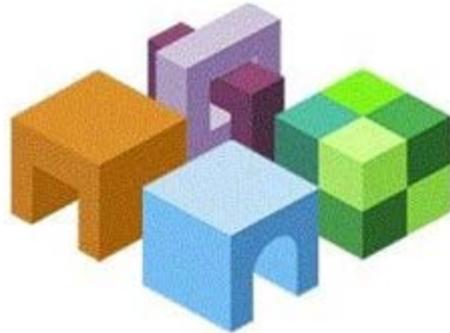


Data Warehouse Portal 11



Yale
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

September 2013

Data Warehouse Portal 11

- **Run a Report** (page 8)
- SMART Space (directory of folders) hierarchy of reports in functional folders
- Program Collections (file type) run reports with various parameters
- Output Collections (file type) access PDF or Brio report output

- **Tabs** (page 10)
- Explore Tab (navigate through directory hierarchies)
- TOC “Table of Contents” Tab (view and/or print report output)

- **Schedule Job to Run Automatically and Distribute Results** (page 15)
- General Properties (schedule name and description)
- Job Parameters (select saved parameter values for scheduled job)
- When to Run (select an existing event to automatically trigger report execution)
- Notification & Report Delivery (enter email addresses for report distribution)

- **Managing Job Parameters & Job Schedules** (page 20)

- **Favorites (Creating & Using)** (page 24)

Remember this...

- The “right- mouse” click is your “best friend”
- Use the “tabs”
- Selecting “Explore” will repopulate your main screen
- You cannot delete unwanted PDF report “output collections”. Output collections disappear after 30 days.

What About Support...

- ITS Help Desk is ready to answer your questions (432-9000)

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer provided by Yale Ma...

https://epm.its.yale.edu/workspace/index.jsp

File >> Convert Select

Favorites Free Hotmail Web Slice Gallery

Oracle Enterprise Performance Management System ...

Yale Enterprise Performance Management System Work...

File

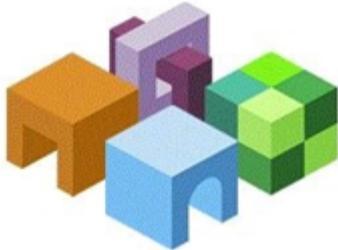
Log On

User Name:
JD298

Password:
|

Log On

Data Warehouse Portal 11



Yale
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Copyright © 2005, 2012, Oracle and / or its affiliates....

Done Trusted sites 75%

Data Warehouse Portal Logon (Release 11)

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer provided by Yale Ma...

https://epm.its.yale.edu/workspace/index.jsp

File Convert Select

Favorites Free Hotmail Web Slice Gallery

Oracle Enterprise Performance Management System ...

Yale Enterprise Performance Management System Work...

Log On

User Name: JD298

Password:

Log On

Warning

EPMCSS-00301: Failed to authenticate user. Invalid credentials.
Enter valid credentials.

OK Show Detail

Data Warehouse Portal 11

Yale
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Copyright © 2005, 2012, Oracle and / or its affiliates.....

(1 item remaining) Trusted sites 75%

Common Error (remember to use your Data Warehouse Portal password)

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer provided by Yale Ma...

https://epm.its.yale.edu/workspace/index.jsp

File >> x Convert Select

Yale Enterprise Performance Management System Workspace, ...

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore

Explore: / x

Search: Se... [input] [button] Adva...

Name	Description	Type	Modified
Crystal Ball Workbooks		Folder	
HSF		Folder	8/30/10 9:50 AM
Metrics		Folder	10/22/10 10:06 AM
Shared Workspace Pages		Folder	
University Standard Reports	University Standard Reports	Folder	5/16/13 2:23 PM

Done Trusted sites 85%

(“Explore” tab) Drill down in “University Standard Reports” – then “Finance”

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer provided by Yale Man...

https://epm.its.yale.edu/workspace/index.jsp

File » Convert Select

Oracle Enterprise Performance Management System

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore

Explore: /University Standard Reports/Finance/Account Holder By Ptao

Name	Description	Type	Modified
FINAH2 Account Holder By PTAO	Account Holder By PTAO - A	Program Collections	5/17/13 10:59 AM
FINAH2 690215_MAR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/7/13 8:50 AM
FINAH2 945001_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/10/13 3:33 PM
FINAH2 cancer center_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	4/30/13 11:18 AM
FINAH2 Donnelley_Account_Position_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 8:53 AM
FINAH2 Donnelley_Fellows_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:38 AM
FINAH2 drama_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/1/13 4:16 PM
FINAH2 Master_project_0000113_forH_Abati_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:10 AM
FINAH2 Yale_China_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 9:27 PM

“Program Collections” (file type) are report programs that can be run

“Output Collections” (file type) are PDF or Brio report outputs to be viewed and/or printed

(“Explore” tab) Double-Click “FINAH2 Account Holder by PTAO” or right-click and select run job on program collections line to run report

Job Parameters

Define Job Parameters starting with Publisher Defaults [dropdown] [Edit] [Go]

