## *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:*

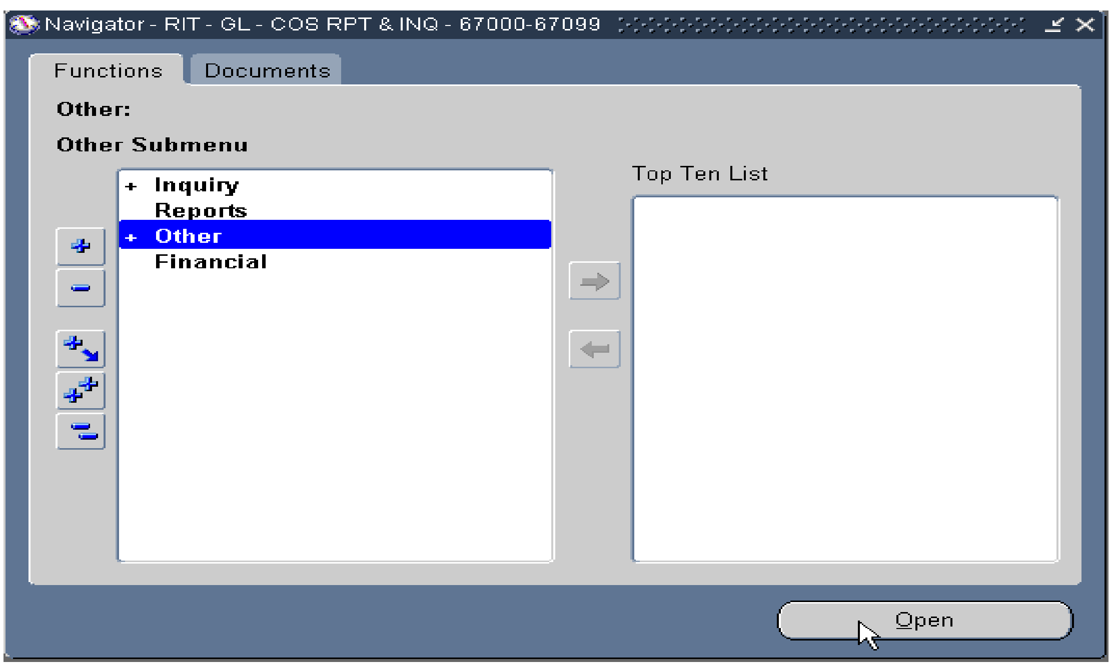
At the end of this lesson, you will be able to create a Request Set to run all of your monthly statements and detail reports at one time.

### Scenario

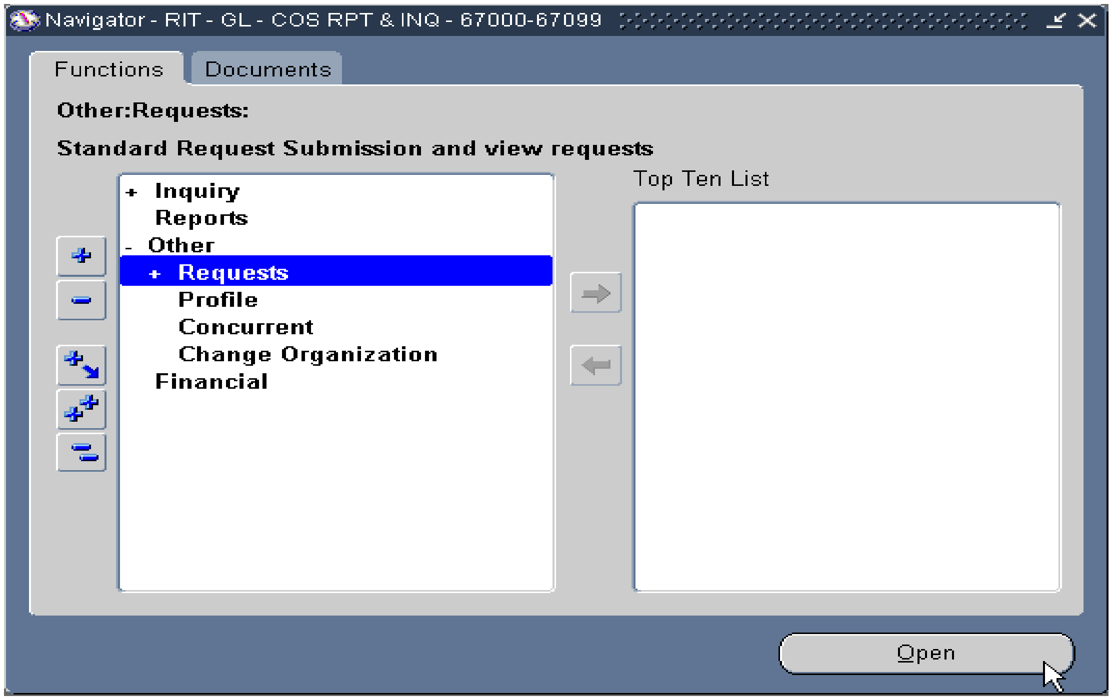
*You are an employee in the College of Science. You want to create a Request Set for your monthly department and project statements, and detail reports. This will reduce the amount of time it takes for you to run your department's reports each month.*

***Directions:***

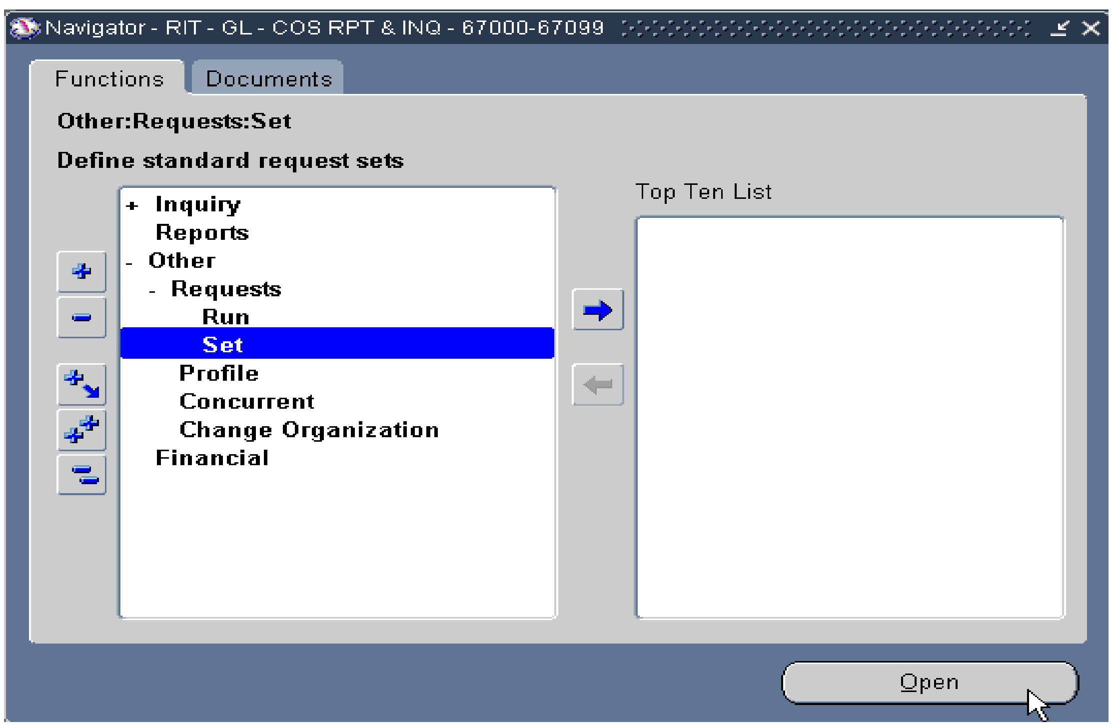
- To create a Request Set select the "Other" menu in your Navigator screen and click on the "Open" button.



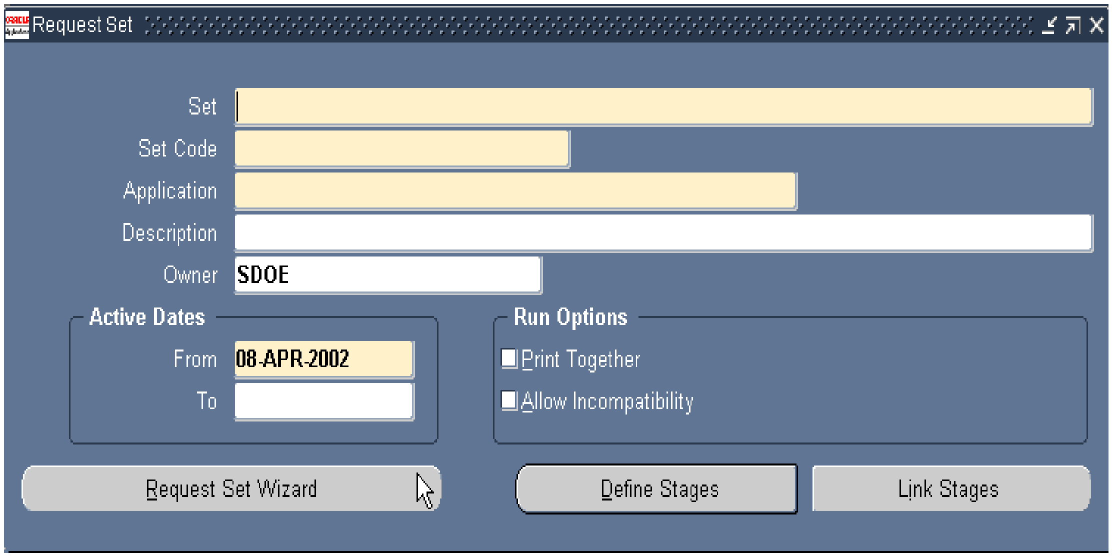
- Next select the "Requests" menu and click on the "Open" button.




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



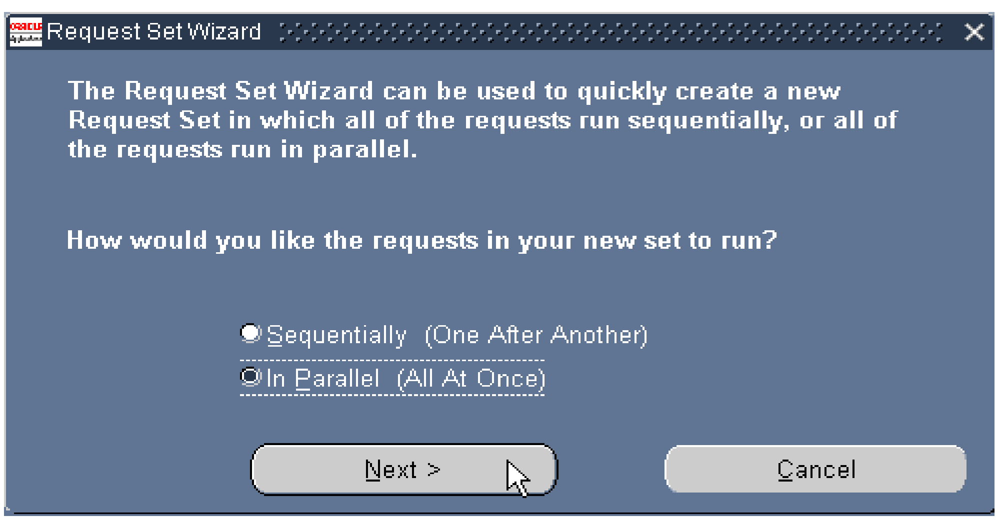
- In the Request Set screen click on the “Request Set Wizard” button.



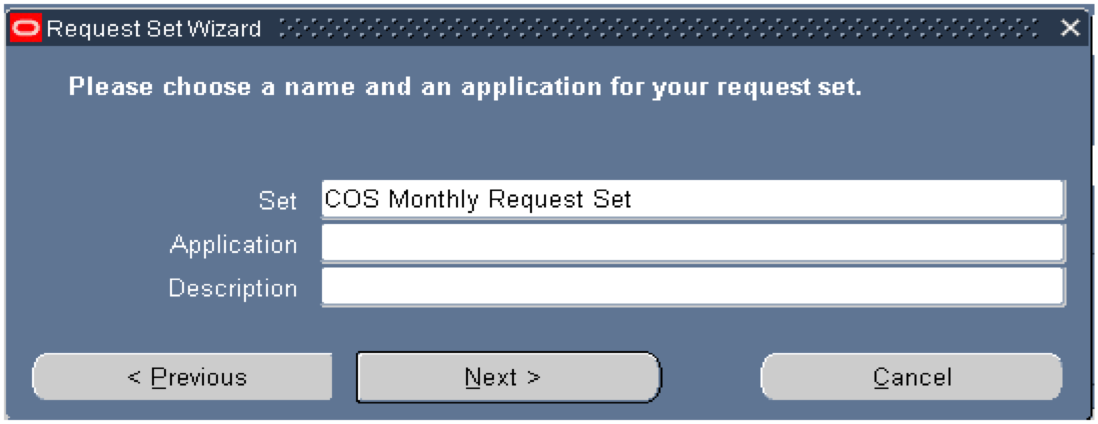

The first step of setting up a Request Set through the Request Set Wizard is to determine if you want your group of reports to run sequentially or parallel.

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.

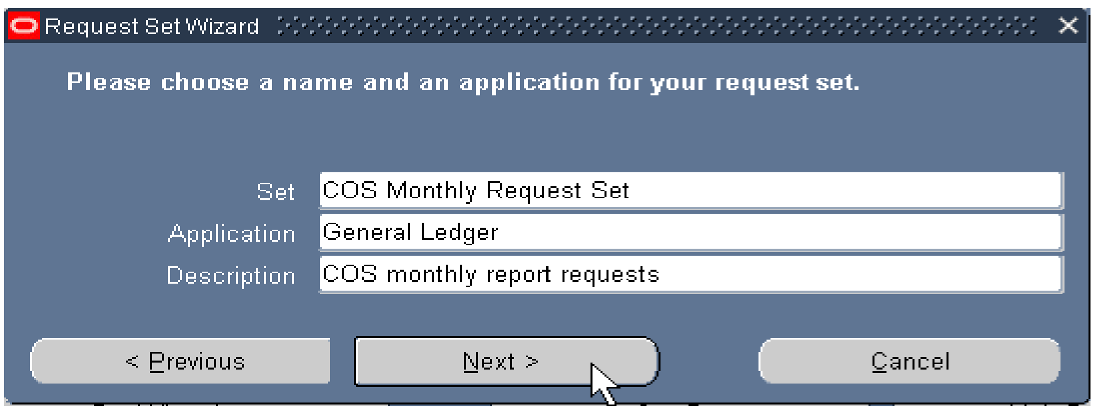
- Select the “In Parallel” option by clicking on the circle to the left, and then the “Next >” button.



