

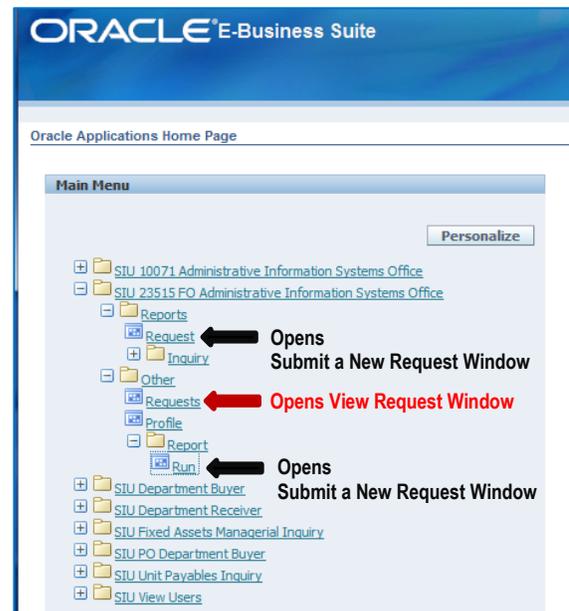
SIU Custom Reports

Note: This document introduces new functionality, as well as changes in existing functionality, that Fiscal Officers and Fiscal Officer delegates can expect to see, when submitting SIU Custom Reports using Oracle Release R12.

- The characteristics of the SIU Custom Reports are still the same; reports are prepared against tables of the prior month's frozen data.
- The following AIS Fiscal Officer reports are still available.
 - SIU FO Funds Available – Report of Transactions
 - SIUGL FO Summary Funds Available Report
 - SIUGL FO Encumbrance Status Report
 - SIU FO/Delegate Funds Available Report
 - SIUGL FO General Ledger Summary Report – Fiscal Officer
 - General Ledger Summary – Report of Transactions

Navigation

- From the Oracle Applications Home Page, you will select the SIU (NNNNN) FO (DEPARTMENT) responsibility.
 - In the screenshot on the right, we've expanded this responsibility to show all available functions; several relate to reporting.
- If you expand the *first* option, **Reports**, and select **Requests** then the application is launched and the *Submit a New Request Window* is opened.
 - You will use this option to Run a new report.
- If you expand the option, **Other**, and select the **Requests** function, then the application is launched and the *View Request* window is opened.
 - Recall the View Request window is used to find requests that are processing or completed.
- You can also drilldown selecting: **Other > Report > Run** to launch the application and submit a new request.



Submit a new Request Window

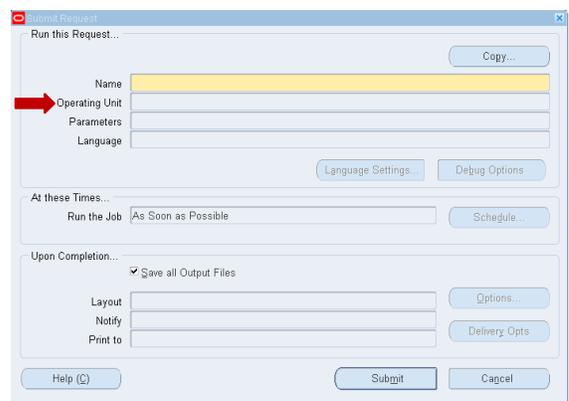
- No changes in Request Types; the majority of reports are Single Request.

Submit Request Window

- After you select the Request Type, the Submit Request Window opens, as before.

Run the Request... Region

- You will still select a report and enter Parameters.
- New in R12 is the **Operating Unit** field.
- The Operating Unit field is disabled for Fiscal Officer Inquiry & Reporting.
 - This field is enabled for specific responsibilities in the financials modules.
 - An Operating Unit is associated with a legal entity. Information is secured by an Operating Unit and each user sees information only for their Operating Unit.



- The screenshot on the right shows the Run this Request...region completed.

At these Times...

- There are no changes for Scheduling. Use the URL below to review eLearning **Unit 2: Navigation, Module 6: Running Reports**, if more detail is needed on how to scheduling a report.
<http://ais.siu.edu/elearning/11i/unit2/navigation.htm>

Upon Completion... Region

- You can still use the **Options** button to select a person to receive notification of a processed report.
- New to this region is the **Delivery Opts** button; clicking on this button opens the **Deliver to...** window.

Deliver to... Window

- This window contains four tabbed regions; the **Email** tabbed region is active; **IPP Printer, Fax** and **FTP** are not setup at this time.

Deliver to... Email

- In the screenshot on the right, we first clicked the **Email** tabbed region; then, clicked in the **From** field.
- When we clicked in the *From* field, that field and the **Subject** field populated automatically.
 - You can edit/ change the contents of the **Subject** field, if desired.
- Next, we populated the **To** and **CC** fields with email addresses of those to receive a copy of the report.
- To populate the **For Language** field, tab or click in this field to activate an LOV icon; use it to select **American English** from the two available options, **All languages** and **American English**.
- Selecting an action for the *For Language* field enables the second record row for entry.
- When all entries are complete, click **OK**.
- That actions returns you to the Submit Request window.
- As before, you will then click **Submit** to run the report.
- The Request window appears with the status of the request, Pending, Normal, etc.

Requests Window

- There are no changes to the Requests window.
- You will still need to click the Refresh button to update the status.

