

Report Bundles

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Report Bundles are used to generate a report or group of reports on demand or at scheduled intervals to be sent via email or to the File Archive.


Automatically Generated Report Bundles

SSDT Report Bundles will automatically generate reports to the Utilities/File Archive when certain actions trigger the events. USAS-R contains one standard SSDT Report Bundle for SSDT Monthly Reports.

+ Create		Advanced Query		More		Reset	
		Username	Report Bundle Name	Description	Tags		
<input type="radio"/>	<input type="checkbox"/>						
<input type="radio"/>	<input checked="" type="checkbox"/>	SSDT	SSDT Calendar Year End Reports	Send SSDT CYE Reports to File Archive with Monthly Reports			
<input type="radio"/>	<input checked="" type="checkbox"/>	SSDT	SSDT Fiscal CD Report	Send SSDT FY Report Bundle to File Archive			
<input type="radio"/>	<input checked="" type="checkbox"/>	SSDT	SSDT Monthly CD Reports	Send SSDT Monthly Report Bundle to File Archive			

SSDT Monthly Reports Bundle

By viewing the SSDT Monthly Reports bundle, you can see the detail of what event triggers the reports and exactly what reports are created from this bundle and sent to the File Archive.

Click on  to view the specific Report Bundle:

+ Create		Advanced Query		More		Reset	
		Username	Report Bundle Name	Description	Tags		
<input type="radio"/>	<input checked="" type="checkbox"/>	SSDT	SSDT Monthly CD Reports	Send SSDT Monthly CD Report Bundle to File Archive			

The SSDT Monthly Reports bundle is triggered when a Posting Period is closed. See the following section for a full list of included reports.

Report Bundle Name:

Description:

Tags:

Event Trigger:

Send To Address:

Archive Type:

Click + to Add this Report with the desired Report Options to the Bundle:

Report Name	Report Title	Options Name	Options Description	Owner	

Reports currently in the Bundle

	Report Name	Report Title	Owner	
		SSDT Appropriation Summary	Appropriation Summary Report	SSDT
		SSDT Monthly Balance Report	SSDT Monthly Balance Report	SSDT
		SSDT Budget Account Activity Report	Budget Account Activity Report	SSDT
		SSDT Budget Summary	Budget Summary Report	SSDT
		SSDT Cash Summary	Cash Summary Report	SSDT
		SSDT Disbursement Detail	Detailed Check Register	SSDT

Monthly Reports Included


All FYTD/MTD report totals generated with the "As of period" of the Posting Period that was closed.

Redesign Report	Compare to Classic Report	Parameters
SSDT Appropriation Summary	APPSUM	All Appropriation Accounts
SSDT Monthly Balance Report	BALMON	All Cash Accounts for each fiscal year
SSDT Budget Account Activity Report	BUDLED	All Budget Activity - posting period Start/End dates
SSDT Budget Summary	BUDSUM	All Expenditure Accounts
SSDT Cash Summary	FINSUMM	All Cash Accounts
SSDT Disbursement Detail	CHEKPY	All Disbursement Types, All Statuses - posting period Start/End dates
SSDT Cash Reconciliation Report	CSHREC	Summary of Details entered in Periodic > Cash Reconciliation for corresponding month and year
SSDT Financial Detail Report	FINDET	All Activity for posting period Start/End dates
SSDT Financial Summary by Fund Report	FUNDSUMM	Categorized by Function, Excludes Zero Amount Accounts
SSDT Negative Appropriation Account Report	NEGAPP	All Appropriation Accounts with a negative FYTD Unencumbered Balance
SSDT Negative Budget Report	NEGBUD	All Expenditure Accounts with a negative FYTD Unencumbered Balance

SSDT Outstanding Disbursement Summary	CHEKPY	Disbursements that are Outstanding as of the posting period
SSDT Outstanding Purchase Orders	PODETL	Purchase Orders with a Remaining Encumbrance as of the posting period
SSDT Purchase Order Detail	PODETL	All Purchase Orders with a transaction date in the posting period
SSDT Receipt Ledger Report	RECLED	All Receipts
SSDT Void Refund Ledger Report	RECVOD	
SSDT Fund to Fund Transfer Ledger Report	RECTRN	
SSDT Reduction of Expenditure Report	RECEXP	All Reduction of Expenditures with a transaction date in the posting period
SSDT Refund Ledger Report	RECREP	All Refunds with a transaction date in the posting period
SSDT Error Corrections and Supplies Distributions	RECCOR	All Distributions/Error Corrections with a transaction date in the posting period
SSDT Budgeting Transactions Summarized by Appropriation	RECAPP	All Budgeting Transactions with a transaction date in the posting period
SSDT Revenue Summary	REVSUM	All Revenue Accounts
SSDT Transfer Advance Summary	TRANADV	All Transfer/Advance activity for the current fiscal year
SSDT Transaction Ledger - Vendor Activity	TRNLED	All vendor transaction activity for posting period Start/Stop dates
SSDT Vendor Listing	VENLST	All Vendors
SSDT Revenue Account Activity Report	REVLED	All Revenue Activity - Posting Period Start/End dates

SSDT Calendar Year End Reports Bundle

By viewing the SSDT Calendar Year End Reports bundle, you can see the detail of what event triggers the reports and exactly what reports are created from this bundle and sent to the File Archive.

