University of Massachusetts

*Amherst * Boston * Dartmouth * Lowell * President's Office * Worcester*

Running SQR User Executed Reports

User executed reports are those reports that can be run by the user at any time. You may receive them as part of your monthly reporting package, but you have the ability to run some of these reports whenever you require that data

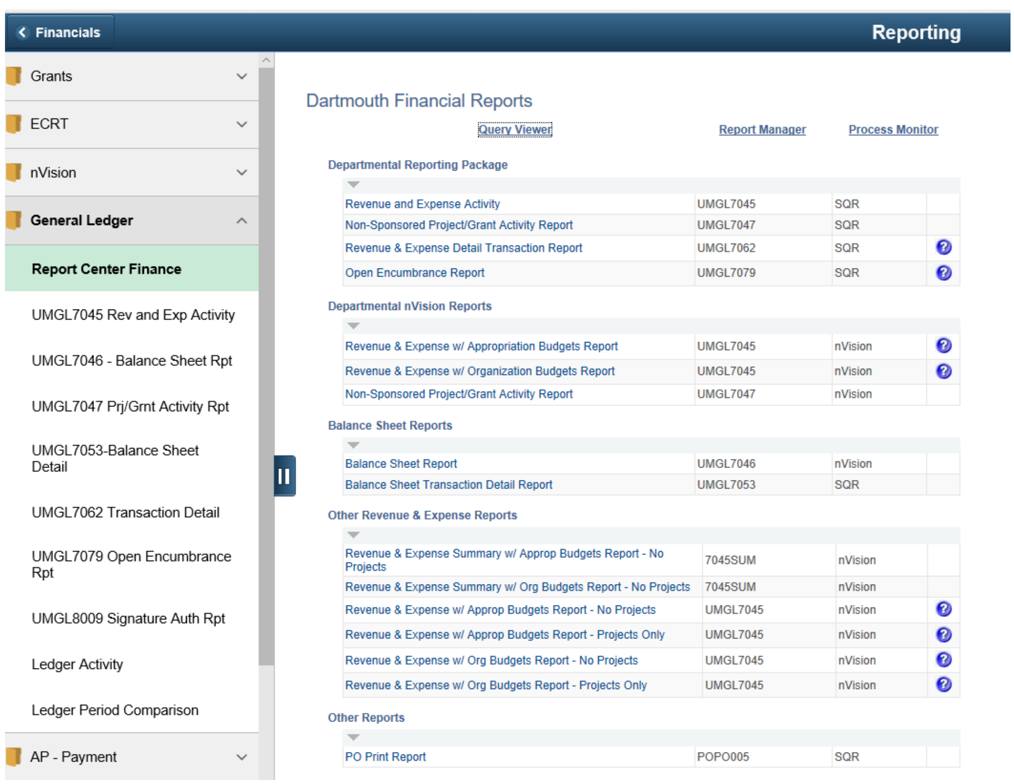
The *Transaction Detail Report* is a user executed SQR report and is used as an example for this job aid.

