Using Oracle EPMS To Access Banner Revenue Budget Reports On the Web Training

2011-2012

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Banner Revenue Budget Reports using Hyperion on the Web

In an effort to assist financial managers reconcile their revenue posted to SAP-FI, the Budget Office has placed an array of Banner revenue budget reports, using Hyperion, on the web. These reports can be accessed on-demand. In addition, the reports are user friendly and easy to run.

In order to access Hyperion on the web, a user must have a Banner/Oracle user ID and password. ***If you need to request user ID's and passwords, please contact the help desk at extension 2371.***

The Hyperion Link

In order to make your access to Hyperion easier, we recommend that you create a link to Hyperion on the web in your favorites folder. The Hyperion link is https://mureporting.millersville.edu/workspace/index.jsp. ***You must be on campus to login to Hyperion on the web.***
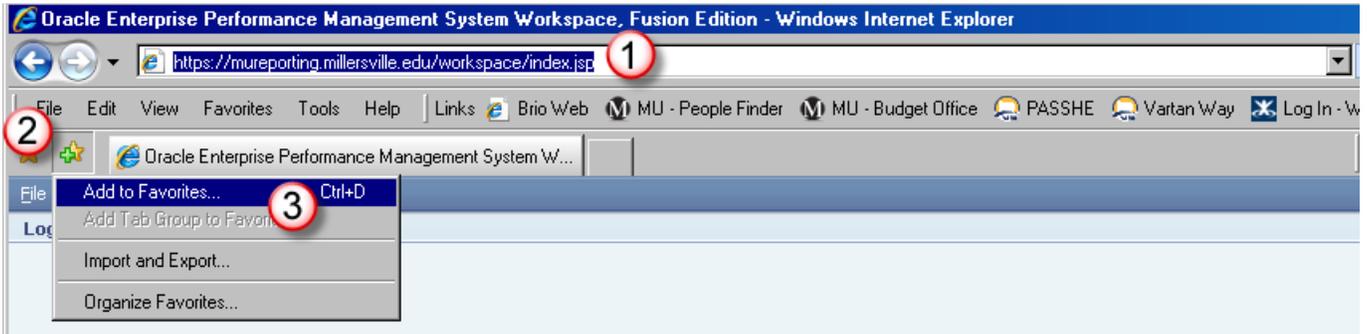
Accessing SAP Budget Reports using Hyperion on the web