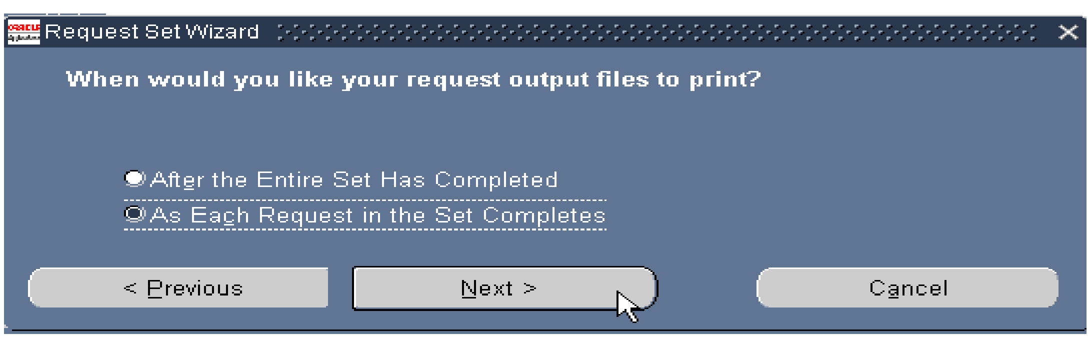
- In the next step enter a name for your Request Set in the “Name” field and tab to the “Application” field.



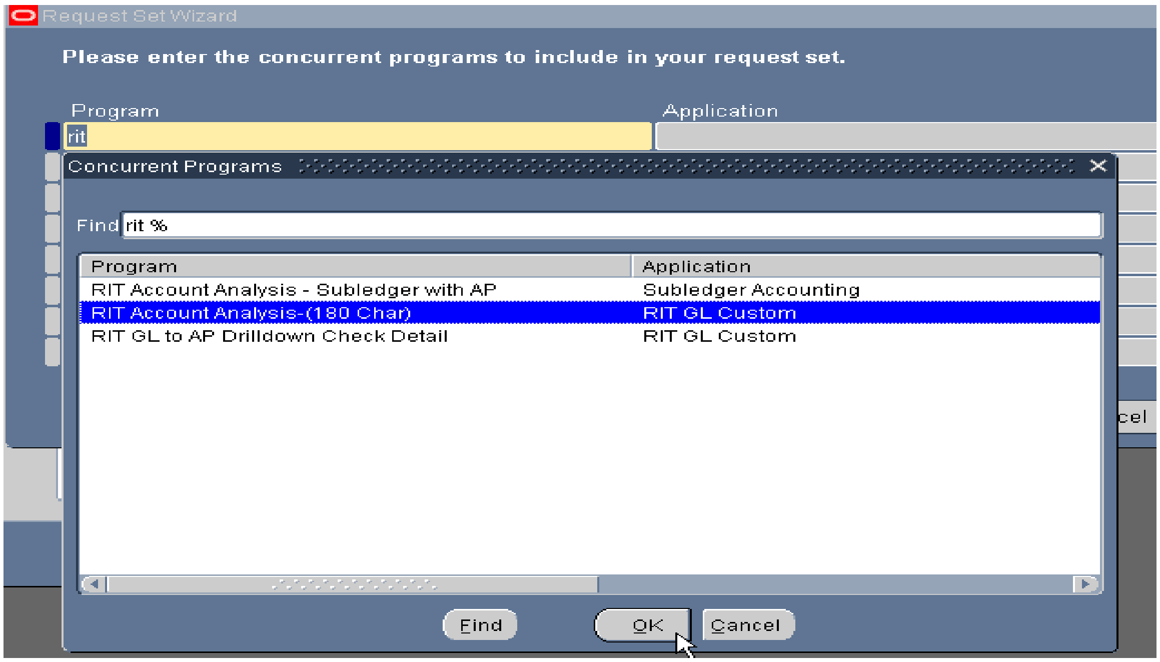

- In the “Application” field type “General” and hit the tab key.  The Application name “General Ledger” will fill in the field.
- Enter a description of the Request Set in the “Description” field and click the “Next” button.

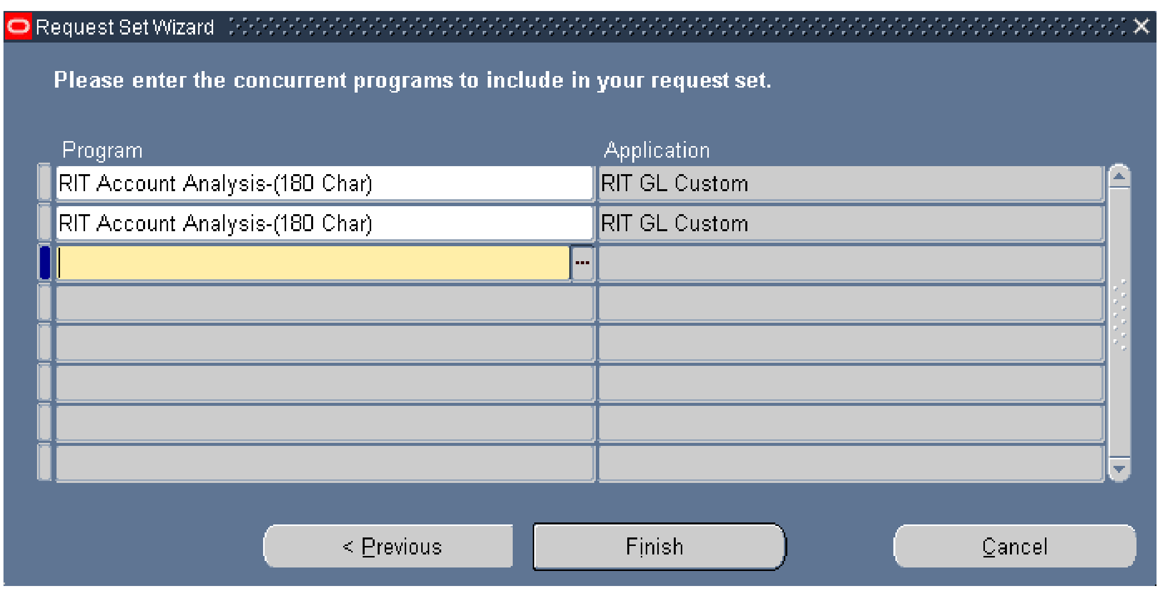



- You can choose whether you want the reports to print as each one completes or after all of them have completed.  Choose “As Each Request in the Set Completes”, and click the “Next” button.

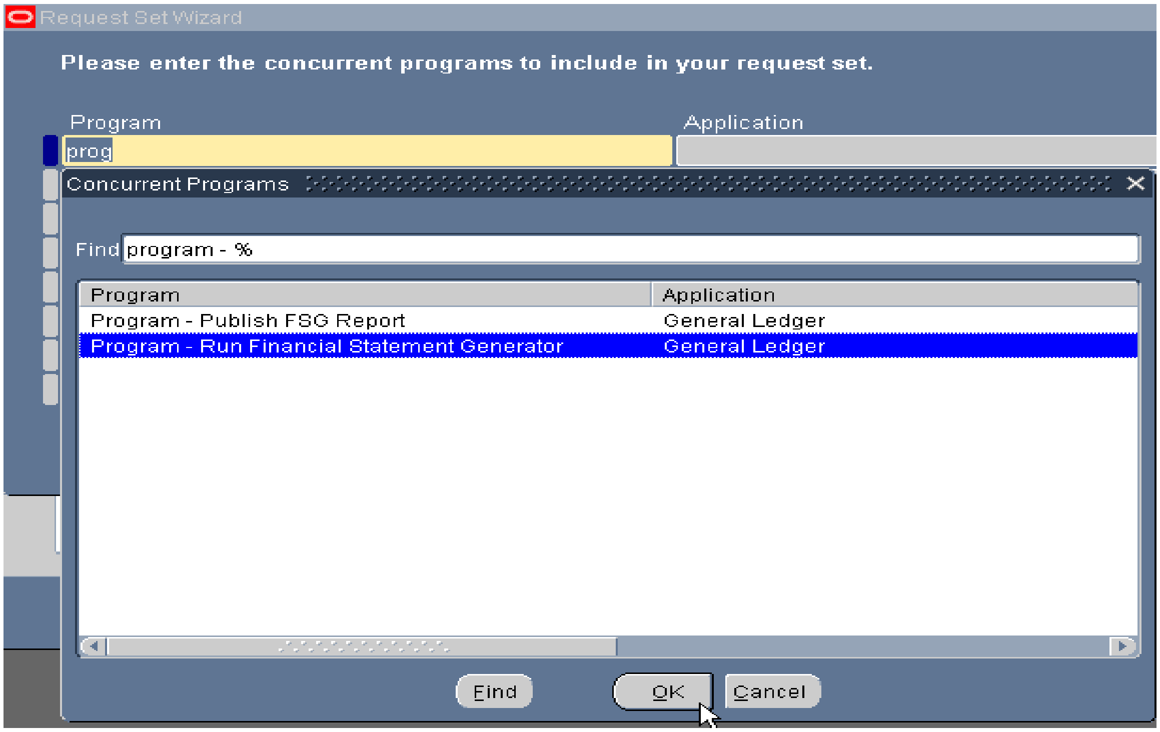


- In the last step of the Request Set Wizard you will select the reports you want to include in your Request Set.
    - Type “RIT” in the first row and hit the tab key.  The field will fill in with the “RIT Account Analysis-(180 Char)” report for your operating accounts detail.  Repeat this process in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

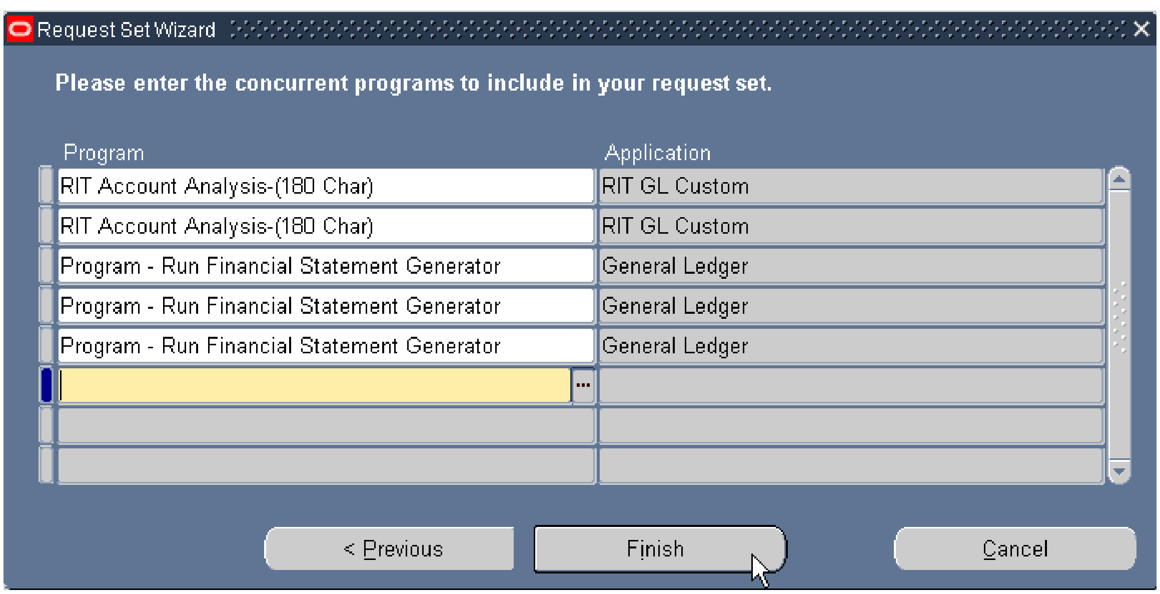


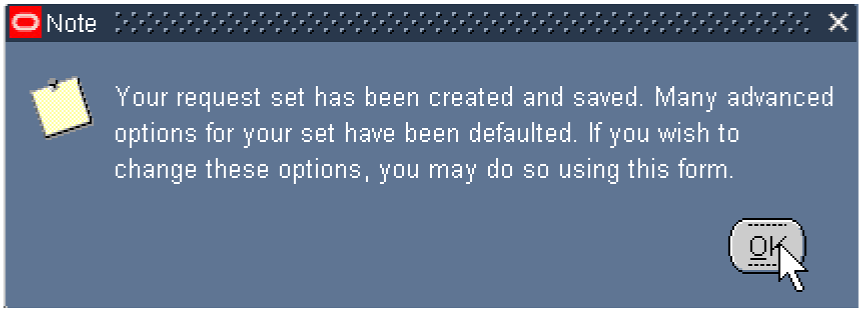
- For your FSG reports, such as your Department or Project statements, select the “Program – Run Financial Statement Generator” for each report you want to run.



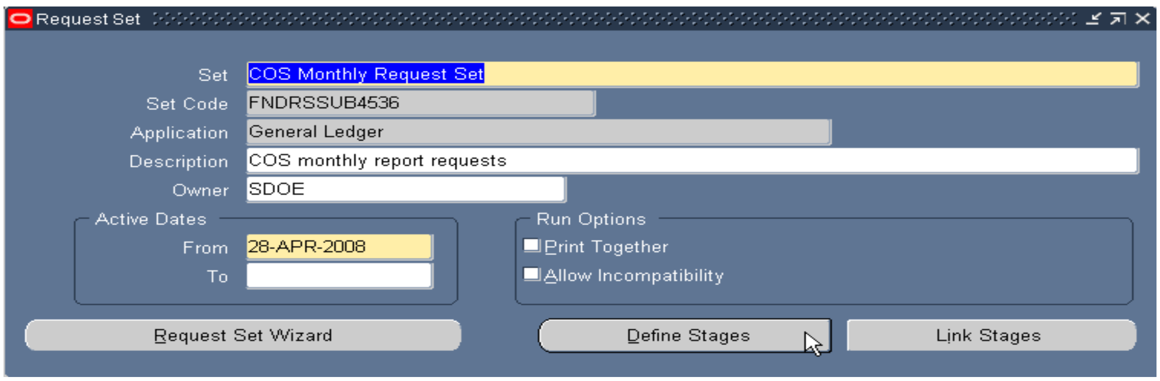

- When you are finished selecting your reports click on the “Finish” button.



