Themis reporting

Reporting available in Themis

Every Themis module contains reports that are specific to that module. Additional reporting options are available via the Discoverer Reporting 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).

Submitting a request in Themis

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

The navigation path for the Report/Request function will vary depending on the responsibility you have selected. For example: if you log in via the UOM Data Entry responsibility you can select **Reports > Run,** where as if you log in via UOM Training Administrator you can select **Processes and Reports > Submit Reports**. In addition, the submit requests function may be accessed via an individual function (such as the **General Ledger Reports** function within Themis Financials).

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

To submit a 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, 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 (e.g.: if you type *UOM* and press **Tab**, all reports beginning with *UOM* will display).

4 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.

5 Click on the **Schedule** and/or **Options** buttons and enter appropriate details, if required.

Refer to the *Scheduling a request* section below for further details on scheduling reports to run automatically and completion options (e.g.: print copies, notification of completion, etc).

6 Click on the **Submit** button to run the report.

The View Request screen will display automatically to show the progress of your request.

- Click on the **Refresh Data** button to update the progress of your report.

Refer to *Viewing your request results* section below for details on viewing the report output.

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.

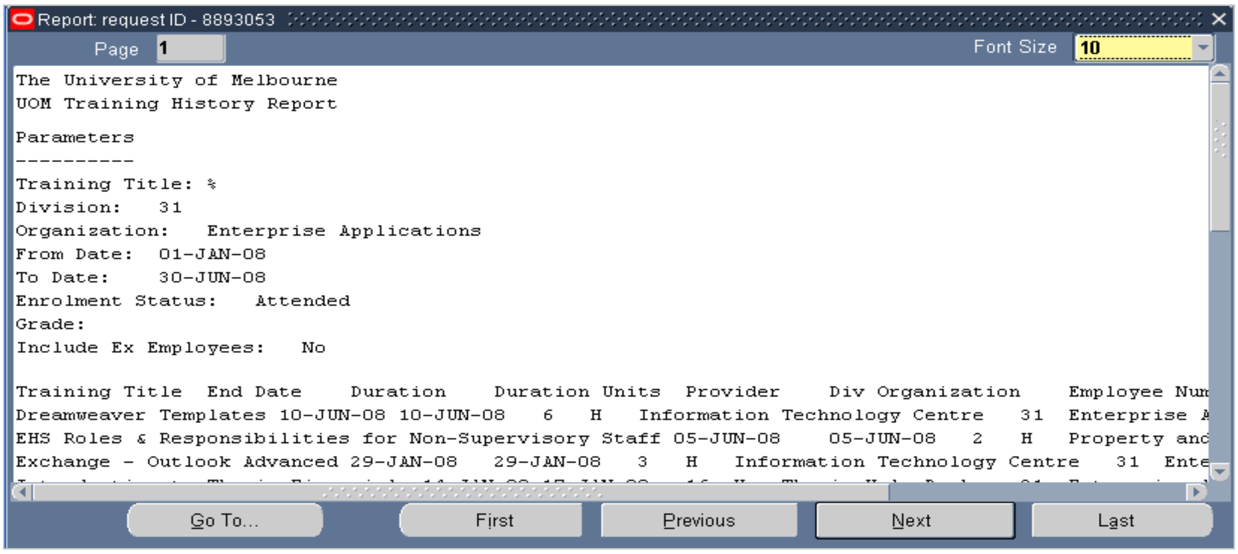
Note: Themis will default to retrieve the last 7 days of your requests unless you specify otherwise.

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.



Note: only one results page will display at a time:

- Use the scroll bars located on the right and bottom of the screen to scroll through the information displayed in the active page.
- Use the buttons located at the bottom of the screen to progress through the available pages (e.g.: **Next**, **Previous**, **Last**, etc).

Printing your request results

The report/request results will print to your default Themis printer automatically if you have set your **Concurrent Report Copies** to *1* in your Themis profile/preferences.

However, if you have set your print preference to *0* you will need to print the results manually. Refer to the *Reprinting your request results* section below for further details.

Exporting your request results

All report/request results and data in Themis may be exported to Excel.

1 Navigate to your report results/output screen.

Refer to steps 1 to 4 in the *Viewing your request results* section above for further details.

2 Select **Tools > Copy File** from the Menu bar.

3 Ensure *MS Excel* format is specified and click the **OK** button.

A File Download dialog box will display, asking whether you wish to Open or Save the results.

4 Select **Open** to view the report/request results in an Excel worksheet.

Reprinting your request results

If your print preferences are set to *0*, or you wish to print an additional copy of your report results, you can use the **Reprint** function in Themis.