Click on  to view the specific Report Bundle:

+ Create					Q Advanced Query	More	Reset
				Username	Report Bundle Name	Description	Tags
				<input type="checkbox"/>	SSDT	SSDT Calendar Year End Reports	Send SSDT CYE Reports to File Archive with Monthly Reports
				<input checked="" type="checkbox"/>	SSDT	SSDT Fiscal CD Report	Send SSDT FY Report Bundle to File Archive
				<input checked="" type="checkbox"/>	SSDT	SSDT Monthly CD Reports	Send SSDT Monthly Report Bundle to File Archive

The SSDT Calendar Year End Reports bundle is triggered when when the Calendar Year End is closed (December Posting Period). The reports will be included in the Monthly File Archive with the other monthly reports for that posting period. See the following section for a full list of included reports.

Report Bundle Name:

Description:

Tags:

Event Trigger:

Send To Address:

Archive Type:

Click **+** to Add this Report with the desired Report Options to the Bundle:

Report Name	Report Title	Options Name	Options Description	Owner	

Reports currently in the Bundle

Report Name	Report Title	
SSDT Audit Trail	Calendar Year End Audit Report	
SSDT Budget Account Activity Report	Calendar Year End Budget Account Activity Report	
SSDT Disbursement Summary	Calendar Year End Disbursement Summary Report	
SSDT Financial Detail Report	Calendar Year End Financial Detail Report	
SSDT Purchase Order Detail	Calendar Year End Purchase Order Detail	
SSDT Receipt Ledger Report	Calendar Year End Receipts Ledger Report	
SSDT Void Refund Ledger Report	Calendar Year End Void Refund Ledger Report	
SSDT Fund to Fund Transfer Ledger Report	Calendar Year End Fund to Fund Transfer Ledger Report	

Calendar Year End Reports Included


The following reports generate with Start/Stop dates for the calendar year.

Redesign Report	Compare to Classic Report	Parameters
1099 Vendor Report - All Vendors	F1099	All 1099 vendors regardless of YTD amount
1099 Vendor Report	F1099	1099 Vendors with YTD amount of 600+
SSDT Budget Account Activity Report	BUDLED	All Budget Activity
SSDT Disbursement Summary	CHEKPY	All Disbursement Types, All Statuses
SSDT Financial Detail Report	FINDET	All Activity
SSDT Purchase Order Detail	PODETL	All Purchase Orders
SSDT Receipt Ledger Report	RECLD	All Receipts
SSDT Void Refund Ledger Report	RECVOD	
SSDT Fund to Fund Transfer Ledger Report	RECTRN	
SSDT Reduction of Expenditure Report	RECEXP	All Reduction of Expenditures
SSDT Refund Ledger Report	RECREP	All Refunds
SSDT Error Corrections and Supplies Distributions	RECCOR	All Distributions/Error Corrections

SSDT Budgeting Transactions Summarized by Appropriation	RECAPP	All Budgeting Transactions
SSDT Transaction Ledger - Vendor Activity	TRNLED	All vendor transaction activity
SSDT Revenue Account Activity Report	REVLED	All Revenue Activity

SSDT Fiscal Year End Reports Bundle

By viewing the SSDT Fiscal Year End Reports bundle, you can see the detail of what event triggers the reports and exactly what reports are created from this bundle and sent to the Fiscal File Archive.

Click on  to view the specific Report Bundle:

+ Create				Q Advanced Query			More	Reset
			Username	Report Bundle Name	Description	Tags		
			SSDT	SSDT Calendar Year End Reports	Send SSDT CYE Reports to File Archive with Monthly Reports			
			SSDT	SSDT Fiscal CD Report	Send SSDT FY Report Bundle to File Archive			
			SSDT	SSDT Monthly CD Reports	Send SSDT Monthly Report Bundle to File Archive			

The SSDT Fiscal Year End Reports bundle is triggered when when the last posting period of the fiscal year is closed. The reports will be included in the Fiscal File Archive. This bundle includes any reports relevant to the end of the fiscal year that will not already be included in the SSDT Monthly Reports bundle for the last period of the fiscal year (ex. Budget Summary, Cash Summary, etc). See the following section for a full list of included reports.

Report Bundle Name

Description

Tags

Event Trigger

Send To Address

Archive Type

Click + to Add this Report with the desired Report Options to the Bundle:

Report Name	Report Title	Options Name	Options Description	Owner	

Reports currently in the Bundle

Report Name	Report Title	Owner	
SSDT Audit Trail	Audit Report	SSDT	
SSDT Budget Account Activity Report	Budget Account Activity Report	SSDT	
SSDT Disbursement Summary	Disbursement Summary Report	SSDT	
SSDT Financial Detail Report	Financial Detail Report	SSDT	
SSDT Purchase Order Detail	Purchase Order Detail	SSDT	
SSDT Receipt Ledger Report	Receipts Ledger Report	SSDT	
SSDT Void Refund Ledger Report	Void Refund Ledger Report	SSDT	
SSDT Fund to Fund Transfer Ledger Report	Fund to Fund Transfer Ledger Report	SSDT	

Fiscal Year End Reports Included


The following reports generate with Start/Stop dates for the fiscal year.