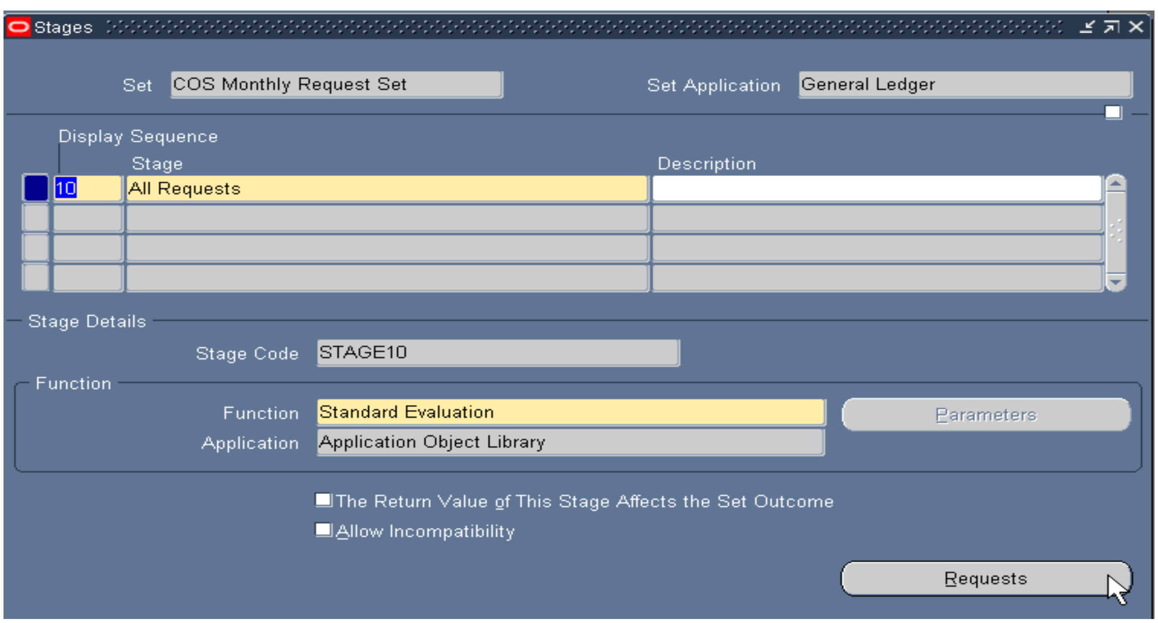
- A Note window will open letting you know that your Request Set has been saved, click on the “OK” button.



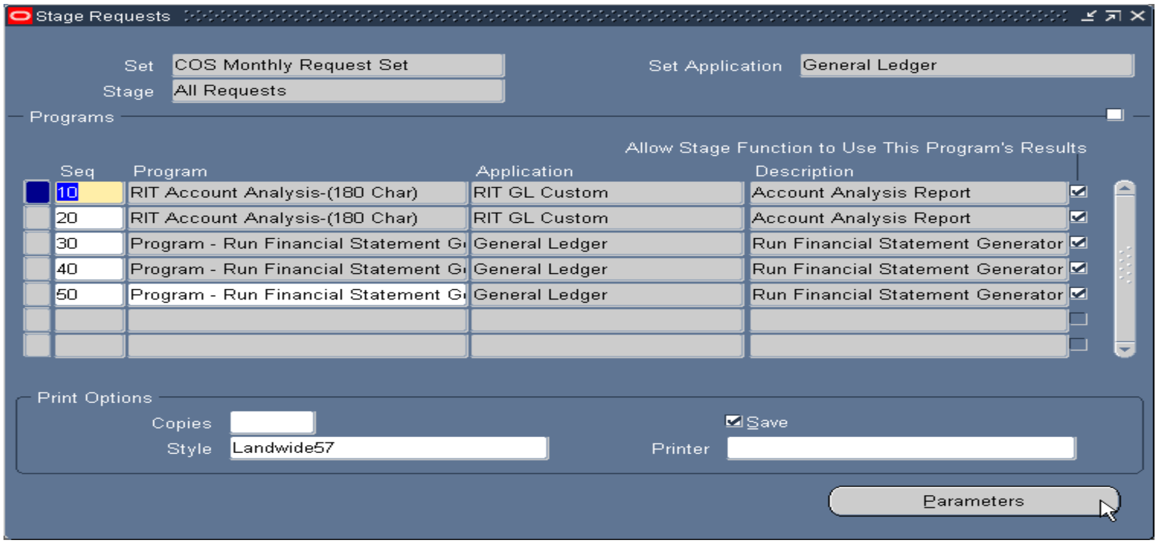

- Your Request Set’s information will automatically fill in the Request Set screen. Click on the “Define Stages” button.



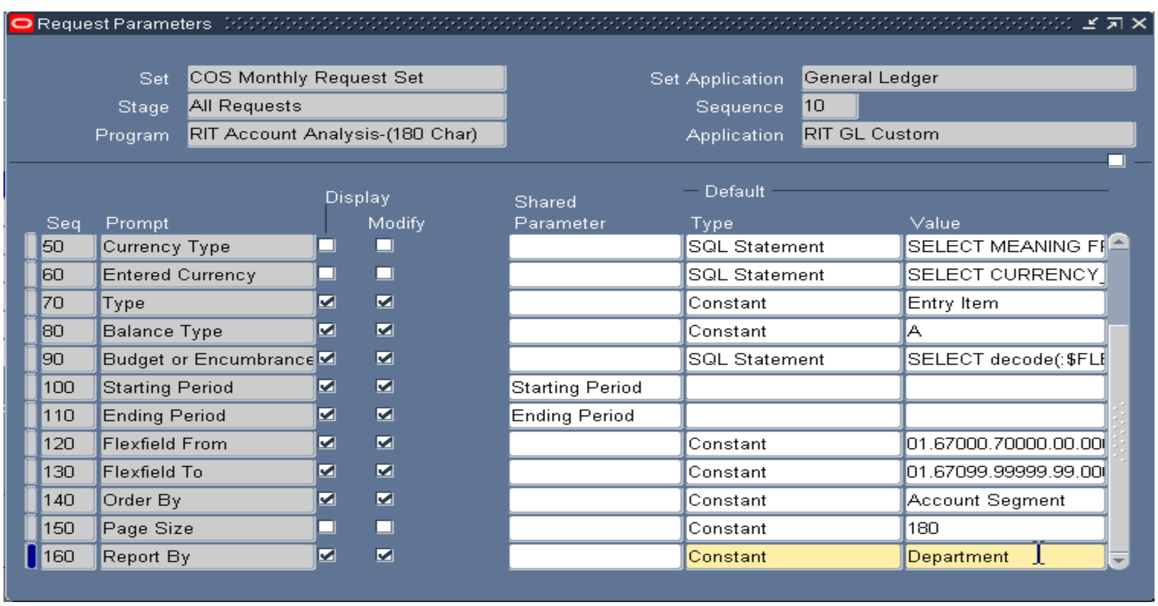

- In the “Stages” form click on the “Requests” button.



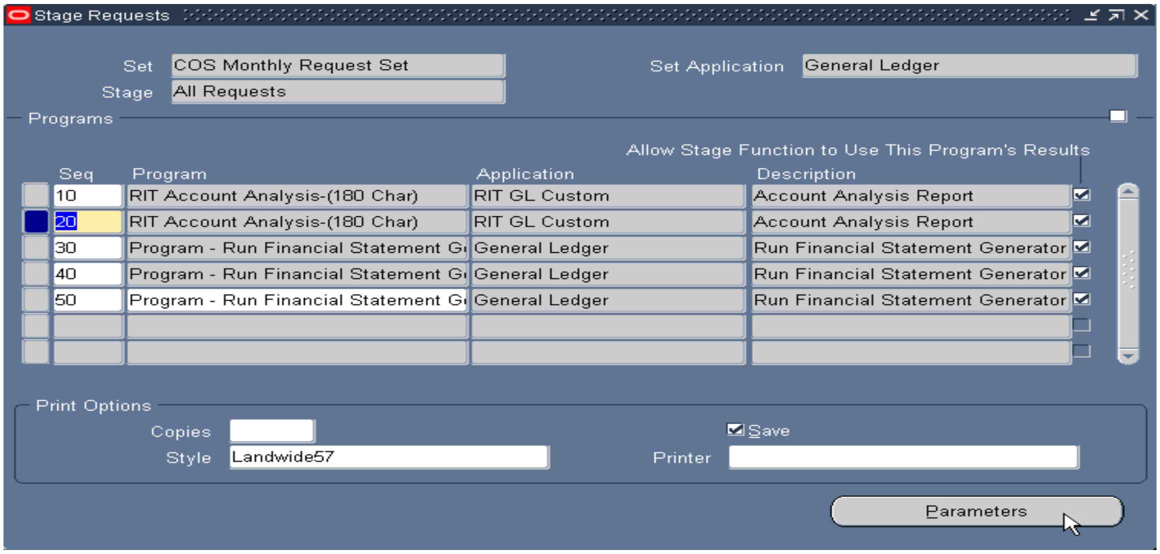
- In the “Stage Requests” screen select the row 10 with the “RIT Account Analysis-(180 Char) detail report and click on the “Parameters” button.



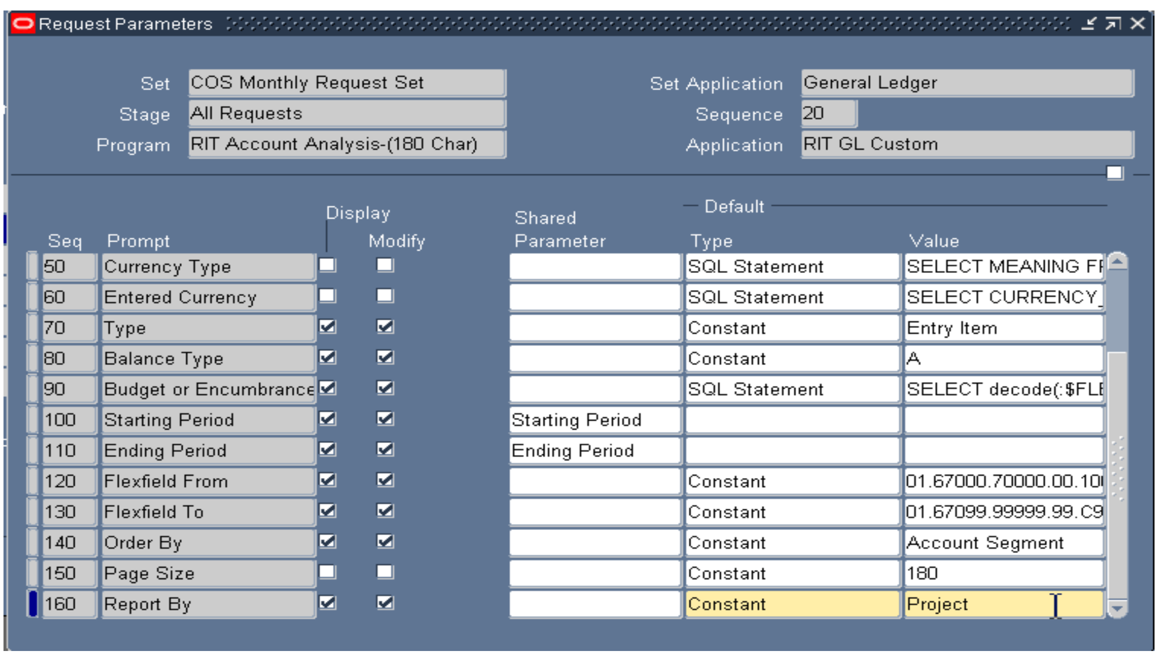

- In the “Request Parameters” form the following changes can be made.
    - Under the “Shared Parameter” column, in the “Starting Period” row type “Starting Period”. In the same column, in the “Ending Period” row type “Ending Period”. This will allow this parameter to be share with requests for this 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.



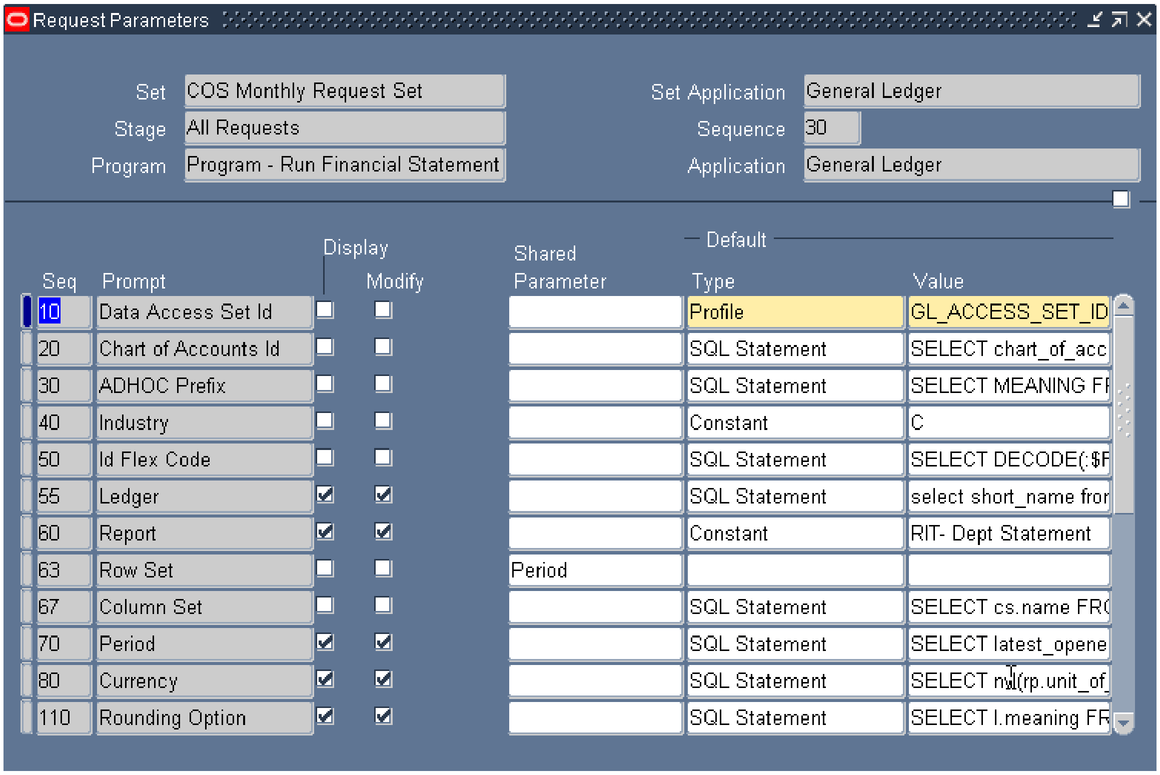
- Save your changes and close the Request Parameters screen.  Back in the Stage Requests screen select the next row for the “RIT Account Analysis–(180 Char)” and click the “Parameters” button.



