Scheduling a Report

See previous W5 version guide

PURPOSE

This document shows the detailed procedure on how to schedule a report.

WHY IS THIS IMPORTANT?

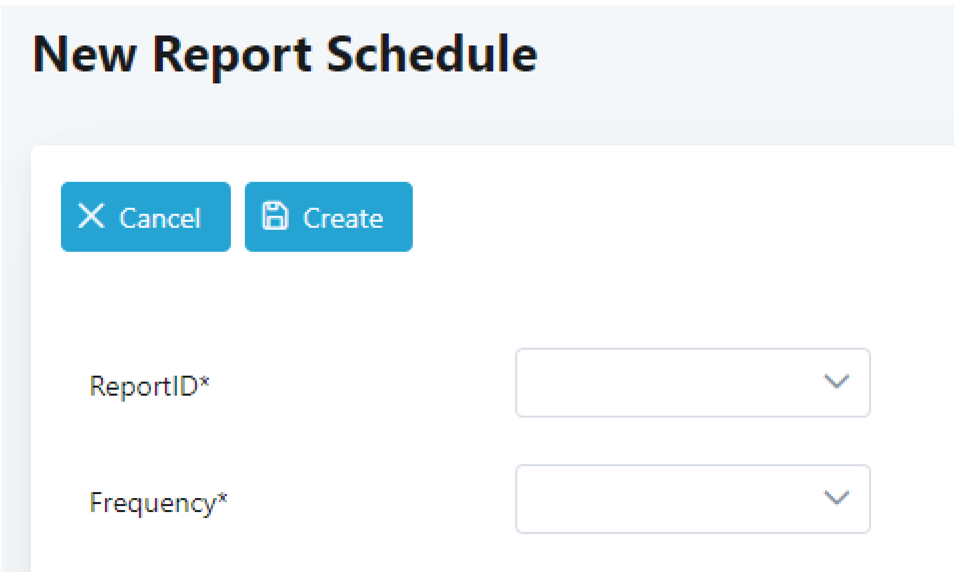
This allows a user to schedule reports to be send to his/ her email without the need to manually print from the system.

PROCEDURE

1. Set up report to be scheduled.

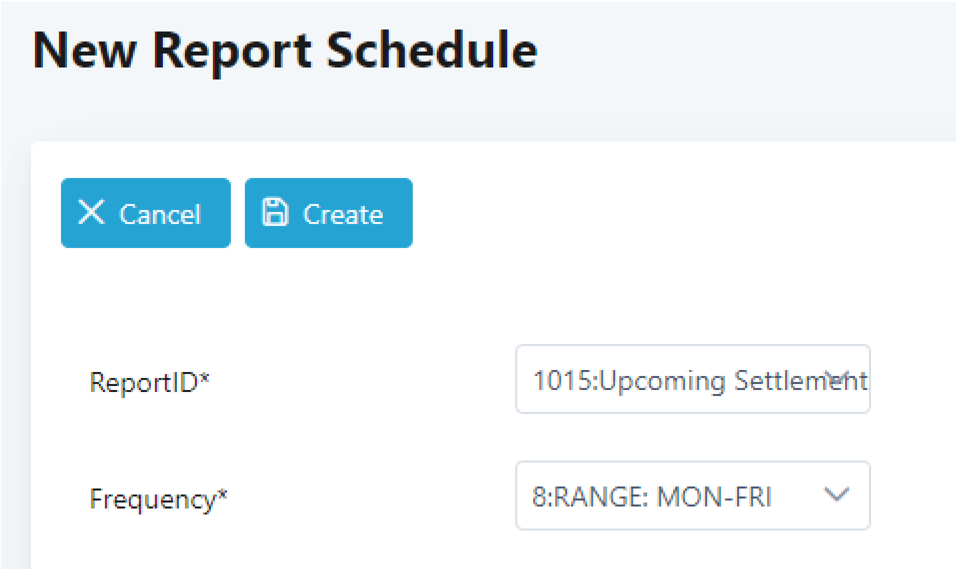
   1.1 Select Reporting > Schedule. The Report Schedule menu will be displayed.

