

Request Set Creation

You can use a Request Set to run all of your monthly reports at one time, such as your Department Statements, Project Statements and RIT Account Analysis reports. A Request Set allows you to include all the reports you want to run in a set and then run the set instead of running each report individually.

Objective:

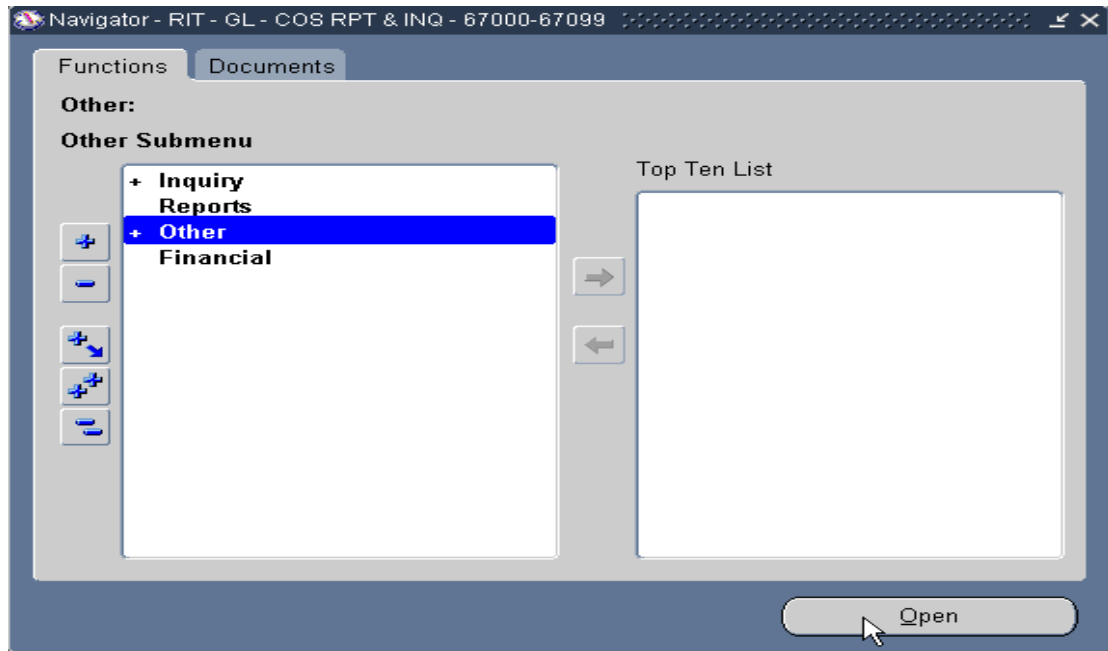
At the end of this lesson, you will be able to create a Request Set to run all of your monthly statements and detail reports at one time.

Scenario

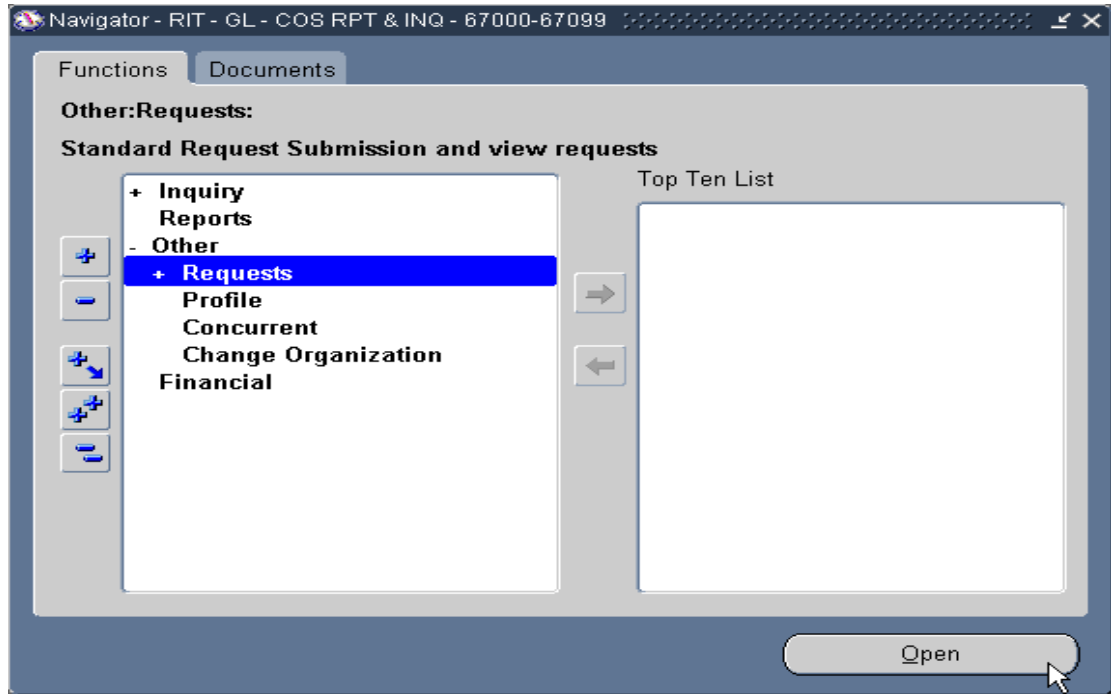
You are an employee in the College of Science. You want to create a Request Set for your monthly department and project statements, and detail reports. This will reduce the amount of time it takes for you to run your department's reports each month.

Directions:

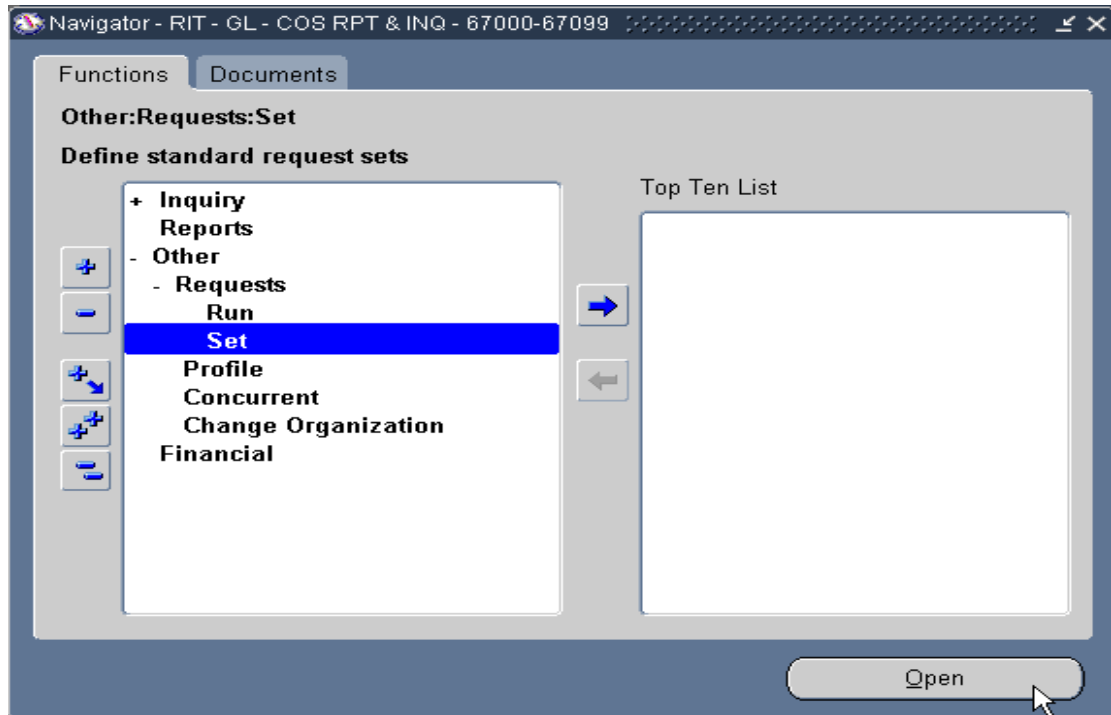
- To create a Request Set select the "Other" menu in your Navigator screen and click on the "Open" button.



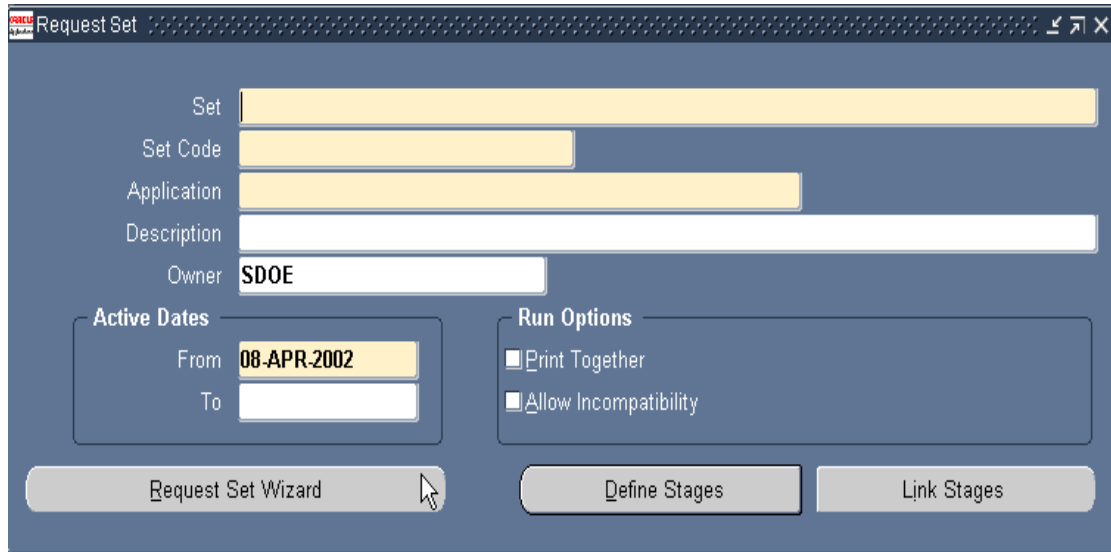
- Next select the “Requests” menu and click on the “Open” button.



- Select “Set” and click the “Open” button, the Request Set screen will open.



- In the Request Set screen click on the “Request Set Wizard” button.



The first step of setting up a Request Set through the Request Set Wizard is to determine if you want your group of reports to run sequentially or parallel.

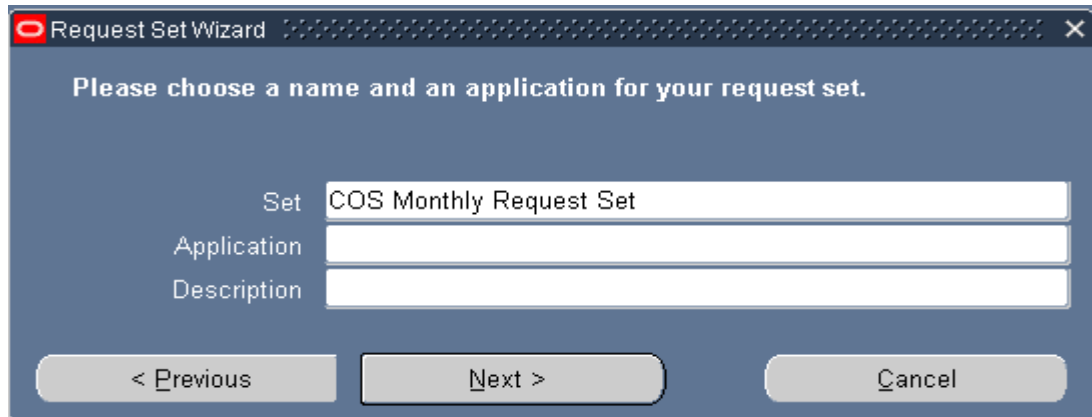
Sequentially – To run one after another. This is generally used for programs and not reports. One program can be dependant upon another, but your reports will not depend on each other for their values.

In Parallel – Since your reports are not dependant upon one another it is possible to run them all at the same time.

