



Emailing Redesign Reports from a Bundle

Revised October 2020

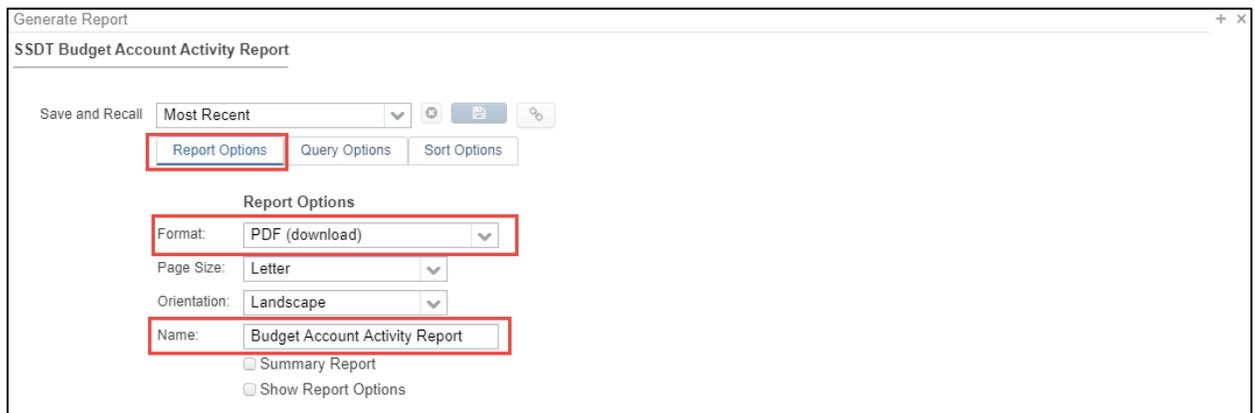
Overview

In Redesign, users have the ability to schedule reports to run at any time interval desired, and to email those reports to any email address. Report bundles can also be created to email reports on demand (immediate), at any time interval, or as a result of events in the software (i.e. closing a posting period).

Creating a Report in Redesign

This document is not intended to review all features available in the Redesign for creating reports, but instead this document focuses on the process to send Redesign Report Bundles to an email address. For more information on reports in Redesign, please see the Report chapters of the Redesign manuals. Links to the manuals can be found on the LACA website.

1. Once logged into Redesign, go to Report/Report Manager, and select your report. Click Generate 
2. On the Report Options Tab:
 - Select the desired format (i.e. PDF).
 - The NAME entered here will show as the report name in the Report Bundle and as the name of the email attachment.



Generate Report

SSDT Budget Account Activity Report

Save and Recall: Most Recent   

Report Options Query Options Sort Options

Report Options

Format: PDF (download)

Page Size: Letter

Orientation: Landscape

Name: Budget Account Activity Report

Summary Report

Show Report Options

3. On the Query Options Tab:
 - a. Complete the Query Parameters as desired (i.e. enter a start and end date, specify desired account dimensions, enter an existing Filter Name, etc.). Wildcards can be used if desired (i.e. “f” for the first day of the fiscal year, “l” for the last day of the fiscal year, “p” for the first day of the current period, “d” for the last day of the current period, % for part of an account dimension, etc.)
 - b. Enter a Name for the Query Parameters in Save and Recall. Then click 

c. After saving, click the X to close the pop up window.

4. Repeat steps 1-3 as desired for more reports that you wish to add to the desired Report Bundle.

5. Go to Reports/Report Bundles and Click

a. Enter Report Bundle Name, Description, and Tags (optional) to define this report bundle.

b. Select a desired report from the drop down. This will populate the grid with default & saved reports. The Name you entered in Save and Recall in step 3b will display under Options Name. Also, the name entered in step 2 will display under Report Title.

c. Click the next to the desired report in the grid to add it to the new bundle.

d. Repeat steps 5b-5c until all desired reports are added to your bundle.

e. Then click

✓ 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
+	SSDT Revenue A...	Revenue Account...	Default	Default	SSDT
+	SSDT Revenue A...	Revenue Account...	HS Principal 018	Default	SSDT

Reports currently in the Bundle

	Report Name	Report Title	Owner
✎ ⊕	SSDT Budget Account Activity ...	Budget Account Activity Report	SSDT
✎ ⊕	SSDT Revenue Account Activit...	Revenue Account Activity Report	SSDT

6. After returning to the Report Bundle Grid, click the icon next to your newly created bundle to schedule the report(s).