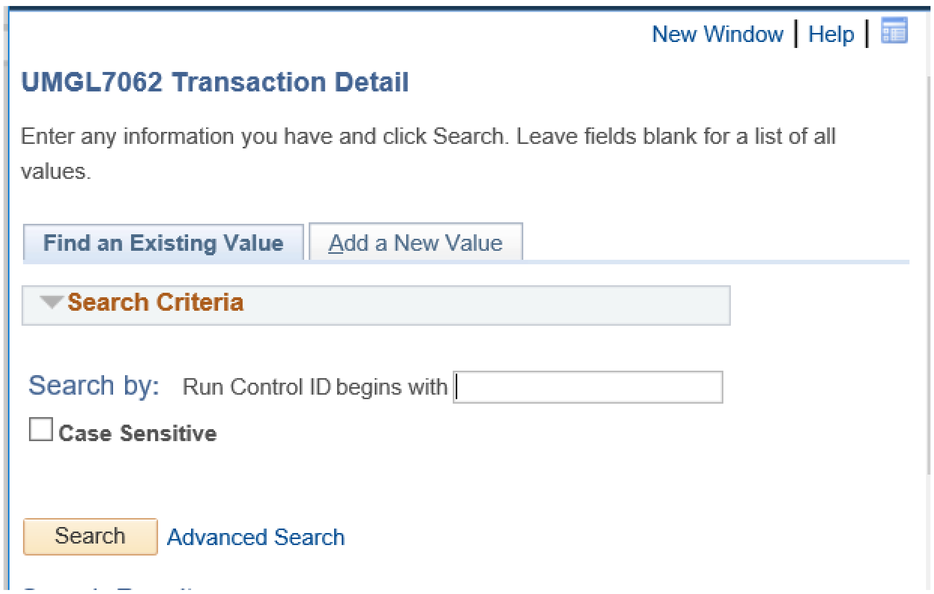
Step 1. Log on to the e*mpac Finance Application with your FIN Username and Password, and navigate to the ***(Campus) Financial Reports*** page.

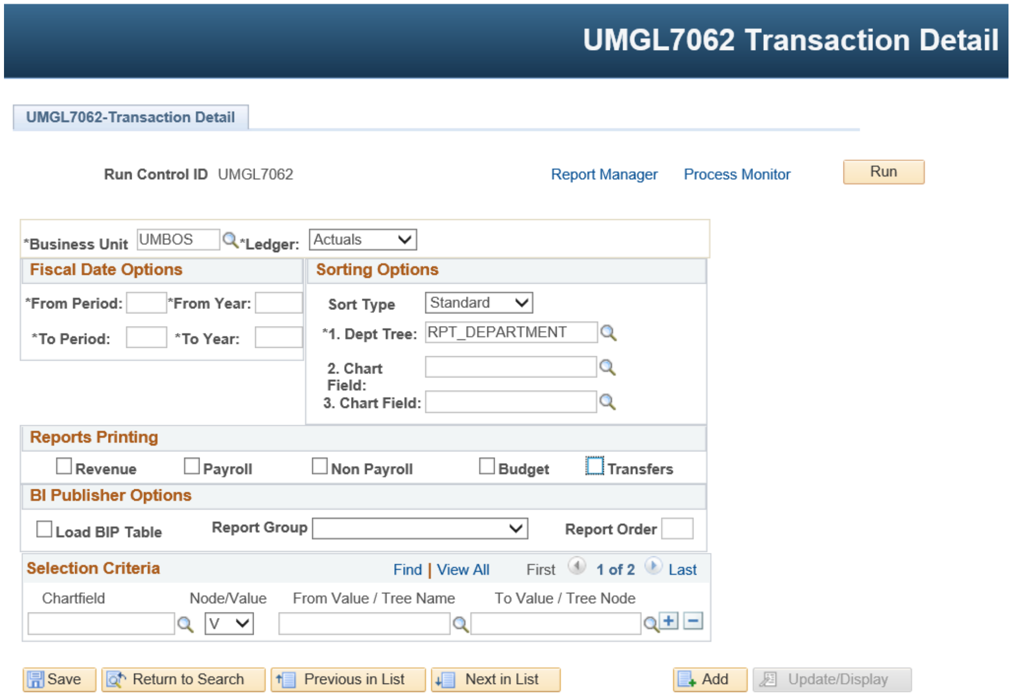
Click on the Reporting Tile from the HomePage

Then navigate to Report Center → Finance

The ***Dartmouth Financial Reports*** page opens – The **"Dartmouth"** identifier for this page name is based on user security.



