

Distributing Reports to Multiple Users



This job aid describes the procedures for distributing reports to multiple users, including:

- Distributing nVision Reports to Multiple Users
- Distributing SQR Reports to Multiple Users

Distributing nVision Reports to Multiple Users

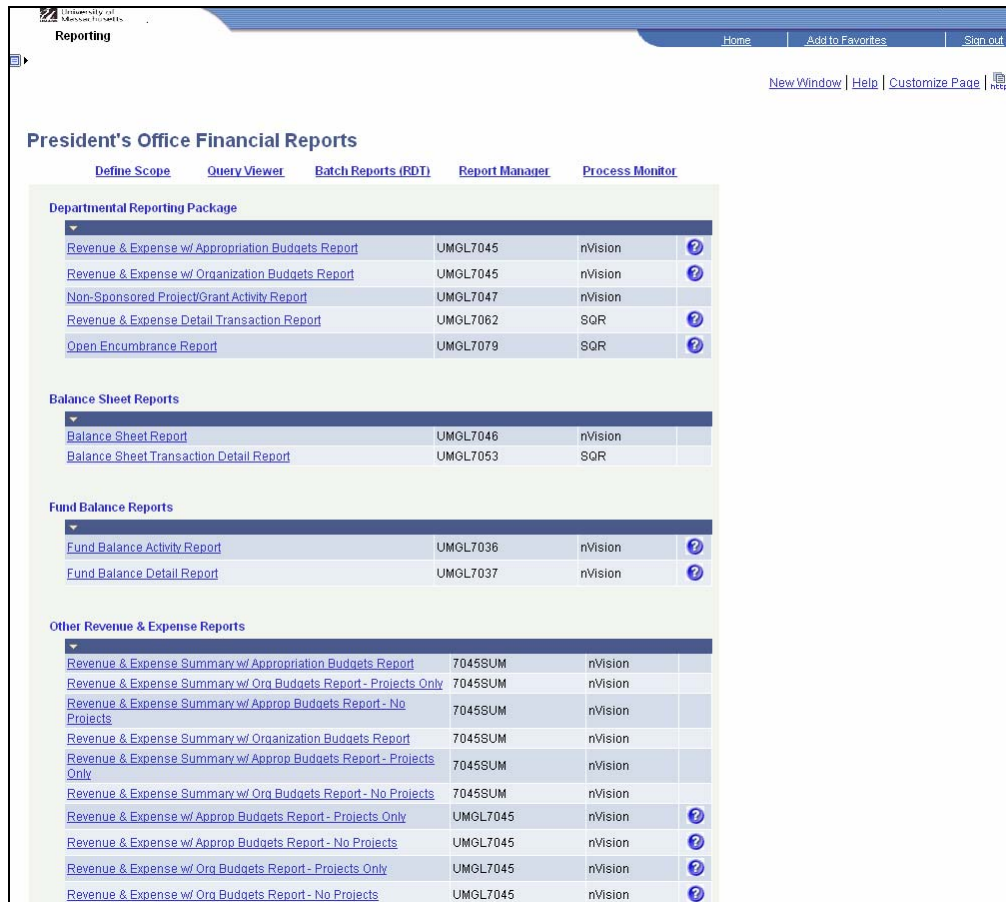
Step 1. Log into the Finance Reporting database with your Finance Username and Password.



Navigate to the following path:

Report Center → Finance / Grants

The **Financial Reports** page opens.



The screenshot shows the 'Reporting' page for the University of Massachusetts. The page title is 'President's Office Financial Reports'. There are navigation links for 'Home', 'Add to Favorites', and 'Sign out'. Below the title, there are links for 'Define Scope', 'Query Viewer', 'Batch Reports (RDT)', 'Report Manager', and 'Process Monitor'. The main content is organized into several sections:

- Departmental Reporting Package:**
 - Revenue & Expense w/ Appropriation Budgets Report (UMGL7045, nVision)
 - Revenue & Expense w/ Organization Budgets Report (UMGL7045, nVision)
 - Non-Sponsored Project/Grant Activity Report (UMGL7047, nVision)
 - Revenue & Expense Detail Transaction Report (UMGL7062, SQR)
 - Open Encumbrance Report (UMGL7079, SQR)
- Balance Sheet Reports:**
 - Balance Sheet Report (UMGL7046, nVision)
 - Balance Sheet Transaction Detail Report (UMGL7053, SQR)
- Fund Balance Reports:**
 - Fund Balance Activity Report (UMGL7036, nVision)
 - Fund Balance Detail Report (UMGL7037, nVision)
- Other Revenue & Expense Reports:**
 - Revenue & Expense Summary w/ Appropriation Budgets Report (7045SUM, nVision)
 - Revenue & Expense Summary w/ Org Budgets Report - Projects Only (7045SUM, nVision)
 - Revenue & Expense Summary w/ Approp Budgets Report - No Projects (7045SUM, nVision)
 - Revenue & Expense Summary w/ Organization Budgets Report (7045SUM, nVision)
 - Revenue & Expense Summary w/ Approp Budgets Report - Projects Only (7045SUM, nVision)
 - Revenue & Expense w/ Approp Budgets Report - No Projects (UMGL7045, nVision)
 - Revenue & Expense w/ Approp Budgets Report - No Projects (UMGL7045, nVision)
 - Revenue & Expense w/ Org Budgets Report - Projects Only (UMGL7045, nVision)
 - Revenue & Expense w/ Org Budgets Report - No Projects (UMGL7045, nVision)

Step 2. Click the appropriate nVision report link.

The **nVision Report Request** page opens in a new window.

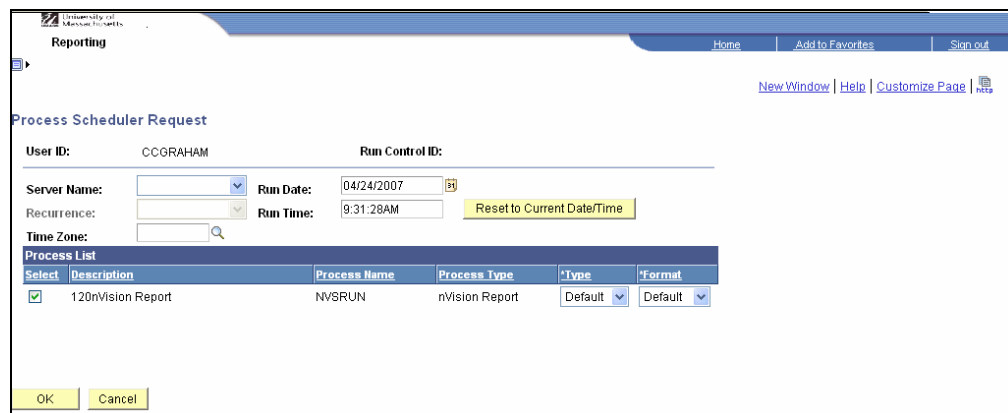


The screenshot shows the 'nVision Report Request' page. It includes fields for Business Unit (UMCEN), Report ID (RE_APP6), Report Title (Revenue & Exp-Approp-All), and Layout (REV_AND_EXP_APPROP_ALL_UMCEN). There are sections for Report Date Selection, Scope Selection (My Scopes selected), and Output Options (Type: Web, Format: Microsoft Excel Files (*.xls)). A 'Run Report' button is highlighted.

Step 3. Enter the applicable date and scope name.

Step 4. Click **Run Report**.

The **Process Scheduler Request** page opens.