   1.2 Click New.

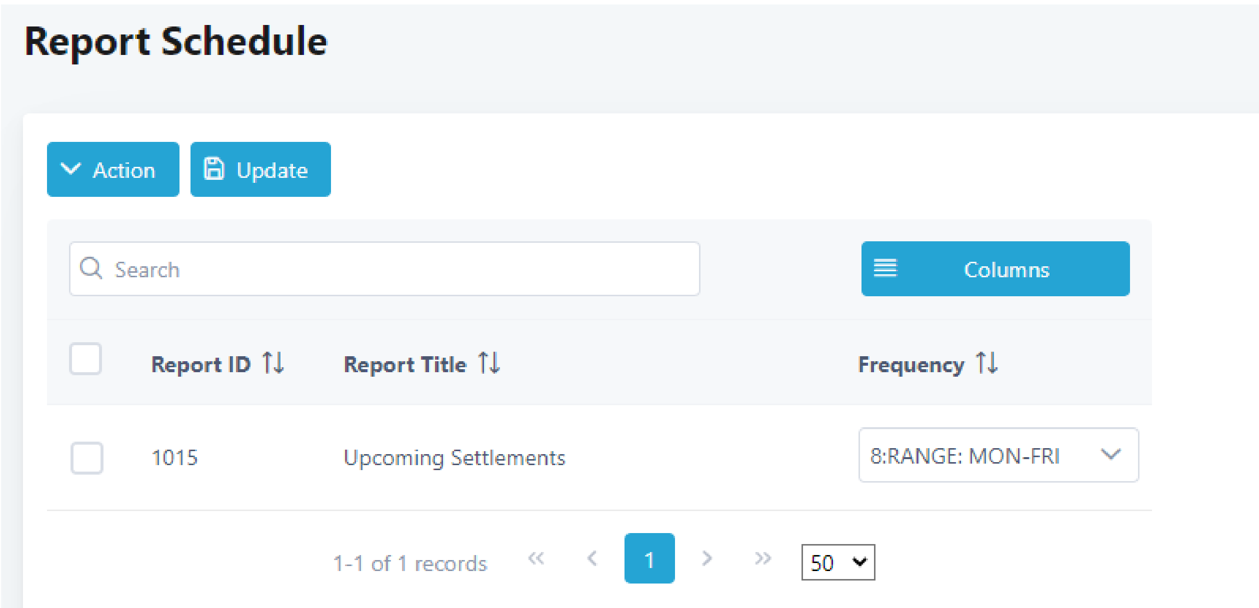


   1.3. Choose the Report ID from the dropdown. Only reports found in the dropdown list can be scheduled.

   1.4. Select the Frequency. This is the day when the report will be scheduled.



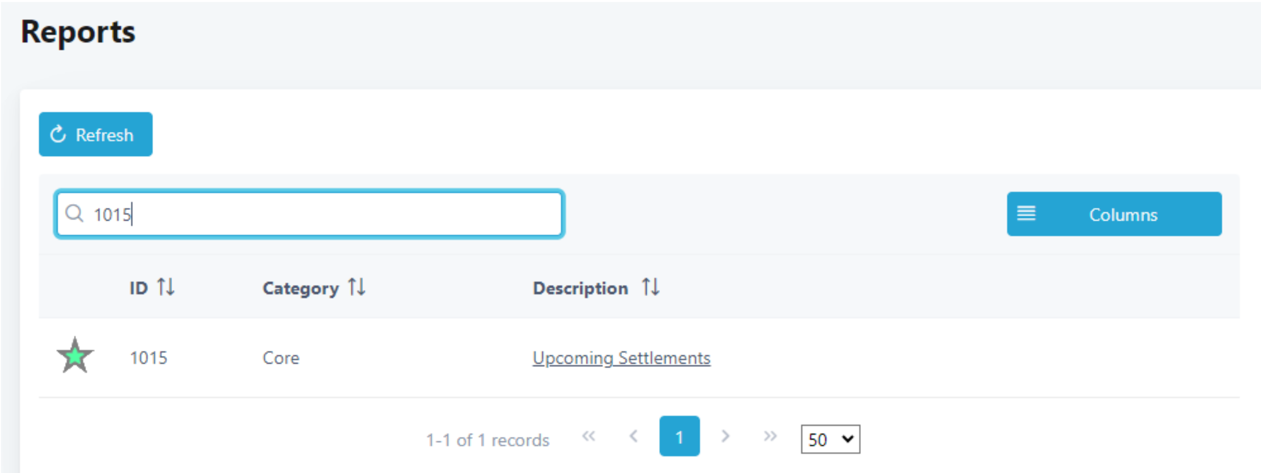
