



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 screenshot displays the 'Cash Balance Report' Run Control interface. At the top, the Run Control ID is 'Job_Aid_multiple_distro'. Navigation links for 'Report Manager' and 'Process Monitor' are visible, along with a yellow 'Run' button. The main form contains several input fields: Business Unit (17300), Fiscal Year (2010), Range From Accounting Period (1), Range To Accounting Period (12), Fund Code (2197), and Budget Unit (empty). Below these are two sections: 'Fund Tree' with SetID, Tree Name, and Tree Level Number fields; and 'Account Tree' with Account SetID (SOKID), Account Tree (CC_ACCOUNT), and Tree Level Number (4) fields.

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.

Process Scheduler Request

User ID: FMSMSUTANTO Run Control ID: Job_Aid_multiple_distro

Server Name: Run Date: 06/22/2010

Recurrence: Run Time: 2:56:24PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	KGL00001	KGL00001	SQR Report	Web	PDF	Distribution

- Click on the hyperlink labeled “Distribution” under the *Distribution* column header.
- 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.

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

- 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

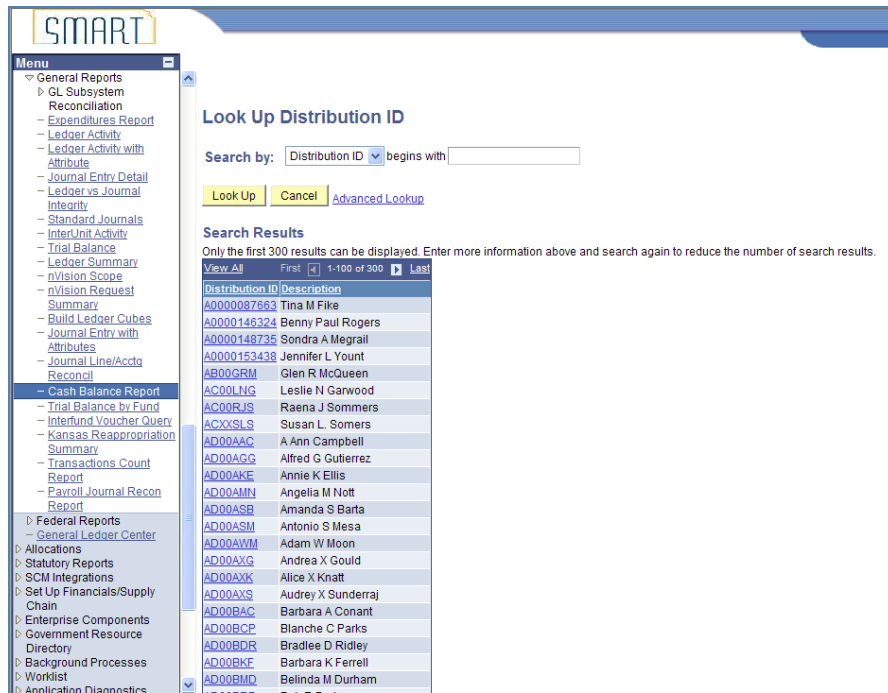
Email Subject: Email With Log Email Web Report
 Message Text:
 Email Address List:

Distribute To

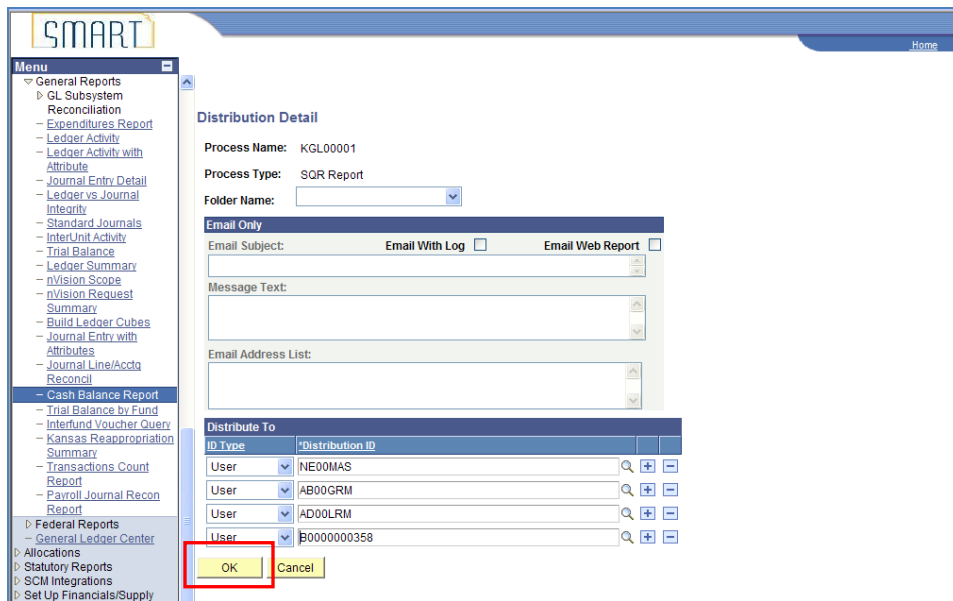
ID Type	*Distribution ID		
User	FMSMSUTANTO	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.