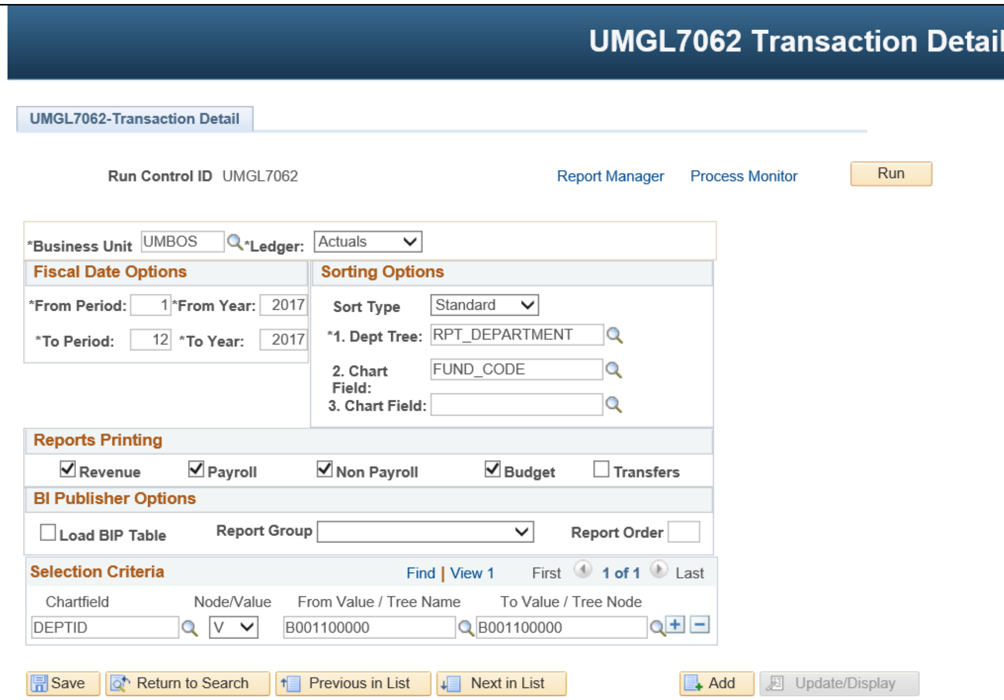
Step 2.	Click the **Revenue & Expense Detail Transaction Report** link to access the run control for this report. The ***UMGL7062-Transaction Detail (Find an Existing Value)*** page opens. 
	Note: If this is the first time you are running this report, click Add a New Value, enter a name for the ***Run Control ID***, and click Add. Use underscores (_) in place of spaces as the system does not recognize spaces for the run control name.
Step 3.	Enter the ***Run Control ID*** and click Search.
	The ***UMGL7062-Transaction Detail*** page opens.



UMGL7062 Transaction Detail
UMGL7062-Transaction Detail
Run Control ID UMGL7062
Report Manager
Process Monitor
Run
*Business Unit UMBOS
*Ledger: Actuals
Fiscal Date Options
*From Period:
*From Year:
*To Period:
*To Year:
Sorting Options
Sort Type Standard
*1. Dept Tree: RPT_DEPARTMENT
2. Chart Field:
3. Chart Field:
Reports Printing
Revenue
Payroll
Non Payroll
Budget
Transfers
BI Publisher Options
Load BIP Table
Report Group
Report Order
Selection Criteria
Find | View All
First 1 of 2 Last
Chartfield
Node/Value
From Value / Tree Name
To Value / Tree Node
V
Save
Return to Search
Previous in List
Next in List
Add
Update/Display