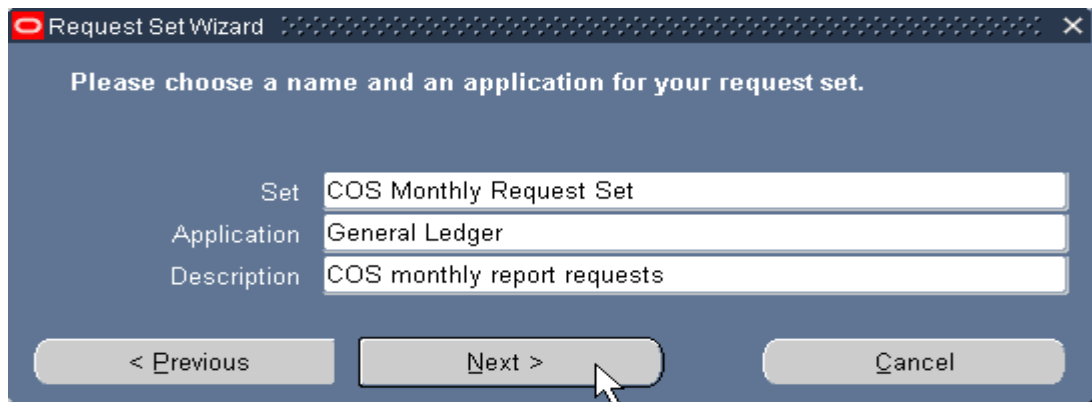
- Select the “In Parallel” option by clicking on the circle to the left, and then the “Next >” button.



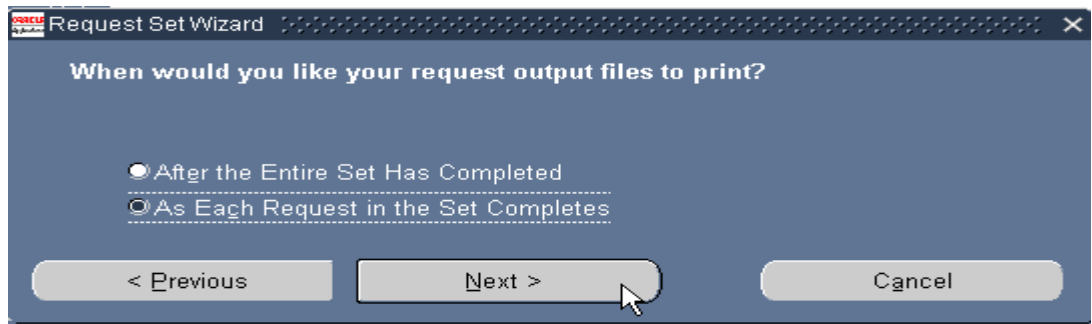
- In the next step enter a name for your Request Set in the “Name” field and tab to the “Application” field.



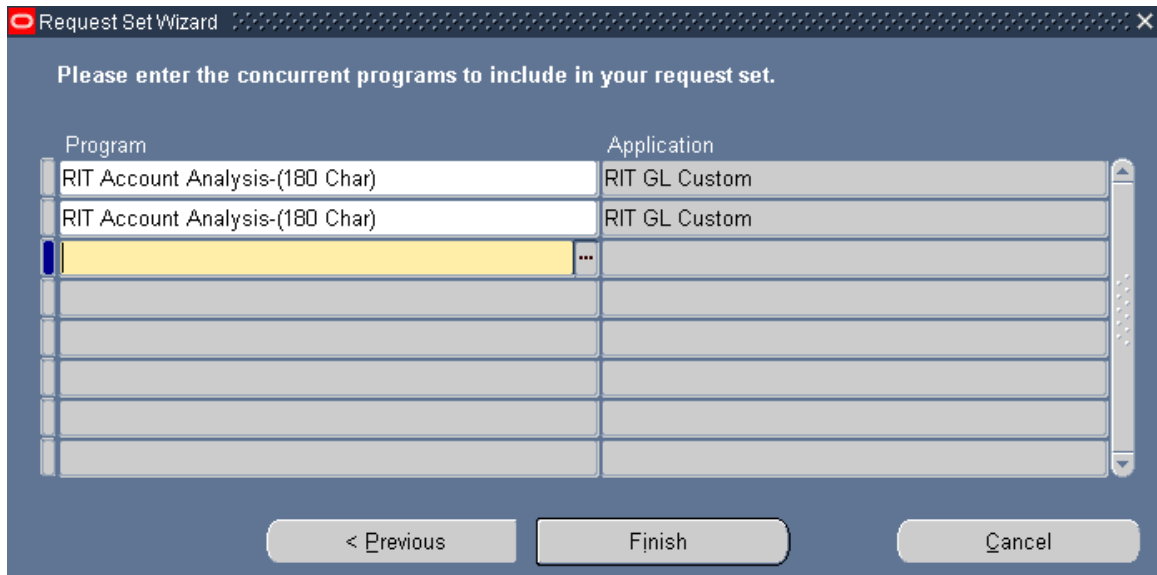
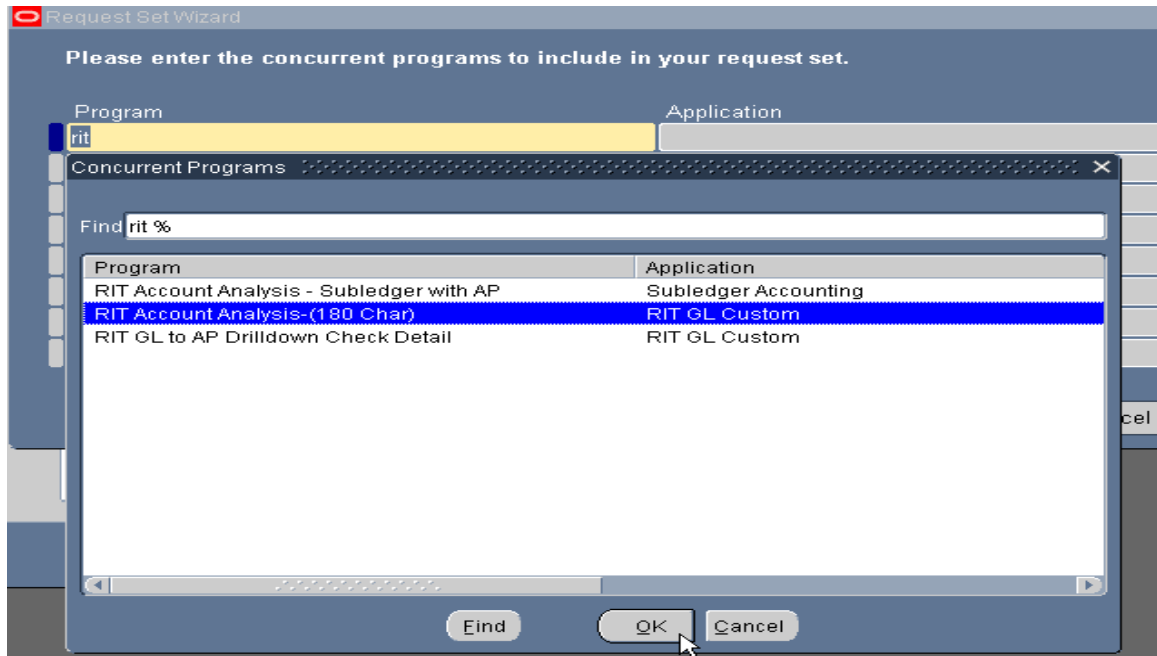
- In the “Application” field type “General” and hit the tab key. The Application name “General Ledger” will fill in the field.
- Enter a description of the Request Set in the “Description” field and click the “Next” button.



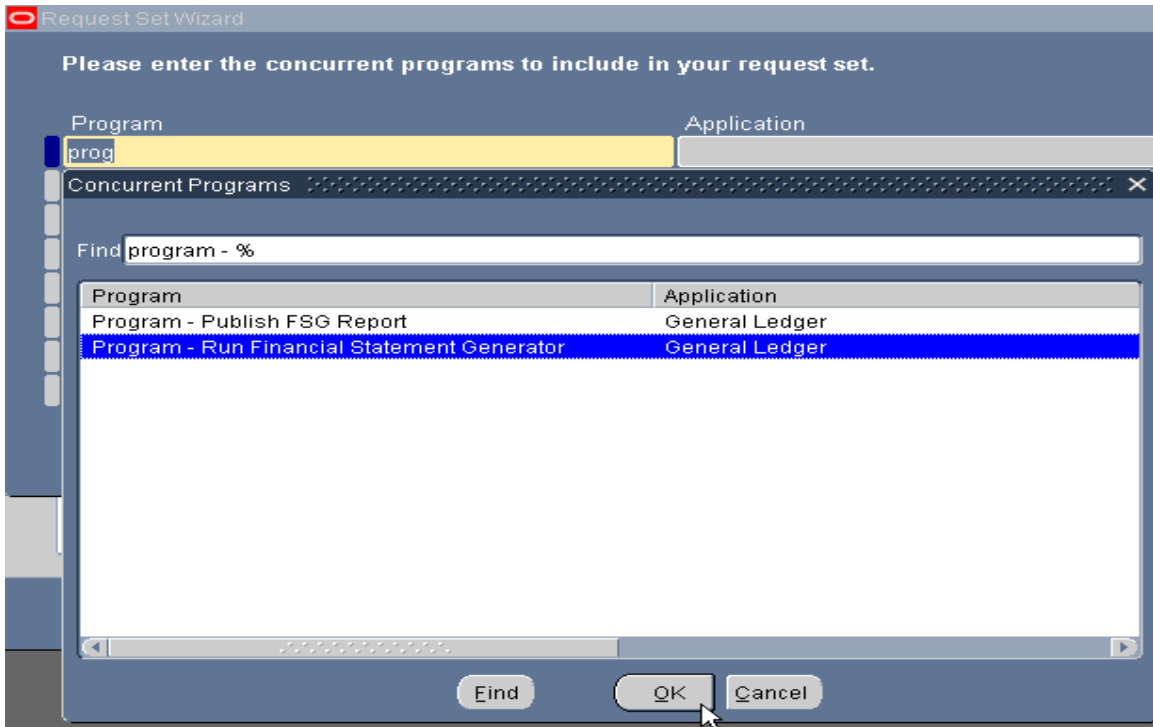
- You can choose whether you want the reports to print as each one completes or after all of them have completed. Choose “As Each Request in the Set Completes”, and click the “Next” button.



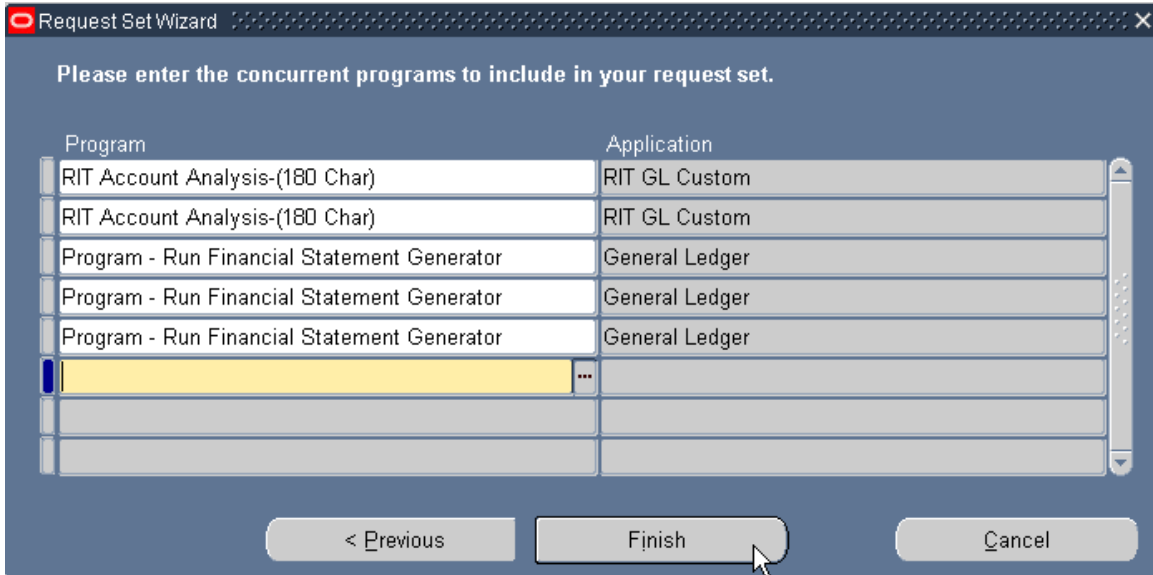
- In the last step of the Request Set Wizard you will select the reports you want to include in your Request Set.
 - Type “RIT” in the first row and hit the tab key. The field will fill in with the “RIT Account Analysis-(180 Char)” report for your operating accounts detail. Repeat this process in the second row for your project accounts detail.