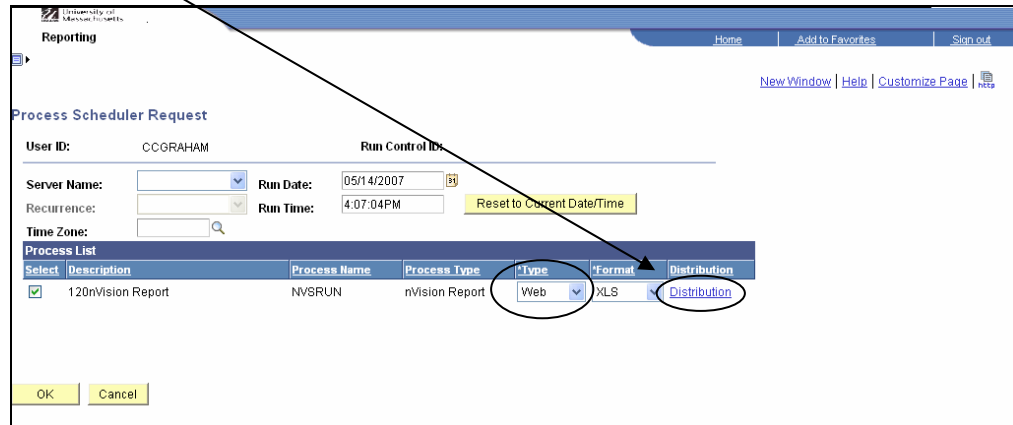


The screenshot shows the 'Process Scheduler Request' page. It includes fields for User ID (CCGRAHAM), Run Control ID, Server Name, Run Date (04/24/2007), Run Time (9:31:28AM), and Time Zone. A table titled 'Process List' is visible with one entry selected.

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	120nVision Report	NVSRUN	nVision Report	Default	Default


Step 5. Select **Web** in the **Type** field.

The [Distribution](#) link displays.



Reporting

Home | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | 

Process Scheduler Request

User ID: CCGRAHAM Run Control ID: _____

Server Name: _____ Run Date: 05/14/2007 BY _____

Recurrence: _____ Run Time: 4:07:04PM [Reset to Current Date/Time](#)

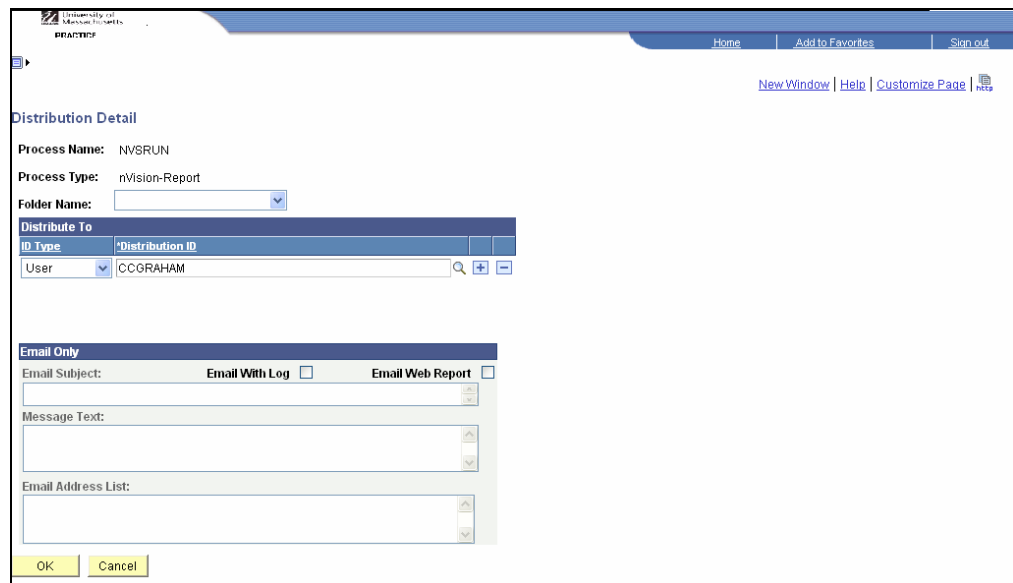
Time Zone: _____

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	120nVision Report	NVSRUN	nVision Report	Web	XLS	Distribution

OK Cancel


Step 6. Click the [Distribution](#) link.

The **Distribution Detail** page opens.



