Navigation

Oracle Navigation Step-by-Step Guide

How to Run a Report

February 4, 2021
FINAL

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Report Types Overview

Oracle Cloud has many reporting tools that can be used to provide report output (results) on all different types of data. Depending on your user role, you may have access to one or more of these tools.

- **Financial Reporting Center (FRC)** serves as the launchpad for delivered and custom reports for all modules in Oracle. You can search for any delivered report, or standard reports.

- **Business Intelligence Publisher (BI)** reports are used for high-volume, highly-formatted transaction-based reports and provides the details of current operational data for all modules.

- **Oracle Transactional Business Intelligence (OTBI)** reports are used for querying transactional data in all modules, and allows you to choose from a large array of reportable data objects within functional subject areas.

- **Financial Reporting Studio (FRS)** is used only for General Ledger, provides a summary of account balances, such as the trial balance, and allows the user to expand the chart of accounts values and drill down into the details. These results can be exported to Excel, PDF, Word, and PowerPoint.

- **Smart View** is used for Projects, General Ledger, and Planning and Budgeting. This reporting tool is unique because it allows you to view, import, manipulate distribute, and share data in different Microsoft interfaces.

UC Merced’s employees will use these steps to run reports dependent on the report type and the module.
Running Reports via Tools >> Scheduled Processes

UC Merced’s employees will use these steps to run a report using the Tools infolet and Scheduled Processes sub-infolet navigation path.

**Note:** the navigation steps for accessing reports will vary based on the module and the type of report being run. You can access the Reports and Analytics or the Scheduled Processes sub-infolets (functions) under the Tools infolet in the Navigator; in addition, some applications’ Overview page interface offers either or both access points.

To perform this task, log into Oracle Cloud

**System Steps:**
1. Click the Tools infolet
2. Click the Scheduled Processes sub-infolet
3. In the Overview page, click the Schedule New Process button
4. In the Schedule New Process pop-up window, enter the values for this process schedule example (*mandatory data fields are indicated by an asterisk):
   a. **Type:** select Job or Job Set based on process being scheduled
   b. **Name:** enter the report/process to schedule, or click the drop-down arrow to access the Search option if you are unsure of the report/process name

5. Click the **OK** button

6. In the Process Details pop-up window, enter the Basic Options Parameters for this process schedule example (*mandatory data fields are indicated by an asterisk):

   **Note:** the parameters will vary based on the report/process being scheduled

7. Click the **Submit** button
8. In the **Confirmation** pop-up window, click the **OK** button to acknowledge the process being submitted.

9. Back in the **Overview** page, click the **Refresh** icon to see the status of the report/process you just submitted.
10. Back in the **Overview** page, select the record of the report/process submitted to view your output by clicking the **Republish** button in the **Output & Delivery** section.

11. In the **BI Publisher** pop-up window, click the **Actions** icon to access the menu, then select **Export >> PDF** or the output format desired.

12. Follow the prompts to open or save the file, and then view the report results once opened in the specified format.
### Payables Cash Requirement Report

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<th>Supplier or Party</th>
<th>Invoice Number</th>
<th>Invoice Date</th>
<th>Unpaid Amount</th>
<th>Discount Available</th>
<th>Interest Due</th>
<th>Payment Amount</th>
<th>Pay Group</th>
<th>Validated</th>
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**Report Date:** 02/05/2021 11:41 AM

**Exercise:** How to Run a Report

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**Oracle Navigation Step-by-Step Guide**
Running Reports via Reports and Analytics

UC Merced’s employees will use these steps to run a report using the Reports and Analytics icon within a module’s Overview page.

To perform this task, log into Oracle Cloud

**Note:** the navigation steps for accessing reports will vary based on the module and the type of report being run. You can access the **Reports and Analytics** or the **Scheduled Processes** sub-infolets (functions) under the Tools infolet in the Navigator; in addition, some applications’ **Overview** page interface offers either or both access points.

**Note:** This example uses an Accounts Receivable report, and please remember the navigation steps for accessing reports will vary based on the module and the type of report being run.

**System Steps:**

1. Click the **Receivables** infolet
2. Click the **Billing** sub-infolet

3. Click the **Reports and Analytics** icon
4. Click the **UCM Invoice Register Report** hyperlink in the expanded **Shared Reports and Analytics** folder
5. Click the More icon to open the BI Dashboard

6. In the Oracle Transactional Business Intelligence (OTBI) Catalog page, click the Open hyperlink for the report you wish to run. In this example we run the UCM Invoice Register Report.
7. Enter parameters if desired and click the OK button to run the report

8. The Report results are displayed