

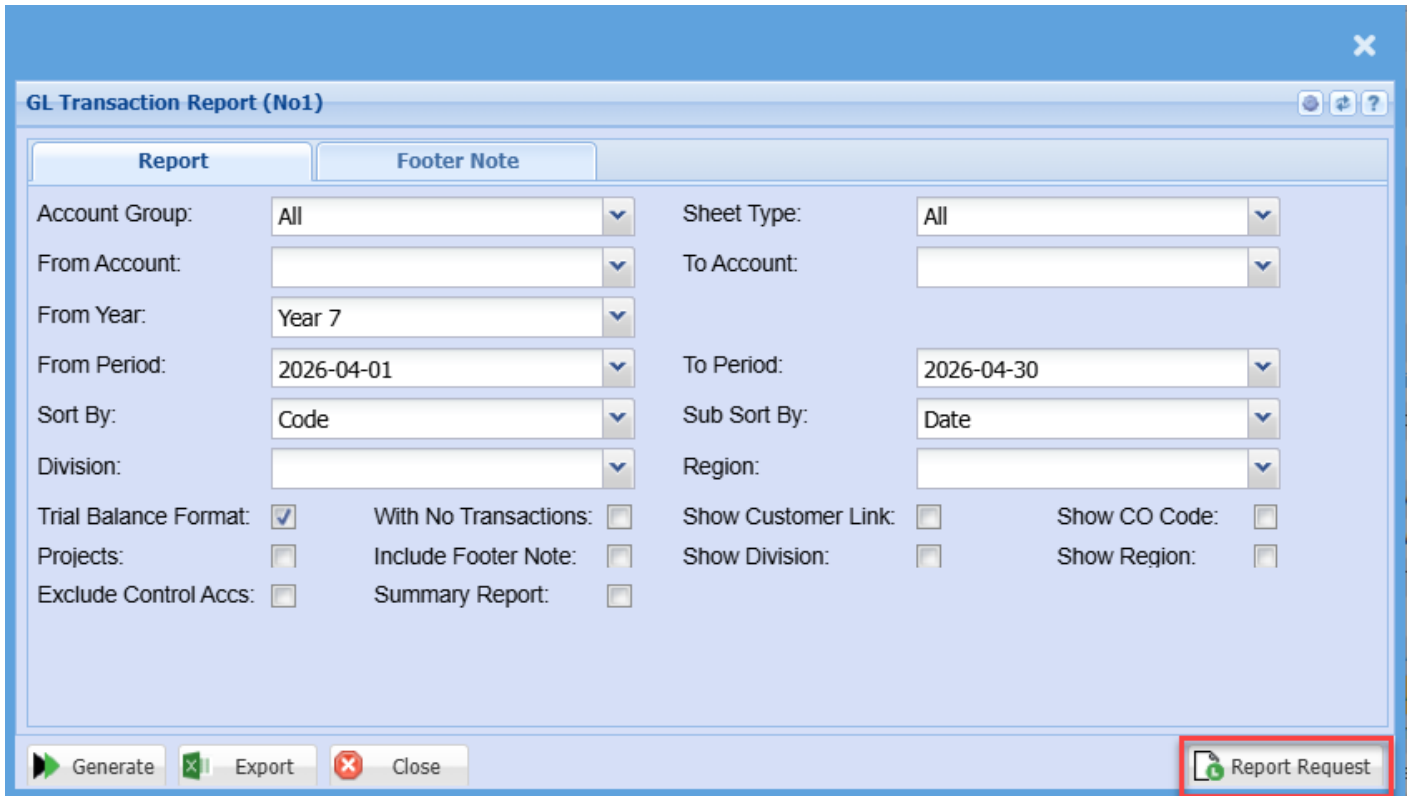
# Report Request

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# Report Request Button

Report request button allows you to schedule large reports to be run either in the evening or early morning and you can also share this with other users.

The output of the report is either in Excel and or PDF.



