Reporting available in Themis

Each Themis module contains reports that are specific to that module, with additional reporting options available via the Oracle Business Intelligence (OBI) function.

The reports to which you have access are defined by the Themis responsibilities you have (e.g.: UOM Data Entry enables you to run Financial reports, while UOM Training Administrator provides access to reports relating to the Themis Training module).

This information sheet will focus on the reporting options specific to the Themis Financials modules. For general information on reporting in Themis (e.g.: viewing request results, printing and reprinting report results, etc), refer to the Themis reporting information sheet.

Important: this information sheet contains technical information required to run reports/queries and access results. It does not contain details of the content of available reports or analytical details of the results retrieved.

- For advice on analysing report results refer to the training provided by Financial Operations (http://www.unimelb.edu.au/finops/resources/reports/index.html).

Submitting a request in Themis

Submit a request is the term used in Themis when you create/submit a report.

There navigation path for the Report/Request function will vary depending on the reports you wish to run. For example:

- Reports > Run provides access to a variety of financial reports including: Purchase Order Report; Incomplete Invoice Report; Internal Transactions Report.
- Receivables > AR Reports provides access to reports specific to Accounts Receivables including: Commitment Balance; Past Due Invoice Report; Customer Listing reports.
- General Ledger > General Ledger Reports provides access to general ledger reports including: Transaction Reports; Chart of Accounts Reports; Batch Reports.
- Inquiries - provides access to a number of inquiry screens including: GL Inquiries; Purchasing Inquiries; Payables Inquiries; Suppliers Inquiries.

Regardless of the navigation path you follow, the sections and fields that display on the Submit Request screen will be consistent.

To submit a request

1. Navigate to the Report/Requests function, select Single Request and click the OK button.
   The Submit Request screen will display.

2. In the Name field, select the report you wish to run from the List of Values.
   Alternatively, if you know the name of the report, you may type a portion of the report name and press Tab to display a list of reports beginning with the value you typed.

3. Enter the appropriate parameters for the selected report and click the OK button.
   Note: The parameters displayed will vary depending on the report you have selected. Compulsory fields will be highlighted in yellow.

4. Click on the Schedule and/or Options buttons and enter appropriate details, if required.
   Refer to the Themis Reporting information sheet for further details on scheduling reports to run automatically and completion options (e.g.: print copies, notification of completion, etc).

5. Click on the Submit button to run the report.
**Viewing your request results**

Once you have submitted your request/report, the view screen will display automatically. You may also navigate to this screen at any time if you wish during your Themis session to retrieve previous report results.

**To view your report results**

1. Select **View > Requests** from the Menu bar.
   The Find Request screen will display.

2. Ensure the **All My Requests** option is selected, and specify the number of days for which you wish to retrieve requests.
   **Note:** Themis will default to retrieve the last 7 days of your requests unless you specify otherwise.

3. Click on the **Find** button to retrieve the requests for the period specified.
   The Requests screen will display all reports you have run for the period specified and their status (e.g.: completed, etc.).

4. Select the report you would like to view, then click on the **View Output** button.
   The report results/output will display.

**Scheduling a Financial Systems Generator (FSG) report**

The request scheduling feature in Themis enables users with the **UOM Manager Department** responsibility to program FSG reports to run automatically outside of peak usage hours (i.e.: between 8pm and 6am nightly or alternatively, weekends where possible).

**To schedule an FSG request**

1. Log on to Themis and navigate to the Report/Requests function.
   The Submit a New Request screen will display.

2. Ensure the **Single Request** option is selected, and click the **OK** button.
   The Submit Request screen will display.

3. In the Name field, type **Program** and press the **Tab** key.
   This will display a list of reports beginning with **Program**.

4. Select the **Program - Run Financial Statement Generator** report.

5. Enter the appropriate parameters for the report and click the **OK** button.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report</td>
<td>Select the type of report you would like to run from the LOV.</td>
<td>e.g.: R20 - Budget Planning, RR1 - All Projects, etc.</td>
</tr>
<tr>
<td>Output Option</td>
<td>Specify the format you would like the results output in.</td>
<td>Select Text if you wish to print the report or Tab Delimited if you wish to export to Excel/Word.</td>
</tr>
<tr>
<td>Segment Override</td>
<td>You must specify either your Budget Unit or Faculty number in this field.</td>
<td></td>
</tr>
<tr>
<td>Period</td>
<td>This field will default and should not be changed.</td>
<td></td>
</tr>
</tbody>
</table>

7. Click on the **Schedule** button, located in the **At these Times** section.
   The Schedule screen will display. The default schedule will be **As Soon as Possible**.
8 Specify the report schedule required in the *Run the Job* section of the screen and click **OK**.

<table>
<thead>
<tr>
<th>Schedule option</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>Run the report one time only at the date/time specified.</td>
<td>• Ensure the date/time in the Run At field is outside peak hours.</td>
</tr>
</tbody>
</table>
| Periodically    | Schedule the report to repeat at selected intervals (e.g.: every 5 days, 1 week, or 1 month) from the nominated start date and time. | • Ensure the date/time in the Start At field is outside peak hours.  
   • Enter an end date/time in the End At field - do not leave this field blank as the report will run indefinitely.  
   • Specify the interval you wish the report to be re-run. |
| Specific        | Schedule the report to repeat on the day of the month specified (e.g.: 1st, 5th, last day, etc) or on the day of the week specified (e.g.: Monday, Thursday, etc). | • Ensure the date/time in the Start At field is outside peak hours.  
   • Enter an end date/time in the End At field - do not leave this field blank as the report will run indefinitely.  
   • Use the calendar to select the date or day you wish the report to run. |

- Tick the **Save this schedule** checkbox if you wish to make the report schedule re-useable for other reports. You will need to enter a Name and Description in the Save Schedule screen that displays.

9 Click on the **Submit** button to queue the report for the scheduled run time.

**Note:** if you wish to view the report output, navigate to the Requests screen (refer to *Viewing your request results* section above for further details).

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**Getting help**

The Themis website provides written support in a variety of formats. Please visit the [Finance Reports support page](https://bsm.app.unimelb.edu.au/) for the following documents:

- Reference cards (step-by-step instructions for specific tasks)
- Information sheets (overview of specific module, function or responsibility)
- Trouble-shooting and Frequently Asked Questions

**Themis Service Desk**

The Themis Service Desk team provides technical assistance from 9am to 5pm, Monday to Friday. You may lodge Themis queries:

- Online: [https://bsm.app.unimelb.edu.au/](https://bsm.app.unimelb.edu.au/)  
- By phone: 8344 9500

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**Further Information**

- [Running a Financial FSG report](#) reference card
- [Scheduling an FSG report](#) reference card