- Repeat steps 4-7 to add additional recipients.
- Once all desired recipients have been added to the “Distribute To” list, click OK on the Distribution Detail page to save the distribution list.



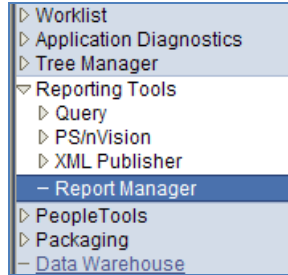
- The user will be redirected to the Process Scheduler Request page. Click “OK” to execute the report.

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.

The screenshot shows the SMART application interface. On the left is a 'Menu' sidebar with a search box and a tree view containing items like 'Manager Self-Service', 'Asset Management', 'Commitment Control', 'General Ledger', 'Worklist', 'Reporting Tools', 'Query', 'Report Manager', 'PeopleTools', 'Change My Password', and 'My System Profile'. The 'Report Manager' item is selected. The main content area has tabs for 'List', 'Explorer', 'Administration', and 'Archives'. The 'Administration' tab is active, showing a 'View Reports For' section with filters for 'User ID' (KGL_KS_GL_VI), 'Type', 'Last' (1 Days), 'Status', 'Folder', and 'Instance'. Below this is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The table contains two rows: one for 'KGL00001' (Request Date/Time: 06/22/2010 3:16:22PM, Format: Acrobat (*.pdf), Status: Posted) and one for 'Budget Status Report' (Request Date/Time: 06/22/2010 2:19:05PM, Format: Acrobat (*.pdf), Status: Posted). At the bottom, there are 'Select All' and 'Deselect All' checkboxes, and a 'Delete' button with the text 'Click the delete button to delete the selected report(s)'.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	35978	49260	KGL00001	06/22/2010 3:16:22PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	35977	49259	Budget Status Report	06/22/2010 2:19:05PM	Acrobat (*.pdf)	Posted	Details

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:

Commitment Control Budget Status Report

Run Control ID: APPROP

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Report Request Parameters

*Unit: 17300 Department of Administration

*Ledger Group: CC_APPROP Appropriation Ledger Group

Refresh

ChartField Selection

Customize | Find | First 1-14 of 14 Last

Sequence	ChartField Name	Include CF	Subtotal	Value	To Value
1	Fund Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	Budget Unit	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
3	Budget Period	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Department	<input type="checkbox"/>	<input type="checkbox"/>		
	Program Code	<input type="checkbox"/>	<input type="checkbox"/>		
	Account	<input type="checkbox"/>	<input type="checkbox"/>		
	Project	<input type="checkbox"/>	<input type="checkbox"/>		
	Activity	<input type="checkbox"/>	<input type="checkbox"/>		
	Source Type	<input type="checkbox"/>	<input type="checkbox"/>		
	Service Location	<input type="checkbox"/>	<input type="checkbox"/>		

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.

Process Scheduler Request

User ID: NE00ALK Run Control ID: APPROP

Server Name: Run Date: 09/15/2010

Recurrence: Run Time: 9:25:17AM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Budget Status Report	GLS8020	SQR Report	Web	PDF	Distribution

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.

Distribution Detail

Process Name: GLS8020

Process Type: SQR Report

Folder Name:

Email Only

Email Subject: Email With Log Email Web Report

Budget Status Report

Message Text:

Please find the Budget Status Report attached for your reievw.

Email Address List:

amy.kuck@da.ks.gov; brett.bauer@da.ks.gov

Distribute To

ID Type	*Distribution ID
User	NE00ALK

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.

Process Scheduler Request

User ID: NE00ALK **Run Control ID:** APPROP

Server Name: **Run Date:** 09/15/2010

Recurrence: **Run Time:** 9:25:17AM

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Budget Status Report	GLS8020	SQR Report	Email	PDF	Distribution

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

Commitment Control Budget Status Report

Run Control ID: APPROP [Report Manager](#) [Process Monitor](#)

Language: English Process Instance: 118206

Report Request Parameters

***Unit:** 17300 Department of Administration

***Ledger Group:** CC_APPROP Appropriation Ledger Group

ChartField Selection						
Sequence	ChartField Name	Include CF	Subtotal	Value	To Value	
1	Fund Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
2	Budget Unit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
3	Budget Period	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
	Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
	Source Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>

- 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.

Budget Status Report - Message (Plain Text)

Message Add-Ins

Reply Reply Forward to All
Delete Move to Folder Create Rule Other Actions
Block Sender Safe Lists Not Junk
Categorize Follow Up Mark as Unread
Find Related Select
Send to OneNote

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 reievw.