Job Aid –

Distribute Reports to Multiple Users

State of Kansas

Distribute Reports to Multiple Users

The purpose of this job aid is to explain how to make a SMART report available to multiple users.

The following steps can be performed on any report available to the user in order to distribute the generated report to multiple users. The recipients will automatically receive the report once the report is generated, available through Report Manager, without any further action on their part.

NOTE: The recipient users will not be able to access the original user's Run Control and/or make modifications to the report once generated. They will only receive the "output" reports as generated.

I. Distribute Report to Multiple Users within SMART

a. Update Report Distribution List

Any report can be made available to multiple users, **which assumes that they have access to view reports within SMART**. **Section II of this document describes how to distribute reports to non-SMART users via email.** As the following steps can be performed on any report, the screenshots contained within this document are for instructional purposes and are not restricted solely to the report depicted.

For the purpose of this job aid, the primary user is executing the General Ledger Cash Balance Report (KGL00001), as depicted below:

The report request parameters page has been filled out by the user with desired criteria. At this point, the user is ready to execute the report.

1. Click "Run". The system will redirect the user to the Process Scheduler Request page.

2. Click on the hyperlink labeled "Distribution" under the *Distribution* column header.

3. The system will redirect the user to the Distribution Detail page. As can be seen in the "Distribute To" section, the primary user executing the report is defaulted as the first Distribution ID, or the recipient of the report.

4. Click on the "Plus" button to the right of the primary user's *Distribution ID* field to add a new line to the "Distribute To" list.

Distribution Detail

Process Name: KGL00001

Process Type: SQR Report

Folder Name: [▼]

Email Only

Email Subject: Email With Log ☐   Email Web Report ☐

Message Text:

Email Address List:

Distribute To

ID Type	*Distribution ID			
User ▼	FMSMSUTANTO	🔍	➕	➖
▼		🔍	➕	➖

Role
User

OK   Cancel

5. On the newly created line, click on the drop-down menu in the *ID Type* field. From the drop-down menu, select "User".

6. After selecting "User" for the *ID Type*, click on the search prompt button to the right of the new line's *Distribution ID* field.

7. On the following prompt page, the user can search for and select specific users he or she intends to distribute the report to via selection of their user/Distribution ID. In order to access the distributed report, the selected user(s) must have a valid SMART sign on, as well as, the **KS GL Viewer** security role.
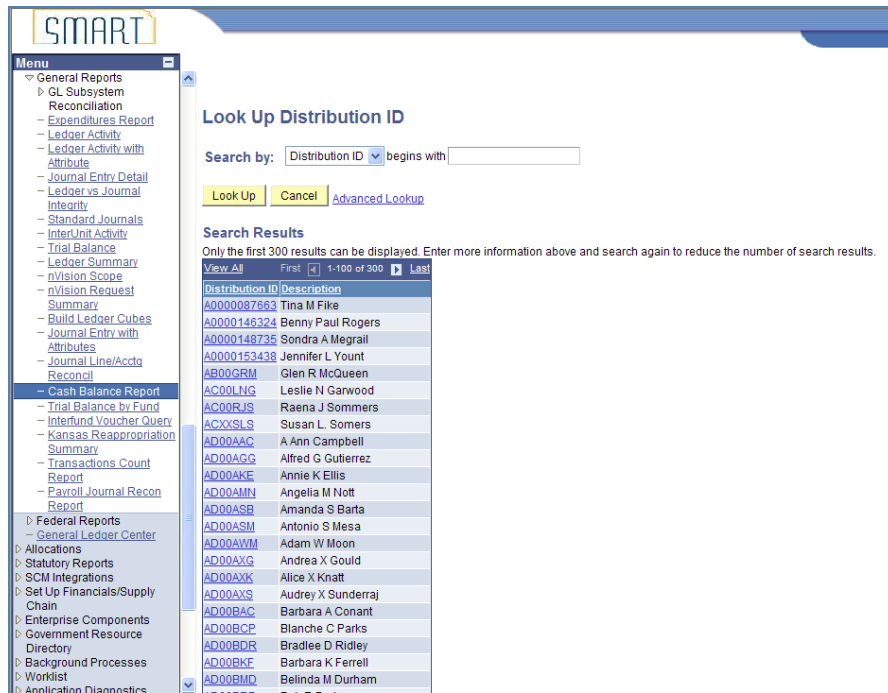
8. Repeat steps 4-7 to add additional recipients.

