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 <a href="https://mureporting.millersville.edu/workspace/index.jsp">https://mureporting.millersville.edu/workspace/index.jsp</a>. 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!)

<u>File H</u> elp			
Log On			
	User Name: jinariacher Password:		
		Log On	ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Copyright © 1989, 2009, Oracle and / or its affiliates. All rights reserved.

- Enter your Banner/Oracle UserID and Password
- Click Log On

• This will bring up the main screen.

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- Click Explore
- Open Banner Queries in the Root folder
- Click on the Budget Reports Folder

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📁 Shared Workspace Pages		

- Select the appropriate folder for your department.
- Inside the folder you will find two revenue reports
  - o Invoiced Revenue
  - o ROC Revenue (Report of Collection)



- Double click on requested report
- Click Process. This will be on the gray toolbar of each of the reports.

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• Enter the Banner username and password to connect to server.

hyp muis.oce						
Host User	OK					
Host Password	Cancel					

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

ΟK

Cancel

Help

•

• Click OK

# Transaction Dates Please select the dates of the fiscal year for which you want the transactions Not Between V Image: Comparison of the fiscal year for which you want the transactions Select All 07/01/08 12:00 AM Generation 06/30/09 12:00 AM 06/30/10 12:00 AM 06/30/10 12:00 AM

07/01/10 12:00 AM 06/30/11 12:00 AM 07/01/11 12:00 AM 06/30/12 12:00 AM

07/01/12 12:00 AM 06/30/13 12:00 AM 07/01/13 12:00 AM

06/30/14 12:00 AM 07/01/14 12:00 AM

### 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
  - o 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			1	275.00	
09/15/11	ACTR	Customized Training	F0015059	B10154	200.00	
	Total			1	200.00	
10/04/11	ACTR	Customized Training	F0015124	B08171	275.00	
	Total			1	275.00	
10/17/11	ACTR	Customized Training	F0015169	B08173	25.00	
	Total			-	25.00	
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- To change the header/footer:
  - Double click in the header/footer area so the edit box appears
  - o Change the header/footer to your specifications

		1	Customized Tra Transactions Betwee Report Proces	aining Report of Col en: 07/01/11 12:00, sed on: Tuesday, O	lections Revenue AM,06/30/12 12:00 / ctober 25, 2011	٩M
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07/06/11	ACTR		Customized Training		F0014808	во
	Total	Edit Header				
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09/15/11	ACTR	Report Proce	essed on: &d''dddd, mmmn	n dd, yyyy"		B1
	Total			(2)	Help	
10/04/11	ACTR		11			во
	Total		ABC #	<u>iii</u> 🦉		
10/17/11	ACTR		Customized Training		F0015169	ВО
	Total					

Show Section/Catalog

 Toggle switch used for viewing more work space or displaying different views available within the report



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Sort Ins	ert Date 💌 by Lab	el 💽 using Sum	▼ ≣ ₹
Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Do
07/06/11	ACTR	Customized Training	F0014808
	Total		
09/09/11	ACTR	Customized Training	F0015043
	Total		
09/15/11	ACTR	Customized Training	F0015059
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10/04/11	ACTR	Customized Training	F0015124
	Total		
10/17/11	ACTR	Customized Training	F0015169
	Total		

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	07/06/11	ACTR	Customized Training
		Total	
	09/09/11	ACTR	Customized Training
	-	Total	
	09/15/11	ACTR	Customized Training
		Total	5 5
	10/04/11	ACTR	Customized Training
		Total	0 0
	10/17/11	ACTR	Customized Training
	3	Total	
	Total		

- 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.
  - o 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

Ī	Insert Date	Tbrmisd Charge Detail Code	Tbrmisd Desc	Gurfeed Doc	Tbrmisd	Tbrmis	d Amount
Ē	07/06/11	ACTR	Customized Training	F0014808	803874		125.00
_		Total					125.00
	09/09/11	ACTR	Customized Training	F0015043	803884	1	275.00
_		Total			Drill Anywhere	•	275.00
-	09/15/11	ACTR	Customized Training	F0015059	Drillup		200.00
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-	10/04/11	ACTR	Customized Training	F0015124	Focus on Items		275.00
-		Total			Hide Items	- 45	275.00
_	10/17/11	ACTR	Customized Training	F0015169	Font		25.00
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	09/09/11	ACTR	Customized Training	50015043	B03884	275.00		
	_	Total						
	Total	otal						
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- To get your data back
  - Procedure
    - Right click on your report
    - Select Show All Items or Show Hidden Items

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Ť	09/09/11	ACTR	Customized Training	F00151	Drill An	where	•	275.00
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- 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

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	Rename Section				Total					275.00	
	Duplicate Section				ACTR		Customized Training		F0015059	B10154	200.00
	✓ Duplicatable			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
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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	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 Mariacherext. 4092Tammy Aument-Martinext. 4091Gladys LaPorte Rodriguez ext. 4090

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

Help Desk x7777