Redesign Report	Compare to Classic Report	Parameters
SSDT Budget Account Activity Report	BUDLED	All Budget Activity
SSDT Disbursement Summary	CHEKPY	All Disbursement Types, All Statuses
SSDT Financial Detail Report	FINDET	All Activity
SSDT Purchase Order Detail	PODETL	All Purchase Orders
SSDT Receipt Ledger Report	RECLED	All Receipts
SSDT Void Refund Ledger Report	RECVOD	
SSDT Fund to Fund Transfer Ledger Report	RECTRN	
SSDT Reduction of Expenditure Report	RECEXP	All Reduction of Expenditures
SSDT Refund Ledger Report	RECREP	All Refunds
SSDT Error Corrections and Supplies Distributions	RECCOR	All Distributions/Error Corrections
SSDT Budgeting Transactions Summarized by Appropriation	RECAPP	All Budgeting Transactions
SSDT Transaction Ledger - Vendor Activity	TRNLED	All vendor transaction activity
SSDT Revenue Account Activity Report	REVLED	All Revenue Activity
SSDT Civil Proceedings	USAEMSED	
SSDT Federal Assistance Detail	USAEMSED	
SSDT Federal Assistance Summary	USAEMSED	
SSDT USAS Auditor Extract - Account	USASAUD	
SSDT USAS Auditor Extract - Transaction	USASAUD	
SSDT USAS Auditor Extract - Vendor	USASAUD	

Disable Automatically Generated Report Bundles

Only Administrators are able to Enable and Disable automatically generated SSDT Report Bundles.

The check box in on the grid for each report bundle will determine if the Report Bundle is enabled or disabled. If the bundle is disabled then the reports will not be sent to File Archive.

To disable a report bundle from going to File Archive, simply uncheck it: 

The SSDT Monthly Reports bundle is **Enabled** by default.

Enabled:

+ Create		Advanced Query		More	Reset
Username	Report Bundle Name	Description	Tags		
SSDT	SSDT Monthly CD Reports	Send SSDT Monthly CD Report Bundle to File Archive		<input checked="" type="checkbox"/>	


Disabled:

+ Create		Advanced Query		More	Reset
Username	Report Bundle Name	Description	Tags		
SSDT	SSDT Monthly CD Reports	Send SSDT Monthly CD Report Bundle to File Archive		<input type="checkbox"/>	

View Reports in the Monthly Reports Archive

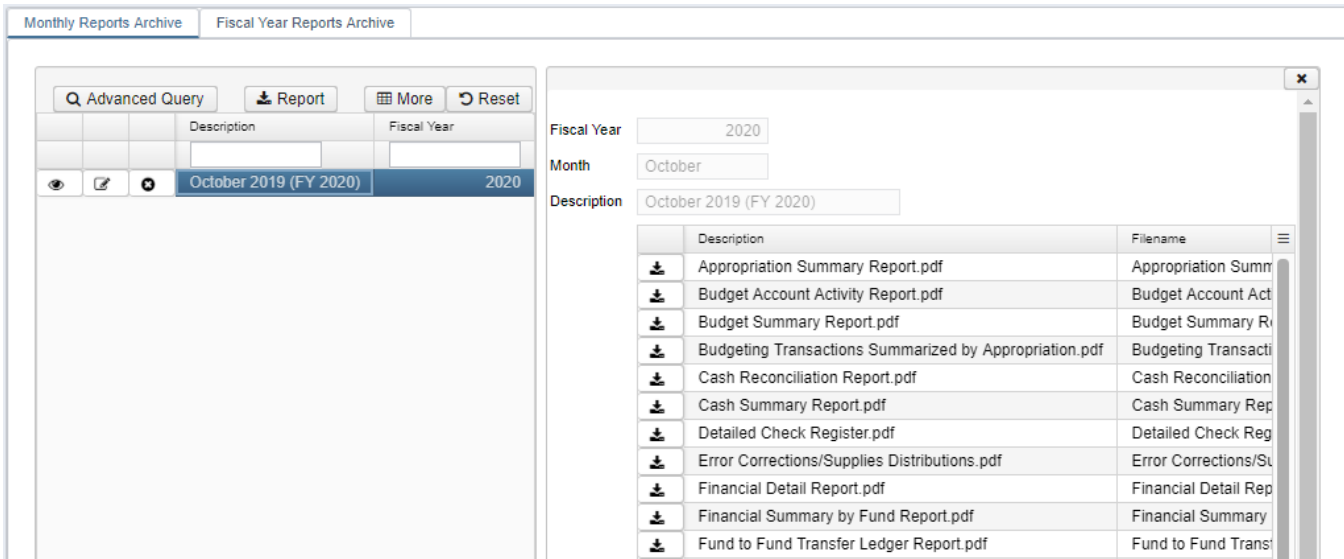
To view the reports, go to [Utilities/File Archive/Monthly Reports Archive](#) tab. The grid will contain a row for each Month that reports have been generated for. To view/download the Reports included in the Monthly Reports bundle, click on the row in the grid to open the detail on the right side of the page.

Reports can be downloaded by clicking the generate  icon.

The Description of the Monthly Report bundle can be modified by clicking the edit  icon.

Monthly Report Bundles can be deleted by users with Administrative access by clicking the delete  icon.

If a Posting Period is re-opened, the Monthly Bundle **will** automatically run again when the period is closed. If a monthly report bundle already exists in the archive a second copy of the reports will be added to the existing Monthly reports. To avoid this, delete the first Monthly Reports bundle before re-closing the reopened posting period to prevent duplicate copies of reports from being stored for that month OR disable the Monthly Reports bundle prior to re-closing the posting period to retain the original reports. Currently you cannot delete individual reports from within a monthly archive.