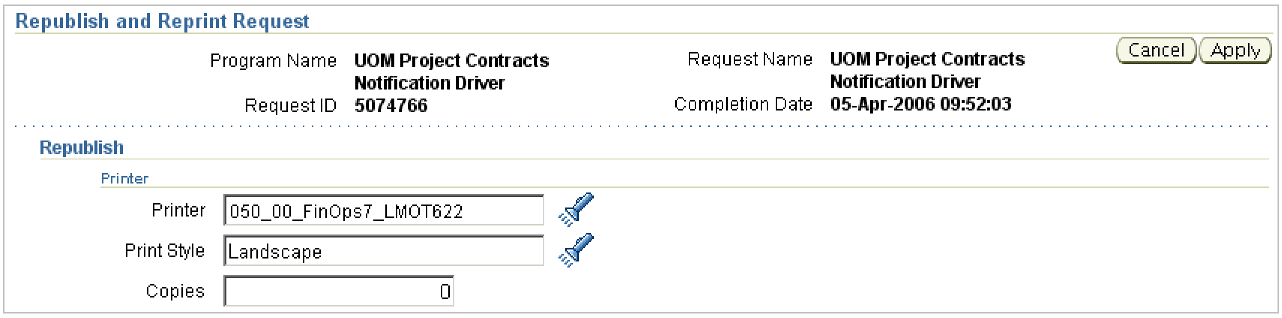
To reprint your report results

1 Navigate to the Requests screen and click on the report you wish to reprint.

Refer to steps 1 to 3 in the *Viewing your request results* section above for further details.

2 Select **Tools > Reprint/Republish** from the Menu bar.

A Republish and Reprint screen will display.

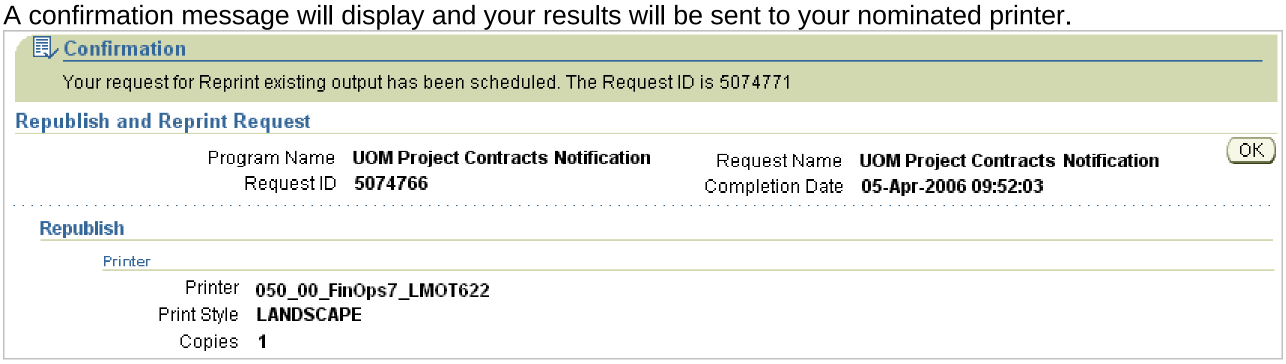


3 Check the printer and number of copies, and update them if required.

Note: these fields will default from your profile settings. If you need to enter or update your printer, click on the **torch** icon to search for and select the appropriate printer from the list of values.

4 Click on the **Apply** button.

A confirmation message will display and your results will be sent to your nominated printer.



5 Click **OK** to close this message.

Resubmitting a request

The **Copy** function in the Submit Request screen enables you to resubmit a report you have previously run.

To resubmit a 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 Click on the **Copy** button located at the top left of the screen.

A list of reports you have previously submitted will display.

4 Select the report you wish to re-run, and click the **OK** button.

The Submit Request screen will populate with the name and parameter details of the report selected.

5 Click in the Parameters field and make any changes, if necessary.

6 Enter any scheduling or output details if required, then click the **Submit** button to run the report.

Refer to the *Scheduling a request* section below for further details.

Scheduling a request

The request scheduling feature in Themis allows you to program reports to run automatically when required (e.g.: weekly, monthly, every Tuesday, on the last day of the month, etc). **Important:** when scheduling a report to run automatically, you should only schedule them to run outside of peak usage hours (i.e.: between 8pm and 6am nightly or alternatively, on weekends where possible).

To schedule a 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, select the report you wish to schedule.

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 (e.g.: if you type *UOM* and press **Tab**, all reports beginning with *UOM* will display).

4 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.

5 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*.

6 Specify the report schedule required in the *Run the Job* section of the screen and click **OK**.

Schedule option	Action	Comment
Once	Run the report one time only at the date/time specified.	• Ensure the date/time in the *Run At* field is outside peak hours.
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.

7 Click on the **Options** button, located in the *Upon Completion* section and set your output options.

Field	Action	Comment
Name	Enter your name if you would like to receive a Worklist Notification when the report has been run.	
Printer	Select your Themis printer from the List of Values.	This field will default from your profile settings but may be updated if required.
Copies	Enter *1* if you would like a hardcopy of your report to print automatically.	

8 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.

Using the Discoverer reporting functions in Themis

The Themis Discoverer reporting functions provide users with access to detailed Financial, Human Resources and Research reports for their department/organisation unit. The data is presented in a report format which may then be manipulated, printed or exported.