1.5. Click Create. The created scheduled report will be displayed in the main menu.



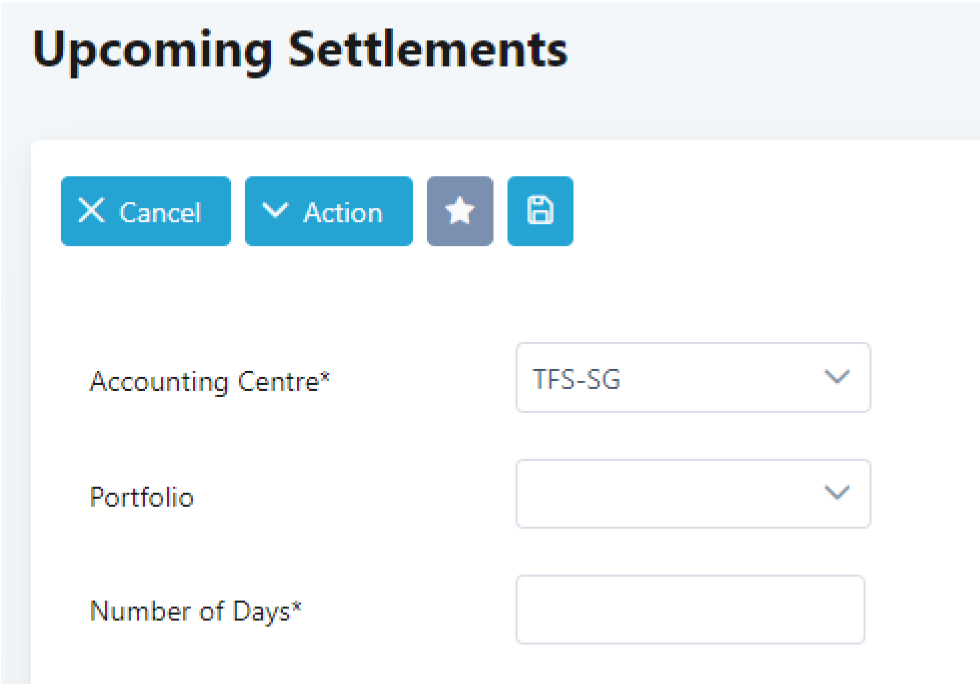
2. Saving report parameters. This is needed to let the system know what parameters needs to be passed to send the scheduled report.

