schedule, delete the existing schedule (see above) and create a new schedule for the report.

on the schedule.	
Is there a way to automatically delete the schedule when I no longer need it?	1. From within the schedule, click the Properties icon. 2. Check the box next to "Delete this schedule if it is not scheduled to run again."
I need my report to run after each month's close. How can I schedule this?	The monthly close process is generally scheduled for the third business day of the month, which means that data on the reports should be up to date on the fourth business day of the month. You can set up a custom schedule to reflect this. Please be aware that if there are any delays with the month-end close, FSM will send a communication and you will need to re-run your scheduled report after the month has been closed.
How can I set up a schedule to email the report to multiple people?	When creating the schedule, separate email addresses with a semicolon or a comma.
I scheduled a report to run during the night, but didn't receive it until 7:00 AM.	Report scheduling is turned off from 7:00 PM – 7:00 AM while the data is being refreshed from Banner to the ODS reporting database. It is not recommended to schedule reports during this period while the nightly data refresh processes are running.