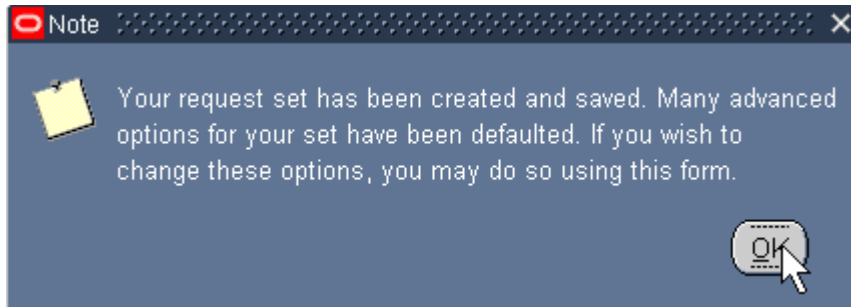
- For your FSG reports, such as your Department or Project statements, select the “Program – Run Financial Statement Generator” for each report you want to run.



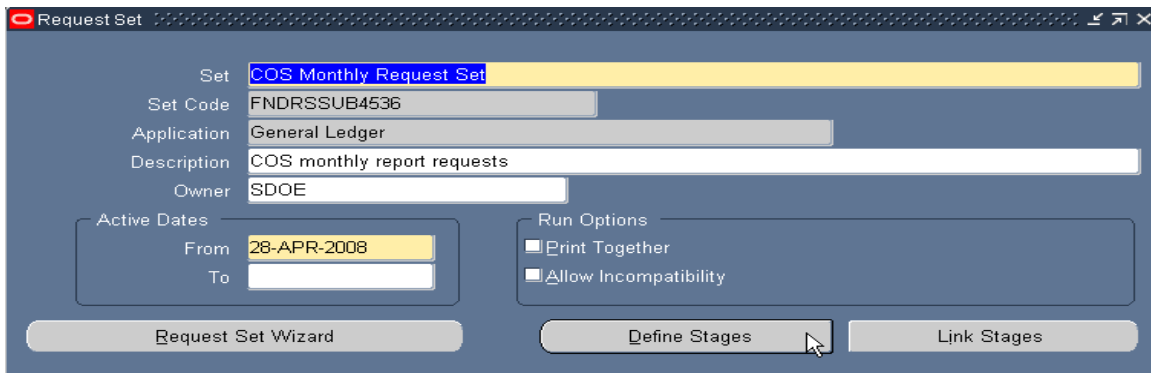
- When you are finished selecting your reports click on the “Finish” button.



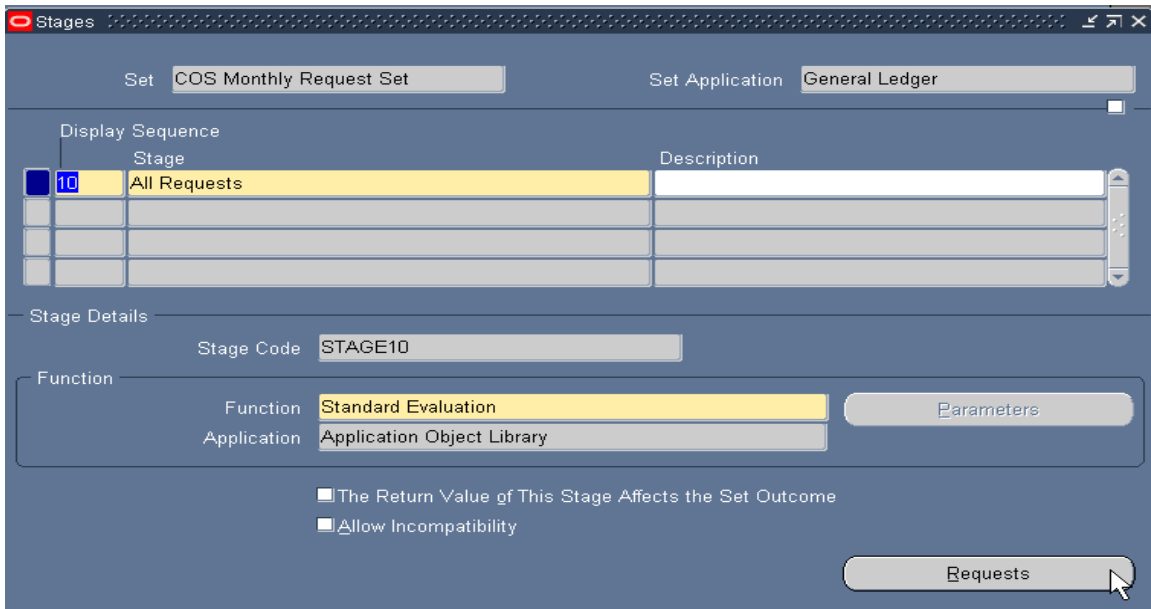
- A Note window will open letting you know that your Request Set has been saved, click on the “OK” button.



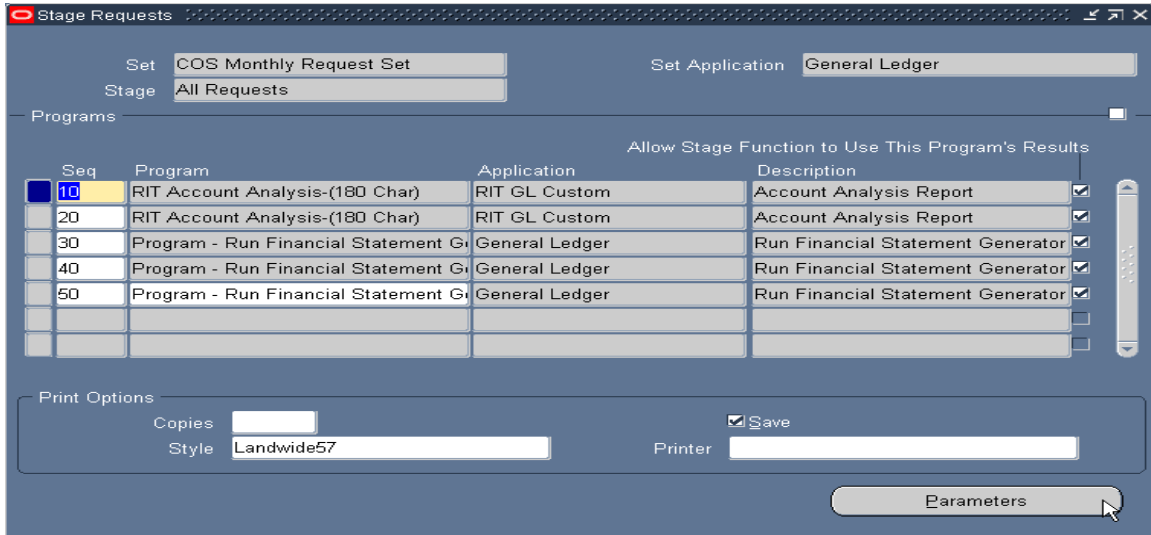
- Your Request Set’s information will automatically fill in the Request Set screen. Click on the “Define Stages” button.



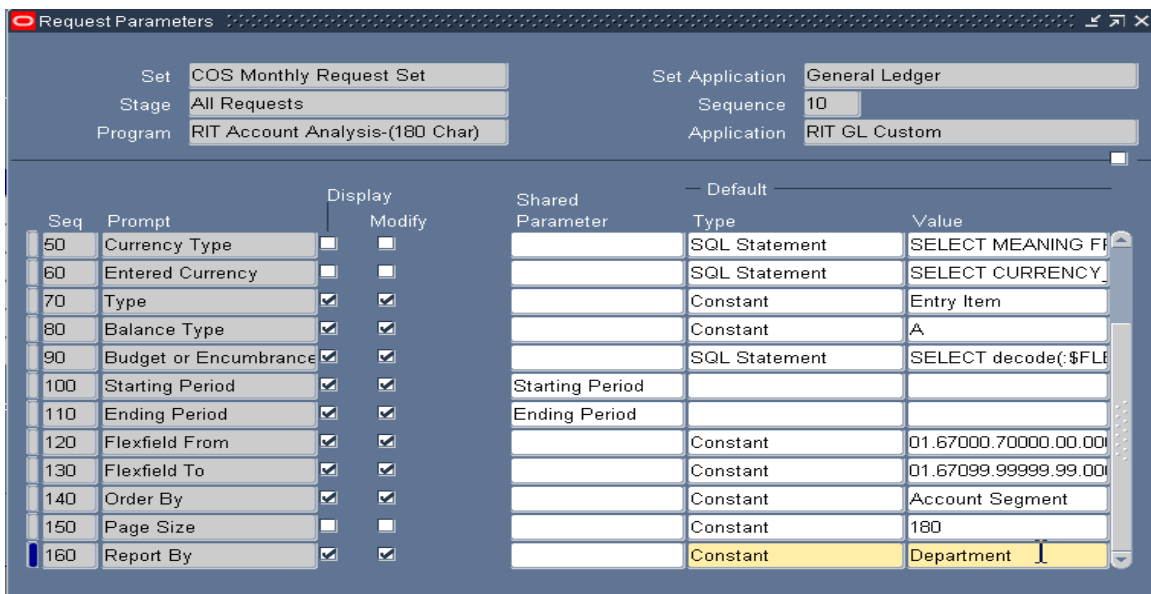
- In the “Stages” form click on the “Requests” button.



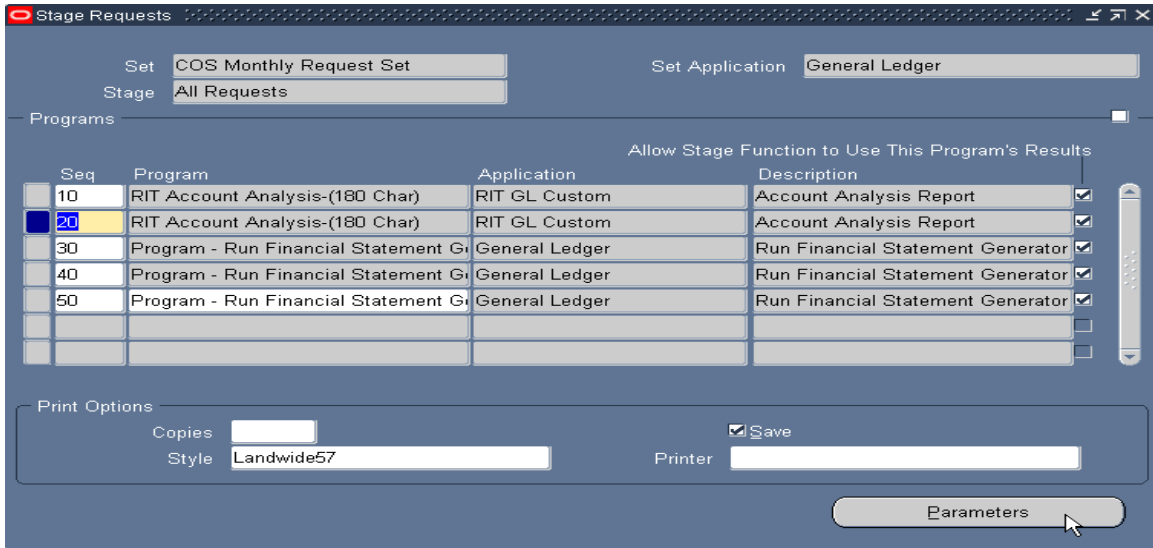
- In the “Stage Requests” screen select the row 10 with the “RIT Account Analysis-(180 Char)” detail report and click on the “Parameters” button.