2.1. Select Reporting > Standard.

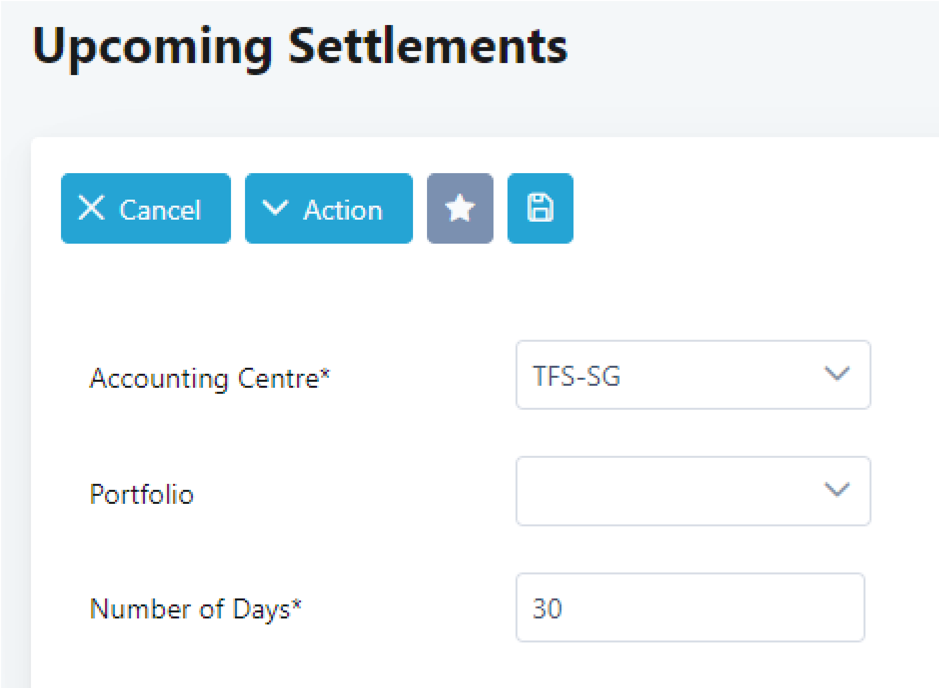
2.2 Search for the report to be scheduled, in this example, 1015- Upcoming Settlements.



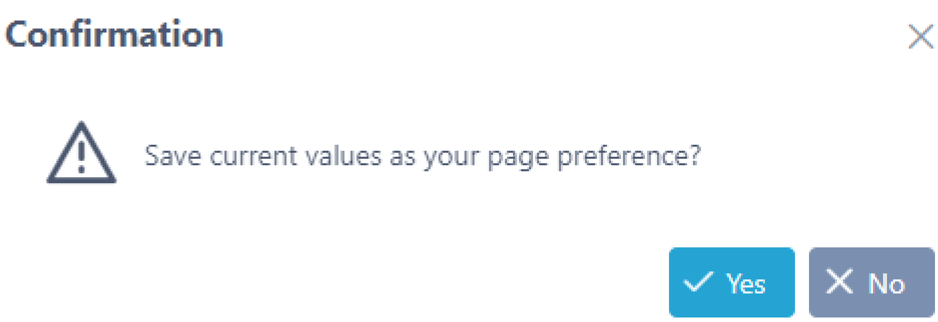
2.3. Click on the Description. The screen below will be displayed.



2.4. Fill in the details, fields with asterisk (*) are mandatory. In this example, we want to see upcoming settlements for the next 30 days. Set the Acct Cntr and type in the number of days desired. You can also set the portfolio if you just need to see settlements for a certain portfolio only.