Reporting

Home | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | 

Distribution Detail

Process Name: NVSRUN

Process Type: nVision-Report

Folder Name: _____

ID	Type	Distribution ID
User	CCGRAHAM	


Email Only

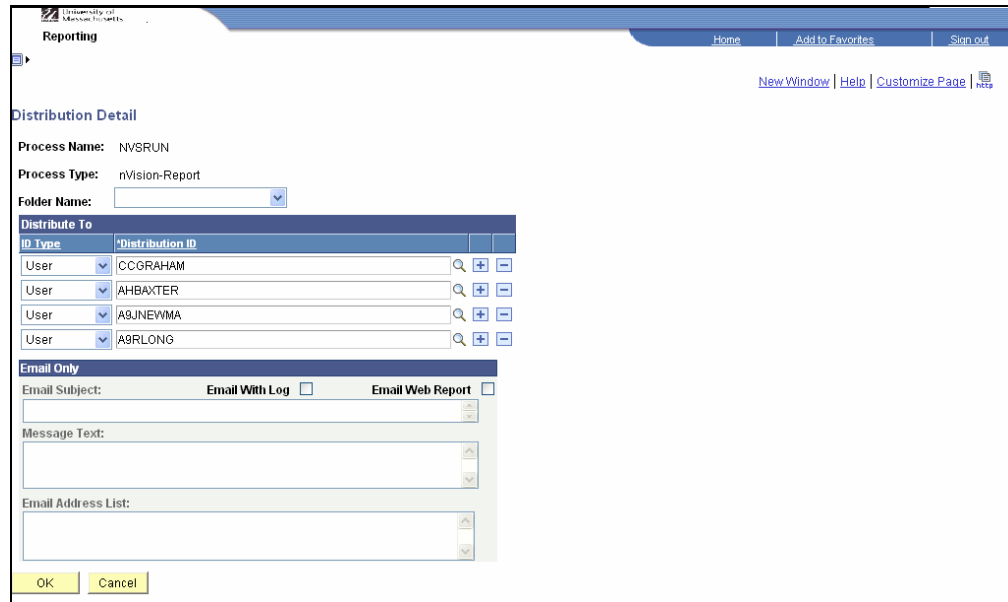
Email Subject: Email With Log Email Web Report

Message Text: _____

Email Address List: _____

OK Cancel

- Step 7.** Click  in the **Distribute To** group box to add more users (as shown in the example below).



ID Type	Distribution ID		
User	CCGRAHAM	Q	+ -
User	AHBAXTER	Q	+ -
User	A9JNEWMA	Q	+ -
User	A9RLONG	Q	+ -

- Step 8.** Click .

The **Process Scheduler Request** page reopens.

- Step 9.** Click .

The report runs and is available in the **Report Manager** for all users.

End of Procedure

Distributing SQR Reports to Multiple Users

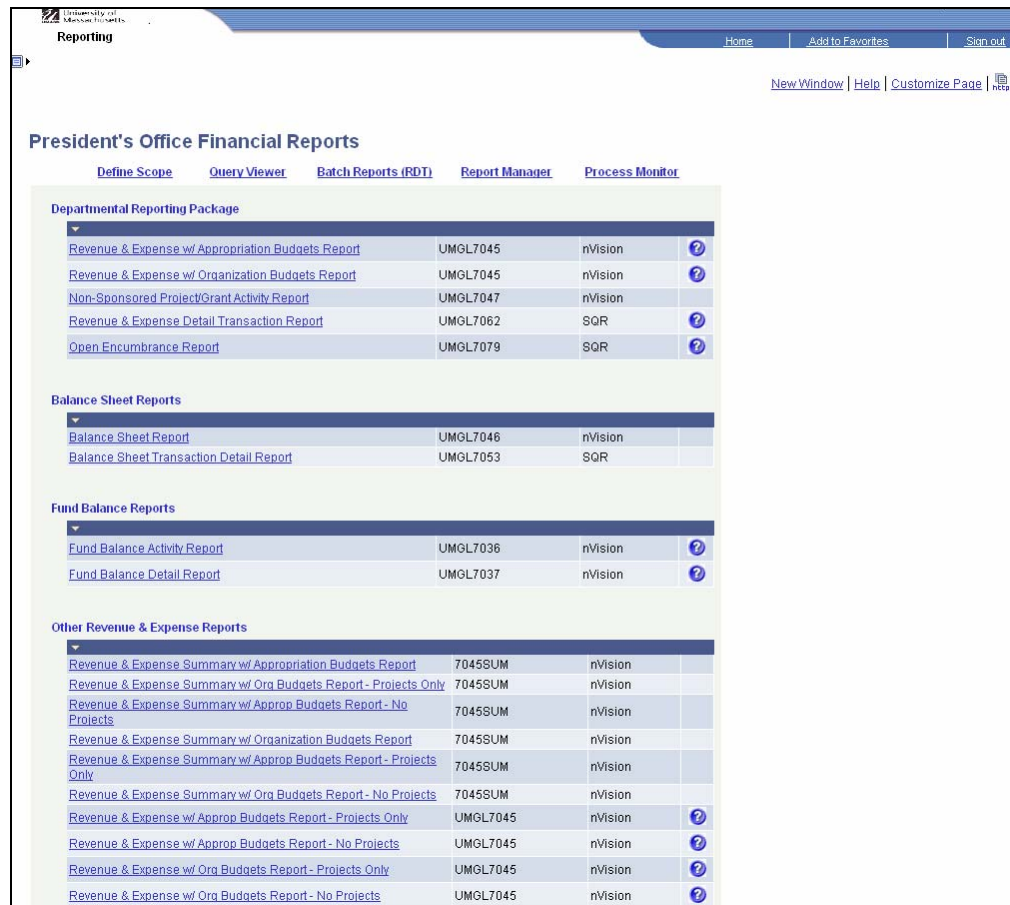
Step 1. Log into the Finance Reporting database with your Finance Username and Password.