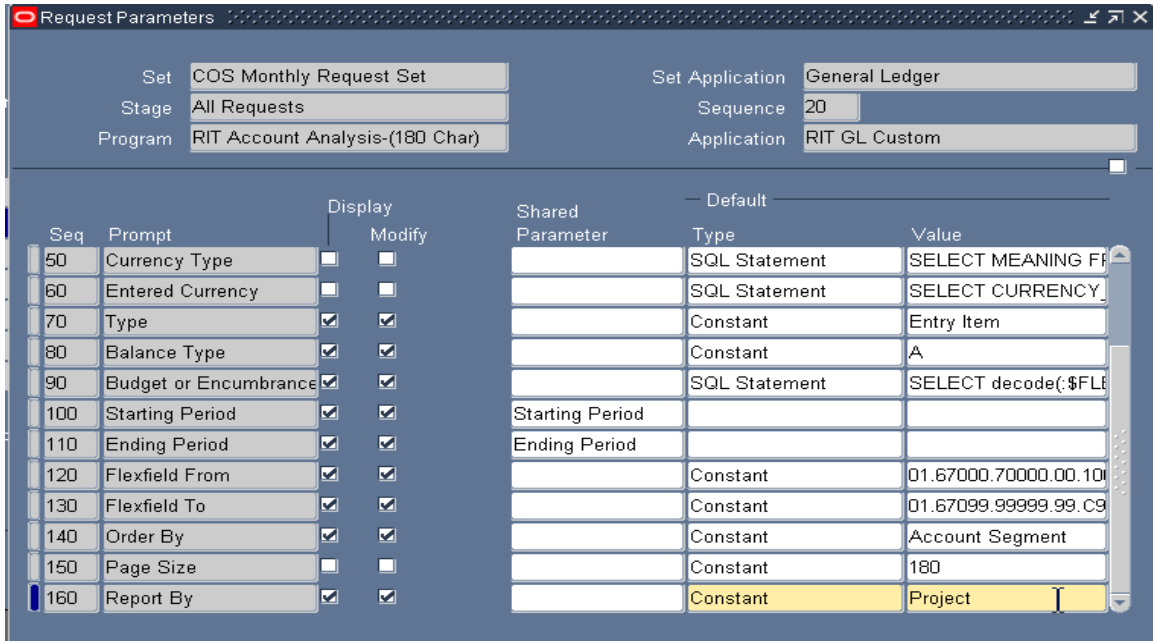
- In the “Request Parameters” form the following changes can be made.
 - Under the “Shared Parameter” column, in the “Starting Period” row type “Starting Period”. In the same column, in the “Ending Period” row type “Ending Period”. This will allow this parameter to be share with requests for this report in the same request set.
 - In the “Flexfield From” row, under the “Type” column, select “Constant”, and enter “01.67000.70000.00.00000.00000” in the “Value” column. In the “Flexfield To” row, select “Constant” in the “Type” column, and enter “01.67099.99999.99.00000.00000” in the “Value” column. These are the lowest and highest accounts you want to get detail for in the report.



- Save your changes and close the Request Parameters screen. Back in the Stage Requests screen select the next row for the “RIT Account Analysis-(180 Char)” and click the “Parameters” button.



- Repeat steps 18-23 only this time in the “Flexfield From” and “Flexfield To” rows in the “Value” column enter the lowest and highest account numbers you want detail for, for your project accounts, “01.67000.70000.00.10000.00000” to “01.67099.99999.99.99999.00000”.
- In the “Report By” row, change “Department” to “Project” so this report sorts by project instead of department.



- In the Stage Requests screen select the first row for the “Program – Run Financial Statement Generator” and click the “Parameters” button.

Request Parameters

Set: COS Monthly Request Set Set Application: General Ledger
 Stage: All Requests Sequence: 30
 Program: Program - Run Financial Statement Application: General Ledger

Seq	Prompt	Display		Shared Parameter	Default	
			Modify		Type	Value
10	Data Access Set Id	<input type="checkbox"/>	<input type="checkbox"/>		Profile	GL_ACCESS_SET_ID
20	Chart of Accounts Id	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT chart_of_acc
30	ADHOC Prefix	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT MEANING FR
40	Industry	<input type="checkbox"/>	<input type="checkbox"/>		Constant	C
50	Id Flex Code	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT DECODE(\$F
55	Ledger	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	select short_name for
60	Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	RIT- Dept Statement
63	Row Set	<input type="checkbox"/>	<input type="checkbox"/>	Period		
67	Column Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT cs.name FR0
70	Period	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT latest_opene
80	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT nvl(rp.unit_of
110	Rounding Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT l.meaning FR

- In the “Report” row in the “Type” column select “Constant” from the list of values. In the “Value” column enter “RIT- Dept Statement”.

Request Parameters

Set: COS Monthly Request Set Set Application: General Ledger
 Stage: All Requests Sequence: 30
 Program: Program - Run Financial Statement Application: General Ledger

Seq	Prompt	Display		Shared Parameter	Default	
			Modify		Type	Value
60	Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	RIT- Dept Statement
63	Row Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT rs.name FRC
67	Column Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT cs.name FRC
70	Period	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT latest_opene
80	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT nvl(rp.unit_of
110	Rounding Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT l.meaning FR
120	Segment Override	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT rg_reports_pl
130	Content Set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT cs.name FRC
140	Row Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT ro.name FRC
150	Display Set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT ds.name FRC
160	Output Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	Text
170	Exceptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT meaning FRC

- In the “Period” field in the “Shared Parameter” column enter “Period”, and clear the values in the “Type” and “Value” columns.

Request Parameters

Set: COS Monthly Request Set Set Application: General Ledger
 Stage: All Requests Sequence: 30
 Program: Program - Run Financial Statement Application: General Ledger

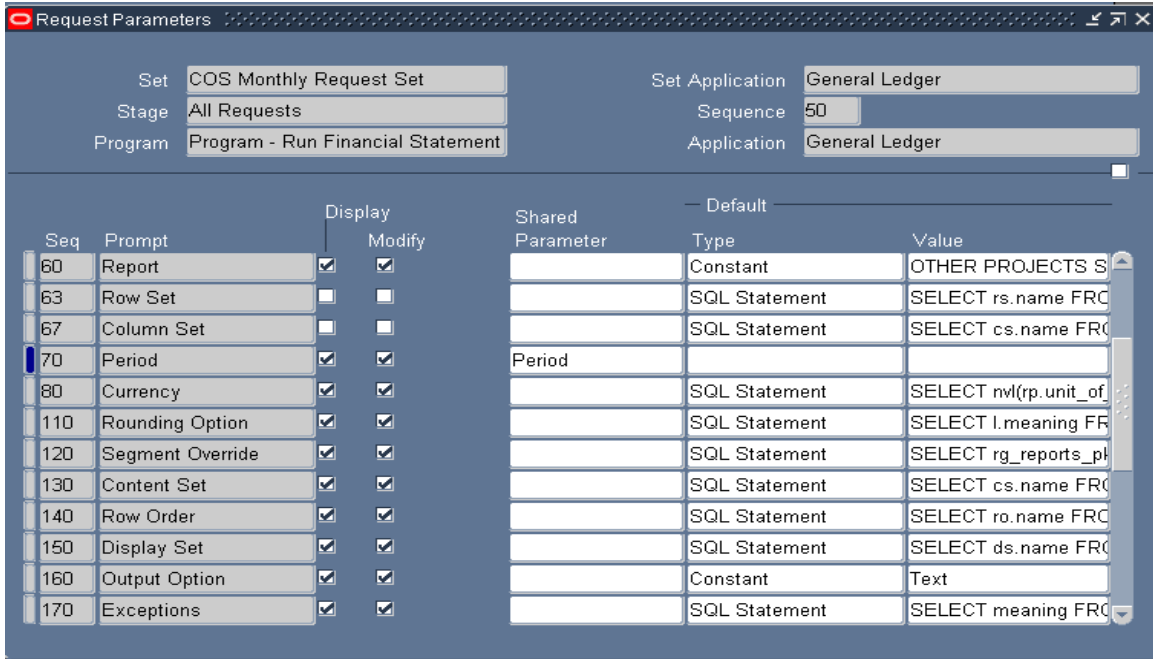
Seq	Prompt	Display	Modify	Shared Parameter	Type	Value
60	Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	RIT- Dept Statement
63	Row Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT rs.name FRC
67	Column Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT cs.name FRC
70	Period	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Period		
80	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT nvl(rp.unit_of
110	Rounding Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT l.meaning FR
120	Segment Override	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT rg_reports_pl
130	Content Set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT cs.name FRC
140	Row Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT ro.name FRC
150	Display Set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT ds.name FRC
160	Output Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	Text
170	Exceptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT meaning FRC

- Save your changes and return to the Stage Requests screen. Continue to select each row with “Program – Run Financial Statement Generator” and enter the parameters as above. The other 2 FSG reports that SDOE included are:
 - SPA GRANTS STATEMENT
 - OTHER PROJECTS STMT

Request Parameters

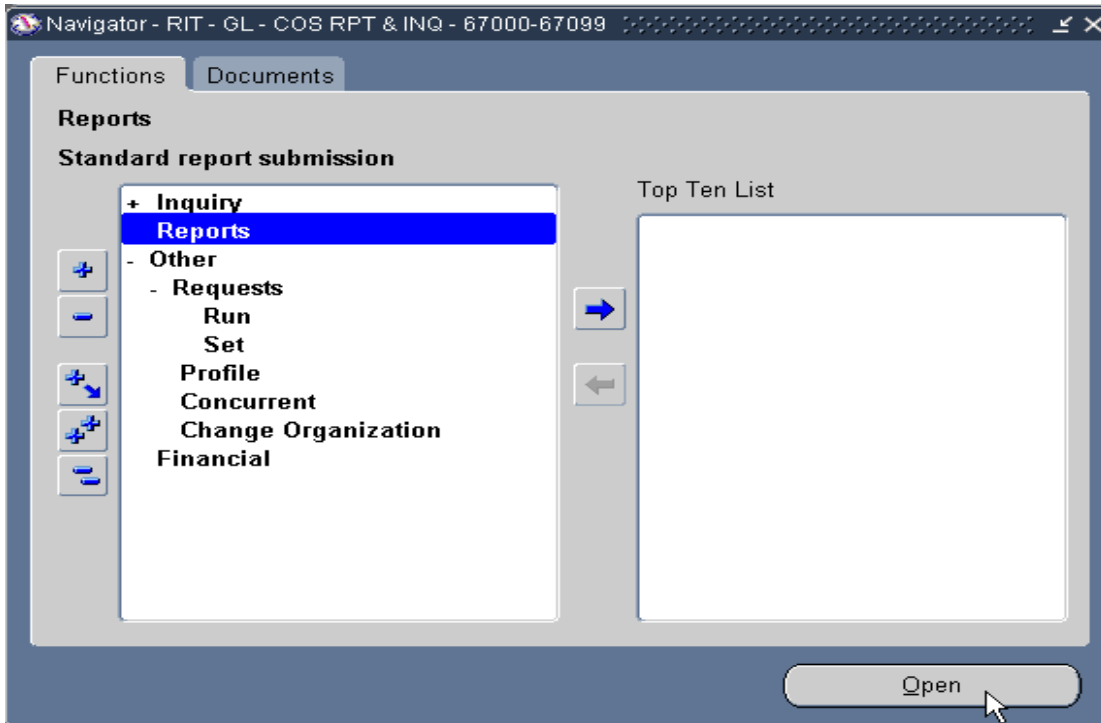
Set: COS Monthly Request Set Set Application: General Ledger
 Stage: All Requests Sequence: 40
 Program: Program - Run Financial Statement Application: General Ledger