2.5. Click  to save the preference. A popup is shown, click Yes.

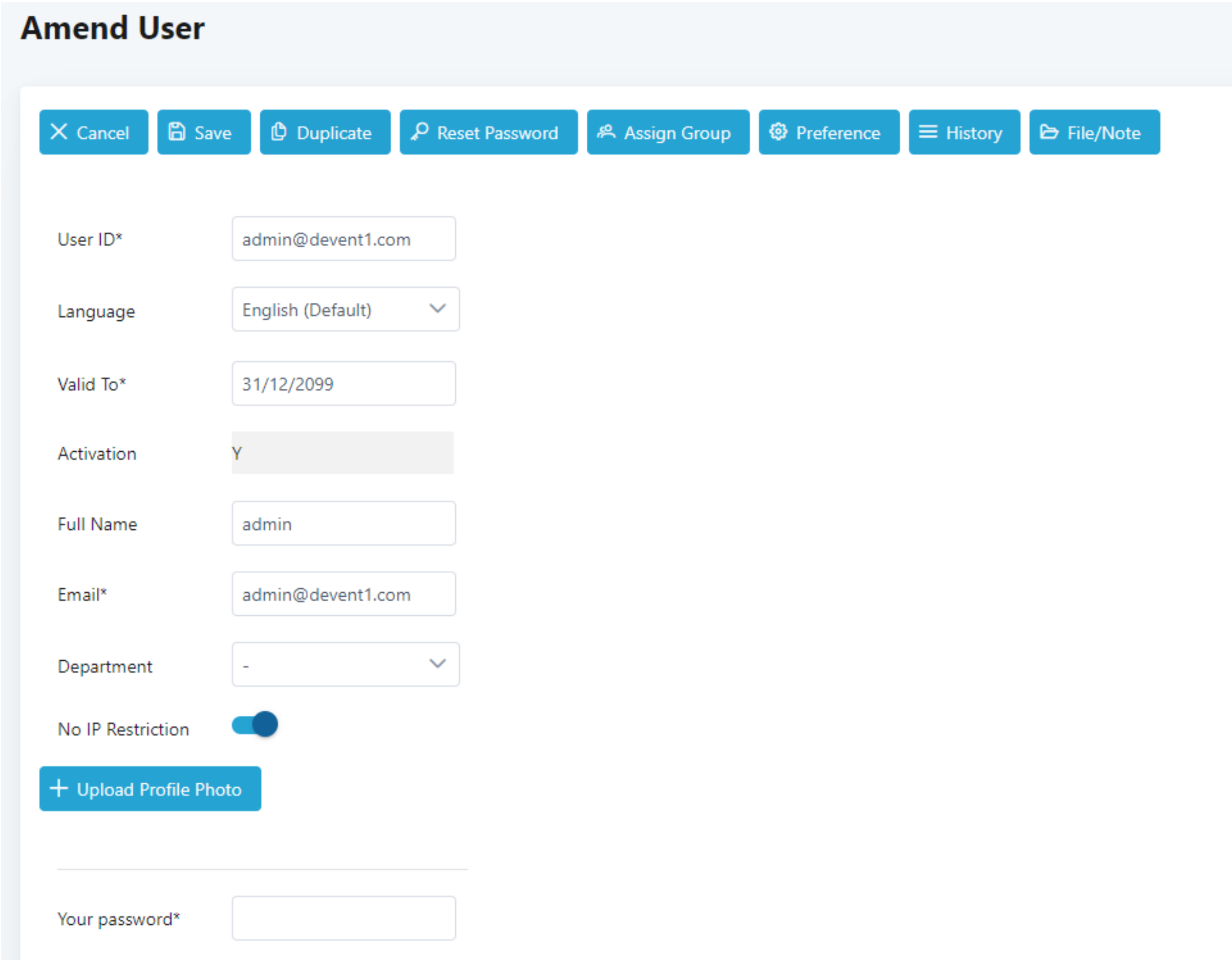


Note that for date field, when you save as today's date, the system will adjust the date to the next day when the report is scheduled to send on the next day and subsequent days.

3. Setting up email under your user ID. This is done to send the scheduled report to your email.

3.1. Select Set Up > User and Rights

3.2. Search for your user ID. The Amend User screen will be displayed.



3.3. Ensure the email address is correct, if not make the changes and click Save.

3.4. Approve the User ID by clicking on the tick box besides N and click Approve.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created.
11-Nov-2016	Clarissa	Reformatted. Rewritten.
18-Jan-2019	Lyra	Updated screenshots.
05-Sep-2023	TS	Updated to W6 instructions and screenshots.