Navigate to the following path:

Report Center → Finance / Grants

The **Financial Reports** page opens.



Reporting Home Add to Favorites Sign out

New Window Help Customize Page

President's Office Financial Reports

Define Scope Query Viewer Batch Reports (RDT) Report Manager Process Monitor

Departmental Reporting Package

Revenue & Expense w/ Appropriation Budgets Report	UMGL7045	nVision	?
Revenue & Expense w/ Organization Budgets Report	UMGL7045	nVision	?
Non-Sponsored Project/Grant Activity Report	UMGL7047	nVision	
Revenue & Expense Detail Transaction Report	UMGL7062	SQR	?
Open Encumbrance Report	UMGL7079	SQR	?

Balance Sheet Reports

Balance Sheet Report	UMGL7046	nVision	
Balance Sheet Transaction Detail Report	UMGL7053	SQR	

Fund Balance Reports

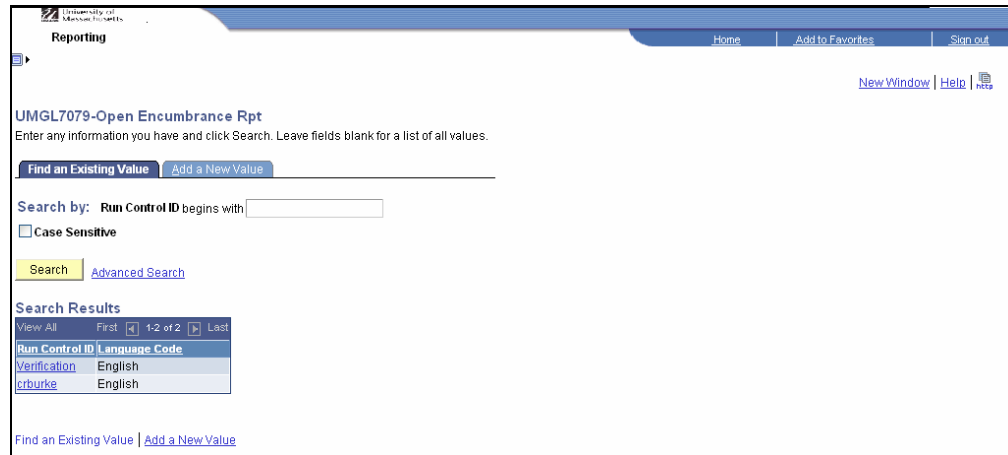
Fund Balance Activity Report	UMGL7036	nVision	?
Fund Balance Detail Report	UMGL7037	nVision	?

Other Revenue & Expense Reports

Revenue & Expense Summary w/ Appropriation Budgets Report	7045SUM	nVision	
Revenue & Expense Summary w/ Org Budgets Report - Projects Only	7045SUM	nVision	
Revenue & Expense Summary w/ Approp Budgets Report - No Projects	7045SUM	nVision	
Revenue & Expense Summary w/ Organization Budgets Report	7045SUM	nVision	
Revenue & Expense Summary w/ Approp Budgets Report - Projects Only	7045SUM	nVision	
Revenue & Expense Summary w/ Org Budgets Report - No Projects	7045SUM	nVision	
Revenue & Expense w/ Approp Budgets Report - Projects Only	UMGL7045	nVision	?
Revenue & Expense w/ Approp Budgets Report - No Projects	UMGL7045	nVision	?
Revenue & Expense w/ Org Budgets Report - Projects Only	UMGL7045	nVision	?
Revenue & Expense w/ Org Budgets Report - No Projects	UMGL7045	nVision	?