Seq	Prompt	Display	Modify	Shared Parameter	Type	Value
60	Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	SPA GRANTS STATE
63	Row Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT rs.name FRC
67	Column Set	<input type="checkbox"/>	<input type="checkbox"/>		SQL Statement	SELECT cs.name FRC
70	Period	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Period		
80	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT nvl(rp.unit_of
110	Rounding Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT l.meaning FR
120	Segment Override	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT rg_reports_pl
130	Content Set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT cs.name FRC
140	Row Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT ro.name FRC
150	Display Set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT ds.name FRC
160	Output Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Constant	Text
170	Exceptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SQL Statement	SELECT meaning FRC

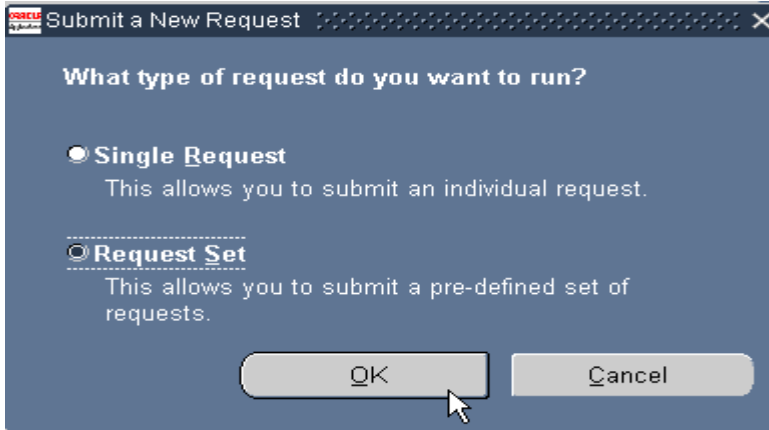


NOTE: You must enter the Report name in the “Value” column exactly as it appears in Oracle.

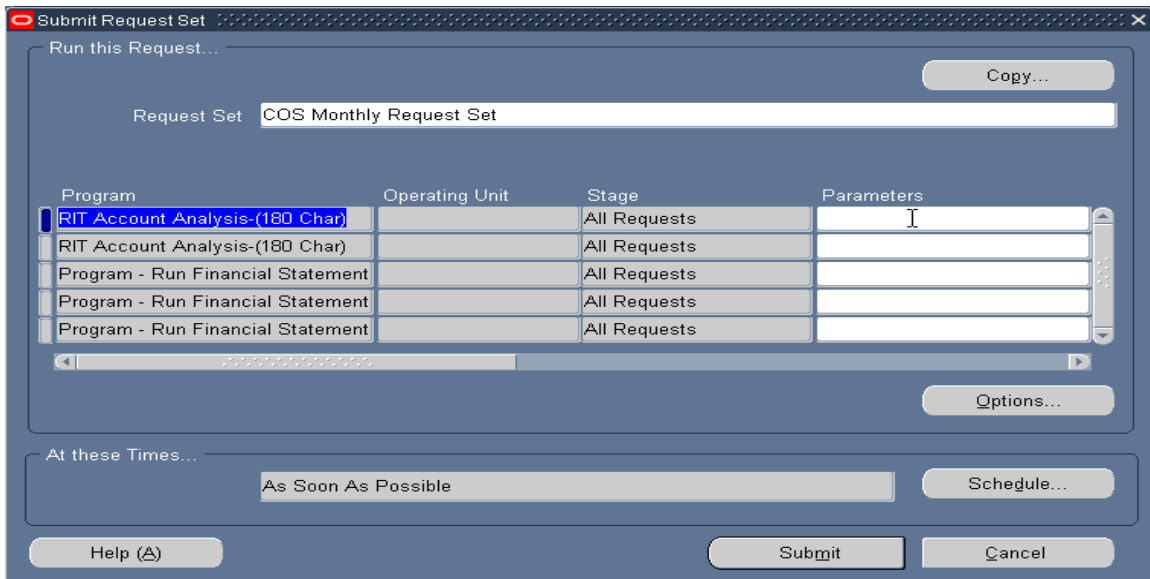
- Once you are finished entering the parameters for each report you are finished and ready to run your request set. To do this return to your Navigator screen and open “Reports”.



- When the Submit a New Request screen opens select “Request Set” and click the “OK” button.



- In the Submit Request Set screen select the name of your Request Set from the list of values in the “Request Set” field.



- Next click in the “Parameters” field for the first report. The Parameters screen will open.
- For the Account Analysis reports enter the Starting Period and Ending Period you want to run these reports for and click on the “OK” button. You only have to enter the period in these fields in the first report, it will automatically fill in for the rest of the Account Analysis reports.

Parameters

Ledger Currency **USD**

Type **Entry Item**

Balance Type **A** Actual

Budget or Encumbrance Name **N/A**

Starting Period **DEC-07**

Ending Period **DEC-07**

Flexfield From **01.67000.70000.00.00000.00000**

Flexfield To **01.67099.99999.99.00000.00000**

Order By **Account Segment**

Report By **Department**

OK Cancel Clear Help

- If you click in the rest of the Account Analysis reports' parameter fields you will see that the Starting and Ending Period fields has automatically filled in, but you don't have to click in the rest of the parameter fields.
- When you click the "OK" button you will be taken back to the Submit Request Set screen and into the next field which is "Language". If you want to specify printing and report notification options you will want to click on the "Options" button at this time if not scroll to the left to see the Program names again.

Submit Request Set

Run this Request... Copy...

Request Set **COS Monthly Request Set**

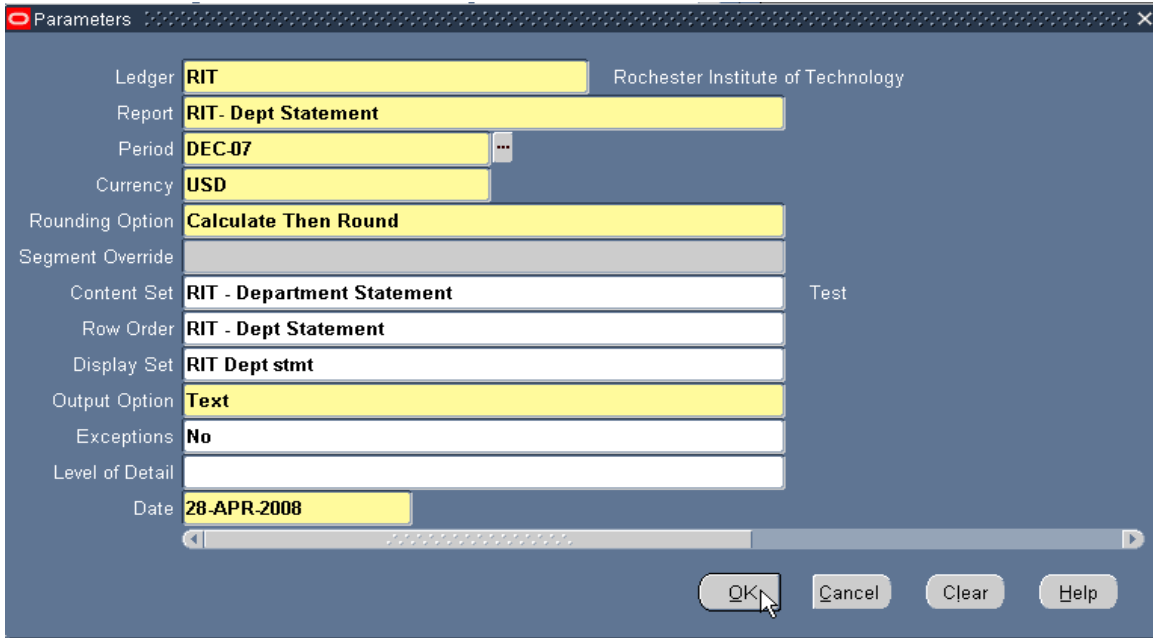
Operating Unit	Stage	Parameters	Language
D Char)	All Requests	USD:Entry Item:A:N/A:DEC-07	American English
D Char)	All Requests		American English
Statement	All Requests		American English
Statement	All Requests		American English
Statement	All Requests		American English

Options...

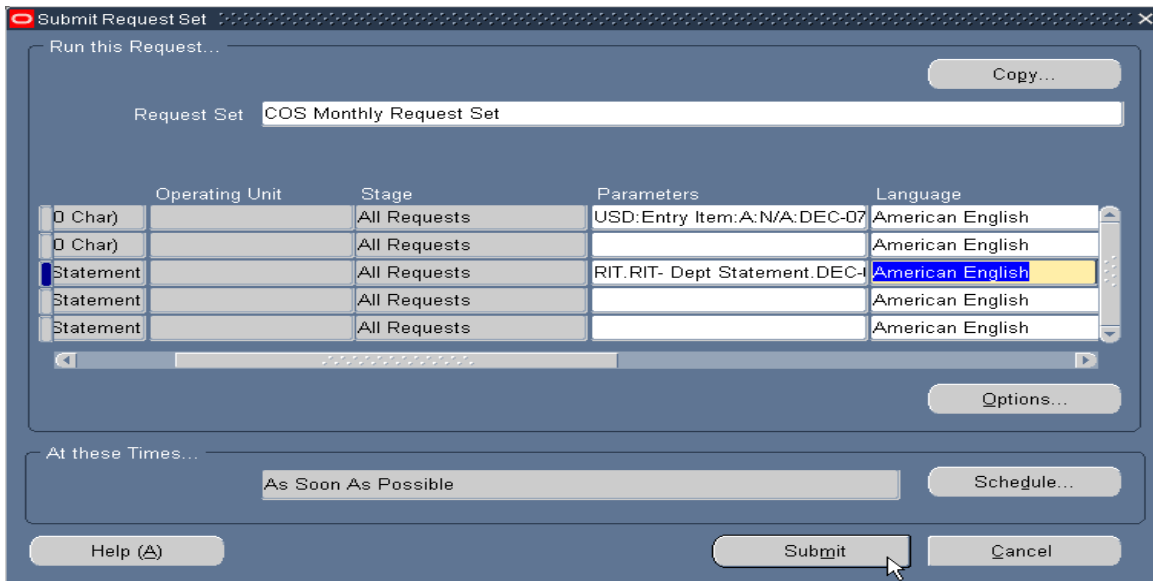
At these Times... **As Soon As Possible** Schedule...

Help (A) Submit Cancel

- Next click in the first “Program – Run Financial Statement Generator” parameter field and enter the period. This period is shared by the other FSG reports that you are running so you do not need to enter this field for each report, just the first one. This field automatically defaults to the current open period so in some cases you may not need to enter anything for the FSG reports.



- Once you are finished entering the periods and printing options click on the “Submit” button to run your Request Set.



- The Requests screen will open, once you have refreshed it at least once you will see that each report has its own request id, and are all running at once. Once these reports complete they will be sent to the printer automatically.