Set Values

PSOO/PTAEO Parameters			
Segment	Level	Value	Page Break By
Organization	Organization	S27013 Accounting Services	Organization
Project	University/All Projects	ALL	University/All Projects
Task	All Tasks	ALL	All Tasks
Award	All Awards	ALL	All Awards
Expenditure			Major Parent Account

Additional Parameters	
Accounting Period	Current Open Month - May FY2013
Org Type	Charging Orgs Only
Grants Budget Type	<input type="radio"/> MPO <input type="radio"/> Department Plan <input checked="" type="radio"/> Grant Budget
	Inception/Installment: Inception F and A Summarize F and A
GENAP Budget Type	<input checked="" type="radio"/> MPO <input type="radio"/> Department Plan
Other Funds Budget Type	<input type="radio"/> MPO <input type="radio"/> Department Plan <input checked="" type="radio"/> Fund Balance
Summarize Salaries	Do Not Include Salaries
Projection Choice	Commitments
Projection Type	Custom POAP <input type="checkbox"/> Select All
Non-Operating Income	<input checked="" type="radio"/> Do Not Include Non-Operating Income <input type="radio"/> Include Non-Operating Income
Reporting Sections	Summary with Commitments Trend Report Prior Month Transactions Current Month Transactions Commitment Detail <input checked="" type="checkbox"/> Select All
Number Format	1,234.10

Output Parameters	
Enter Output File Name	527013

Save as my default
 Save Personal Job Parameter Name: [input]

[Run] [Cancel]

("FINAH2" report program tab) parameters entered & ready to run

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Loq ...

Navigate File View Favorites Tools Help

Explore

Explore: /University Standard Reports/Finance/Account Holder By Ptao

Search: [] Adv...

Folders

- SMART Space
 - Crystal Ball Workbooks
 - HSF
 - Metrics
 - Shared Workspace Pages
 - University Standard Reports
 - Finance
 - Account Holder By Person
 - Account Holder By Ptao
 - Account Intersection
 - Capital Management Reports
 - Current Month Detail
 - Expense Management
 - Fund Balance Activity
 - General Accounting
 - Grant Balance
 - Payroll Earnings Detail
 - Position Plan
 - Review Tools
 - Source Group Activity
 - HR
 - ISP
 - Procurement
 - Usage

/University Standard Reports/Finance/Account Holder By Ptao

Name	Description	Type	Modified
FINAH2 Account Holder By PTAO	Account Holder By PTAO - A	Program Collections	5/17/13 10:59 AM
FINAH2 527013_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/30/13 11:24 AM
FINAH2 690215_MAR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/7/13 8:50 AM
FINAH2 945001_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/10/13 3:33 PM
FINAH2 cancer center_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	4/30/13 11:18 AM
FINAH2 Donnelley_Account_Position_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 8:53 AM
FINAH2 Donnelley_Fellows_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:38 AM
FINAH2 drama_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/1/13 4:16 PM
FINAH2 Master_project_0000113_forH_Abati_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:10 AM
FINAH2 Yale_China_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 9:27 PM