Step 2. Click the link for the appropriate SQR report.

The **Find an Existing Value** page opens in a new window.



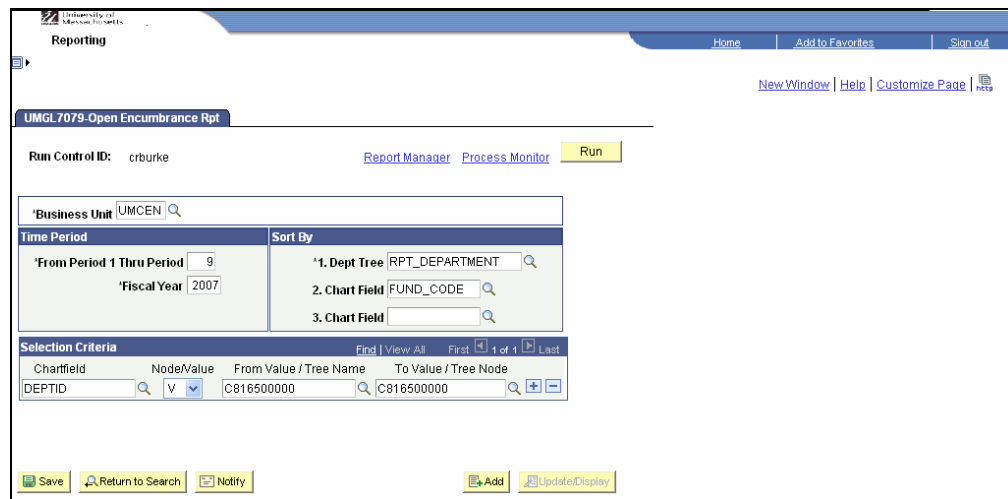
The screenshot shows the 'Reporting' section of the application. The main heading is 'UMGL7079-Open Encumbrance Rpt'. Below this, there is a search interface with a 'Find an Existing Value' button and an 'Add a New Value' button. The search criteria are set to 'Run Control ID begins with' followed by a text input field. There is a 'Case Sensitive' checkbox which is unchecked. Below the search buttons, the 'Search Results' section displays a table with two columns: 'Run Control ID' and 'Language Code'. The results are as follows:

Run Control ID	Language Code
Verification	English
crburke	English

At the bottom of the search results, there are links for 'Find an Existing Value' and 'Add a New Value'.

Step 3. Click on the link for the appropriate Run Control ID or add a new value to create a new Run Control ID.

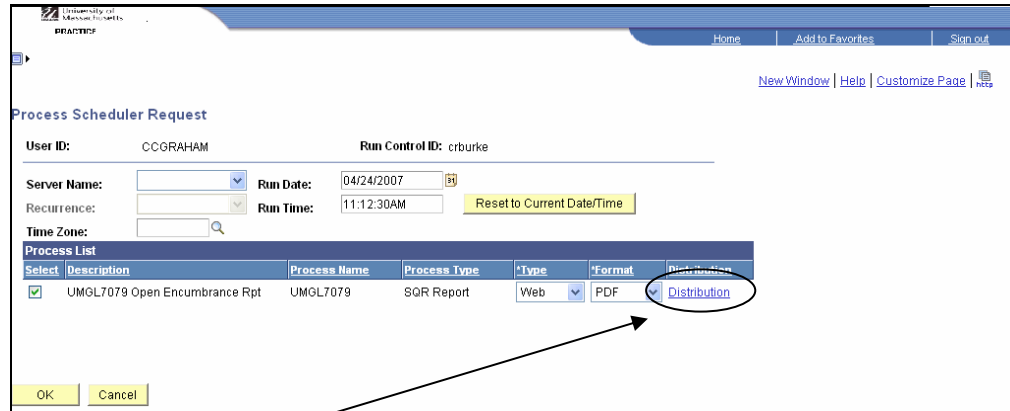
The **Report** page opens.