The screenshot shows a software window titled "GL Transaction Report (No1)". It has a blue header bar with a close button (X) and three small icons (refresh, print, help). Below the header, there are two tabs: "Report" (selected) and "Footer Note". The main area contains various configuration options for the report:

- Account Group: All (dropdown)
- From Account: (empty dropdown)
- From Year: Year 7 (dropdown)
- From Period: 2026-04-01 (dropdown)
- Sort By: Code (dropdown)
- Division: (empty dropdown)
- Sheet Type: All (dropdown)
- To Account: (empty dropdown)
- To Period: 2026-04-30 (dropdown)
- Sub Sort By: Date (dropdown)
- Region: (empty dropdown)
- Trial Balance Format: ☒ (checkbox)
- With No Transactions: ☐ (checkbox)
- Show Customer Link: ☐ (checkbox)
- Show CO Code: ☐ (checkbox)
- Projects: ☐ (checkbox)
- Include Footer Note: ☐ (checkbox)
- Show Division: ☐ (checkbox)
- Show Region: ☐ (checkbox)
- Exclude Control Accs: ☐ (checkbox)
- Summary Report: ☐ (checkbox)

At the bottom, there are four buttons: "Generate" (with a play icon), "Export" (with an Excel icon), "Close" (with a red X icon), and "Report Request" (with a document icon and a green circle, highlighted with a red rectangle).

When clicking on the Report Request button this screen will appear

x

Report Date: 2026-04-20

Report Time: 13:40

Include PDF: ☐ Landscape: ☐

Available

| #  | Employee Name     |
|----|-------------------|
| 1  | Acck Support      |
| 2  |                   |
| 3  |                   |
| 4  | Andrew Skene      |
| 5  |                   |
| 6  |                   |
| 7  |                   |
| 8  |                   |
| 9  |                   |
| 10 |                   |
| 11 | Gerrit van Rooyen |
| 12 |                   |

Selected

| Page 0 of 0 |               |
|-------------|---------------|
| #           | Employee Name |
|             |               |

 Close

# Report Request List

The report request is only uncertain reports. It is mainly on reports that take long to run if there is a massive amount of data .

The current reports are as follows:

1. General Ledger transaction report number one
2. Sales monthly group report
3. Customers debtors transaction report
4. Suppliers creditors transaction report
5. Weekly debt movement summary

System Configurati... ◀



Administration +

General +

General Ledger Lin... +

Security +

Reports -

User Access Report

Report List

Dashboard Display

Report Request

Document Management

Management Reports

Search Open Printing Status Permissions Manage Reports ▾

Category: Favourites Description:

Note:

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| # | Category       | Description                  | Note                                                           | Tag Code | Modified | Favourite                           |
|---|----------------|------------------------------|----------------------------------------------------------------|----------|----------|-------------------------------------|
| 1 | Creditors      | Transactions report          | Full transactional history of all postings done within Cr...   | CM37     |          | <input checked="" type="checkbox"/> |
| 2 | Debtors        | Sales Monthly Group Report   | Report shows sales monthly grouped by Groups and t...          | DM193    |          | <input checked="" type="checkbox"/> |
| 3 | Debtors        | Transactions Report          | Full transactional history of all postings in Debtors wit...   | DM36     |          | <input checked="" type="checkbox"/> |
| 4 | Debtors        | Weekly Debt Movement Summary | Shows a summary and detail movement of transaction...          | DM157    |          | <input checked="" type="checkbox"/> |
| 5 | General Ledger | GL Transaction Report (No1)  | Full transactional history of all postings in all ledger ac... | GL115    |          | <input checked="" type="checkbox"/> |

# Report Request Security Setup

To view the report request menu item, go to **system configuration > security > roll permissions**.

Find the module that you want the report request to be accessed. It is under a report list only.

The screenshot displays the 'SCM Role Permission' configuration window. On the left, a sidebar menu shows 'System Configuration' with sub-items: Administration, General, General Ledger..., Security, API Setup, Favourites Maintenance, Role Permissions (highlighted with a red box), Report Security, System Utilities, History Import, Approval Levels, and Dashboard Setup. The main area is titled 'SCM Role Permission' and includes buttons for 'Add Role', 'Edit Role', and 'Delete'. Below these are dropdowns for 'Module' (General Ledger) and 'Security Role' (Full Access General Ledger). A tabbed interface shows 'Menu Group', 'Menu Item' (highlighted with a red box), and 'Tab Permission'. Under the 'Menu Item' tab, a 'Menu Group' dropdown is set to 'Reports'. Below this, there are two tables: 'Available' and 'Selected'. The 'Available' table is empty with a message 'No data to display'. The 'Selected' table lists items with their IDs and descriptions. Item 7, 'Report Request', is highlighted with a red box.