- Access Hyperion on the web using the link above. (You must be on campus for the link to work!)
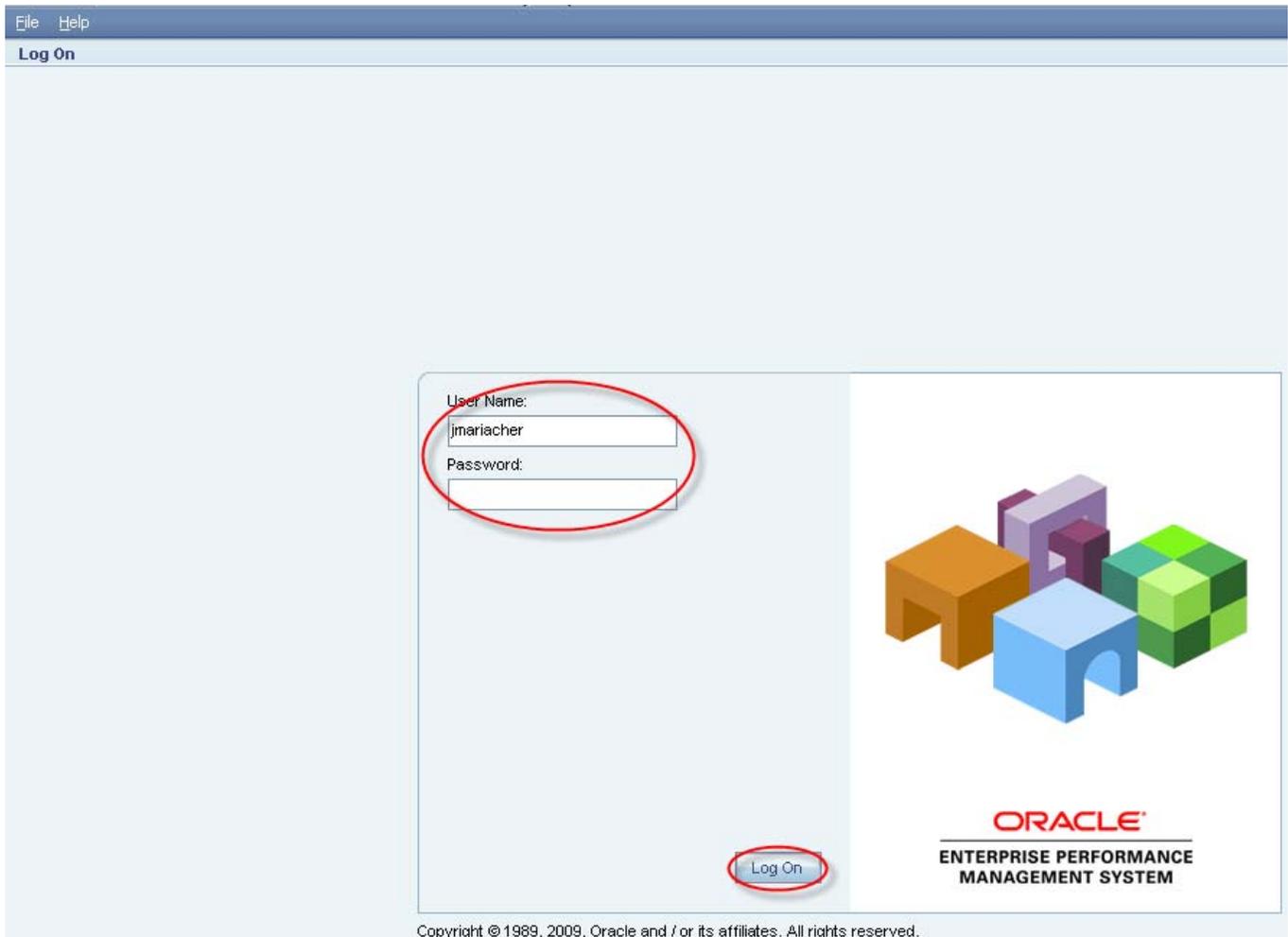
File Help

Log On

User Name:

jmariacher

Password:

Log On

ORACLE®

ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

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- Enter your **Banner/Oracle UserID and Password**

- Click Log On

- This will bring up the main screen.

- Click Explore
- Open Banner Queries in the Root folder
- Click on the Budget Reports Folder
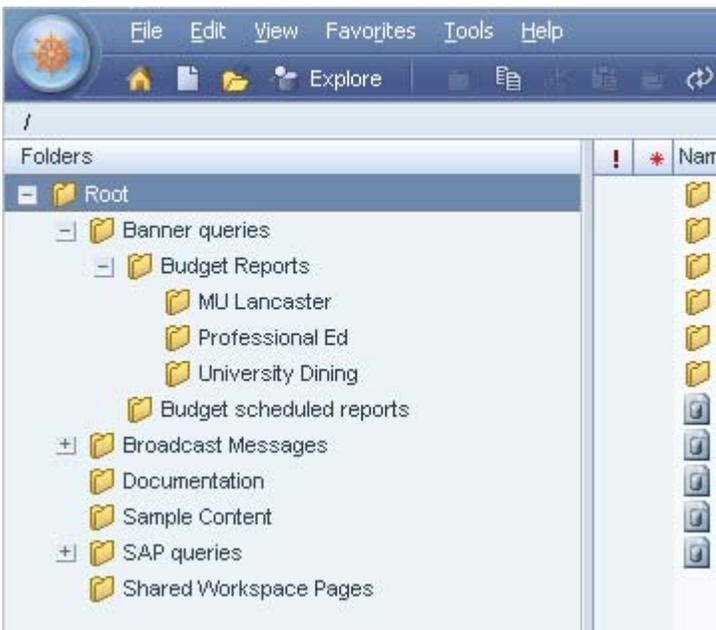
- Select the appropriate folder for your department.
- Inside the folder you will find two revenue reports
  - Invoiced Revenue
  - ROC Revenue (Report of Collection)

