Running SQR User Executed Reports

User executed reports are those reports that can be run at any time. They may be included as part of the monthly reporting package, but users have the ability to run some of these reports whenever the data is required.

The **Revenue & Expense Detail Transaction Report** is a user executed SQR report and is used as an example for this job aid.

**Step 1.** Log on to the Finance 8.9 Reporting Database with your Finance Username and Password.

**Navigate to the following path:**

*Report Center ➔ Finance*

The **Dartmouth Financial Reports** page opens.
Step 2. Click the Revenue & Expense Detail Transaction Report link to access the run control for this report.

The UMGL7062-Transaction Detail (Find an Existing Value) page opens.

Note: If this is the first time you are running this report, click Add a New Value. Enter a name for the Run Control ID, and click Add. Use underscores (_) in place of spaces, as the system does not recognize spaces in a run control name.

Step 3. Click Search and select a Run Control ID.

The UMGL7062-Transaction Detail page opens.
Tip: The run control page allows you to select the parameters needed to run your report. Some run control pages require more information than others.

Note: The Business Unit defaults based on user security.

Step 4. Enter the following fields:
- **Ledger**: Actuals
- **Time Period**
  - Beginning Period
  - Ending Period
  - Beginning Fiscal Year
  - Ending Fiscal Year
- **Sort By**
  - Dept Tree (RPT_DEPARTMENT is recommended)
  - Chart Field (2: Fund_Code is recommended; 3: optional)

Tips:
- It is recommended that the RPT_DEPARTMENT tree be entered in the Dept Tree field. (This is the same tree used in the monthly batch reports.)
- The Chart Field fields are optional. Valid values are Class, DeptID, Fund Code, Program Code, and Project ID.

Step 5. Select any appropriate check boxes in the Reports Printing section.

Note: At least one checkbox must be selected in the Reports Printing section.

Step 6. To limit the selection of Chartfields in the report, enter a Chartfield value in the Selection Criteria section.

Step 7. Enter one of the following options in the Node/Value field:
- **V** (Chartfield value)
- **N** (Node in the tree structure)
Step 8. Enter **Chartfield From Value** and **To Value**, or **Tree Name** and **Tree Node**.

**Tip:**
- To define one specific department, select **V** in the **Node/Value** field and enter the same department number in the **From Value / Tree Name** and **To Value / Tree Name** fields.
- To define a range of department ID values, enter the start value of the range in the **From Value / Tree Name** and the end value of the range in the **To Value / Tree Name**.
- To define a group of departments, it may be easier to enter **N** in the **Node/Value** field and enter the tree name in the **From Value / Tree Name** and **To Value / Tree Name** fields.
Step 9. Click + to add another Chartfield value, if necessary.

Note: To delete a Chartfield, click −.

Step 10. Click Run.

The Process Scheduler Request page opens.

Note: Choosing a Server Name is no longer required. Leave the Server Name field blank for faster processing.

Step 11. Click OK.

The UMGL7062-Transaction Detail page reopens.
Step 12. To monitor the status of the report, click the Process Monitor link and click periodically until the Run Status displays “Success”.

Note: The Process Monitor and Report Manager links also appear on the Report Center page, which was used to access the Report Request (see Step 1). To view reports that have been run in the past, you can open them directly using the Process Monitor link and/or the Report Manager link via the Report Center.
Step 13. Click the Details link to the right of the appropriate process instance.

The Process Detail page opens.
Step 14. Click the **View Log/Trace** link.

The **View Log/Trace** page opens.
Step 15. Click the PDF or XLS link to view the report in the appropriate format.

Note: To manipulate the report by using filters, sorting, etc., open the report in XLS format. To simply view the report, open the report in PDF format.

The report opens in a new window.