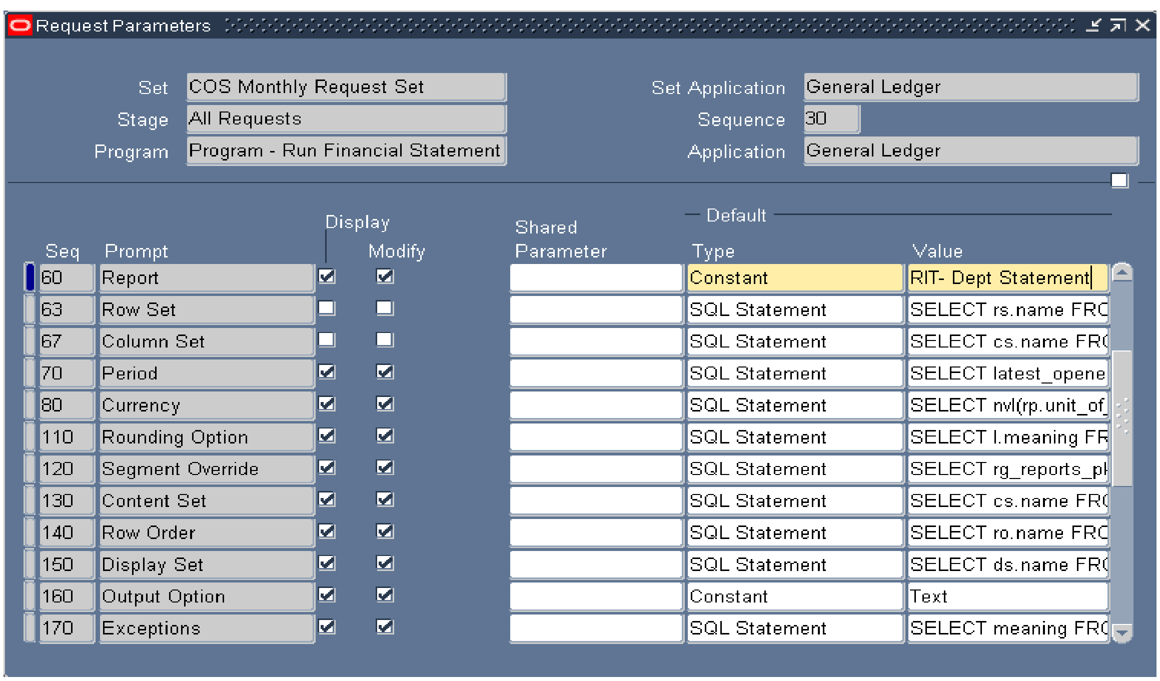

- Repeat steps 18-23 only this time in the “Flexfield From” and “Flexfield To” rows in the “Value” column enter the lowest and highest account numbers you want detail for, for your project accounts, “01.67000.70000.00.10000.00000” to “01.67099.99999.99.99999.00000”.
- In the “Report By” row, change “Department”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



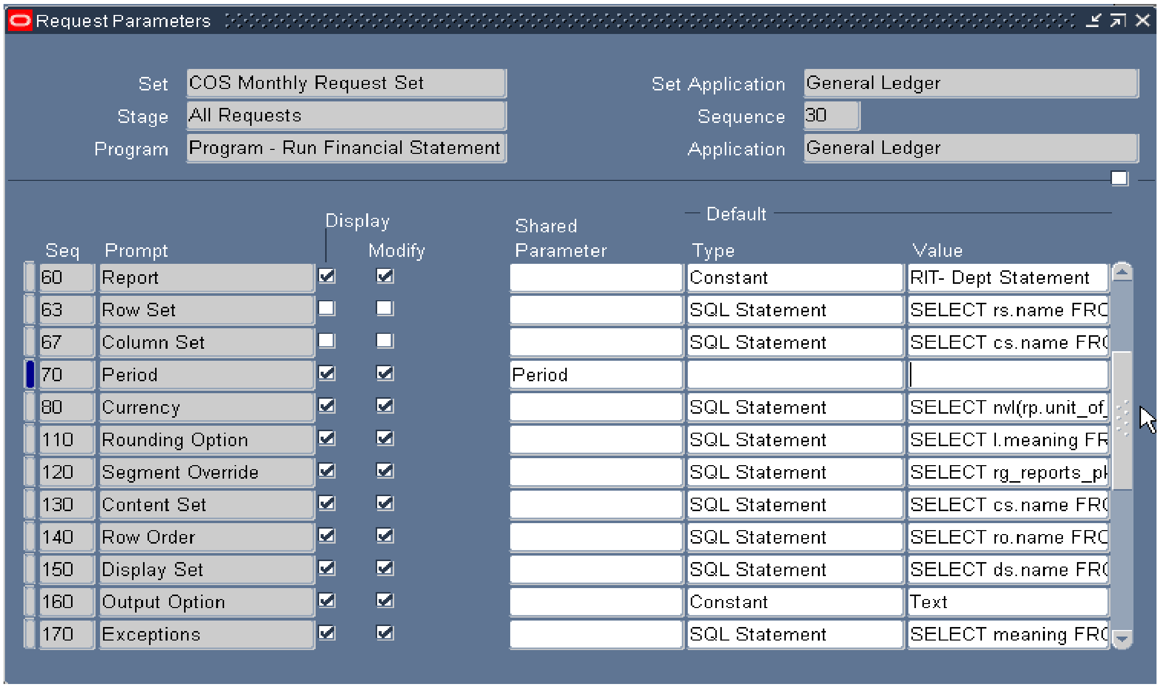
- In the Stage Requests screen select the first row for the “Program – Run Financial Statement Generator” and click the “Parameters” button.



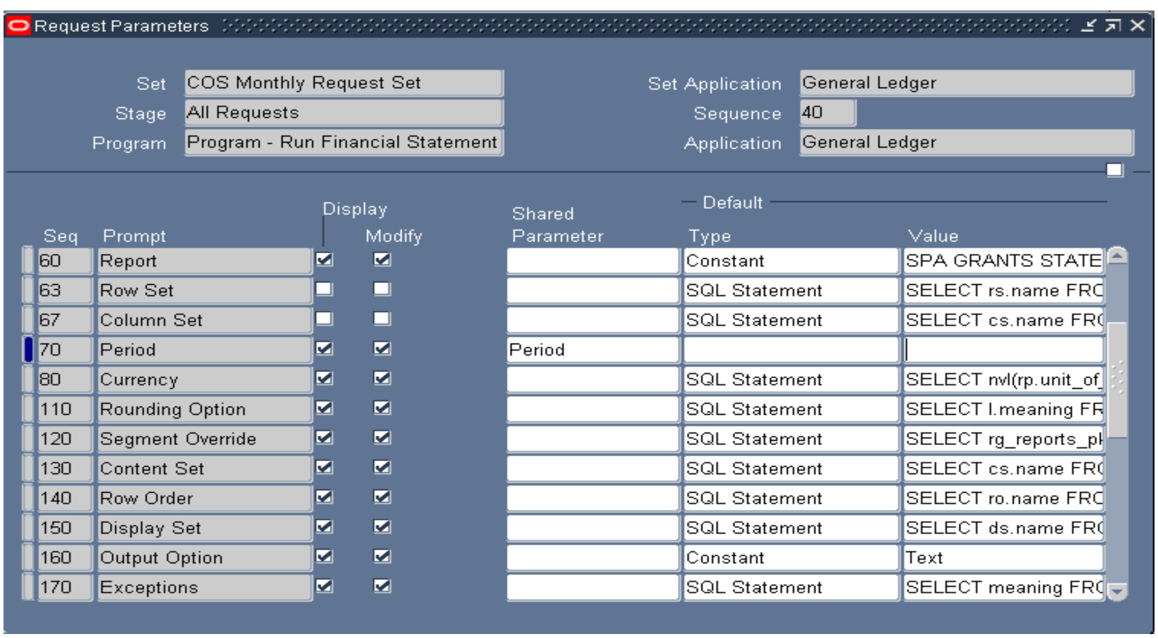

- In the “Report” row in the “Type” column select “Constant” from the list of values. In the “Value” column enter “RIT- Dept Statement”.

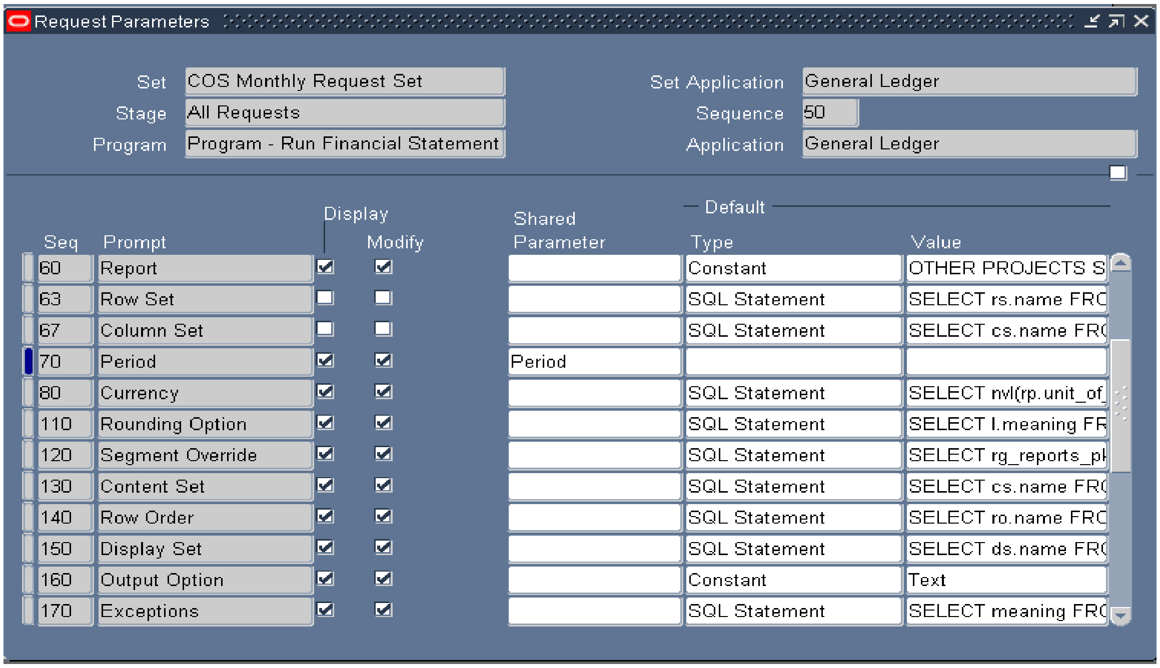


- In the “Period” field in the “Shared Parameter” column enter “Period”, and clear the values in the “Type” and “Value” columns.



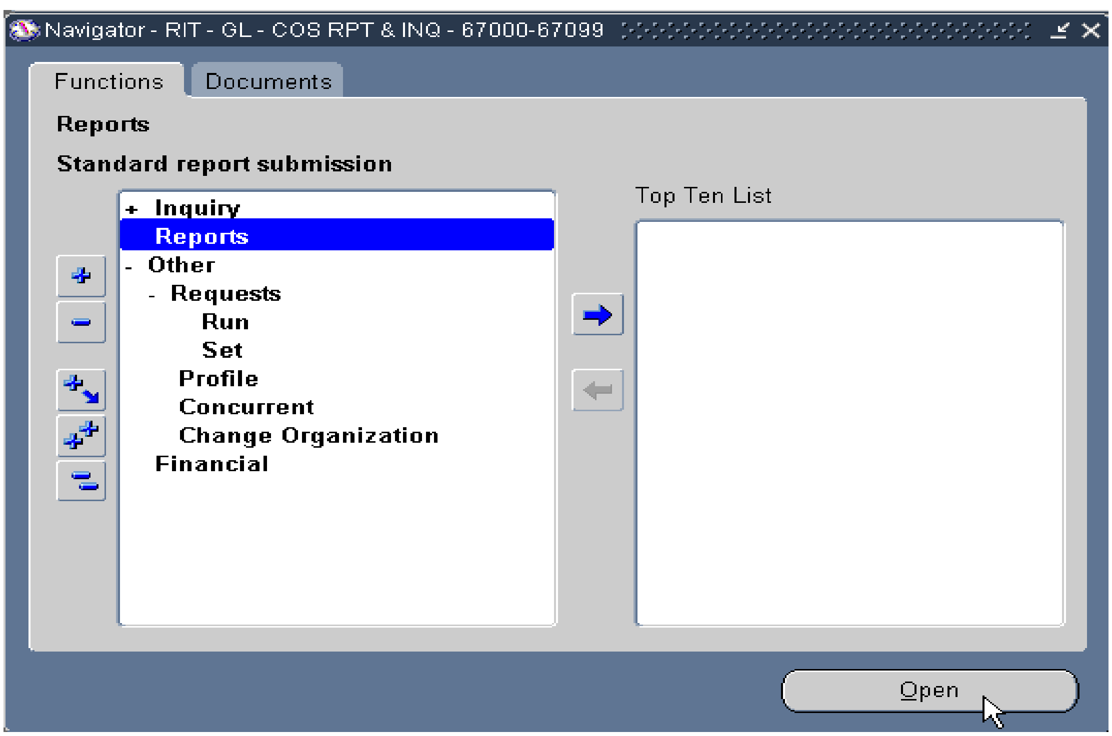

- Save your changes and return to the Stage Requests screen. Continue to select each row with “Program – Run Financial Statement Generator” and enter the parameters as above. The other 2 FSG reports that SDOE included are:
    - SPA GRANTS STATEMENT
    - OTHER PROJECTS STMT



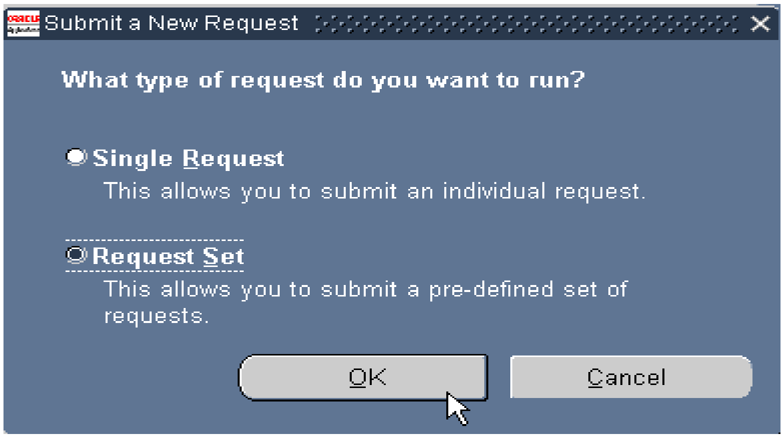



NOTE: You must enter the Report name in the "Value" column exactly as it appears in Oracle.

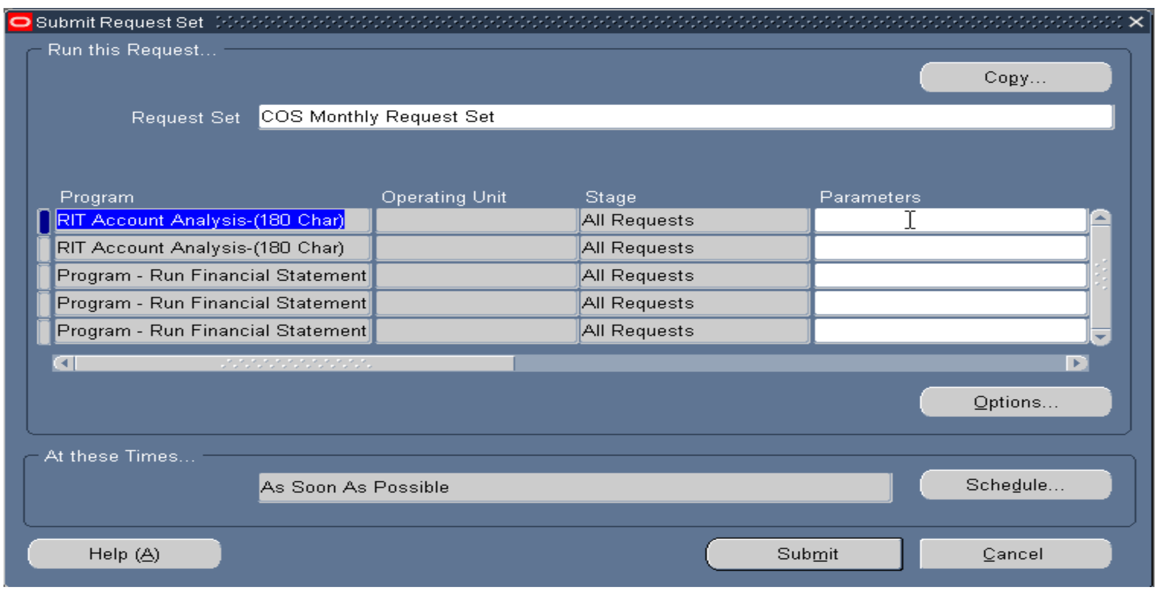
- Once you are finished entering the parameters for each report you are finished and ready to run your request set. To do this return to your Navigator screen and open "Reports".