- Double click on requested report

- Click Process. This will be on the gray toolbar of each of the reports.
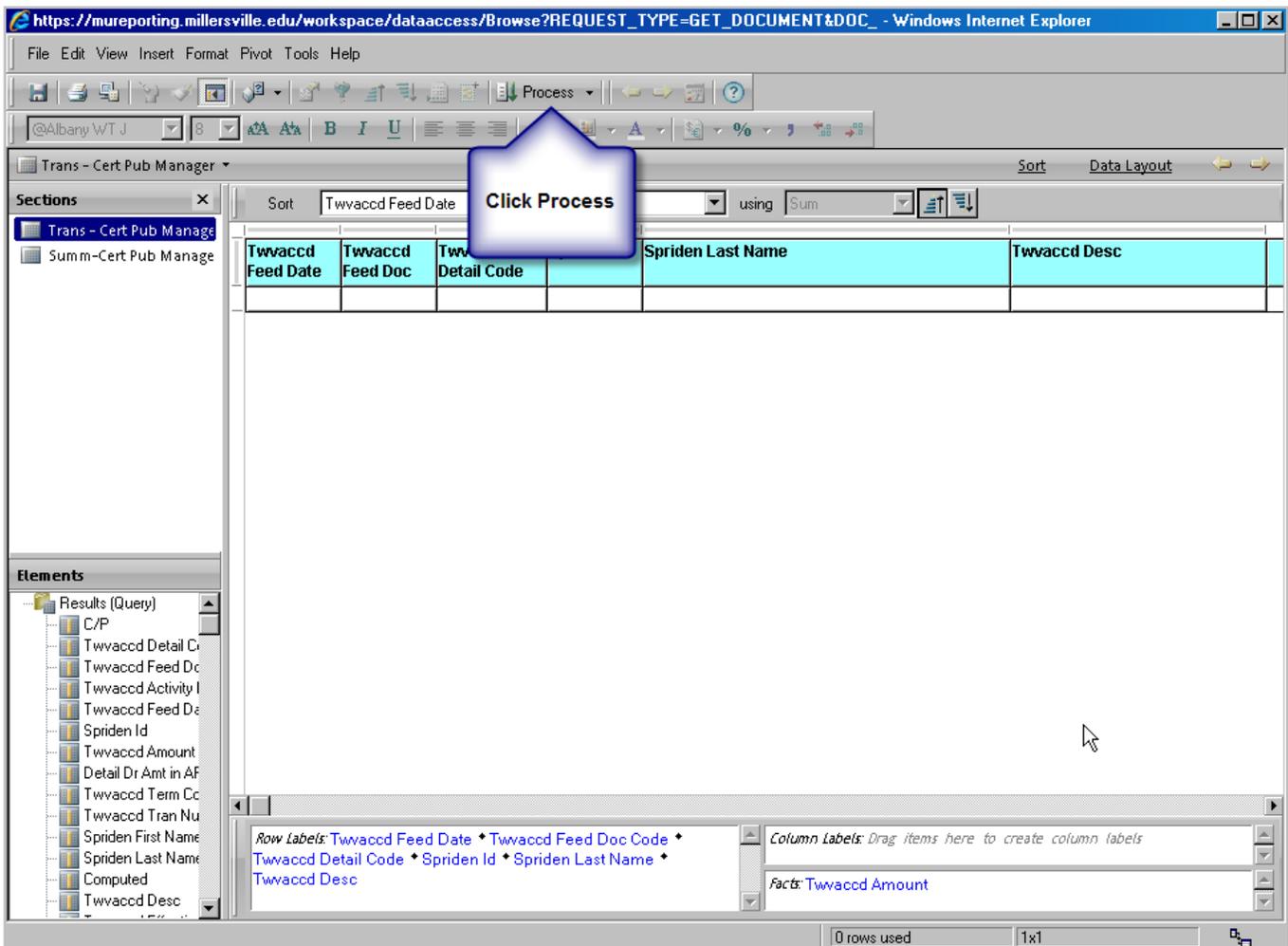
- Enter the Banner username and password to connect to server.

