

SALISBURY UNIVERSITY

PROCEDURES: CREATE MONTHLY SCHEDULED/RECURRING REPORTS

You can set up each Budget report of your choosing to run the fifth business day of every month with the results emailed to you. In order to do this, it needs to be set up using processing 'recurrences'.

Follow the instructions on this same webpage for running either one of the Budget reports until you get to the Process Scheduler Request page.

Set the recurrence to FifthBusinessDay. Set type to Email and the Format to PDF. Click on the Distribution link.

Favorites ▾ Main Menu ▾ > SU Customizations ▾ > Reports ▾ > Create Budget Transaction Rpt

ORACLE®

All ▾ Search >> Advanced Search 🔍 Last Search Results

Process Scheduler Request

User ID jaoneal

Run Control ID REPORTS

Server Name

Run Date 07/25/2018

Recurrence FifthBusinessDay

Run Time 7:00:00AM

Reset to Current Date

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Create Dept Budget Rpt	SUGL0017	SQR Report	Email ▾	PDF ▾	Distribution

OK

Cancel

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Fill in the **Email Subject** and **Message Text** that you would like to see when you receive the email each month. The report will automatically be distributed to the primary email address for your own userid. Fill in the **Email Address List** for anyone else that you would like to receive the same report. Click **“OK”**.

Favorites ▾ Main Menu ▾ > SU Customizations ▾ > Reports ▾ > Create Budget Transaction Rpt

ORACLE All ▾ Search >> Advanced Search

Distribution Detail

Process Name SUGL0017
Process Type SQR Report
Folder Name
Retention Days

Email Only

Email Subject Email With Log: Email Web Report:

Message Text

Email Address List

Distribute To

*ID Type	*Distribution ID		
User ▾	jaoneal	<input type="button" value=""/>	<input type="button" value=""/>

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The system will return you to this page.

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<input checked="" type="checkbox"/>	Create Dept Budget Rpt	SUGL0017	SQR Report	Email ▾	PDF ▾	Distribution

OK

Cancel

Click OK and your report will be run once for the current date (since the Run date defaults to the current date) and will also be scheduled for the Fifth Business day of each month at 7:00 AM. You should receive an email today and each month with an attachment for the report.