9. Once all desired recipients have been added to the "Distribute To" list, click OK on the Distribution Detail page to save the distribution list.
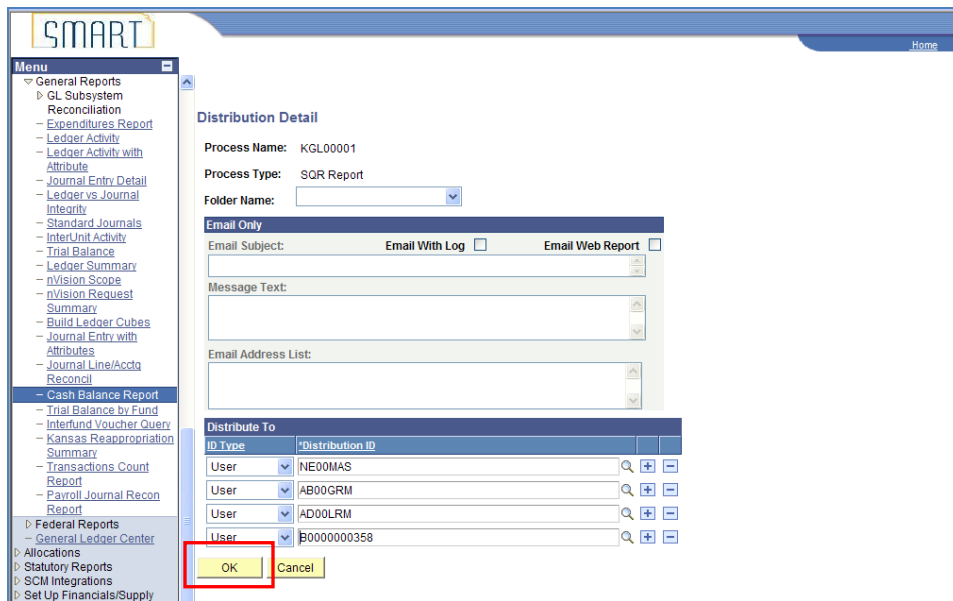

10. The user will be redirected to the Process Scheduler Request page. Click "OK" to execute the report.

b. Access Report

Once the report is executed, the primary user can access the report by viewing the "Details" of the process instance and clicking on the "View Log/Trace" hyperlink or via the Report Manager as described below.

For the additional recipients, they can only access the report via the Report Manager. As depicted in the example step 9 screenshot, the primary user has chosen to distribute the report to multiple users with the Kansas GL Viewer role. The following screenshots depict the steps that those users would perform to access the report.

1. From the main menu, navigate to: Reporting Tools > Report Manager.
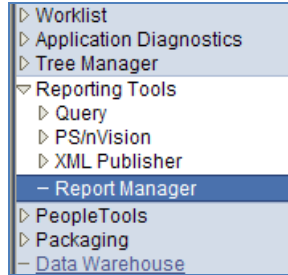
2. Click on the "Administration" tab. This page will display all reports available to the user, including reports executed by the user and reports distributed to the user.

   As can be seen in the following screenshot, the KGL00001 report executed by the primary user in section **I.a** has been distributed to the selected user.

II. Distribute Report to Users without SMART access

SMART users can distribute reports to non-SMART users via email. As the following steps can be performed on any report, the screenshots contained within this document are for instructional purposes and are not restricted solely to the report depicted.

For the purpose of this job aid, the primary user is executing the Budget Status Report (GLS8020), as depicted below:

The report request parameters page has been filled out by the user with desired criteria. At this point, the user is ready to execute the report.

1. Click "Run". The system will redirect the user to the Process Scheduler Request page.

2. Click on the hyperlink labeled "Distribution" under the *Distribution* column header.

3. The system will redirect the user to the Distribution Detail page. Click the checkbox marked "Email Web Report." Enter the Email Subject, Message Text, and a list of email addresses, separated by semi-colons of the users who should receive the emailed report. The SMART user creating the distribution will automatically receive a copy of the emailed report and does not need to enter his/her email address in the distribution.

4. Click OK to return to the Process Scheduler Request Page. Select "Email" as the Type. Depending on the report, the user may also select the format of PDF or CSV.

5. Click OK to execute the report. The report will go into queue for execution and the run control page will re-appear.

6. When the report execution is complete, an email is sent to the SMART user executing the report, as well as the email addresses referenced in the Distribution tab.

From: FNQAS1@da.ks.gov
To: qas.email@da.ks.gov; Kuck, Amy [ACC]; Bauer, Brett [FMS]
Cc:
Subject: Budget Status Report

Message | gls8020_118206.PDF (28 KB)

Please find the Budget Status Report attached for your reivew.