- Click OK
- Choose the data as requested – Select 7/1/yyyy – Hold your Ctrl key – Select 6/30/yyyy
- Click OK

Hyperion Navigation

- Print Preview
    - Recommended before printing to ensure margins and orientation are set properly and for viewing/changing the page header and pager footer
    - This is the only way in which the margins can be changed
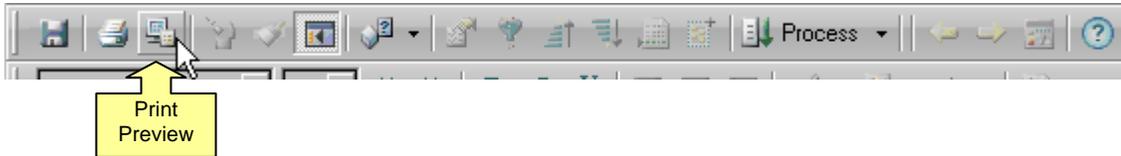
- To change margin/header spacing:
    - Click on print preview
    - Move cursor to horizontal and vertical lines which mark the margins and header spacing
    - Hover over the line until the cursor appears as a double arrow
    - Click and drag your cursor to the new spacing

Customized Training Report of Collections Revenue
Transactions Between: 07/01/11 12:00 AM,06/30/12 12:00 AM
Report Processed on: Tuesday, October 25, 2011

Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	Tbrmisd	Tbrmisd Amount
07/06/11	ACTR	Customized Training	F0014808	B03874	125.00
	Total				125.00
09/09/11	ACTR	Customized Training	F0015043	B03884	275.00
	Total				275.00
09/15/11	ACTR	Customized Training	F0015059	B10154	200.00
	Total				200.00
10/04/11	ACTR	Customized Training	F0015124	B08171	275.00
	Total				275.00
10/17/11	ACTR	Customized Training	F0015169	B08173	25.00
	Total				25.00
Total					900.00

- To change the header/footer:
  - Double click in the header/footer area so the edit box appears
  - Change the header/footer to your specifications

Show Section/Catalog
  - Toggle switch used for viewing more work space or displaying different views available within the report

Show Section/Catalog Off   **Show Section/Catalog On**

Left window

Cust Train ROC Transactions

Sort: Insert Date | by Label | using Sum

Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	
07/06/11	ACTR	Customized Training	F0014808	E
	Total			
09/09/11	ACTR	Customized Training	F0015043	E
	Total			
09/15/11	ACTR	Customized Training	F0015059	E
	Total			
10/04/11	ACTR	Customized Training	F0015124	E
	Total			
10/17/11	ACTR	Customized Training	F0015169	E
	Total			
Total				

Right window

Sections

Cust Train ROC Transact

Cust Train ROC Transactions

Sort: Insert Date | by Label | using Sum

Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc
07/06/11	ACTR	Customized Training
	Total	
09/09/11	ACTR	Customized Training
	Total	
09/15/11	ACTR	Customized Training
	Total	
10/04/11	ACTR	Customized Training
	Total	
10/17/11	ACTR	Customized Training
	Total	
Total		

Elements

Results2 (Cash (ROC)
Grp
Insert Date

- Focusing on a particular item
  - In Hyperion, you have the ability to filter out certain data. This is done by focusing on an item or hiding an item.
  - Procedure:
    - Process the report
    - Make sure the report is NOT in print preview
    - Select the data on which you want to filter
    - Right click and select either focus on items or hide items
    - Multiple selections may be made by using control or shift keys

Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	Tbrmisd	Tbrmisd Amount
07/06/11	ACTR	Customized Training	F0014808	B03874	125.00
	Total				125.00
09/09/11	ACTR	Customized Training	F0015043	B03884	275.00
	Total				275.00
09/15/11	ACTR	Customized Training	F0015059		200.00
	Total				200.00
10/04/11	ACTR	Customized Training	F0015124		275.00
	Total				275.00
10/17/11	ACTR	Customized Training	F0015169		25.00
	Total				25.00
Total					900.00

Drill Anywhere ►
Drillup

Add Computed Item...
Focus on Items
Hide Items

Font...
Style ►
Justify ►
Borders ►

Data Labels ►
Corner Labels ►
Use Surface Values

Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	Tbrmisd	Tbrmisd Amount
09/09/11	ACTR	Customized Training	F0015043	B03884	275.00
	Total				275.00
Total					275.00

- To get your data back
  - Procedure
    - Right click on your report
    - Select Show All Items or Show Hidden Items

Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	Tbrmisd	Tbrmisd Amount
09/09/11	ACTR	Customized Training	F0015...		275.00
	Total				275.00
Total					275.00

Right-click menu:
- Drill Anywhere ▶
- Drillup
- Add Computed Item...
- Focus on Items
- Hide Items
- Show Hidden Items
- Show All Items
- Font...
- Style ▶
- Justify ▶
- Borders ▶
- Data Labels ▶
- Corner Labels ▶
- Use Surface Values

- Copy – Paste to Excel
  - Procedure
    - Process the report
    - Click Edit – Copy
    - Open Excel
    - Click Paste 📋
    - May have to change formatting in Excel for presentation purposes

File Edit View Insert Format Pivot Tools Help

Edit menu:
- Undo   Ctrl+Z
- Redo   Ctrl+Y
- Cut   Ctrl+X
- Copy   Ctrl+C
- Paste   Ctrl+V
- Clear
- Select All   Ctrl+A
- Copy Conditional Format
- Paste Conditional Format
- Delete Section...
- Rename Section...
- Duplicate Section
- ✔ Duplicatable

Gurfeed Doc Code ▼ by Label ▼ using Sum ▼

ate	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	Tbrmisd	Tbrmisd Amount
	ACTR	Customized Training	F0014808	B03874	125.00
	Total				125.00
	ACTR	Customized Training	F0015043	B03884	275.00
	Total				275.00
	ACTR	Customized Training	F0015059	B10154	200.00
	Total				200.00
10/04/11	ACTR	Customized Training	F0015124	B08171	275.00
	Total				275.00
10/17/11	ACTR	Customized Training	F0015169	B08173	25.00
	Total				25.00
Total					900.00

A1 — Insert Date

	A	B	C	D	E	F
1	Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc Code	Tbrmisd Document Number	Tbrmisd Amount
2	7/6/2011	ACTR	Customized Training	F0014808	B03874	125
3	7/6/2011	Total	Total	Total	Total	125
4	9/9/2011	ACTR	Customized Training	F0015043	B03884	275
5	9/9/2011	Total	Total	Total	Total	275
6	9/15/2011	ACTR	Customized Training	F0015059	B10154	200
7	9/15/2011	Total	Total	Total	Total	200
8	10/4/2011	ACTR	Customized Training	F0015124	B08171	275
9	10/4/2011	Total	Total	Total	Total	275
10	10/17/2011	ACTR	Customized Training	F0015169	B08173	25
11	10/17/2011	Total	Total	Total	Total	25
12	Total	Total		Total	Total	900

SPECIAL NOTES

If a query is taking too long to process, press Alt – End to end the query before processing is complete.

During registration, please limit the running of reports to the afternoon so registration won't be interrupted during the morning hours.

If you make any changes to the reports using the Hyperion navigation tools included in this manual, please be aware that these changes will not be saved. The report will return to its default upon exiting Hyperion.

If you require any additional reports or revisions to an existing report, including adding additional detail codes, please contact the Budget Office.

Please contact the following with any questions or for assistance:

Jennifer Mariacher   ext. 4092
Tammy Aument-Martin   ext. 4091
Gladys LaPorte Rodriguez ext. 4090

For assistance with logons, please contact the following and note which logon requires assistance:

Help Desk   x7777