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
2530734	OTHER PROJECTS STMT		Pending	Standby	1000, 50133, FSG-ADHOC-, G
2530733	SPA GRANTS STATEMEN		Pending	Standby	1000, 50133, FSG-ADHOC-, G
2530732	RIT- Dept Statement (Finar		Pending	Standby	1000, 50133, FSG-ADHOC-, G
2530730	Program - Run Financial St	2530724	Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530729	Program - Run Financial St	2530724	Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530728	Program - Run Financial St	2530724	Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530727	RIT Account Analysis-(180	2530724	Completed	Normal	1000, 50133, 1, USD, T, N/A, I
2530726	RIT Account Analysis-(180	2530724	Completed	Normal	1000, 50133, 1, USD, T, N/A, I
2530724	COS Monthly Request Set		Running	Paused	101, 4537
2530722	OTHER PROJECTS STMT		Completed	Normal	1000, 101, FSG-ADHOC-, C, C

Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
2530734	OTHER PROJECTS STMT		Running	Normal	1000, 50133, FSG-ADHOC-, G
2530733	SPA GRANTS STATEMEN		Running	Normal	1000, 50133, FSG-ADHOC-, G
2530732	RIT- Dept Statement (Finar		Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530730	Program - Run Financial St	2530724	Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530729	Program - Run Financial St	2530724	Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530728	Program - Run Financial St	2530724	Completed	Normal	1000, 50133, FSG-ADHOC-, G
2530727	RIT Account Analysis-(180	2530724	Completed	Normal	1000, 50133, 1, USD, T, N/A, I
2530726	RIT Account Analysis-(180	2530724	Completed	Normal	1000, 50133, 1, USD, T, N/A, I
2530724	COS Monthly Request Set		Completed	Normal	101, 4537
2530722	OTHER PROJECTS STMT		Completed	Normal	1000, 101, FSG-ADHOC-, C, C

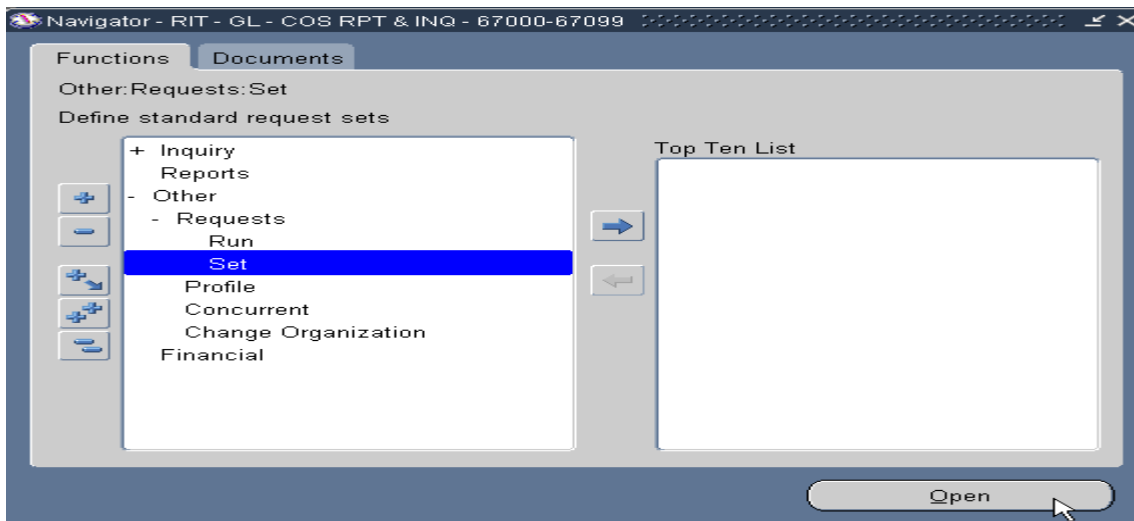
Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

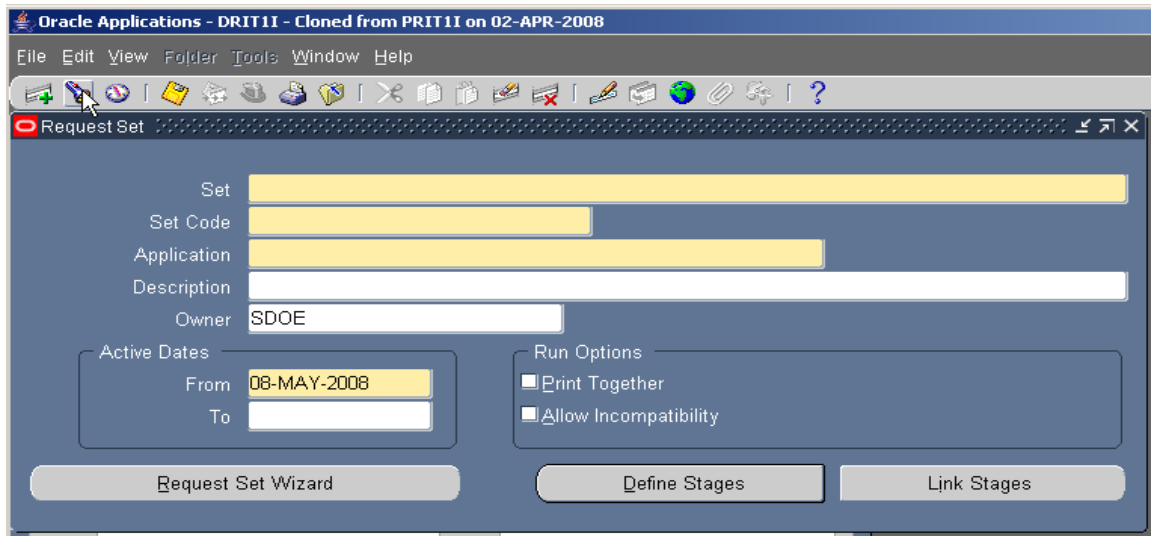
The “RIT Account Analysis – Subledger with AP” report can be run with a source of “Payables” to view the subledger detail for a range of accounts. This report can be added to Request Sets also, but at this time cannot be sent to a networked printer. In order to print this report, you must view the output in PDF, HTML or Excel format for each request in your Request Set, and print from using the print function in Adobe, your browser window or Excel.

First we have to add this report to our existing Request Set.

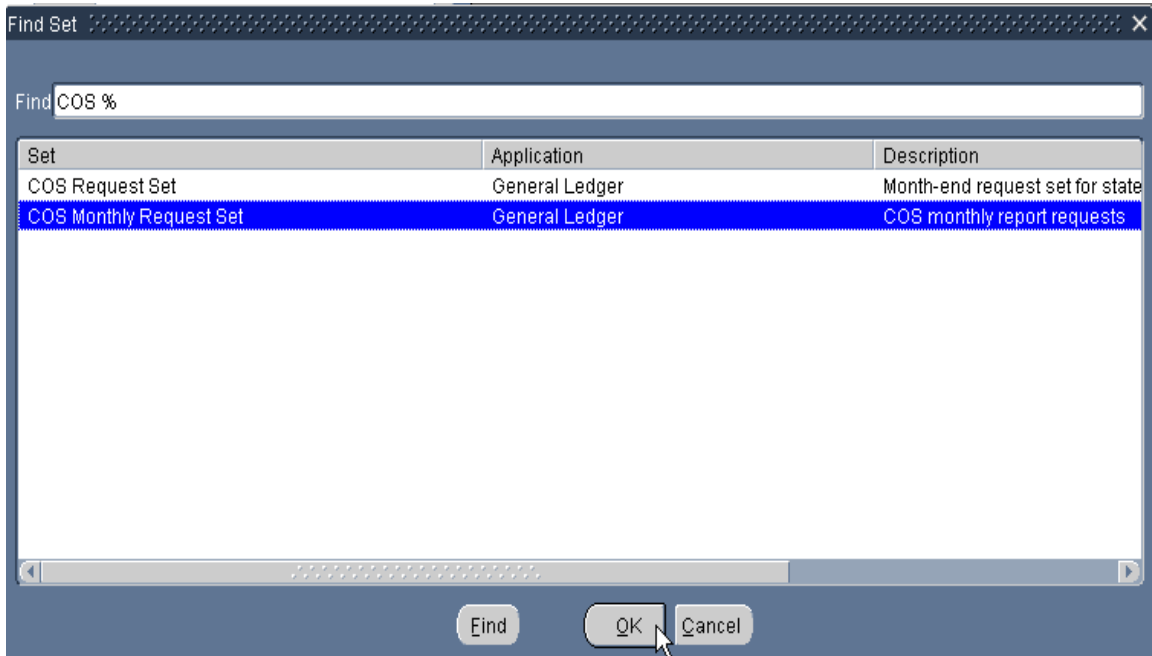
- In the Navigator screen navigate to Other / Requests / Set and click on the “Open” button.



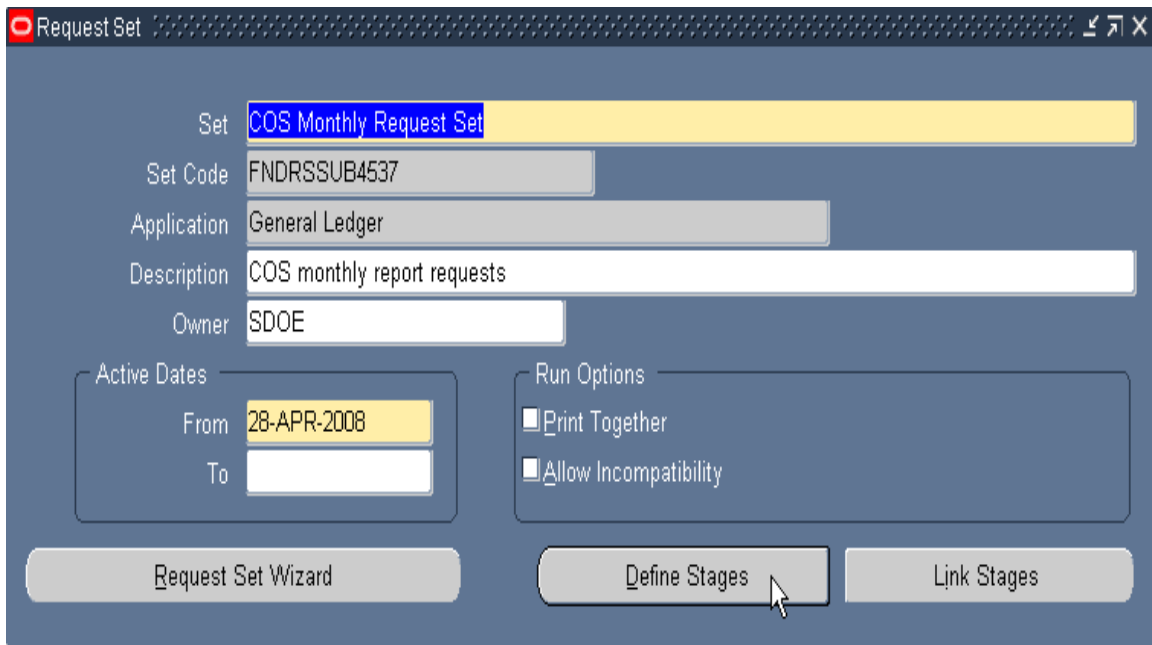
- Click on the Flashlight icon to query up the Request Set.



- Select “COS Monthly Request Set” from the list that appears and click on the “OK” button.



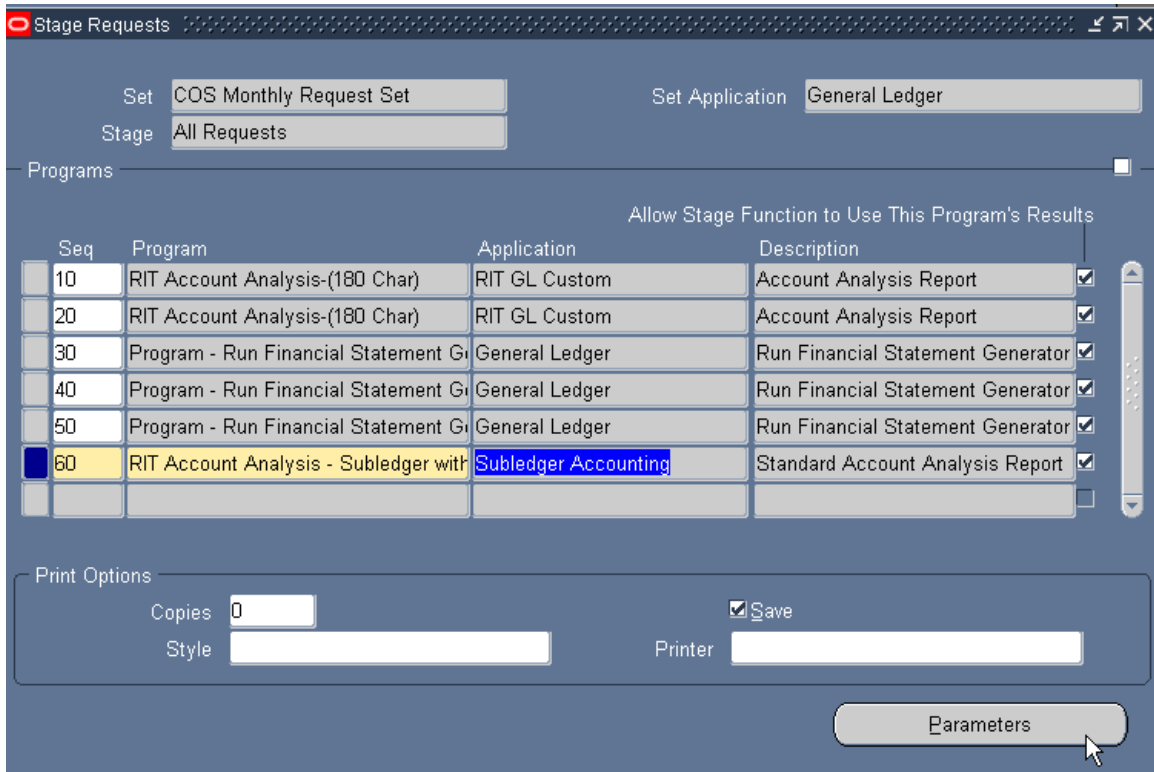
- In the “Request Set” screen, click on the “Define Stages” button.