View Progress of Report Generation in the Job Scheduler

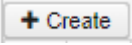
When the Monthly Reports bundle is triggered, Administrative users have the ability to view the job in the Utilities/Job Scheduler grid. This grid can be used to track the Status of the reports as they are generated. The Monthly Reports will be generated one by one in sequential order. Once all reports have been

generated and sent to the File Archive, the Status will show "Completed." Click  on the Job Scheduler grid to view the most up to date status.

				Q Advanced Query		More		Reset	
		Type	Name	Username	Status	Description			
		System	Scheduler cleanup job		Completed	Scheduler			
		User	Budget Summary - SA	admin	Failed	ReportJob			
		User	SSDT Monthly CD Reports \$TEMP\d5c185e8-389c-4856-9c3f-a5f3e2287477	SSDT	Completed	ReportBur			

User Generated Report Bundles

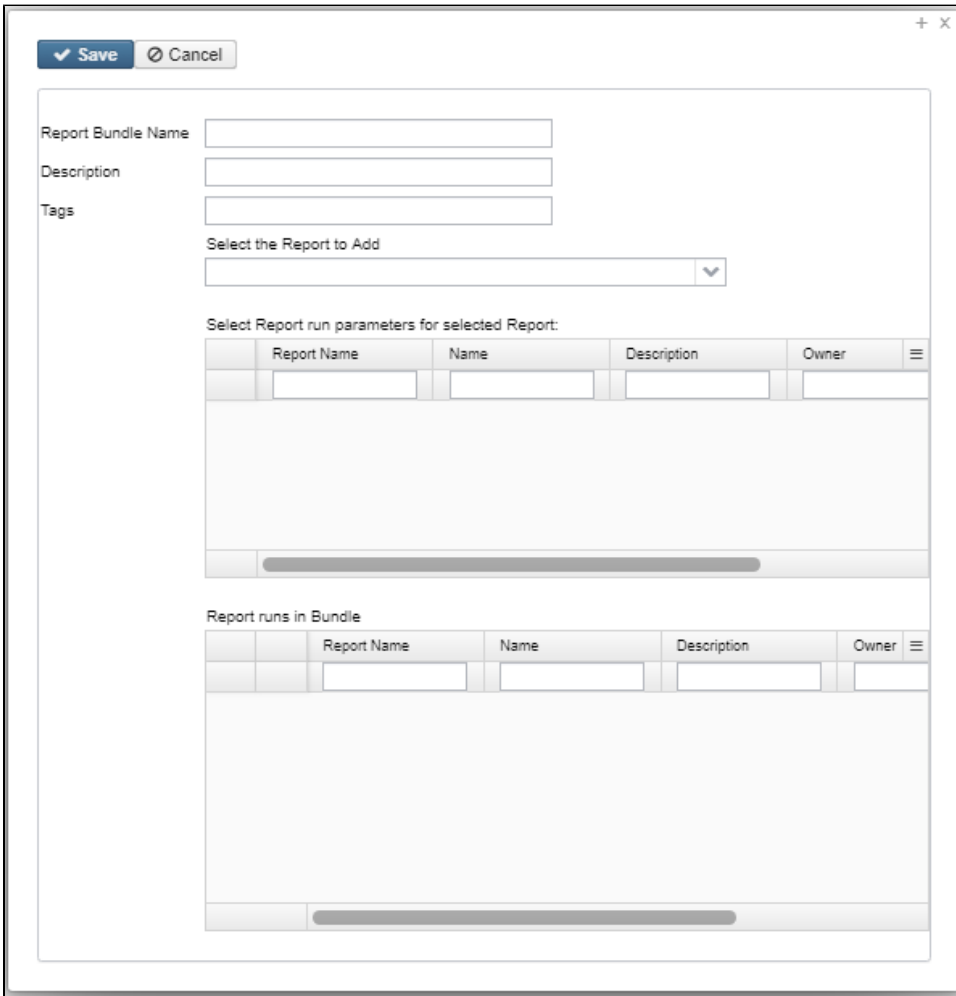
Creating a Report Bundle

To Create a new Bundle of reports, click on  option.

1. From the menu, select 'Report' and click on 'Report Bundles.'

2. Click on 

- a. **Report Bundle Name:** Name of the Report Bundle that will show in the grid and on scheduled Report Bundles.
- b. **Description:** Option to add additional description detail that will show in grid by default
- c. **Tags:** Tags are user-defined words that mean something to the user to help categorize report definitions. For example, a tag could be 'YEAREND' or 'MONTHLY' reports. Then they can use these tags for several other reports, enabling them to search for them easily in the Grid.