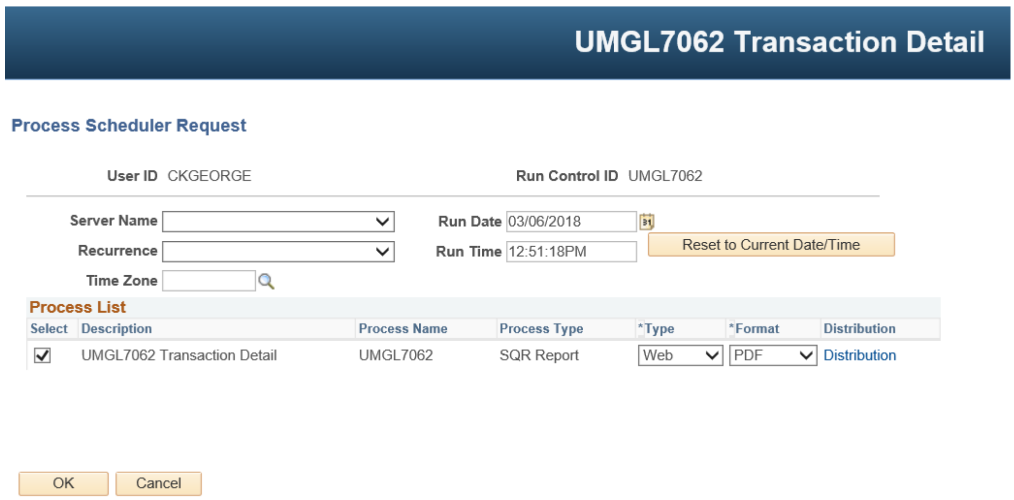
	Tip: The run control page allows you to select the parameters needed to run your report. Some run control pages require more information than others.
	Note: The Business Unit defaults based on your user security.
Step 4.	Enter the following fields: • ***Ledger*** • ***Beginning Period*** • ***Ending Period*** • ***Beginning Year*** • ***Ending Year*** • ***Tree Name*** • ***ChartField (1 and 2)***
	Tips: • It is recommended that the ***RPT_DEPARTMENT*** tree be entered in the ***Tree Name*** field. (This is the same tree used in the monthly batch reports. • The ***ChartField*** fields are optional and can include any ChartField. Valid values are ***Class***, ***DeptID***, ***Fund Code***, ***Program Code***, and ***Project ID***.
Step 5.	Select any appropriate check boxes in the ***Reports Printing*** group box.
Step 6.	To limit the selection of ChartFields in the report, enter the ***ChartField*** field.
Step 7.	Enter one of the following options in the Node/Value field: • ***V*** (ChartField value) • ***N*** (Node in the tree structure)

Step 8.	To limit the selection of ChartFields in the report, enter the ***ChartField*** field.

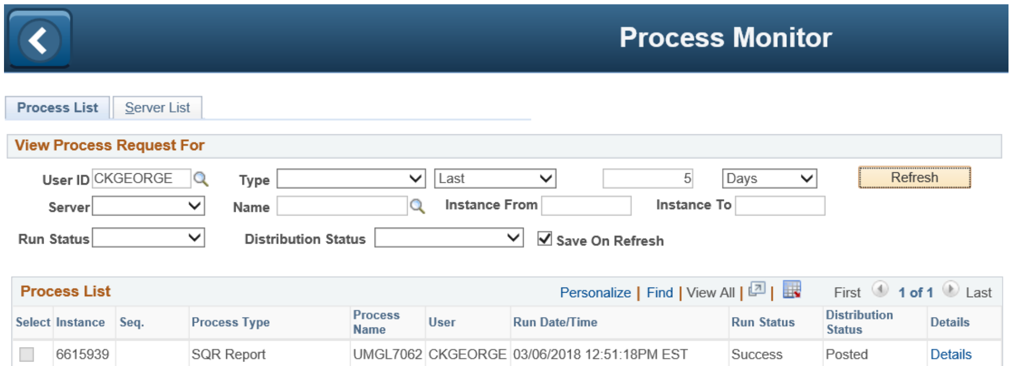


Tip:

- 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.	To add another ChartField value, click +.
Step 10.	Click Run. The ***Process Scheduler Request*** page opens. 
Step 11.	Verify that the following fields default (depending on user prefereces): • The ***Server Name, recurrence and time zone*** can be blank. • The Type should be ***Web*** • The Format should be ***PDF***
Step 12.	Click OK. The UMGL7062-Transaction Detail page reopens.

