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Schedule reports to run on financial close [1]

September 18, 2017 by Carl Sorenson [2]

You can schedule CU-Data m-Fin reports to run automatically upon each financial close. This is done by creating report views and then setting them up to run with the *by trigger* scheduling feature. My thanks to Sarju Khadka for her work enhancing all the m-Fin reports to work with this, Sunny in the UIS/IRM team for getting the FINCLOSE trigger set up, and to the OUC FPBS team for this excellent video: Scheduling Reports for Month-End/Year-End Close [3].

Financial close happens during the first week of each month, closing the prior month. At fiscal year-end there are two more closes, 996 and 997. The FINCLOSE trigger will fire once for each monthly close, once for 996, and once for 997.

Configuring the runs as shown in the video results in runs that will be for the closed period. For example, if your run occurs on the 5th of October, it will be a run for 3 -- SEP, the accounting period that just closed.

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