Report Bundle Name

Description

Tags


Select the Report to Add

Select Report run parameters for selected Report:

Report Name	Name	Description	Owner
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Report runs in Bundle

Report Name	Name	Description	Owner
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. To create a bundle of Reports, click on  or start typing the report name under **Select the Report to Add to the Bundle.**

- a. SSDT Template Reports and Custom Reports in the Reports manager are available to add to Report Bundles
- b. The following Canned Reports are also available to add to Report Bundles
 - i. SSDT Accounts Payable Report
 - ii. SSDT Account Status Report
 - iii. SSDT Amend Certificates Report
 - iv. SSDT Appropriations Resolution Report
 - v. SSDT Certificate Available Balances Report
 - vi. SSDT Financial Summary By Fund
 - vii. SSDT Revenues and Expenditures Report
- c. The SSDT Cash Reconciliation report is also available to add to a Report Bundles
 - i. **When adding this report to a bundle it must be scheduled to run on the PostingPeriodCloseCompleted event so that the report is able to determine which month should be used.**

Select a Report to Add to the Bundle

SSDT USAS Auditor Extract - Account, SSDT

SSDT Void Refund Ledger Report, SSDT

SSDT Audit Trail, SSDT

SSDT Budget Account Activity Report, SSDT


Student Activity Financial Detail Report 200s, admin

SSDT RAM Export, SSDT

SSDT Revenue Account Activity Report, SSDT

SSDT Listing of Transactions by Account, SSDT

SSDT Financial Budget Report, SSDT

4. Once selected, this report will then show under **Click + to Add this report with the desired Report Options to the Bundle**. This grid will show one row for each of the saved parameters (created from the "Save and Recall" option) that exists for the chosen report. Use the  icon to select which version of the report to add to the Report Bundle.

Click + to Add this Report with the desired Report Options to the Bundle:

	Report Name	Report Title	Options Name	Options Description	Owner	
+	SSDT Financial ...	Financial Detail R...	Default	Default	SSDT	
+	SSDT Financial ...	Financial Detail R...	test	Default	SSDT	
+	SSDT Financial ...	Financial Detail R...	Most Recent	Default	SSDT	
+	SSDT Financial ...	Financial Detail R...	Financial Detail	Default	SSDT	

5. The report will show that it has been added to the **'Reports currently in the Bundle'** box below.

+ ×

✓ Save
⊗ Cancel

Report Bundle Name

Description

Tags



Select a Report to Add to the Bundle


SSDT Financial Detail Report July 1 Cash Balances, SSDT

Click + to Add this Report with the desired Report Options to the Bundle:

	Report Name	Report Title	Options Name	Options Description	Owner	
+	SSDT Financial ...	Financial Detail R...	Default	Default	SSDT	
+	SSDT Financial ...	Financial Detail R...	test	Default	SSDT	
+	SSDT Financial ...	Financial Detail R...	Most Recent	Default	SSDT	
+	SSDT Financial ...	Financial Detail R...	Financial Detail	Default	SSDT	

Reports currently in the Bundle

	Report Name	Report Title	Owner	
 	SSDT Financial Detail Report J...	Financial Detail Report (July 1s...	SSDT	

6. To add more reports to the bundle, select another report from the **'Select the Report to Add to the Bundle'** option. Then click the  next to the report under **'Add this Report with the desired Report Options to the Bundle'** box. This report will then show with the others in **'Report currently in the Bundle'** box.


Save
Cancel



Report Bundle Name

Description

Tags

Select a Report to Add to the Bundle

Click  to Add this Report with the desired Report Options to the Bundle:

	Report Name	Report Title	Options Name	Options Description	Owner	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
	SSDT Budget Ac...	Budget Account ...	Default	Default	SSDT	
	SSDT Budget Ac...	Budget Account ...	Most Recent	Default	SSDT	

Reports currently in the Bundle

	Report Name	Report Title	Owner	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	SSDT Financial Detail Report J...	Financial Detail Report (July 1s...	SSDT	
<input checked="" type="checkbox"/>	SSDT Budget Account Activity ...	Budget Account Activity Report	SSDT	

7. To modify the report parameters for reports included in the Report Bundle, click on the icon next to the report in the grid at the bottom of the pop up window.

+ x

Save Cancel

Report Bundle Name: Example

Description: Example Report Bundle





Tags: Weekly

Select a Report to Add to the Bundle

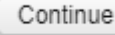
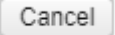
Click + to Add this Report with the desired Report Options to the Bundle:


Report Name	Report Title	Options Name	Options Description	Owner

Reports currently in the Bundle

Report Name	Report Title	Owner
  SSDT Financial Detail Report July 1 Cash Balances	Financial Detail Report (July 1st Cash Balances)	SSI
  SSDT Budget Account Activity Report	Budget Account Activity Report	SSI

8. Update the report parameters as needed


- a. Click  to save the updated report parameters
- b. Click  to continue with the original report parameters

 **Generate Report**

c. Click to generate the report on demand with the entered parameters

Report Options
+ x


Format:	PDF (download) <input type="button" value="v"/>
Page Size:	LETTER <input type="button" value="v"/>
Orientation:	LANDSCAPE <input type="button" value="v"/>
Name:	Financial Detail Report (July 1st Ca) <input type="checkbox"/> Summary Report <input type="checkbox"/> Show Report Options
Include Cash Account(s) i.e 000-0000	<input type="text" value="006-0000"/>
Include Full Account Code(s)	<input type="text"/>
Exclude Full Account Code(s)	<input type="text"/>
Include Fund	<input type="text"/>
Include Func	<input type="text"/>
Include Rcpt	<input type="text"/>
Include Obj	<input type="text"/>
Include SCC	<input type="text"/>
Include Subj	<input type="text"/>
Include Opu	<input type="text"/>
Include IL	<input type="text"/>
Include Job	<input type="text"/>
Filter Name	<input type="text"/>
Total As of Period (if a date is specified Initial Cash will be calculated as of that period)	<input type="text"/>


9. Click on  **Save** to save the Report Bundle.
10. To **Exit** out of the report bundles selecting option, click on the **x** in the right had corner.
11. After the Report Bundle has been created, it will show in the Report Bundle Manager grid.