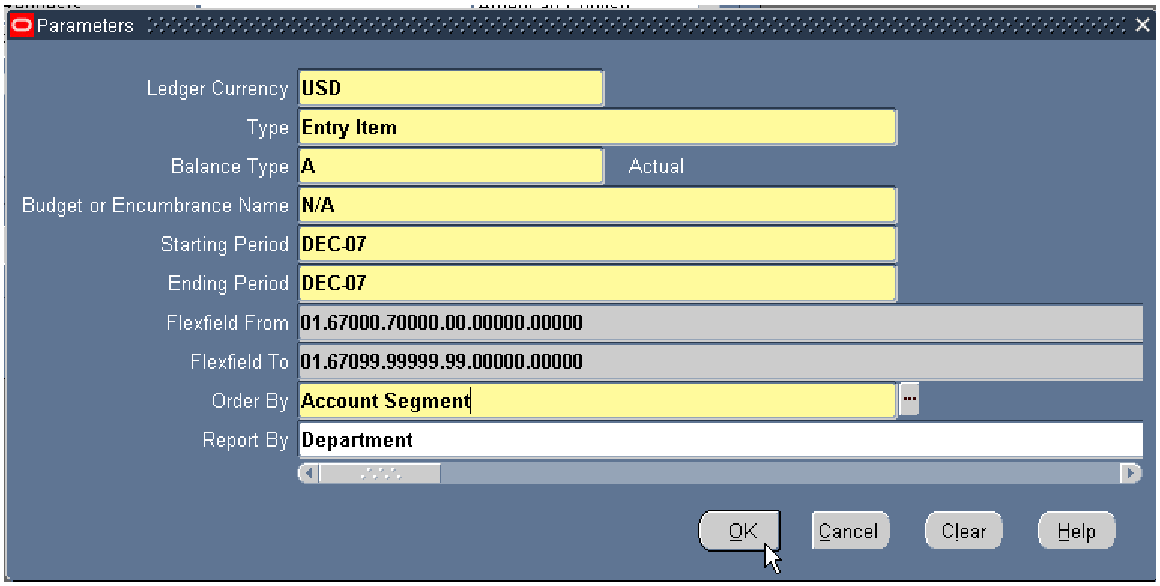
- When the Submit a New Request screen opens select “Request Set” and click the “OK” button.




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

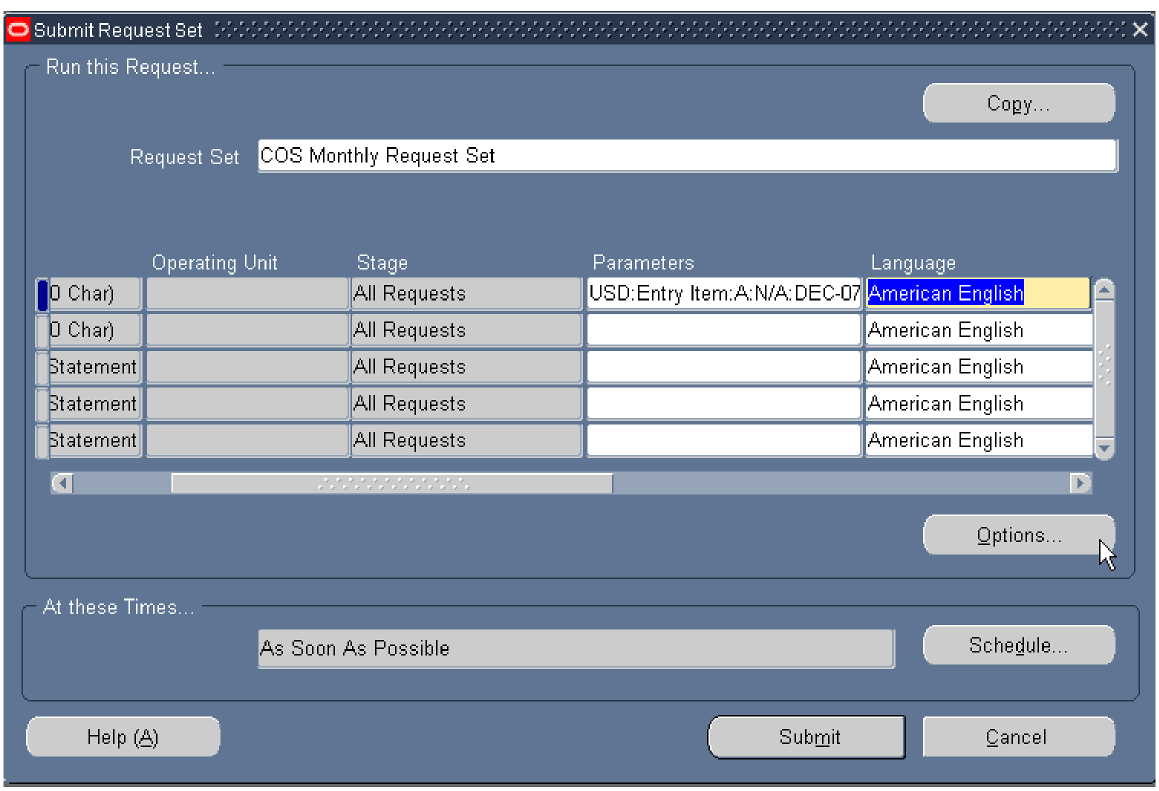



- Next click in the “Parameters” field for the first report. The Parameters screen will open.
- For the Account Analysis reports enter the Starting Period and Ending Period you want to run these reports for and click on the “OK” button. You only have to enter the period in these fields in the first report,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

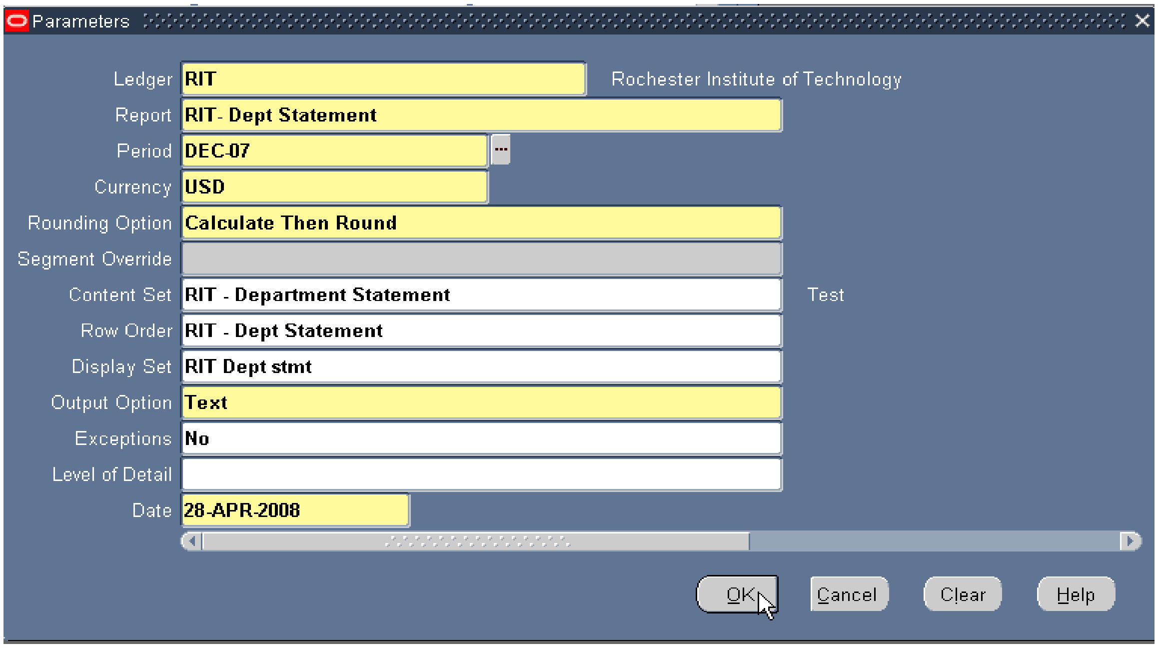



- If you click in the rest of the Account Analysis reports' parameter fields you will see that the Starting and Ending Period fields has automatically filled in, but you don't have to click in the rest of the parameter fields.

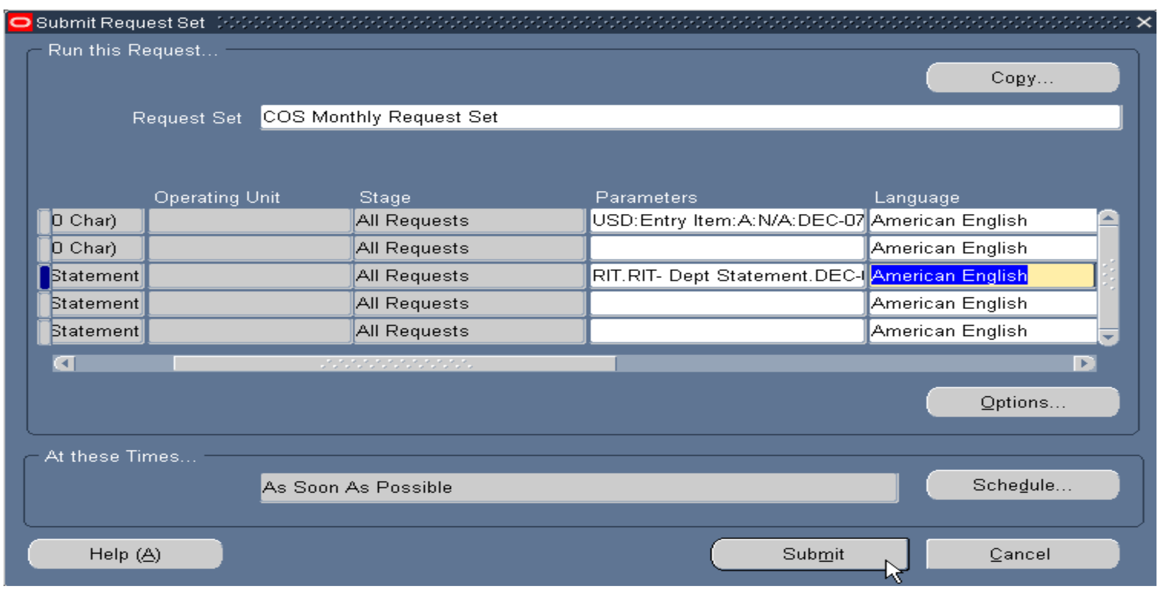
- When you click the "OK" button you will be taken back to the Submit Request Set screen and into the next field which is "Language". If you want to specify printing and report notification options you will want to click on the "Options" button at this time if not scroll to the left to see the Program names again.



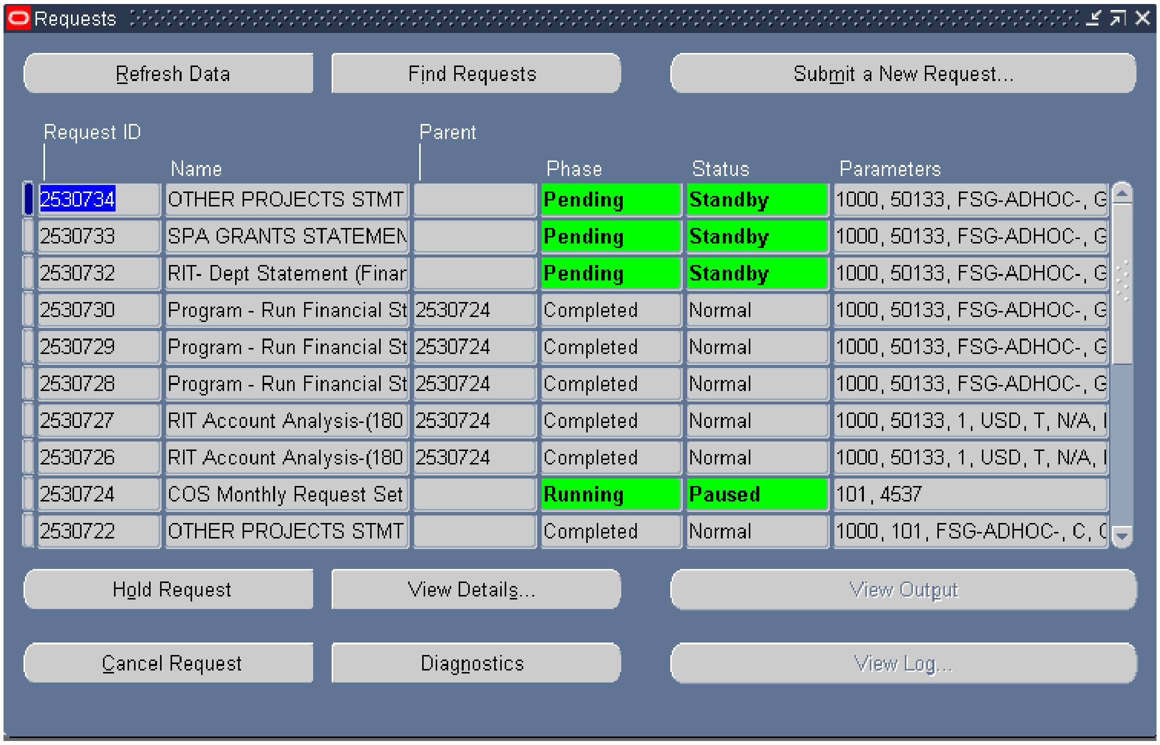
- Next click in the first “Program – Run Financial Statement Generator” parameter field and enter the period.  This period is shared by the other FSG reports that you are running so you do not need to enter this field for each report, just the first one.  This field automatically defaults to the current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

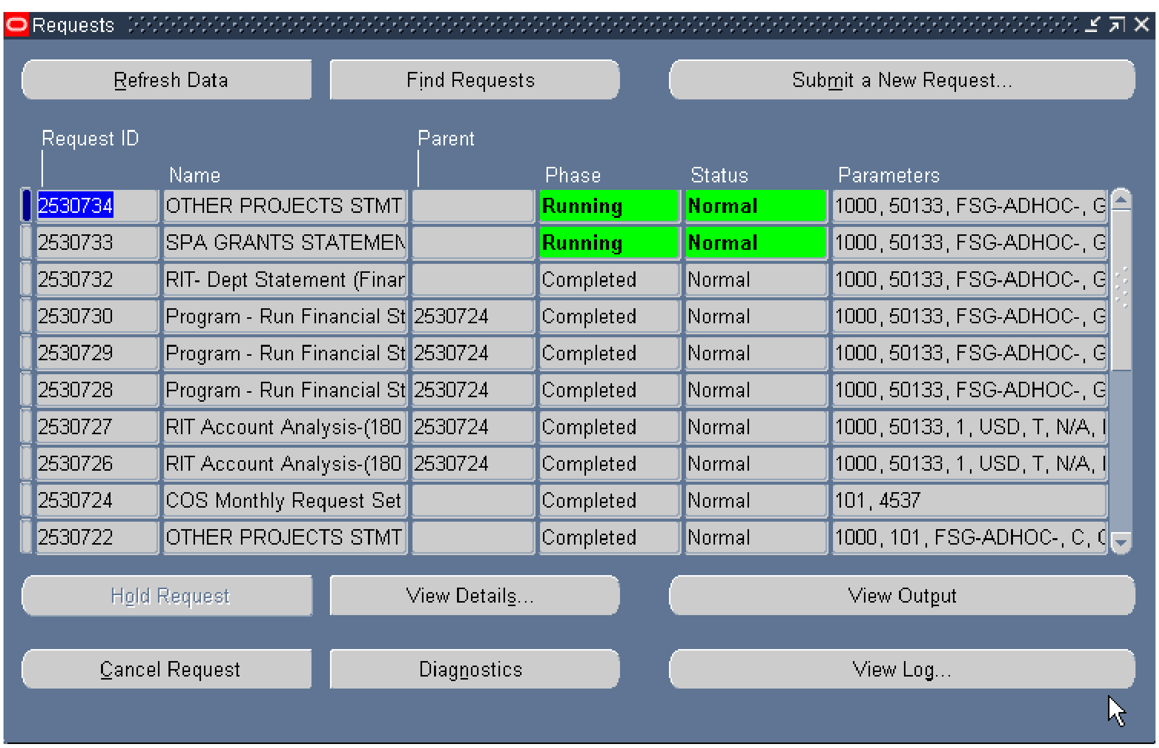



- Once you are finished entering the periods and printing options click on the “Submit” button to run your Request Set.