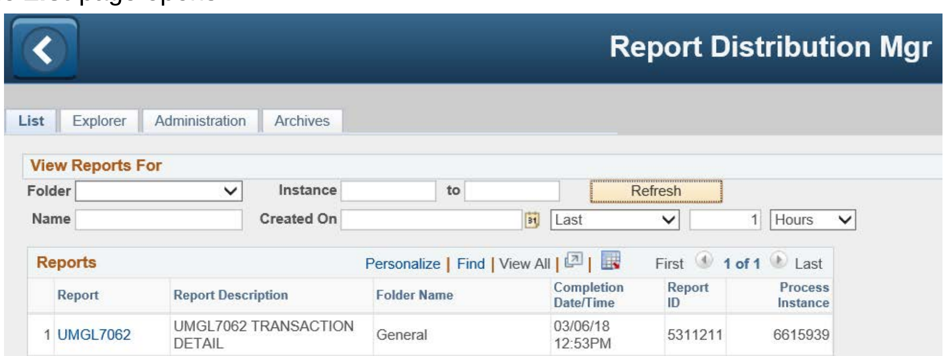
Step 13. To monitor the status of the report, click the **Process Monitor** link and click Refresh periodically until the ***Run Status*** displays "Success".



Note: The Process Monitor and Report Manager links also appear on the Report Center page that was used to access the Report Request (see example after Step 1). If you want to view reports that have been run in the past, you do not have to open the Report Request to view those reports. You can open them directly the Process Monitor and/or Report Manager via the Report Center.

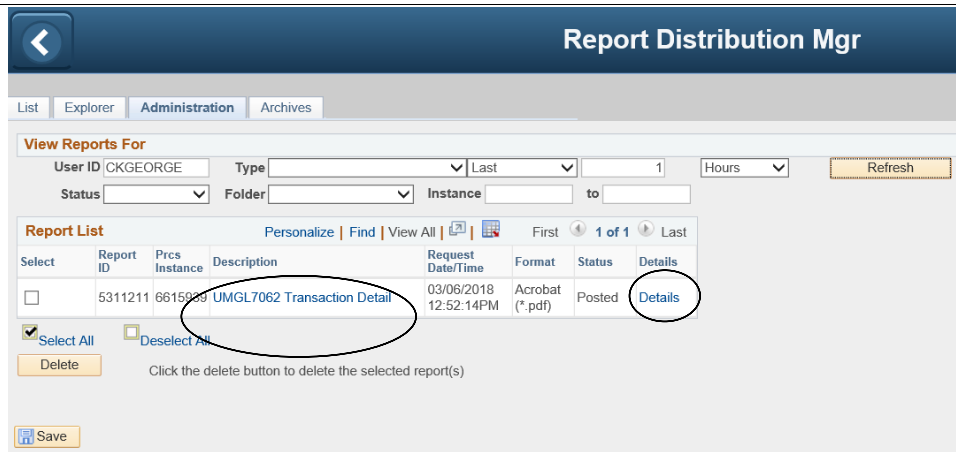
Step 14. To view the report, click the **Report Manager** link.

The ***List*** page opens.



Step 15. Click Administration.