Search/View Report Bundles

The Report Bundle grid allows the user to search for existing report bundles. Report Bundles can be filtered using the headings on each column.

+ Create		Q Advanced Query	More	Reset
	Username	Report Bundle Name	Description	Tags
<input type="button" value="o"/> <input type="button" value="e"/> <input type="button" value="p"/> <input type="button" value="g"/>	admin	Example	Example Report Bundle	Weekly

Click on the  icon to view the Report Bundle. From this view, the option to Edit the reports or add additional reports can be accessed by clicking on

 **Edit**

 Edit

Report Bundle Name

Description





Tags

Select a Report to Add to the Bundle

Click **+** to Add this Report with the desired Report Options to the Bundle:


	Report Name	Report Title	Options Name	Options Description	Owner	

Reports currently in the Bundle

		Report Name	Report Title	
		SSDT Financial Detail Report July 1 Cash Balances	Financial Detail Report (July 1st Cash Balances)	SSI
		SSDT Budget Account Activity Report	Budget Account Activity Report	SSI

Editing the Report Bundles

Users with Administrator or System Manager access can edit ANY report bundles. Users with other roles can edit Report Bundles that they created.

1. To change the Report Bundle details or reports included, locate the Report Bundle in the grid and click on the edit  icon.

+ x

Save
Cancel

Report Bundle Name

Description

Tags

Select a Report to Add to the Bundle

Click + to Add this Report with the desired Report Options to the Bundle:

Report Name	Report Title	Options Name	Options Description	Owner	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Reports currently in the Bundle

	Report Name	Report Title	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	SSDT Financial Detail Report July 1 Cash Balances	Financial Detail Report (July 1st Cash Balances)	SSI
<input checked="" type="checkbox"/>	SSDT Budget Account Activity Report	Budget Account Activity Report	SSI

2. To edit the report parameters of a report that is included in the Report Bundle, select the report to edit and click on  in the grid on the pop up window.

+ x

Report Bundle Name
 Description
 Tags

Select a Report to Add to the Bundle

Click **+** to Add this Report with the desired Report Options to the Bundle:

	Report Name	Report Title	Options Name	Options Description	Owner	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Reports currently in the Bundle

	Report Name	Report Title	
<input type="checkbox"/>	SSDT Financial Detail Report July 1 Cash Balances	Financial Detail Report (July 1st Cash Balances)	SSI
<input type="checkbox"/>	SSDT Budget Account Activity Report	Budget Account Activity Report	SSI

3. Update the report parameters as needed. Updates made to the parameters on this page will **only** affect the report when it is run from this Report Bundle.

- a. Click to save the updated report parameters
- b. Click to continue with the original report parameters

 **Generate Report**

c. Click to generate the report on demand with the entered parameters

Report Options + x

Format:	PDF (download) <input type="button" value="v"/>
Page Size:	LETTER <input type="button" value="v"/>
Orientation:	LANDSCAPE <input type="button" value="v"/>
Name:	Financial Detail Report (July 1st Ca)
	<input type="checkbox"/> Summary Report
	<input type="checkbox"/> Show Report Options
	Query Parameters
Include Cash Account(s) i.e 000-0000	006-0000
Include Full Account Code(s)	
Exclude Full Account Code(s)	
Include Fund	
Include Func	
Include Rcpt	
Include Obj	
Include SCC	
Include Subj	
Include Opu	
Include IL	
Include Job	
Filter Name	
Total As of Period (If a date is specified Initial Cash will be calculated as of that period)	
	<input type="button" value="Continue"/> <input type="button" value="Cancel"/> <input type="button" value="Generate Report"/>

4. Once all updates are complete click  **Save** to save changes the Report Bundle.

Delete a Report Bundle

Click on  in the grid beside the desired Report Bundle. A confirmation box will appear asking to confirm that the Report Bundle can be deleted.

Confirm x

Are you sure you want to delete?

Schedule a Report Bundle

Once a job is scheduled, you cannot change the Report Bundle Name.

1. To schedule a report bundle, click on .

+ Create		Advanced Query		More		Reset
Username	Report Bundle Name	Description	Tags			
admin	Example	Example Report Bundle	Weekly			

2. Enter Job Parameters to schedule the Report Bundle

- a. **Job Types:** Select one of 3 Job Type Options to determine when the Report Bundle will be generated. The parameter fields below will change based on which Job Type Option is selected. See sub sections below for additional information on each Job Type.
 - i. Cron - Schedule a reoccurring job to run on a regular interval or date/time.

- ii. Event - Schedule to run based when a specific action is prompted in USAS-R.
- iii. Immediate - Run on demand (now).

b. **Job Name:** Defaults to what is displayed in the 'Name' parameter. You can overwrite the default job name.

If the report is scheduled using the Cron option, the Job Name must be unique for each scheduled job.

c. **Send Output to:** This can be the email of the intended recipient or a path to the File Archive

- i. When entering the email of the intended recipient; you can enter multiple email addresses by separating each with a comma. The recipient is not required to have a user account for USAS-R.