The screenshot shows the 'Reporting' section of the application. The main heading is 'UMGL7079-Open Encumbrance Rpt'. Below this, there is a 'Run Control ID' field containing 'crburke' and a 'Run' button. There are also links for 'Report Manager' and 'Process Monitor'. Below the 'Run Control ID' field, there is a 'Business Unit' field containing 'UMCEN'. The 'Time Period' section includes 'From Period 1 Thru Period' set to '9' and 'Fiscal Year' set to '2007'. The 'Sort By' section includes '1. Dept Tree' set to 'RPT_DEPARTMENT', '2. Chart Field' set to 'FUND_CODE', and '3. Chart Field' set to an empty field. Below the 'Sort By' section, there is a 'Selection Criteria' table with columns for 'Chartfield', 'Node/Value', 'From Value / Tree Name', and 'To Value / Tree Node'. The table contains one row with 'DEPTID' in the 'Chartfield' column, 'V' in the 'Node/Value' column, 'C816500000' in the 'From Value / Tree Name' column, and 'C816500000' in the 'To Value / Tree Node' column. At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

Step 4. Click .

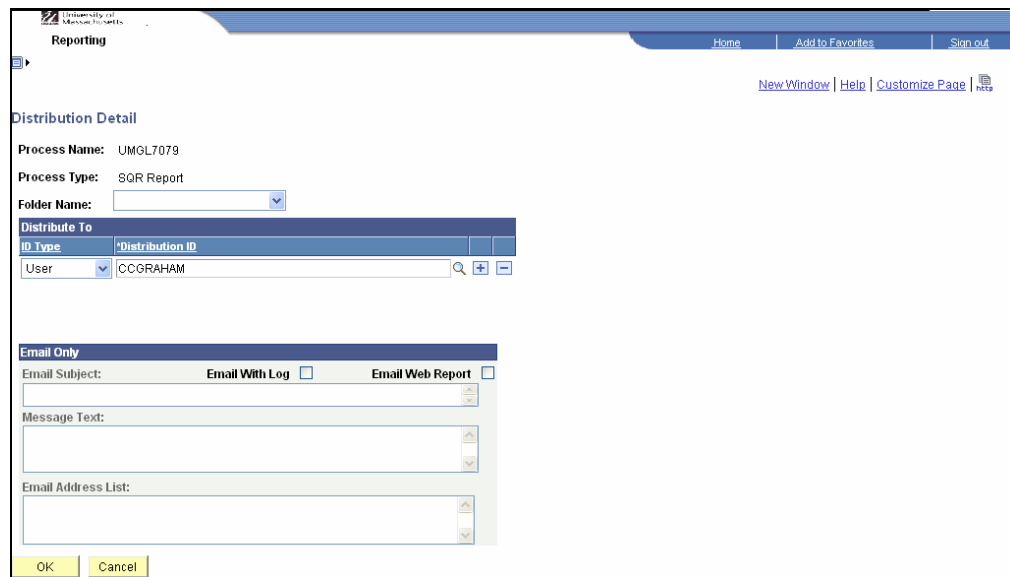
The **Process Scheduler Request** page opens.




The screenshot shows the 'Process Scheduler Request' page. At the top, there are navigation links: Home, Add to Favorites, Sign out, New Window, Help, Customize Page, and a printer icon. The page title is 'Process Scheduler Request'. Below the title, there are fields for 'User ID: CCGRAHAM' and 'Run Control ID: crburke'. There are also fields for 'Server Name', 'Run Date: 04/24/2007', 'Recurrence', and 'Run Time: 11:12:30AM'. A 'Reset to Current Date/Time' button is next to the Run Time field. Below these fields is a 'Process List' table with columns: Select, Description, Process Name, Process Type, *Type, *Format, and Distribution. The first row is checked and contains: 'UMGL7079 Open Encumbrance Rpt', 'UMGL7079', 'SQR Report', 'Web', 'PDF', and 'Distribution'. The 'Distribution' link is circled in blue. At the bottom of the page are 'OK' and 'Cancel' buttons.