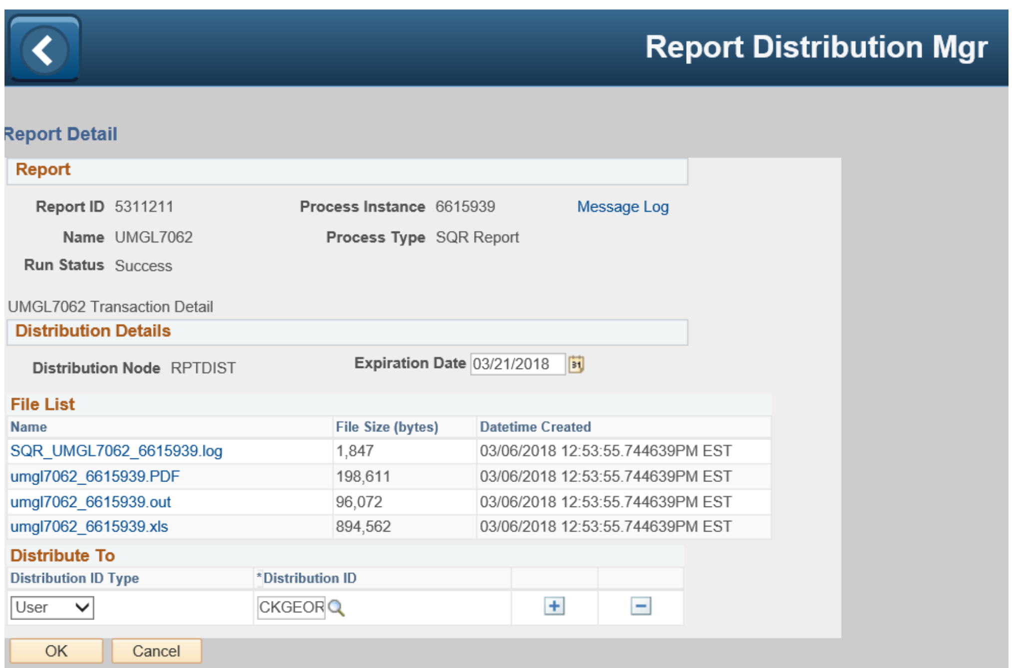
The ***Administration*** page opens.



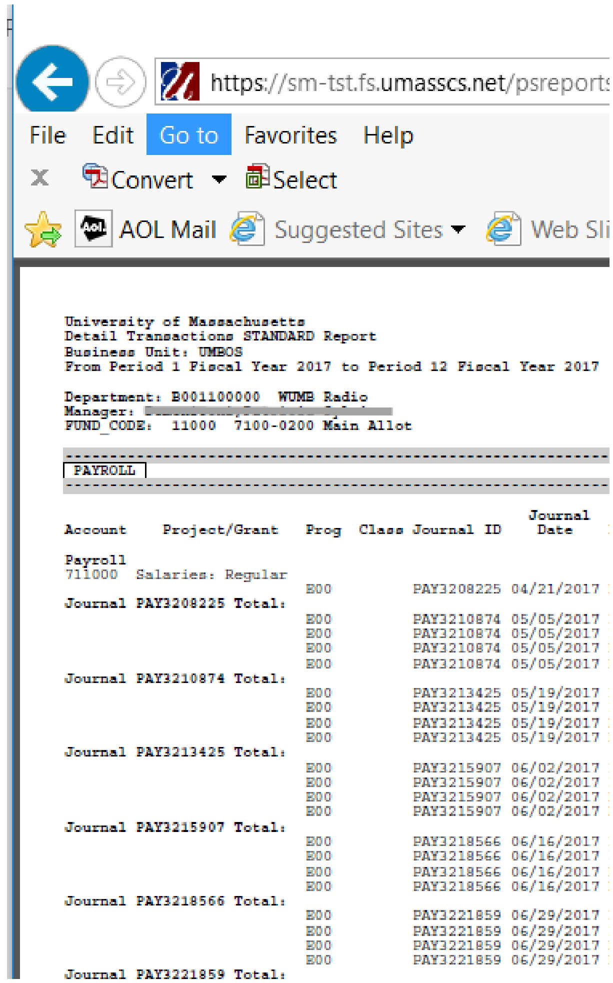
Note: The report will not show on the Administration tab until it has been "Posted". If you do not see the desired report in the Report Manager, click Refresh until it appears. Otherwise, go to the Process Monitor to check the status of the report in progress.

Step 16. Click the Description link to open the report in PDF format, or click the **Details** link to view the report in either PDF or XLS format. In this example, the **Details** link is used

The ***Report Detail*** page opens.



Step 17.	Click the link for either format. For this example, the PDF format is selected. The *UMGL7062-Transaction Detail Report* opens.
	End of Procedure



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