The Email Notification Services module must be installed and configured in order to send Report Bundles via email

- ii. A path to the File Archive will send the Reports to a specific section of the File Archive under the Utilites menu.
 1. The path will always start with **fileinfo://**
 2. Next the path will determine if the files should be sent to the Monthly Archive Tab or the Fiscal Archive Tab
 - a. MonthlyReportFileSet
 - b. FiscalYearReportFileSet
 3. Last, the group of reports must be determined - Fiscal year OR Fiscal year & Period(month) depending on which Tab is chosen. These should be entered as numerical values where the "month" is the period number when July is the first Period of the Fiscal Year (ex. Enter 1 for July, 2 for August, 3 for September, etc.)

Description	Path
Send Reports to Monthly Archive for December 2019 (FY2020)	fileinfo://MonthlyReportFileSet/2020/6
Send Reports to Fiscal Archive for FY 2020	fileinfo://FiscalYearReportFileSet/2020

- 4. When the File archive option is used with a specific Event, then the path to the File Archive can include variables so that the file location will be based certain even factors. Example - If a specific Posting Period is being closed, then the Fiscal year & Period where the Reports are sent to the File Archive correspond to the Fiscal year & Period that is being closed.

Description	Path
Send Reports to Monthly Archive when connected to the event of closing a Posting Period	fileinfo://MonthlyReportFileSet/eventFiscalYear/eventMonth

- d. **Archive type:** Determines if reports in bundle will be combined and sent together or sent in individual notifications for each report chosen.
 - i. Send a single notification with multiple attachments (One email with multiple attachments)
 - ii. Send a multiple notifications with a single attachment (Multiple emails with a single attachment in each)

Cron Job Type

This Job Type can be used to schedule a reoccurring job to run on a regular interval or date/time.

1. Select Cron as the Job Type

Screenshot of the 'Schedule Report Bundle' window. The 'Job Parameters' section is visible. Under 'Job Type Options', 'Cron' is selected. The 'Job Name' field contains 'Test'. The 'Cron Expression' field is empty. The 'Send output to' and 'Archive Type' fields are empty. A 'Save' button is located at the bottom.

2. Enter a Cron Expression


- a. A Cron Expression is a command set up to run periodically at fixed times, dates, or intervals
- b. Cron Expressions can be set up by using a free online cron expression generator
- c. Free online cron expression generators:

- <https://www.freeformatter.com/cron-expression-generator-quartz.html>
- <http://www.cronmaker.com>

- d. Once the Cron Expression for the preferred interval has been generated, copy and paste or type the cron expression into the Cron Expression field.

Screenshot of the 'Schedule Report Bundle' window. The 'Job Parameters' section is visible. Under 'Job Type Options', 'Cron' is selected. The 'Job Name' field contains 'Test'. The 'Cron Expression' field now contains '0 0 6 1/1 * :'. The 'Send output to' and 'Archive Type' fields are empty. A 'Save' button is located at the bottom.

3. Enter the remaining parameters

- 4. Click  to schedule the Report Bundle
- 5. The scheduled job will be listed under [Utilities/Job Scheduler](#).

Event Job Type

This Job Type can be scheduled to run based when a specific action is prompted in USAS-R.

1. Select Event as the Job Type


Screenshot of the 'Schedule Report Bundle' window. The 'Job Parameters' section is visible. Under 'Job Type Options', 'Event' is selected. The 'Job Name' field contains 'Test'. The 'Events' field is empty. The 'Send output to' and 'Archive Type' fields are empty. A 'Save' button is located at the bottom.

2. Select an Event for when to run the Report Bundle from the drop down

- a. Events correspond to actions that happen in USAS-R
- b. For Example, selecting the event **org.ssd_t_ohio.usas.model.fiscalPeriod.FiscalPeriodCloseEvent** will generate the report bundle when the last period of the fiscal year is closed on the Core/Posting Periods page.

For Custom Report Bundles, the reports will generate based on the **current** posting period. When scheduling a Report Bundle for a posting period close event, make sure to allow the custom bundles to create before changing the current period to the new period.

