

Reports: Running Reports

Reports ?

Favorites (3) | **All Reports (100)** Data Dictionary | New Report

Report Type Include Historical Reports

Report Name	Subject Area	Type	Alert	Schedule	Last Updated	Output
Activity (29) New						
Activity Cashiering Report	Cashiering	Shared			04/04/2012	Online
All Activity	Cashiering	Personal		Daily - All days	12/05/2011	Online
All EFT Activity	Cashiering	Personal	✓	Daily - Busin...	01/30/2012	Online
All Wires	Cashiering	Personal	✓	Daily - All days	12/05/2011	Online
Cashiering	Cashiering	Shared			05/22/2012	Online
Daily Che	Cashiering	Personal		Daily - All days	11/28/2011	Online
MM- Mont	Cashiering	Personal	✓	Daily - Busin...	01/23/2012	Online
MM-Quart	Cashiering	Historical		Daily - Busin...	11/18/2011	Online
Option Ac	Cashiering	Shared	⚠	Daily - All days	05/25/2012	Online
Option Ac	Cashiering	Shared		Daily - All days	12/05/2011	Online
Wires Re	Cashiering	Shared	⚠	Daily - Busin...	01/30/2012	Online

Expand All | Collapse All

H Manage Alert

Subscription Details:
All Activity

Subscribe

Pop Up

Email 1: msmith@yourfirm.com

Email 2: echang@yourfirm.com

Email 3: jjones@yourfirm.com

Note: To set up or modify email addresses please use "Edit Delivery Options" in Alerts.

Close without saving changes Save

Reports > Reports

Use the Reports function in WealthscapeSM to run and manage on-demand reports assigned to you.

- A** When you first open the Reports window, the All Reports tab displays. For users with administrative entitlements, this tab is labeled My Work (not shown). This tab lists all shared reports that are assigned to you, as well as any personal reports that you have created, if entitled.
- B** If a shared report has been removed from your profile, it is represented in the Type column as a Historical report. Select **Include Historical Reports** to include these reports on the All Reports tab.
- C** To take action on a report, select the arrow next to the report name to display a menu. Only those actions that you are entitled to perform or that are applicable for the report are available on the menu. To run a report, for example, select **View** (or simply select the report name).
- D** If a Prompted Report icon displays next to the report name, you will be prompted to enter report criteria (not shown), such as a date range, before the report is generated.
- E** The Favorite Report icon displays next to any report that you have designated as a favorite. Select the **Favorites** tab (top of Report window) to access your favorite reports.
- F** If you subscribed to receive an alert when a scheduled report is generated, an icon displays in the Alert column. Different icons display based on whether you are subscribed to a personal, optional, or mandatory alert.
- G** To manage your alert subscriptions, select **Manage Alert** from the menu.
- H** The Manage Alert window displays. Note that you cannot unsubscribe from a mandatory alert.