- 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.

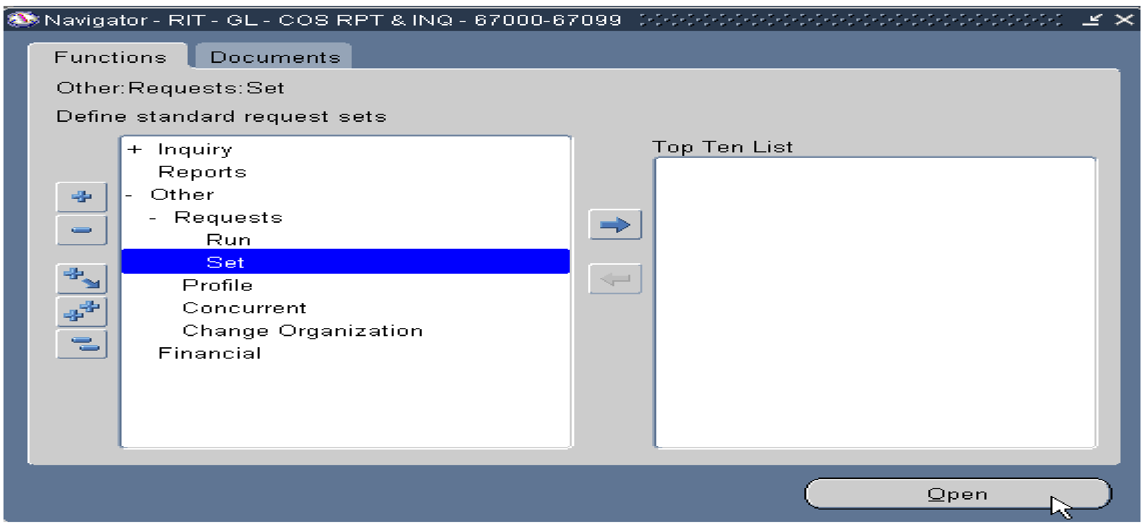


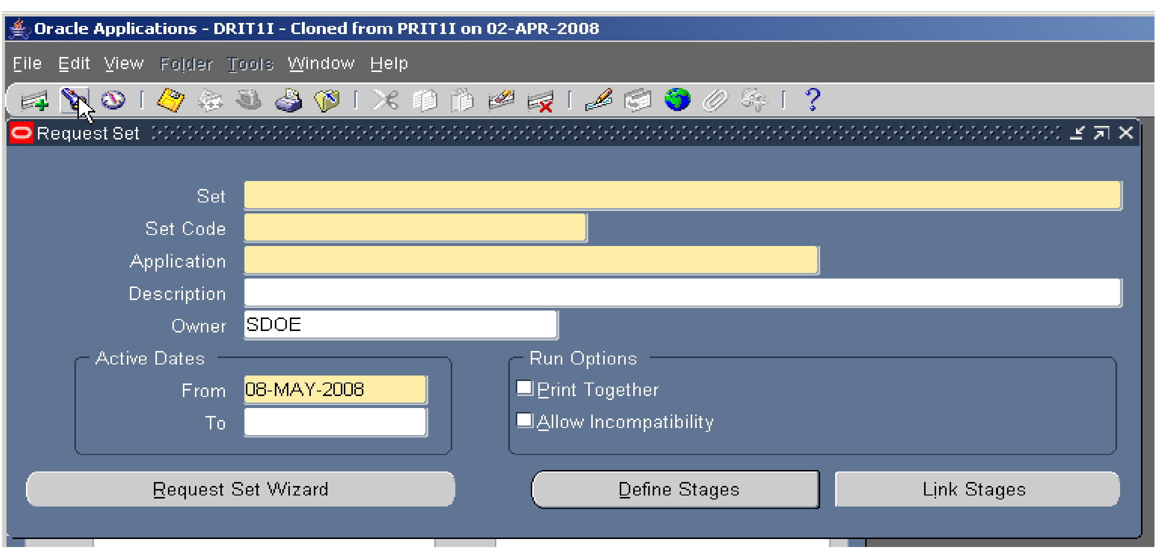
The “RIT Account Analysis – Subledger with AP” report can be run with a source of “Payables” to view the subledger detail for a range of accounts.  This report can be added to Request Sets also, but at this time cannot be sent to a networked printer.  In order to print this report, you must view the 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.

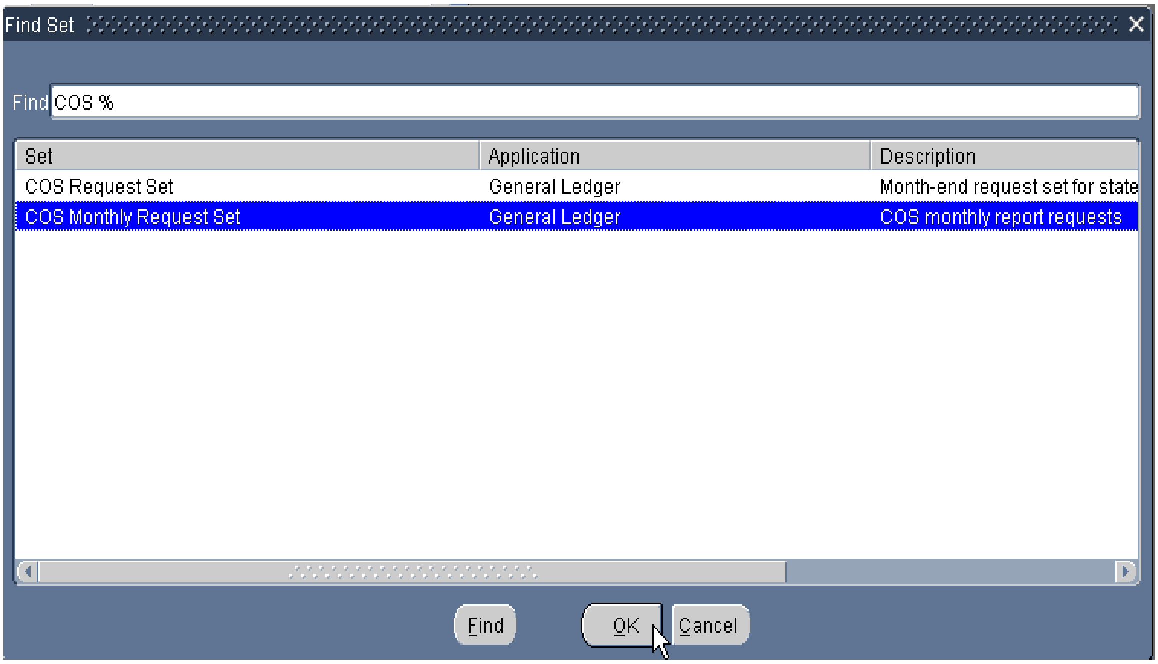
- In the Navigator screen navigate to Other / Requests / Set and click on the “Open” button.



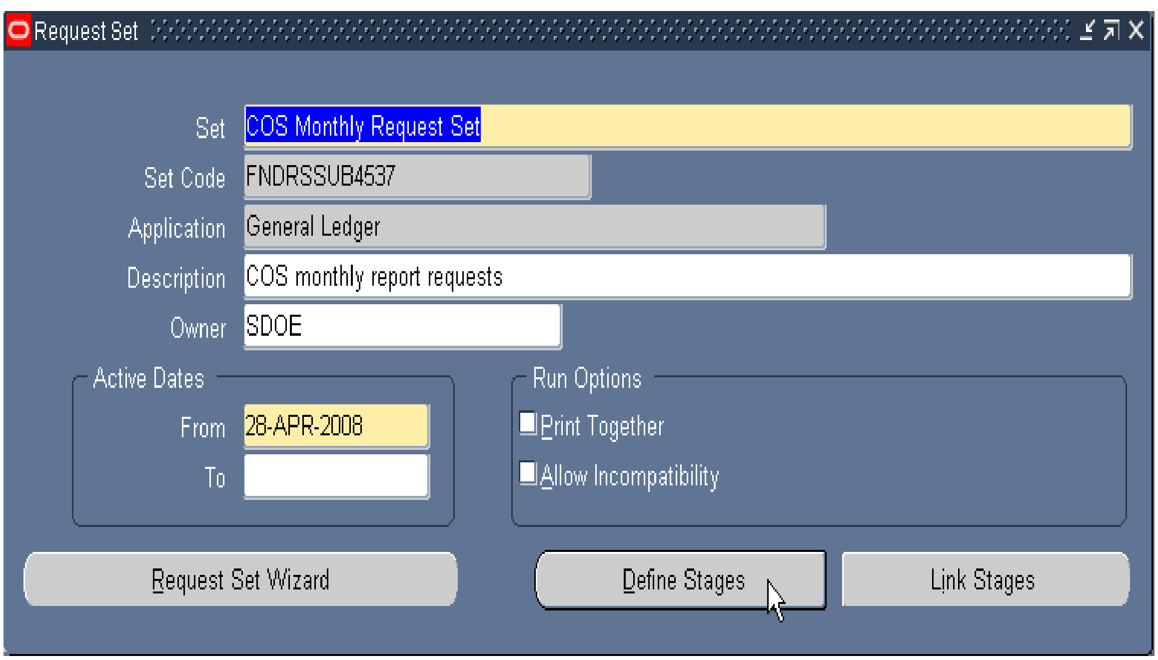

- Click on the Flashlight icon to query up the Request Set.



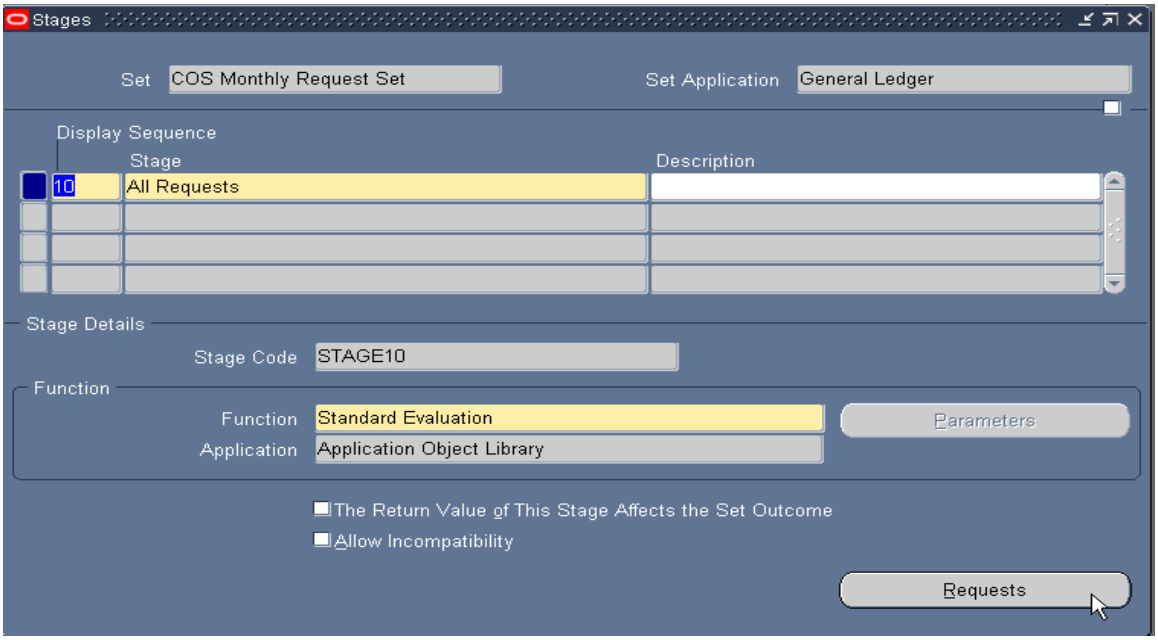
- Select “COS Monthly Request Set” from the list that appears and click on the “OK” button.