3. Enter the remaining parameters

4. Click  to schedule the Report Bundle

Events

Full Event Title	Event	Description
org.ssdt_ohio.model.events.ConfigurationUpdatedEvent	Configuration Updated	
org.ssdt_ohio.model.events.ReportDefinitionDeletedEvent	Report Definition Deleted	A report definition is deleted from the Report Manager
org.ssdt_ohio.module.events.ModuleInstalledEvent	Module Installed	A module is installed
org.ssdt_ohio.module.events.ModuleUninstalledEvent	Module Uninstalled	A module is uninstalled
org.ssdt_ohio.modules.dba.backup.DatabaseBackupCompletedEvent	Database Backup Completed	
org.ssdt_ohio.modules.dba.backup.DatabaseBackupEvent	Database Backup	
org.ssdt_ohio.modules.dba.backup.DatabaseBackupFailureEvent	Database Backup Failure	
org.ssdt_ohio.modules.rules.events.RuleSetDisabledEvent	Rule Set Disabled	
org.ssdt_ohio.modules.rules.events.RuleSetEnabledEvent	Rule Set Enabled	
org.ssdt_ohio.reporting.ReportStartEvent	Report Start	
org.ssdt_ohio.scheduler.ScheduledJobFinishedEvent	Scheduled Job Finished	
org.ssdt_ohio.usas.model.accountHistory.ImportCashBalanceMismatchEvent	Import Cash balance Mismatch	
org.ssdt_ohio.usas.model.anticipatedRevenue.AnticipatedRevenueAdjustmentEvent	Anticipated Revenue Adjustment	
org.ssdt_ohio.usas.model.anticipatedRevenue.AnticipatedRevenueInitialEvent	Anticipated Revenue Initial	Initial Anticipated Revenue amounts are applied
org.ssdt_ohio.usas.model.budget.AccountMappingEvent	Account Mapping	
org.ssdt_ohio.usas.model.budget.BudgetAdjustmentEvent	Budget Adjustment	
org.ssdt_ohio.usas.model.budget.BudgetInitialEvent	Budget Initial	Initial Budget amounts are applied
org.ssdt_ohio.usas.model.budget.EncumbranceLedgerRepostEvent	Encumbrance Ledger Repost	
org.ssdt_ohio.usas.model.cashrec.CashReconciliationSaveEvent	Cash Reconciliation Save	A Cash Reconciliation record is saved
org.ssdt_ohio.usas.model.disbursement.DisbursementPostingCompletedEvent	Disbursement Posting Complete	
org.ssdt_ohio.usas.model.disbursement.DisbursementPostingStartedEvent	Disbursement Posting Started	
org.ssdt_ohio.usas.model.disbursement.DisbursementPrintEvent	Disbursement Print	Generate Print File option is run for Disbursements
org.ssdt_ohio.usas.model.disbursement.DisbursementReconciledEvent	Disbursement Reconciled	Reconcile option is run for Disbursements
org.ssdt_ohio.usas.model.disbursement.DisbursementUnreconciledEvent	Disbursement Unreconciled	Unreconcile option is run for Disbursements
org.ssdt_ohio.usas.model.disbursement.VoidDisbursementEvent	Void Disbursement	Void option is run for Disbursements

VoidDisbursementEvent		
org.ssdt_ohio.usas.model.fiscalPeriod.FiscalPeriodCloseCompletedEvent	Fiscal Year Period Close Completed	Last Posting Period of the fiscal year close is completed - This Option should be used when scheduling Fiscal Year End Reports
org.ssdt_ohio.usas.model.fiscalPeriod.FiscalPeriodCloseEvent	Fiscal Period Close	Last Posting Period of the fiscal year is closed
org.ssdt_ohio.usas.model.fiscalPeriod.FiscalPeriodOpenEvent	Fiscal Period Open	First Posting Period of the fiscal year is opened
org.ssdt_ohio.usas.model.pendingTransaction.PendingTransactionPostedEvent	Pending Transaction Posted	Transaction posted successfully from Pending Transactions
org.ssdt_ohio.usas.model.pendingTransaction.PendingTransactionRejectedEvent	Pending Transaction Rejected	Transaction rejected when attempting to post from Pending Transactions
org.ssdt_ohio.usas.model.po.ChargeAdjustmentImpactEvent	Charge Adjustment Impact	
org.ssdt_ohio.usas.model.postingPeriod.CalendarYearCloseCompletedEvent	Calendar Year Period Close Completed	Last Posting Period of the calendar year close is completed - This Option should be used when scheduling Calendar Year End Reports
org.ssdt_ohio.usas.model.postingPeriod.PostingPeriodChangeEvent	Posting Period Change	
org.ssdt_ohio.usas.model.postingPeriod.PostingPeriodCloseEvent	Posting Period Close	Posting Period close is initialized
org.ssdt_ohio.usas.model.postingPeriod.PostingPeriodCloseCompletedEvent	Posting Period Close Completed	Posting Period close is completed - This Option should be used when scheduling Month End Reports
org.ssdt_ohio.usas.model.postingPeriod.PostingPeriodOpenEvent	Posting Period Open	Posting Period is opened
org.ssdt_ohio.usas.model.postingPeriod.PostingPeriodReOpenEvent	Posting Period Reopen	Posting Period is reopened
org.ssdt_ohio.usas.model.project.ProjectAssignmentEvent	Project Assignment	
org.ssdt_ohio.usas.model.requisition.RequisitionConvertedEvent	Requisition Converted	Requisition(s) is/are converted
org.ssdt_ohio.usas.module.uspsintegration.events.CommunicationTestReceivedEvent	Communication Test Received	
org.ssdt_ohio.usas.module.uspsintegration.events.CommunicationTestSendEvent	Communication Test Send	
org.ssdt_ohio.usas.module.uspsintegration.events.USPSIntegrationEvent	USPS Integration	
org.ssdt_ohio.usas.module.uspsintegration.events.UspIntegrationAuthenticationFailureEvent	USPS Integration Authentication Failure	
org.ssdt_ohio.usas.repository.numbers.NumberAssignmentServiceImpl\$AssignedNumberChangedEvent	Assigned Number Changed	
org.ssdt_ohio.usas.repository.numbers.NumberAssignmentServiceImpl\$NumberAssignedEvent	Number Assigned	

Immediate Job Type

This Job Type can be used to run the Report Bundle on demand (now).

1. Select Immediate as the Job Type

2. The reports will immediately be sent to the output specified

Schedule Report Bundle + X

Job Parameters

Job Type Options Cron
 Event
 Immediate

Job Name

Send output to

Archive Type