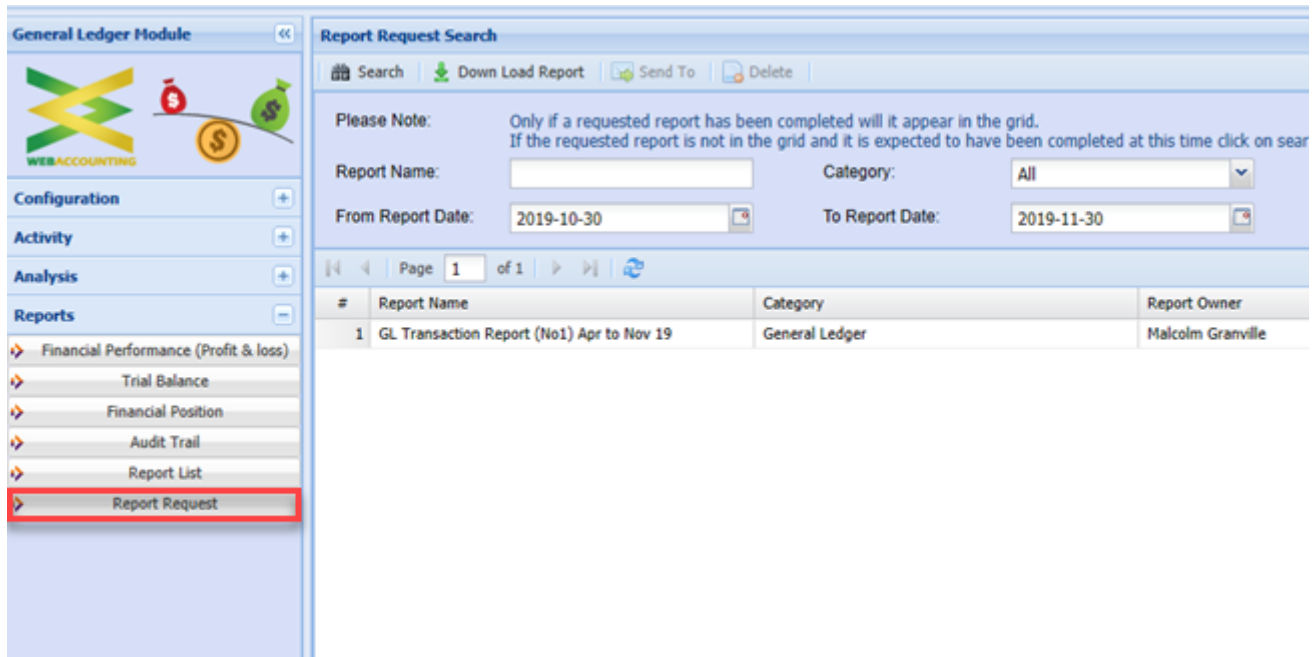
| # | Description           |
|---|-----------------------|
| 1 | Financial Performance |
| 2 | Trial Balance         |
| 3 | Financial Position    |
| 4 | Audit Trail           |
| 5 | Report List           |
| 6 | Dashboard Display     |
| 7 | Report Request        |

# Report Request Download

To access the report request after you have set up your security.

After you click on the menu item report request, search for the report that you had generated and then click on the download report button.

This will give you an area that allows you to download the report to your computer.



The screenshot displays the 'General Ledger Module' interface. On the left is a navigation menu with options: Configuration, Activity, Analysis, and Reports. The 'Reports' section is expanded, showing a list of report types: Financial Performance (Profit & loss), Trial Balance, Financial Position, Audit Trail, Report List, and Report Request. The 'Report Request' item is highlighted with a red border. The main area is titled 'Report Request Search' and contains a search bar with icons for Search, Download Report, Send To, and Delete. Below the search bar is a 'Please Note' section with instructions. The search criteria include Report Name, Category (set to All), From Report Date (2019-10-30), and To Report Date (2019-11-30). A table below shows the search results, with one entry: 'GL Transaction Report (No1) Apr to Nov 19' under the 'General Ledger' category, owned by 'Malcolm Granville'.

**General Ledger Module**

**Report Request Search**

Search Download Report Send To Delete

Please Note: Only if a requested report has been completed will it appear in the grid. If the requested report is not in the grid and it is expected to have been completed at this time click on search.

Report Name: Category: All

From Report Date: 2019-10-30 To Report Date: 2019-11-30

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| # | Report Name                               | Category       | Report Owner      |
|---|-------------------------------------------|----------------|-------------------|
| 1 | GL Transaction Report (No1) Apr to Nov 19 | General Ledger | Malcolm Granville |