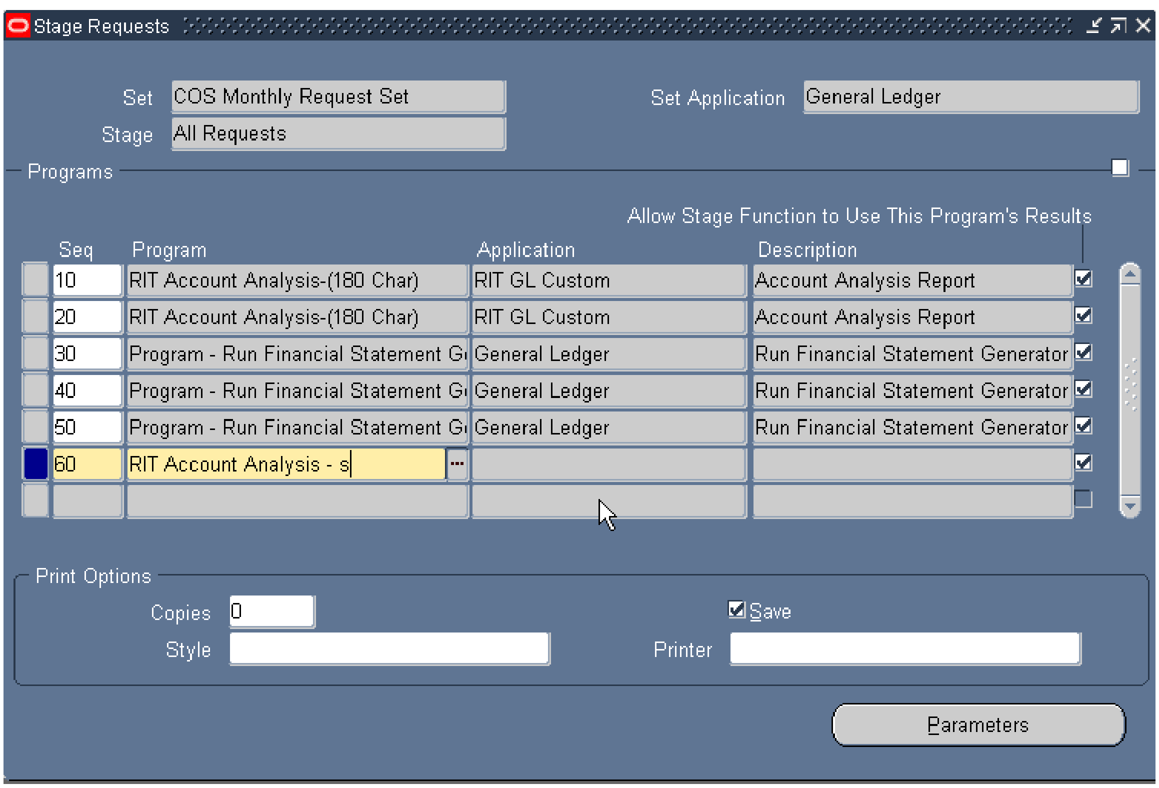

- In the “Request Set” screen, click on the “Define Stages” button.



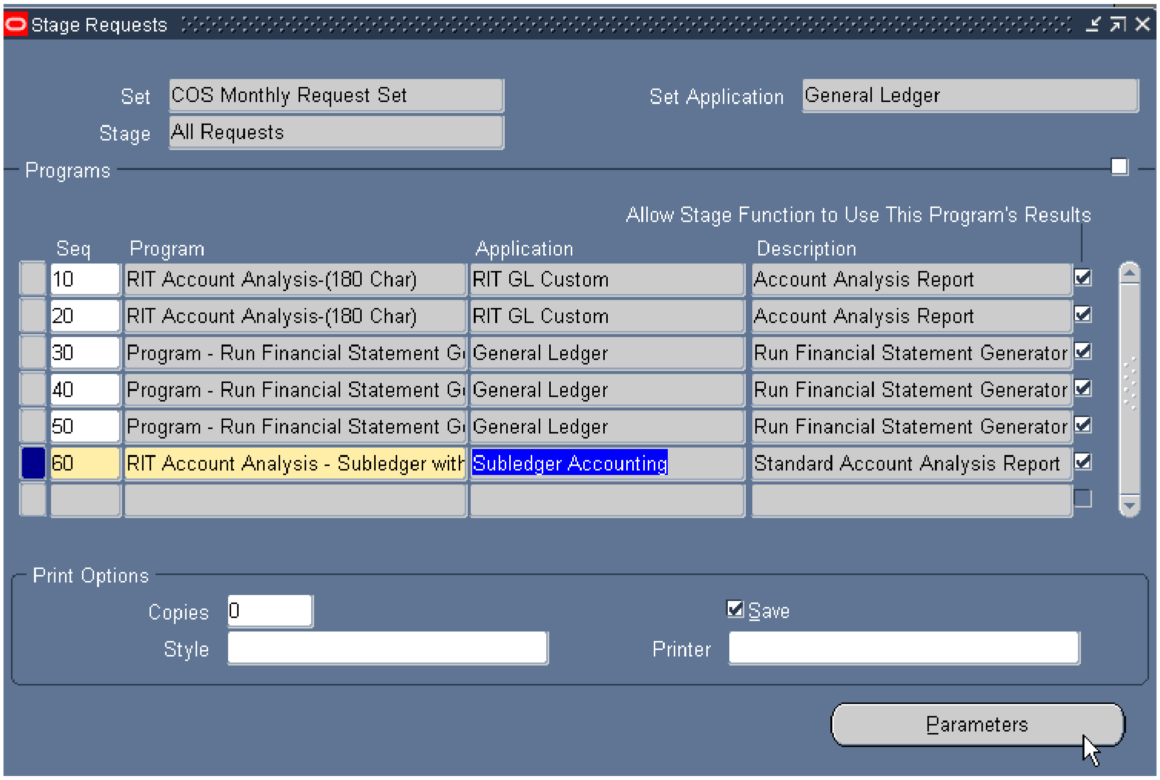
- In the “Stages” screen click on the “Requests” button to see the list of requests included in the Request Set.



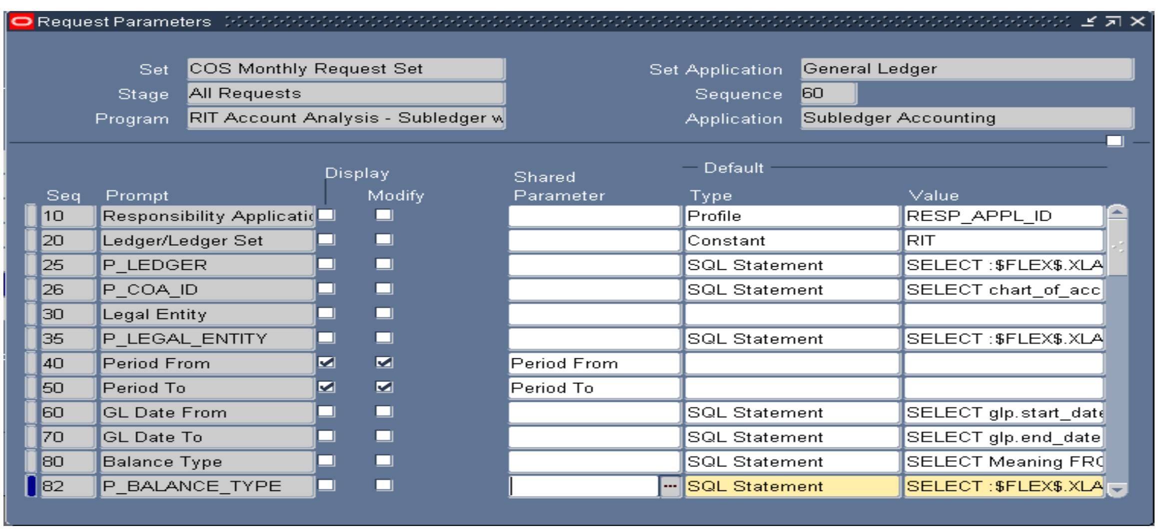

- In the “Stage Requests” screen enter the next sequence number in the next available row.
- Type “RIT Account Analysis – s” in the “Program” field and press the Tab key.



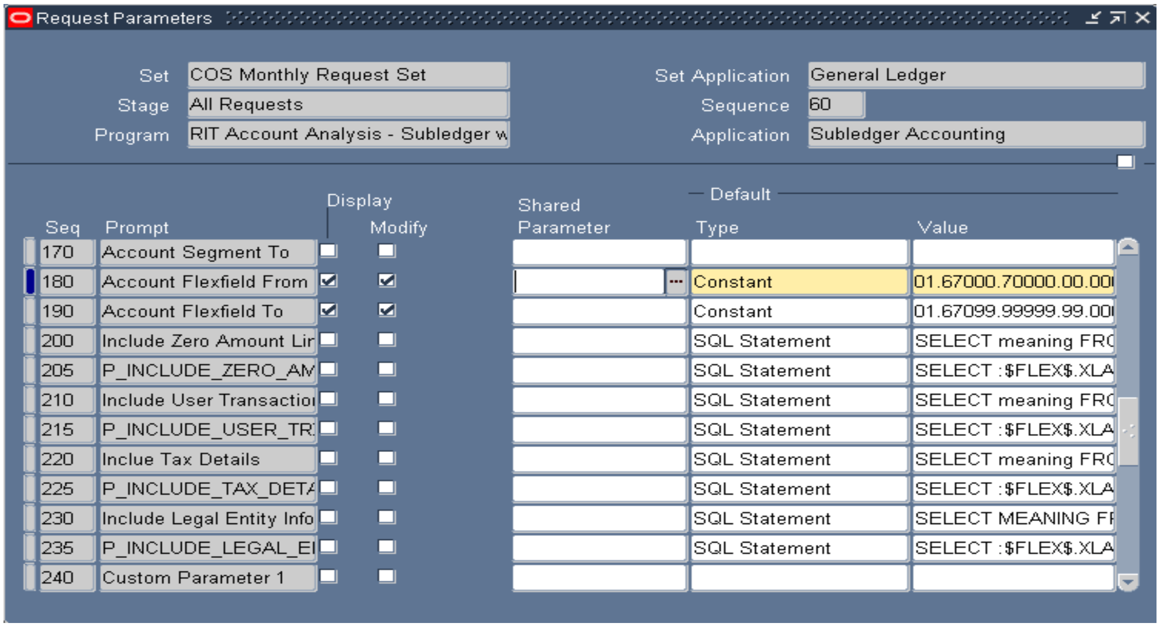
- The rest of the fields will automatically fill in. To enter the parameters for this report click on the "Parameters" button. The "Printer" field does not need to be filled in since this report cannot be printed from a network printer.




- 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.

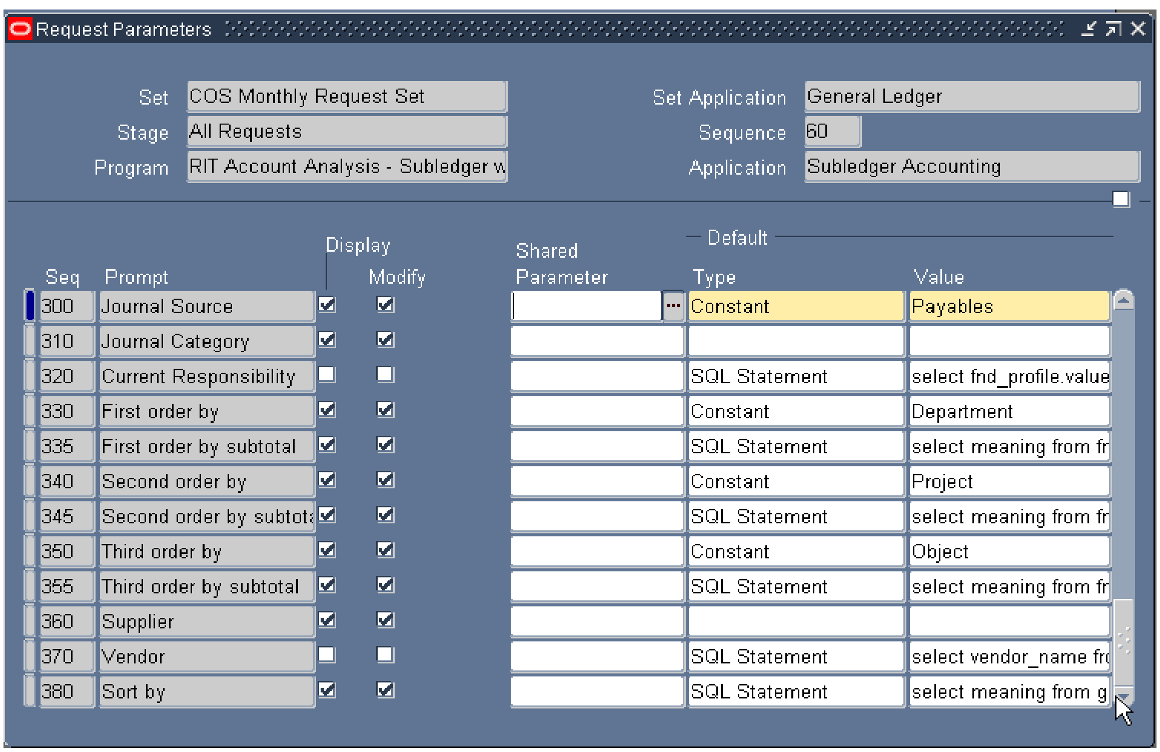


Request Parameters

| | | | |
|---|---|---|---|
| Set | COS Monthly Request Set | Set Application | General Ledger |
| Stage | All Requests | Sequence | 60 |
| Program | RIT Account Analysis - Subledger w | Application | Subledger Accounting |

| Seq | Prompt | Display | Modify | Shared Parameter | Default Type | Default Value |
|---|---|---|---|---|---|---|
| 170 | Account Segment To | ☐ | ☐ | | | |
| 180 | Account Flexfield From | ☑ | ☑ | | Constant | 01.67000.70000.00.00 |
| 190 | Account Flexfield To | ☑ | ☑ | | Constant | 01.67099.99999.99.00 |
| 200 | Include Zero Amount Lir | ☐ | ☐ | | SQL Statement | SELECT meaning FR |
| 205 | P_INCLUDE_ZERO_AM | ☐ | ☐ | | SQL Statement | SELECT :$FLEX$.XLA |
| 210 | Include User Transactio | ☐ | ☐ | | SQL Statement | SELECT meaning FR |
| 215 | P_INCLUDE_USER_TR | ☐ | ☐ | | SQL Statement | SELECT :$FLEX$.XLA |
| 220 | Inclue Tax Details | ☐ | ☐ | | SQL Statement | SELECT meaning FR |
| 225 | P_INCLUDE_TAX_DET | ☐ | ☐ | | SQL Statement | SELECT :$FLEX$.XLA |
| 230 | Include Legal Entity Info | ☐ | ☐ | | SQL Statement | SELECT MEANING F |
| 235 | P_INCLUDE_LEGAL_E | ☐ | ☐ | | SQL Statement | SELECT :$FLEX$.XLA |
| 240 | Custom Parameter 1 | ☐ | ☐ | | | |