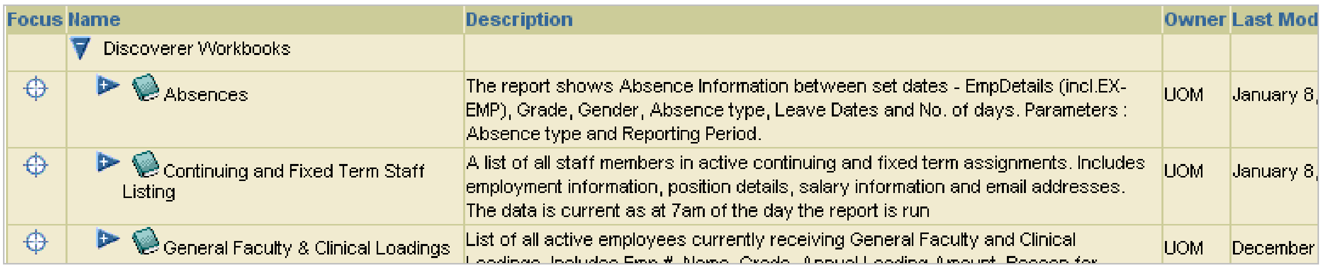
Access to Discoverer reporting is available through a number of different responsibilities:

- UOM Department (& Below) – Human Resources Discoverer reports
- UOM Agreements Discoverer Reports – Research (Agreement) Discoverer reports
- UOM Disco Repts FAC – Finance Discoverer reports

To run a report

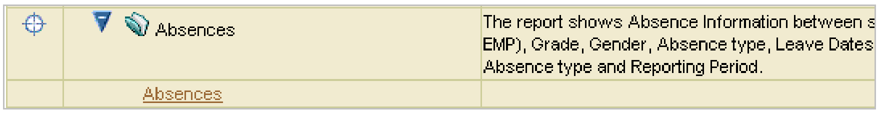
1 Log on to Themis via the appropriate responsibility and navigate to the **Discoverer Reports** functions.

A list of available reports will display. The example below is taken from the HR Discoverer Reporting function.



Focus	Name	Description	Owner	Last Mod
	Discoverer Workbooks			
	Absences	The report shows Absence Information between set dates - EmpDetails (incl.EX-EMP), Grade, Gender, Absence type, Leave Dates and No. of days. Parameters : Absence type and Reporting Period.	UOM	January 8,
	Continuing and Fixed Term Staff Listing	A list of all staff members in active continuing and fixed term assignments. Includes employment information, position details, salary information and email addresses. The data is current as at 7am of the day the report is run	UOM	January 8,
	General Faculty & Clinical Loadings	List of all active employees currently receiving General Faculty and Clinical	UOM	December

2 Select the report you wish to run then click on the **Expand** icon ( ) to display the available worksheets.



3 Click on the worksheet name hyperlink (e.g.: Absences) to run the query.

Depending on the report selected, it will either commence running automatically (e.g.: *Continuing and Fixed Term Staff Listing*) or will require you to specify report parameters (e.g.: *Increment Details Report*).

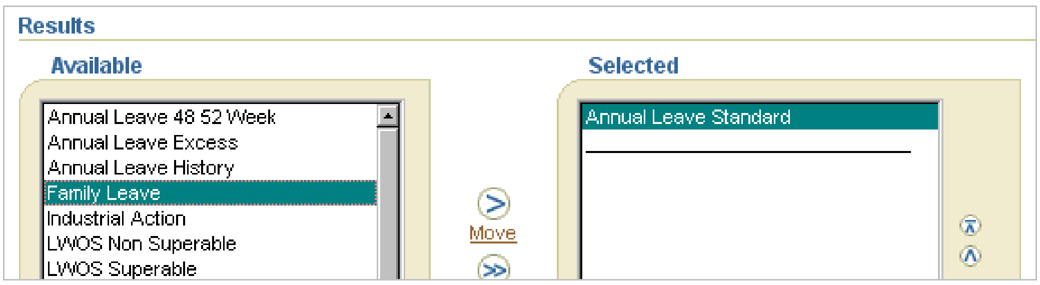
If report parameters are required

Where parameters are required the report parameters screen will display. **Note:** the parameters displayed are dependent on the report selected. Compulsory parameters are indicated by an *.

4 Specify your report parameters.

Many of the search parameters allow you to select from a pre-defined list of values.

- To select from the list of values, click on the **Torch** icon. The Search and Select screen for the field will display.
- Select the appropriate value/s then click on the **Select** button to close the screen and return to the report parameters.



5 Click on the **Go** button to run the report.

The Query Progress screen will automatically update the progress of the report selected. Once the report has completed the results will display.

You may manipulate the report results within the Discoverer function (e.g.: reorder columns, use the Page Items to group results, sort the results, etc) or export the results to Excel to manipulate.
For further details on running reports and manipulating or exporting results, refer to the appropriate Discoverer Reporting reference cards available on the Themis website.