Schedule Report Bundle

Job Parameters

Job Type Options: Cron
 Event
 Immediate

Job Name:

Cron Expression:

Send output to:

Archive Type:

✓ Save

7. For Job Type:
- a. If selecting Cron, under CRON Expression, enter the interval at which you want the report to generate itself. To test your new report, you may want to set it to run every

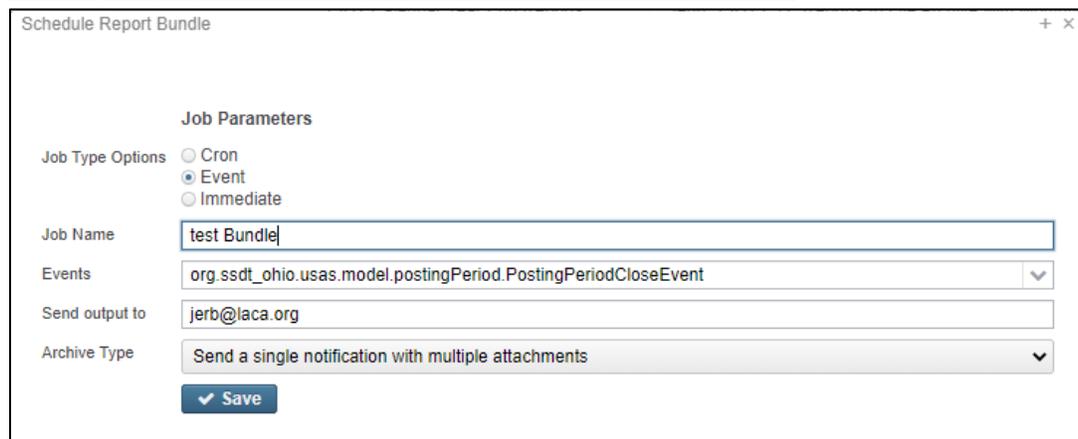
hour, so you can verify if it works. After you know it works, then delete that job from Utilities/Job Scheduler and re-enter it using the true interval that you want.

Here are some example CRON expressions you may choose to use:

Every hour on the hour	0 0 * ? * * *
First day of every month, at 11:00pm	0 0 23 1 * ?
Every day at 11:00pm	0 0 23 ? * * *

For additional CRON expressions, see <https://www.freeformatter.com/cron-expression-generator-quartz.html>.

- b. If selecting Event, under Events, select the desired event that you wish to initiate this report bundle. For a more detailed explanation of each event, see <https://wiki.ssd-ohio.org/display/usasrdoc/Report+Bundles#ReportBundles-Events>.



- c. If selecting Immediate, the report bundle will be generated on demand and emailed when you click Save.

8. Job Name will be what shows up under “Utilities/Job Scheduler”. Each Job Name must be unique so you will most likely need to be specific (i.e. HS Student Council). Enter the desired job name here.
9. Under “Send Output To” input the desired user’s email address (i.e. sameusername@laca.org).
10. For Archive Type, select “Send multiple notifications with a single attachment” or “Send a single notification with multiple attachments” as desired.
11. When all fields are complete, click  and click X to close the pop up window.
12. You can go to Utilities/Job Scheduler to see if the job that you scheduled was successful. It will display Pending if the job is scheduled to occur in the future, Completed if it has already ran successfully, Running if it is currently processing, etc.