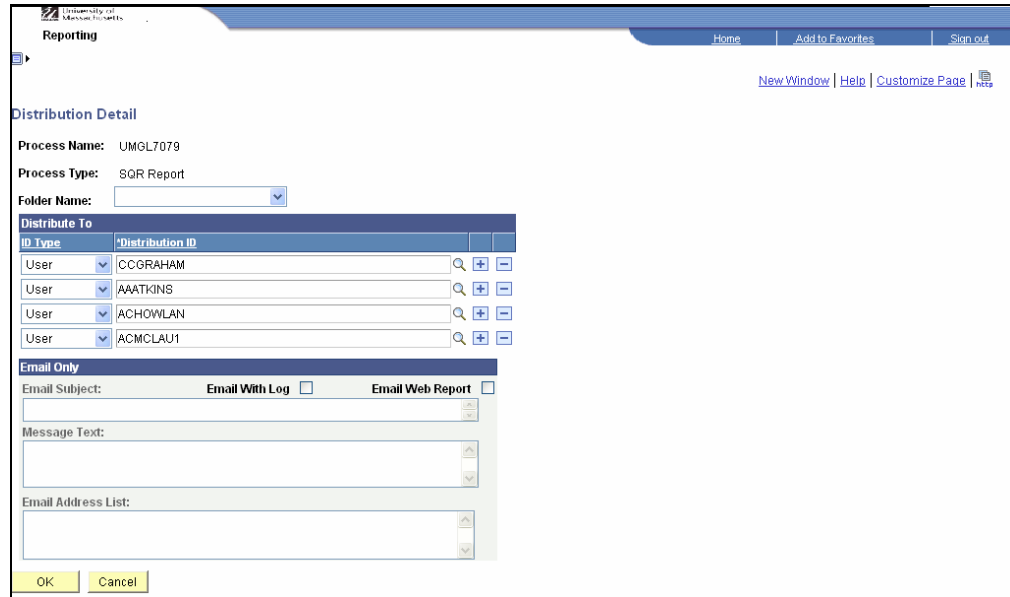
Step 5. Click the [Distribution](#) link.

The **Distribution Detail** page opens.



The screenshot shows the 'Distribution Detail' page. At the top, there are navigation links: Home, Add to Favorites, Sign out, New Window, Help, Customize Page, and a printer icon. The page title is 'Distribution Detail'. Below the title, there are fields for 'Process Name: UMGL7079' and 'Process Type: SQR Report'. There is a 'Folder Name' dropdown menu. Below that is a 'Distribute To' table with columns: ID Type and *Distribution ID. The first row contains 'User' and 'CCGRAHAM'. Below the table are 'Email Only' options: 'Email Subject', 'Email With Log' (checkbox), and 'Email Web Report' (checkbox). There are also fields for 'Message Text' and 'Email Address List'. At the bottom of the page are 'OK' and 'Cancel' buttons.

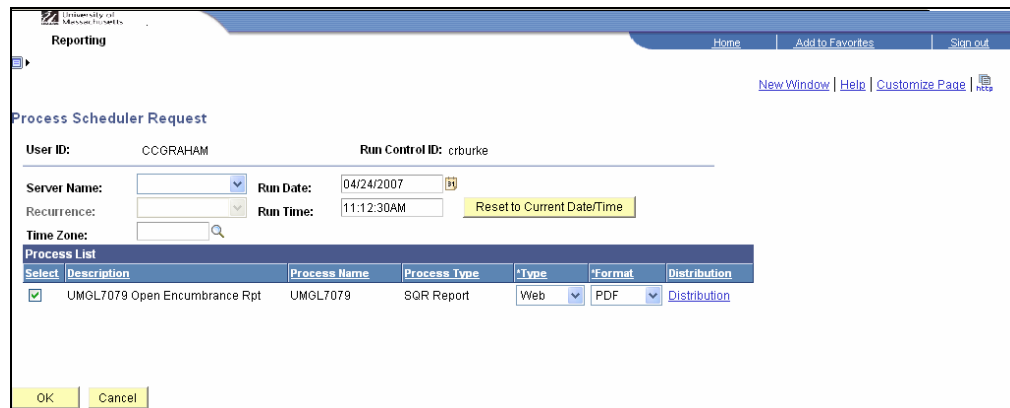
Step 6. Click  in the **Distribute To** group box to add more users (as shown in the example below).




Note: These extra User IDs will remain attached to the Run Control ID until the rows are deleted. If this distribution is being run one time only, create a new Run Control ID or go back and delete the rows.

Step 7. Click .

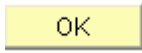
The **Process Scheduler Request** page reopens.



Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	UMGL7079 Open Encumbrance Rpt	UMGL7079	SQR Report	Web	PDF	Distribution



Step 8.

Click .

The report runs and is available in the **Report Manager** for all users.

End Procedure