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

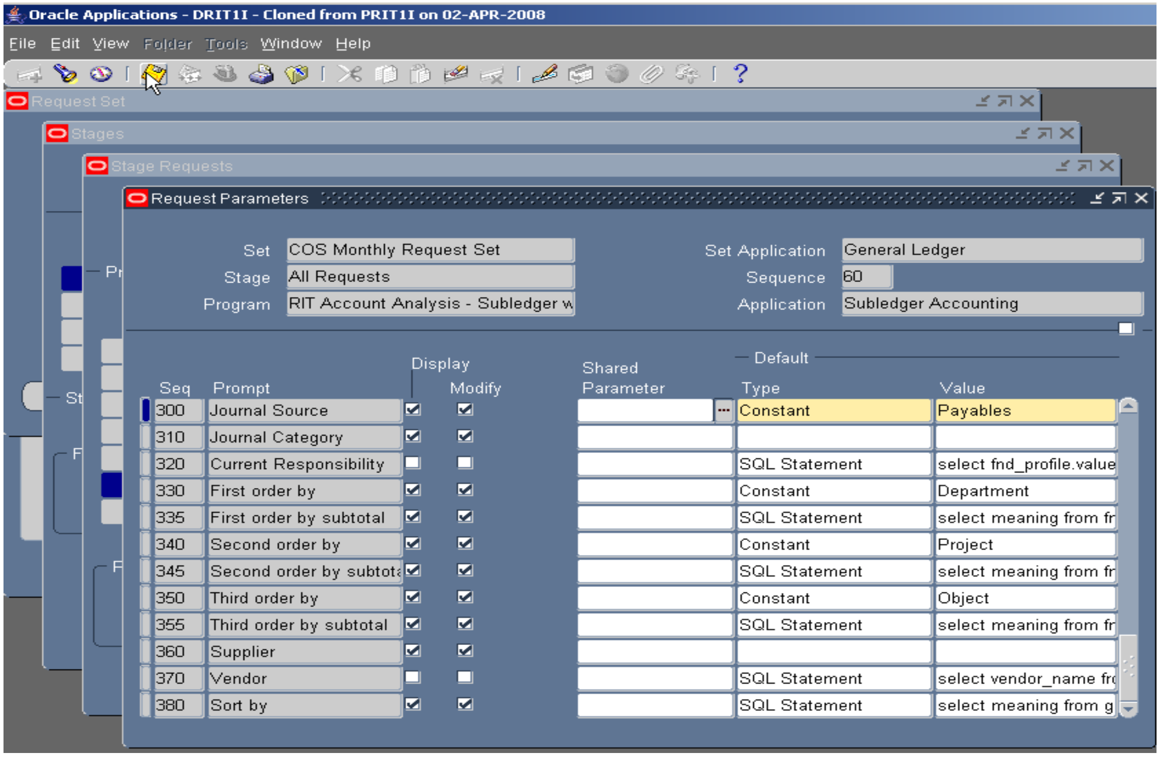


Request Parameters

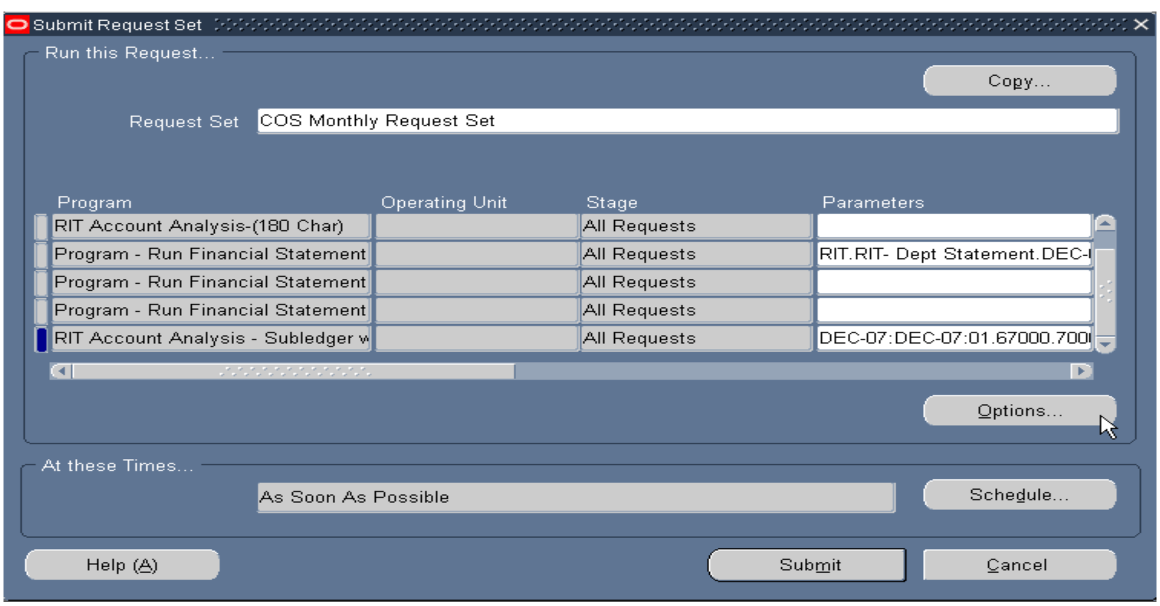
| | | | |
|---|---|---|---|
| Set | COS Monthly Request Set | Set Application | General Ledger |
| Stage | All Requests | Sequence | 60 |
| Program | RIT Account Analysis - Subledger w | Application | Subledger Accounting |

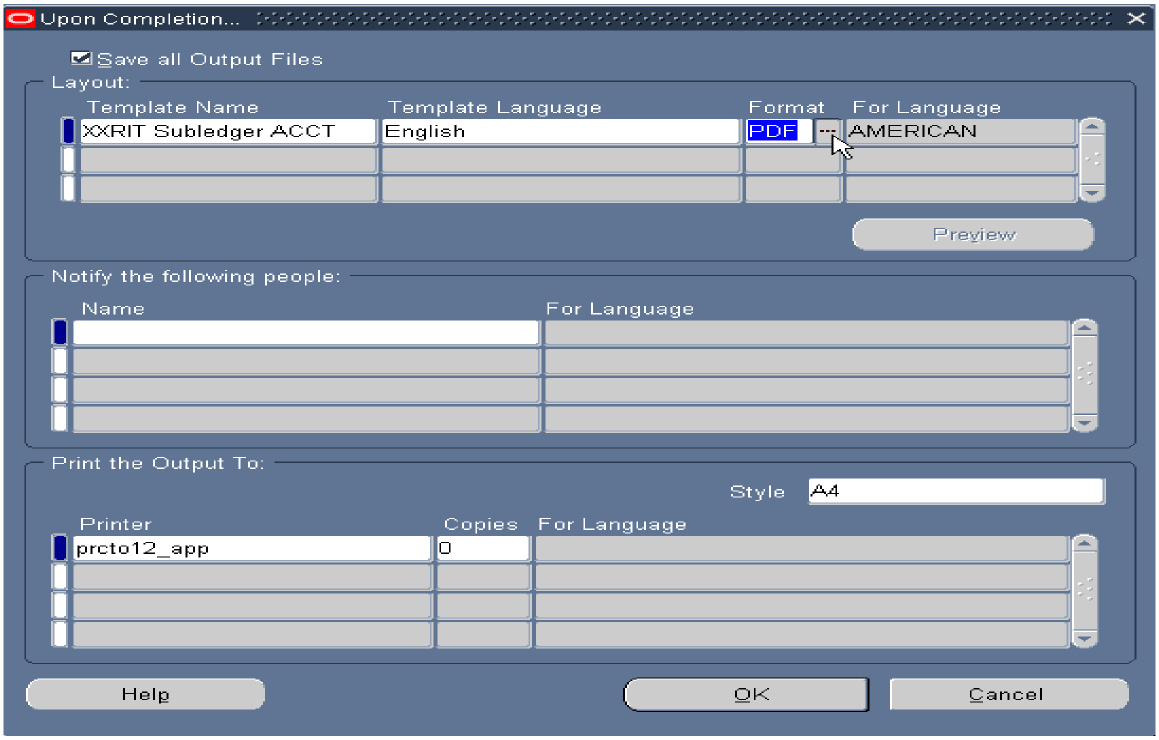
| Seq | Prompt | Display | Modify | Shared Parameter | Default Type | Default Value |
|---|---|---|---|---|---|---|
| 300 | Journal Source | ☑ | ☑ | | Constant | Payables |
| 310 | Journal Category | ☑ | ☑ | | | |
| 320 | Current Responsibility | ☐ | ☐ | | SQL Statement | select fnd_profile.value |
| 330 | First order by | ☑ | ☑ | | Constant | Department |
| 335 | First order by subtotal | ☑ | ☑ | | SQL Statement | select meaning from fr |
| 340 | Second order by | ☑ | ☑ | | Constant | Project |
| 345 | Second order by subtot | ☑ | ☑ | | SQL Statement | select meaning from fr |
| 350 | Third order by | ☑ | ☑ | | Constant | Object |
| 355 | Third order by subtotal | ☑ | ☑ | | SQL Statement | select meaning from fr |
| 360 | Supplier | ☑ | ☑ | | | |
| 370 | Vendor | ☐ | ☐ | | SQL Statement | select vendor_name fr |
| 380 | Sort by | ☑ | ☑ | | SQL Statement | select meaning from g |

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

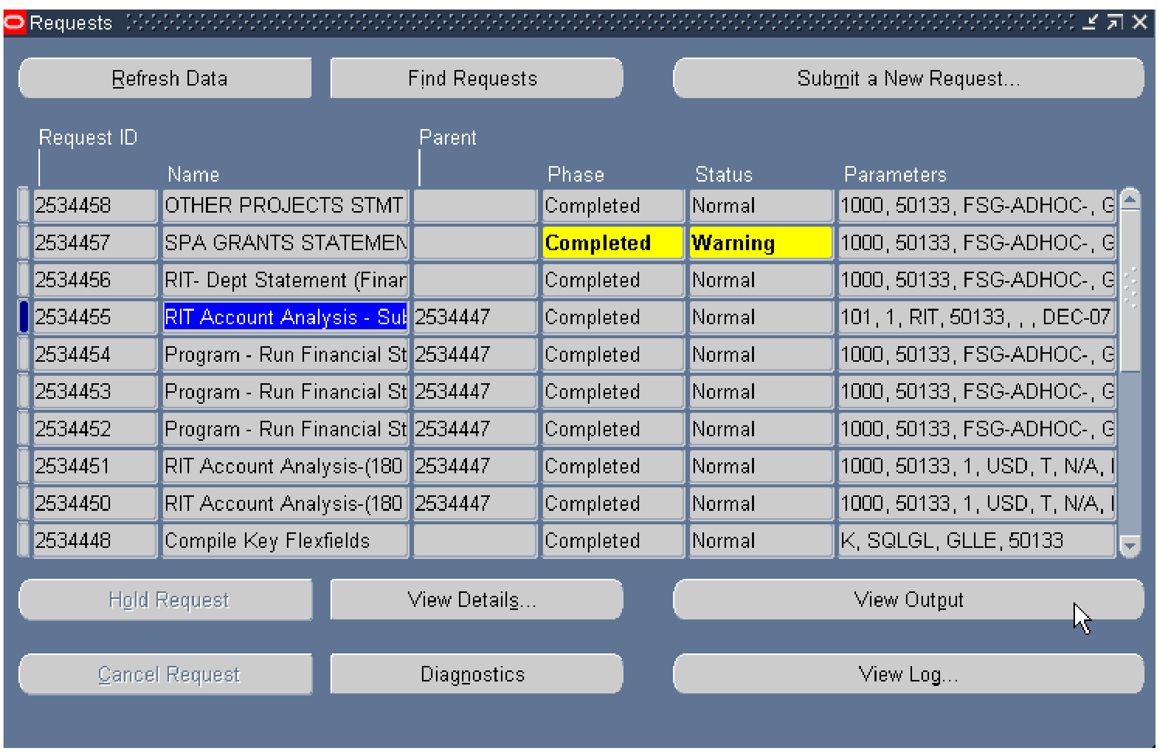



- You can now request your Request Set like you normally would.
- In the “Submit Request Set” screen click on the “Options” button to change the format of the report to HTML or Excel. The preferred output for printing is PDF which is the default. You don’t have to make any changes if you want to leave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

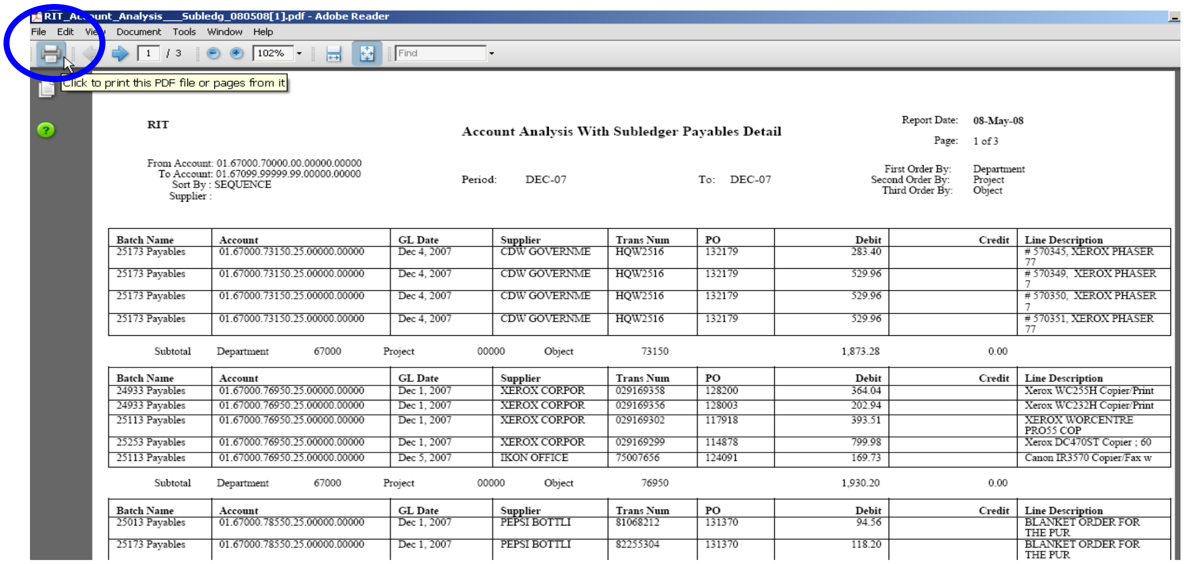




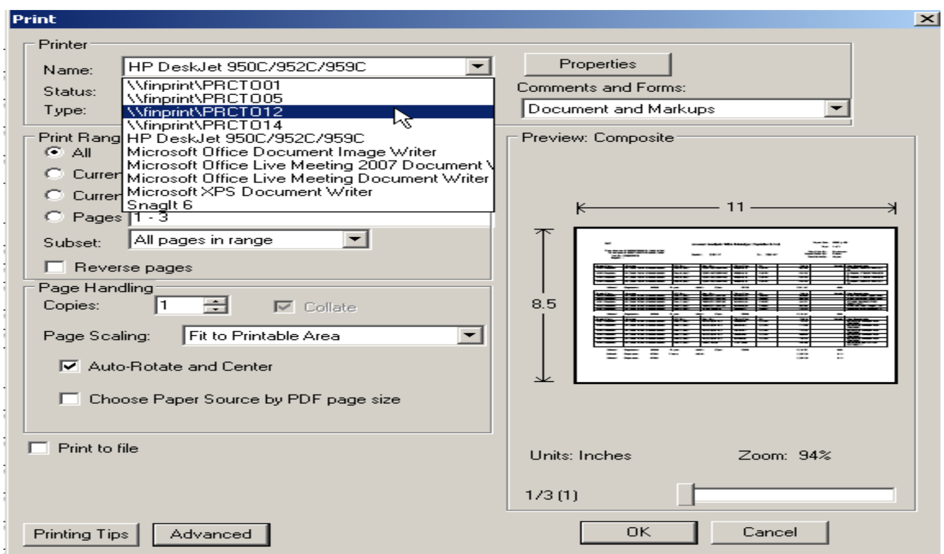

- Click on the Submit button, and open the View / Requests screen. Once the request completes click on the "View Output" button.



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




- Select a printer name and click the "OK" button.




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.