

Report Bundles Guide

Introduction: Report Bundles in Redesign allow users to efficiently generate, schedule, and distribute reports via email or sending them to the File Archive. This guide will walk you through the step-by-step process of creating and configuring Report Bundles.

Section 1: Creating a Report Bundle

1.1 Navigate to Report Bundles:

- Go to **Report** -> **Report Bundles**.
- Access the Report Bundles grid displaying SSDT and user-created bundles.

1.2 Create a New Bundle:

- Click the **Create** button.
- Provide a name (e.g., Food Services), and optionally add a description and tags.
- Select a report from the dropdown menu, adding it to the bundle using the plus icon.
 - Choose between "Default" and "Most Recent Option" for multiple report versions.

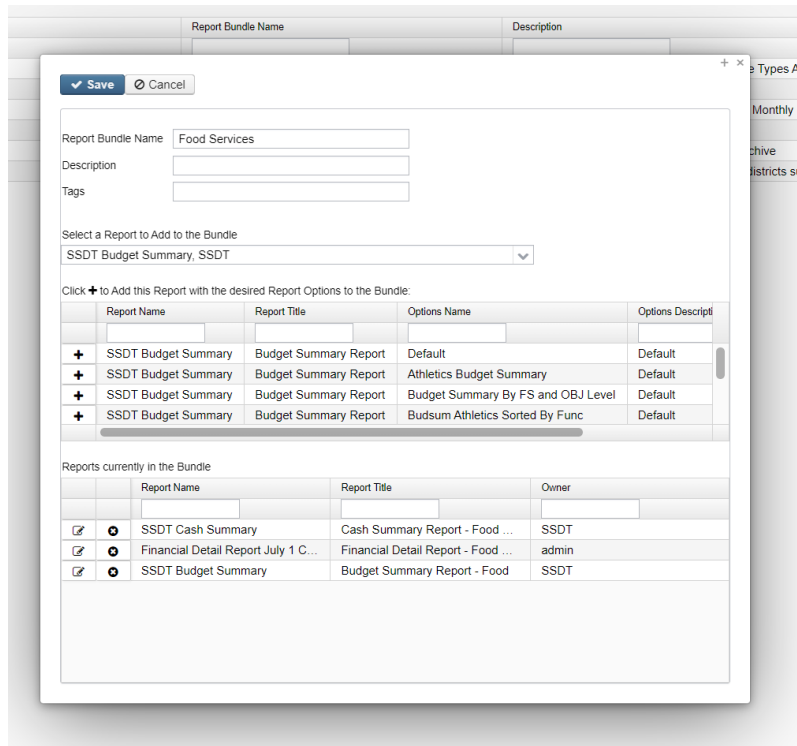


Figure 1 - Multiple reports for one bundle

1.3 Edit the Selected Report:

- Click the edit button on the report.
- Add filters (Query Options tab) for specific account codes.
- Customize additional options in the Report Options and Sort Options tabs.
- Click **Continue** to save changes to the report.

1.4 Save the Bundle:

- Click **Save** to complete the bundle creation.
- Add more reports as needed; bundles can include multiple reports.

Section 2: Scheduling the Bundle

2.1 Schedule the Bundle to Run:

- Click the clock icon for the desired bundle.
- Configure when the reports run, who will receive them, and how they will receive them.

The screenshot shows a 'Schedule Report Bundle' dialog box. At the top, there are three tabs: 'SSDT Monthly Reports', 'SSDT Transmitter Summary Report', and 'Send SSDT Monthly Report Bundle to File Archive'. The 'SSDT Transmitter Summary Report' tab is selected. The dialog contains the following fields and options:

- Job Parameters:** Three radio buttons: 'Cron' (selected), 'Event', and 'Immediate'.
- Job Name:** Text input field containing 'Food Services'.
- Cron Expression:** Text input field.
- Send output to:** Text input field.
- Archive Type:** Dropdown menu.
- Save:** A blue button with a checkmark icon.

Figure 2 - Menu that appears after clicking the clock icon

2.2 Choose a Job Type:

- **Cron:**
 - Utilize a cron expression for specific scheduling.
 - Example: **0 0 8 ? * FRI *** for every Friday at 8:00 AM.
 - Use tools like [this website](#) for creating cron expressions.
- **Event:**
 - Select an event from the Events dropdown (e.g., month closure).

- **Immediate:**
 - Run the bundle once immediately.

2.3 Enter Recipient Information:

- Enter email addresses (comma-separated) in the **Send Output to** field.
- Optionally, direct reports to the File Archive by using the specified format in the send output to field.
 - fileinfo://MonthlyReportFileSet/eventFiscalYear/eventMonth

2.4 Choose an Archive Type:

- **Send Multiple Notifications with a Single Attachment:**
 - Sends separate emails for each report in the bundle.
- **Send a Single Notification with Multiple Attachments:**
 - Sends one email with all reports attached.
 - **It is recommended to use this option**
- **Send a Single Notification with Zip Attachment:**
 - Compresses reports into a zip file attached to the email.
 - This option should only be used if the file size is too large to be sent by email.
- Select the preferred option based on your email notification and attachment preferences.