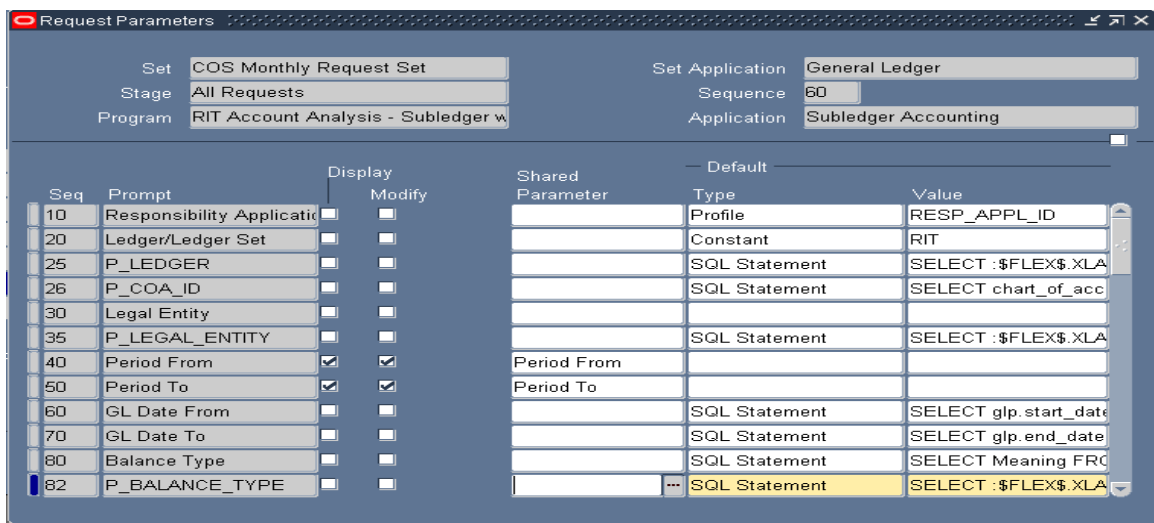
- In the “Stages” screen click on the “Requests” button to see the list of requests included in the Request Set.

- In the “Stage Requests” screen enter the next sequence number in the next available row.
- Type “RIT Account Analysis – s” in the “Program” field and press the Tab key.

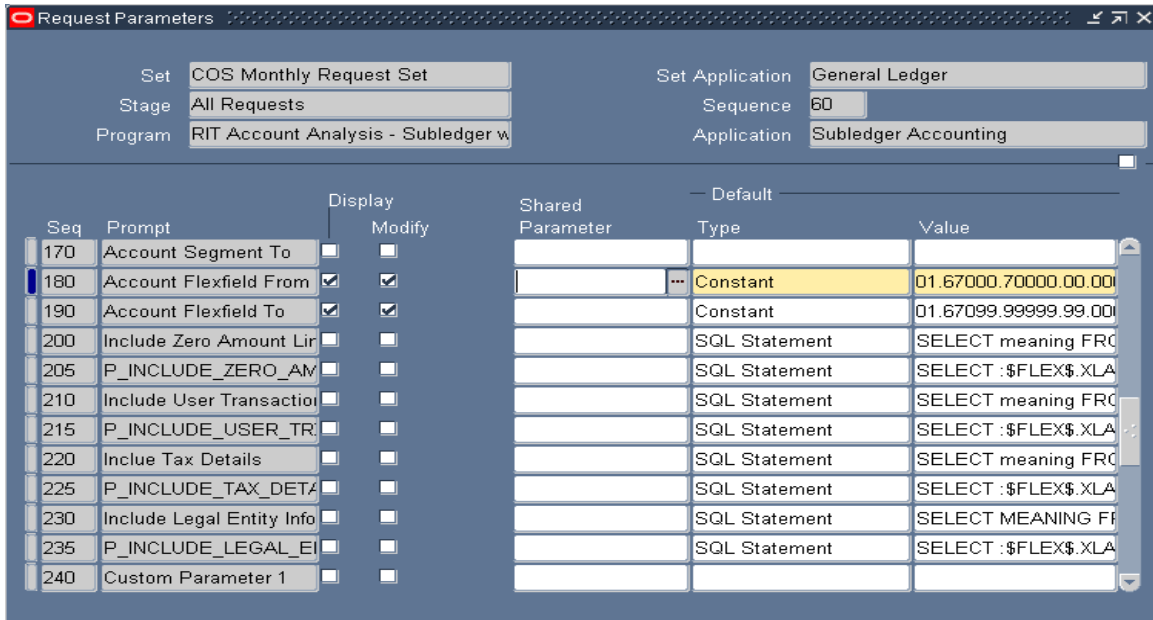
- The rest of the fields will automatically fill in. To enter the parameters for this report click on the “Parameters” button. The “Printer” field does not need to be filled in since this report cannot be printed from a network printer.



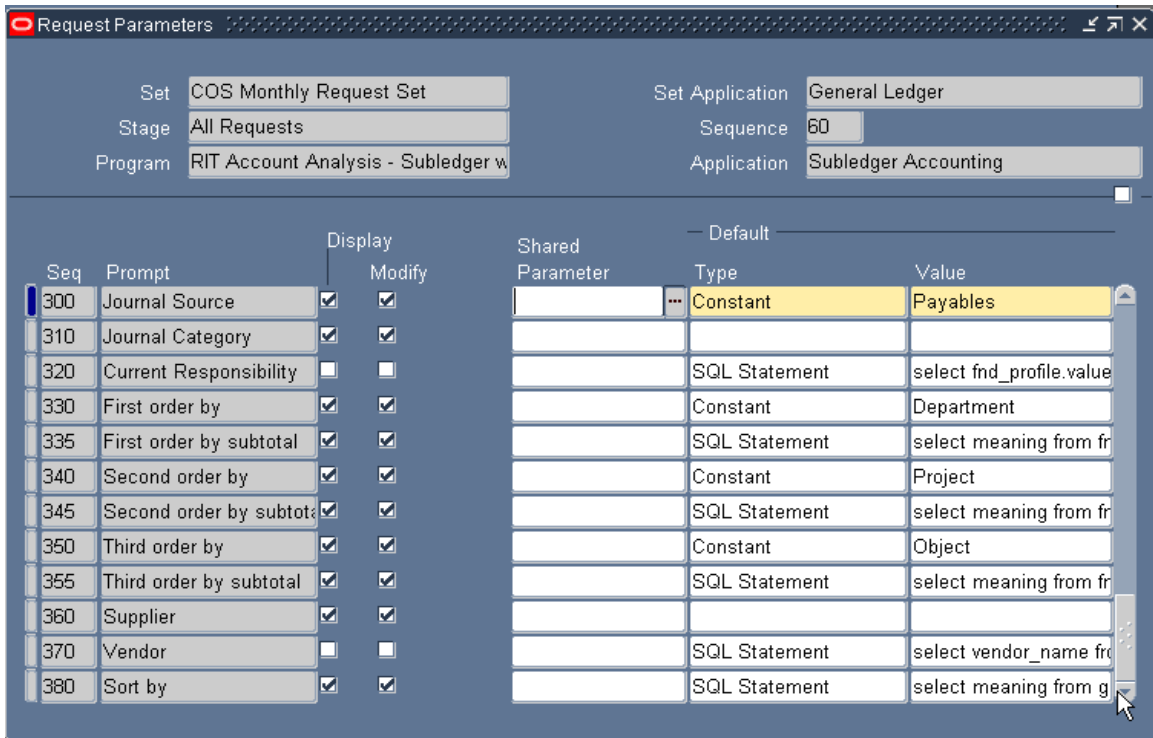
- Enter “Period From” in the “Shared Parameter” column for the “Period From” row, and “Period To” in the “Period To” row, in order to share these fields with other requests for this report in the same Request Set.



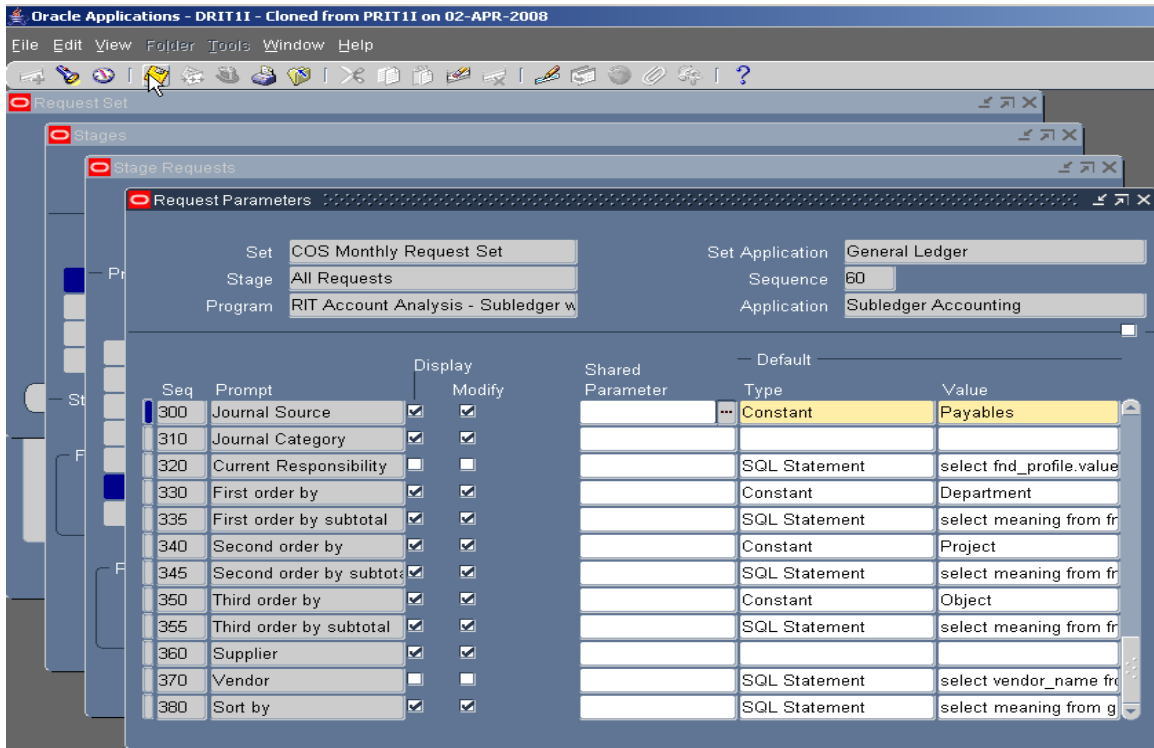
- In the “Account Flexfield From” and “Account Flexfield To” fields enter “Constant” in the “Type” column and the account number ranges in the “Value” column.



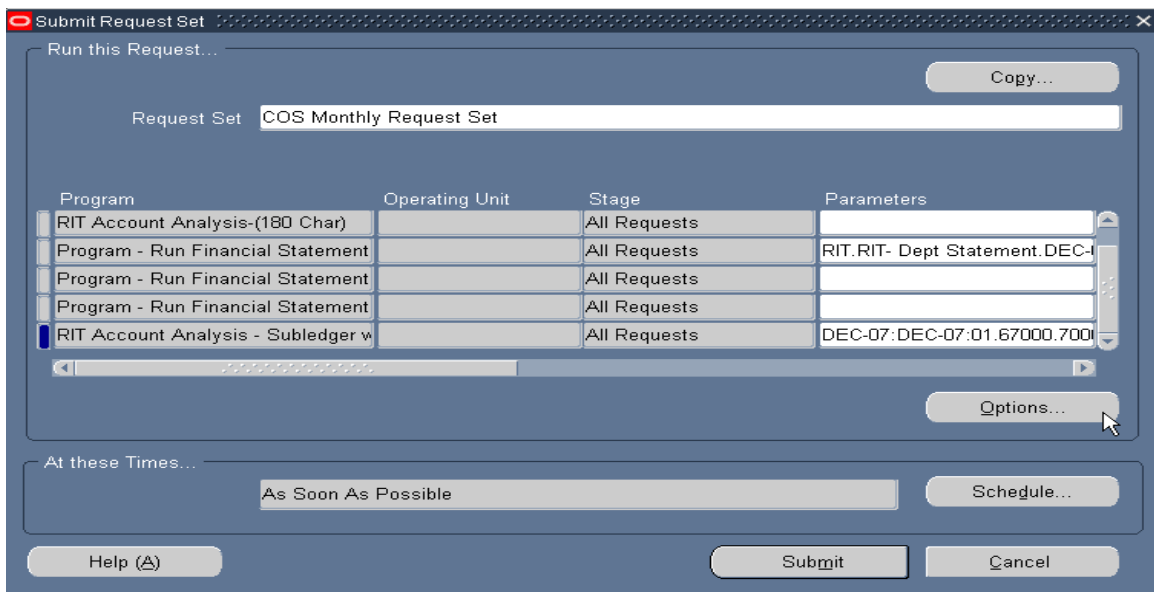
- In the “First order by”, “Second order by” and “Third order by” you can change the “Value” column to be “Department”, “Project”, or “Object”.

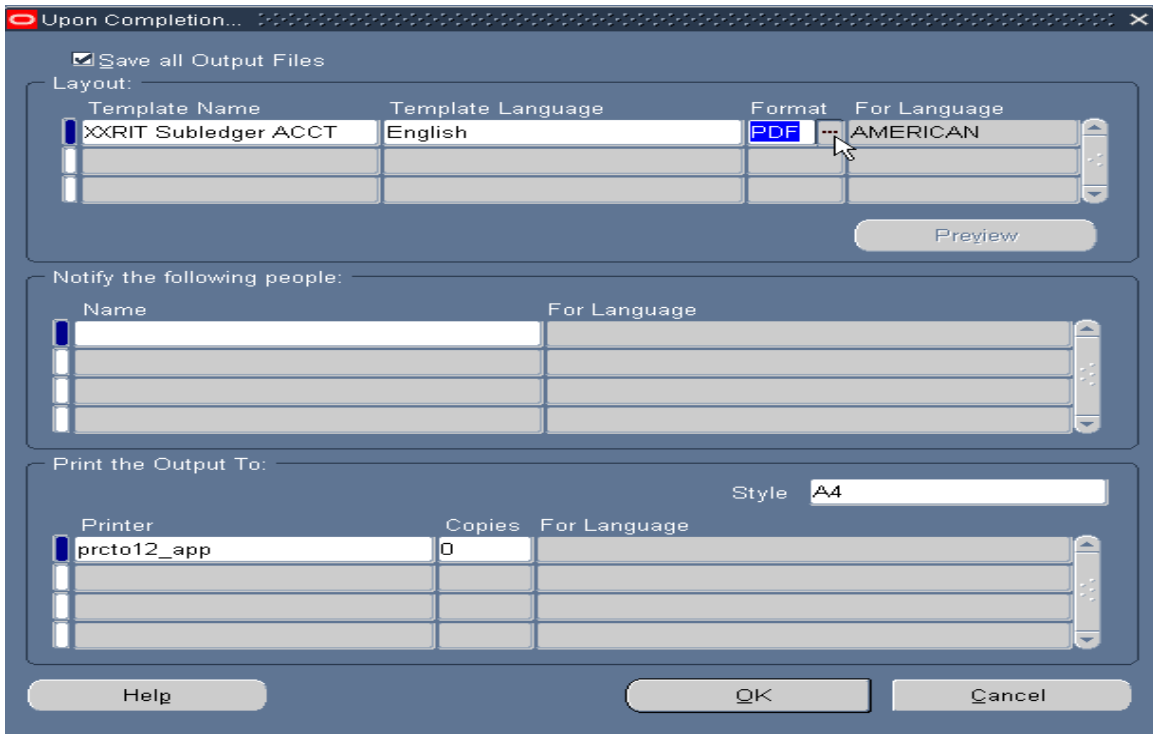


- Save your changes and close the screens to return to the Navigator screen.

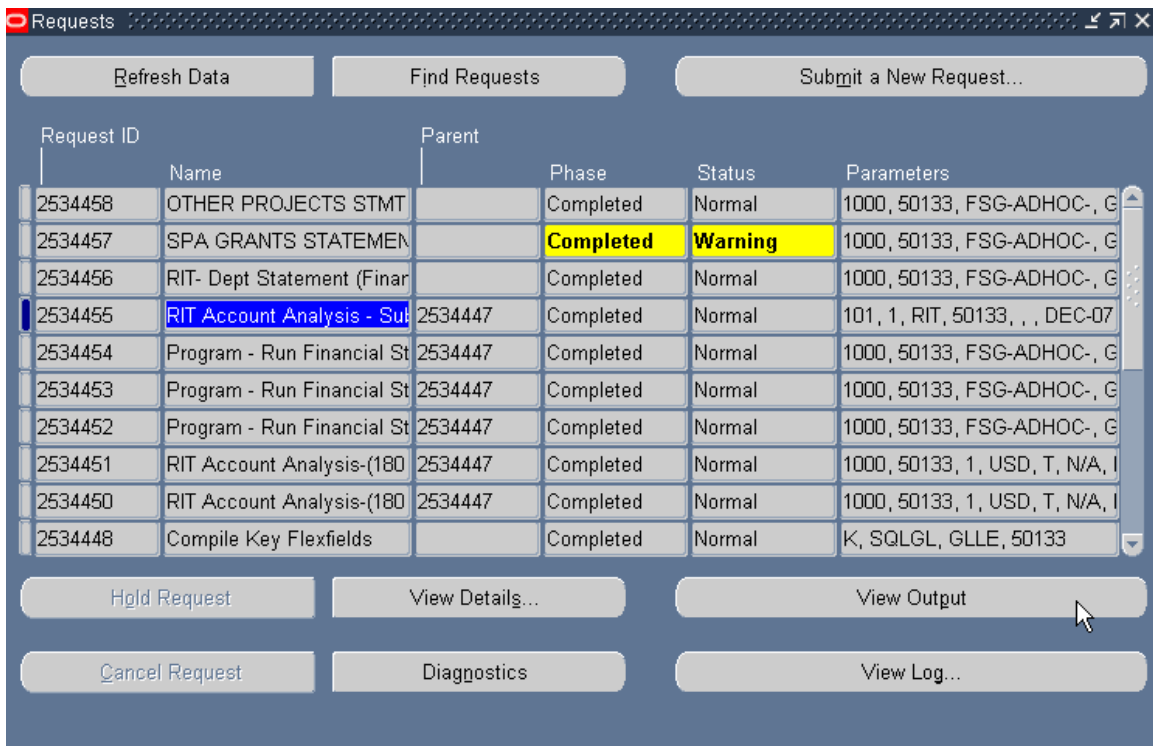


- You can now request your Request Set like you normally would.
- In the “Submit Request Set” screen click on the “Options” button to change the format of the report to HTML or Excel. The preferred output for printing is PDF which is the default. You don’t have to make any changes if you want to leave the report in the PDF format.





- Click on the Submit button, and open the View / Requests screen. Once the request completes click on the “View Output” button.



- Click on the Printer button to send the report to a local printer.

RIT Account Analysis With Subledger Payables Detail

Report Date: 08-May-08
Page: 1 of 3

From Account: 01.67000.70000.00.00000.00000
To Account: 01.67099.99999.99.00000.00000
Sort By: SEQUENCE
Supplier:

Period: DEC-07 To: DEC-07

First Order By: Department
Second Order By: Project
Third Order By: Object

Batch Name	Account	GL Date	Supplier	Trans Num	PO	Debit	Credit	Line Description
25173 Payables	01.67000.73150.25.00000.00000	Dec 4, 2007	CDW GOVERNME	HQW2516	132179	283.40		# 570343, XEROX PHASER 77
25173 Payables	01.67000.73150.25.00000.00000	Dec 4, 2007	CDW GOVERNME	HQW2516	132179	529.96		# 570349, XEROX PHASER 7
25173 Payables	01.67000.73150.25.00000.00000	Dec 4, 2007	CDW GOVERNME	HQW2516	132179	529.96		# 570350, XEROX PHASER 7
25173 Payables	01.67000.73150.25.00000.00000	Dec 4, 2007	CDW GOVERNME	HQW2516	132179	529.96		# 570351, XEROX PHASER 77
Subtotal						1,873.28	0.00	

Batch Name	Account	GL Date	Supplier	Trans Num	PO	Debit	Credit	Line Description
24933 Payables	01.67000.76950.25.00000.00000	Dec 1, 2007	XEROX CORPOR	029169338	128200	364.04		Xerox WC255H Copier;Print
24933 Payables	01.67000.76950.25.00000.00000	Dec 1, 2007	XEROX CORPOR	029169356	128003	202.94		Xerox WC255H Copier;Print
25113 Payables	01.67000.76950.25.00000.00000	Dec 1, 2007	XEROX CORPOR	029169302	117918	393.51		XEROX WORCENTRE PRO355 COP
25253 Payables	01.67000.76950.25.00000.00000	Dec 1, 2007	XEROX CORPOR	029169299	114878	799.98		Xerox DC470ST Copier; 60
25113 Payables	01.67000.76950.25.00000.00000	Dec 5, 2007	IKON OFFICE	75007656	124091	169.73		Canon IR3570 Copier;Fax w
Subtotal						1,930.20	0.00	

Batch Name	Account	GL Date	Supplier	Trans Num	PO	Debit	Credit	Line Description
25913 Payables	01.67000.78550.25.00000.00000	Dec 1, 2007	PEPSI BOTTLI	81068212	131370	94.56		BLANKET ORDER FOR THE PUR
25173 Payables	01.67000.78550.25.00000.00000	Dec 1, 2007	PEPSI BOTTLI	82255304	131370	118.20		BLANKET ORDER FOR THE PUR

- Select a printer name and click the “OK” button.

Print

Printer: HP DeskJet 950C/952C/959C

Name: HP DeskJet 950C/952C/959C
Status: \\finprint\PRCT001
Type: \\finprint\PRCT005

Print Range: HP DeskJet 950C/952C/959C
 All
 Current
 Current
 Pages 1 - 3

Subset: All pages in range

Page Handling: Copies: 1 Collate:
Page Scaling: Fit to Printable Area
 Auto-Rotate and Center
 Choose Paper Source by PDF page size

Preview: Composite
Units: Inches Zoom: 94%
1/3 (1)

Buttons: Printing Tips, Advanced, OK, Cancel

The last 3 steps will have to be followed for each “RIT Account Analysis – Subledger with AP” request that is included in your Request Set.