Click Hyperion Workspace "Refresh" icon when needed

Trusted sites 85%

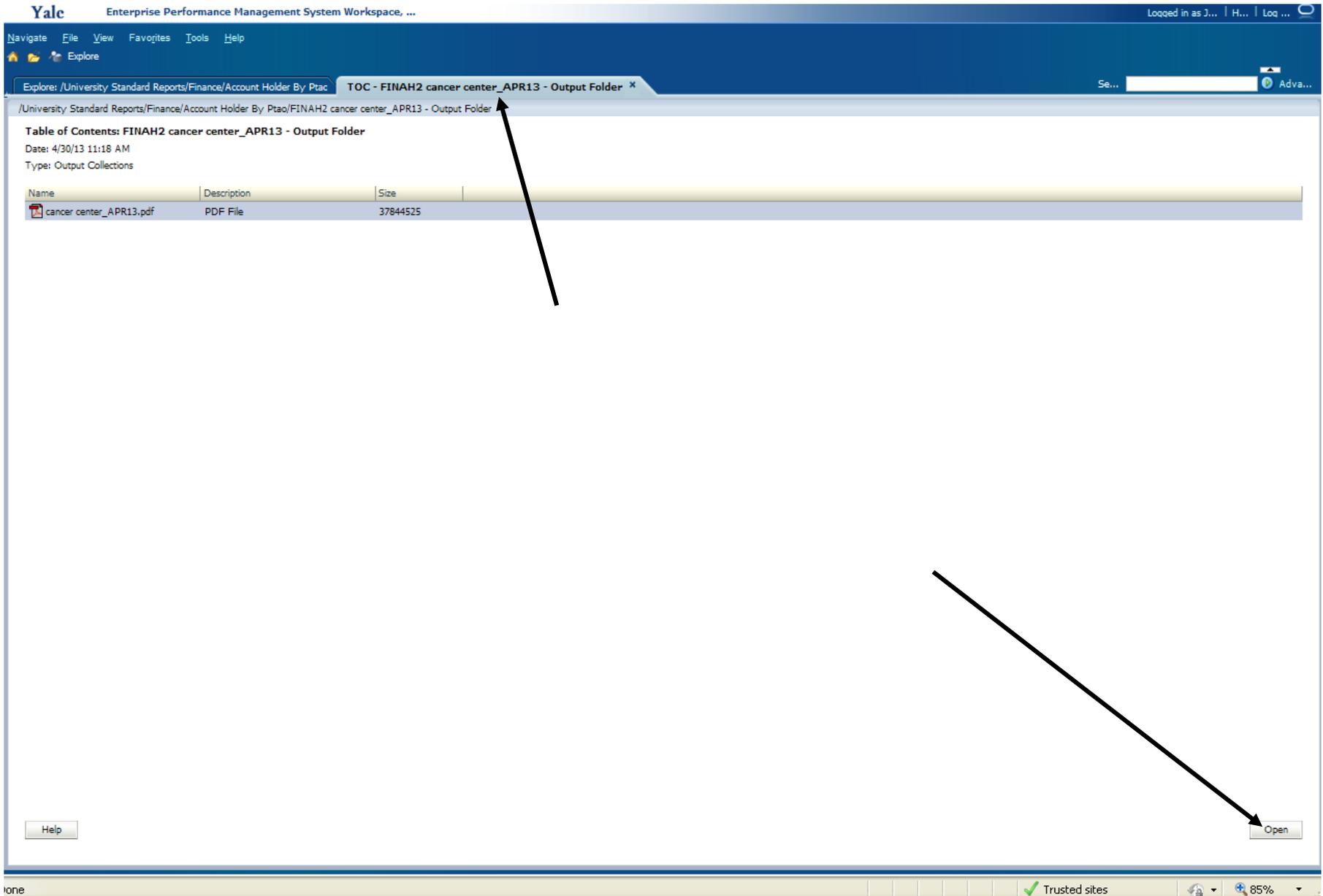
("Explore" tab) resulting report output present & ready to view - "Output Collections" file type

Folders

- SMART Space
 - Crystal Ball Workbooks
 - HSF
 - Metrics
 - Shared Workspace Pages
 - University Standard Reports
 - Finance
 - Account Holder By Person
 - Account Holder By Ptao
 - Account Intersection
 - Capital Management Reports
 - Current Month Detail
 - Expense Management
 - Fund Balance Activity
 - General Accounting
 - Grant Balance
 - Payroll Earnings Detail
 - Position Plan
 - Review Tools
 - Source Group Activity
 - HR
 - ISP
 - Procurement
 - Usage

Name	Description	Type	Modified
FINAH2 Account Holder By PTAO	Account Holder By PTAO - A	Program Collections	5/17/13 10:59 AM
FINAH2 527013_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/30/13 11:24 AM
FINAH2 690215_MAR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/7/13 8:50 AM
FINAH2 945001_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/10/13 3:33 PM
FINAH2 cancer center_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	4/30/13 11:18 AM
FINAH2 Donnelley_Account_Position_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 8:53 AM
FINAH2 Donnelley_Fellows_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:38 AM
FINAH2 drama_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/1/13 4:16 PM
FINAH2 Master_project_0000113_forH_Abati_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:10 AM
FINAH2 Yale_China_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 9:27 PM

- Open
- E-mail Link...
- Add to Favorites
- Properties... Alt+Enter
- Refresh F5



("TOC" report tab) Double-Click (or) highlight & "Open"

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore

Explorer: /University Standard Reports/Finance/Account Holder By Ptao TOC - FINAH2 527013_MAY13 - Output Folder 527013_MAY13.pdf x

/University Standard Reports/Finance/Account Holder By Ptao/527013_MAY13.pdf

72.9% Collaborate Sign Find

Yugr_acct_hldr_by_ptao.bog7 (DWH1)
Sum of budget with cmts

YALE UNIVERSITY
Account Holder Report

Date: 30-May-13
Time: 11:24:50 AM

Monthly Account Summary for May 2013
Report run on: 05/30/13

Project: ALL
Task: ALL
Award: ALL - (GENAP)
Charging Organization: 527013 FINCNT Accounting Services

Object Description	Total Budget MPO	Fiscal Year Actuals prior to April 2013	Actuals during April 2013	Actuals during May 2013	Subtotal: Fiscal Year Actuals to date	Pending Commitments Custom, POAP	Subtotal: Actuals + Commitments	Projected Remaining Balance
Revenue								
MR5200 Internal Income Allocation								
Total for Income Internal (MS5000)								
Total Revenue								
Expense								
MR8200 Materials and Supplies								
MR8300 Service Expenses								
MR8600 Interest & Amortization								
Total for Non Salaries (MS8000)								
Total Expense								
Revenue Less Expenses								
Remaining Balance								
PROJECTED REMAINING BALANCE WITH Custom, POAP Commitments IS							-39,834.48	

Page: 1 of 6

Data hidden for confidentiality

("PDF File Name" tab) use Adobe print icon to print report

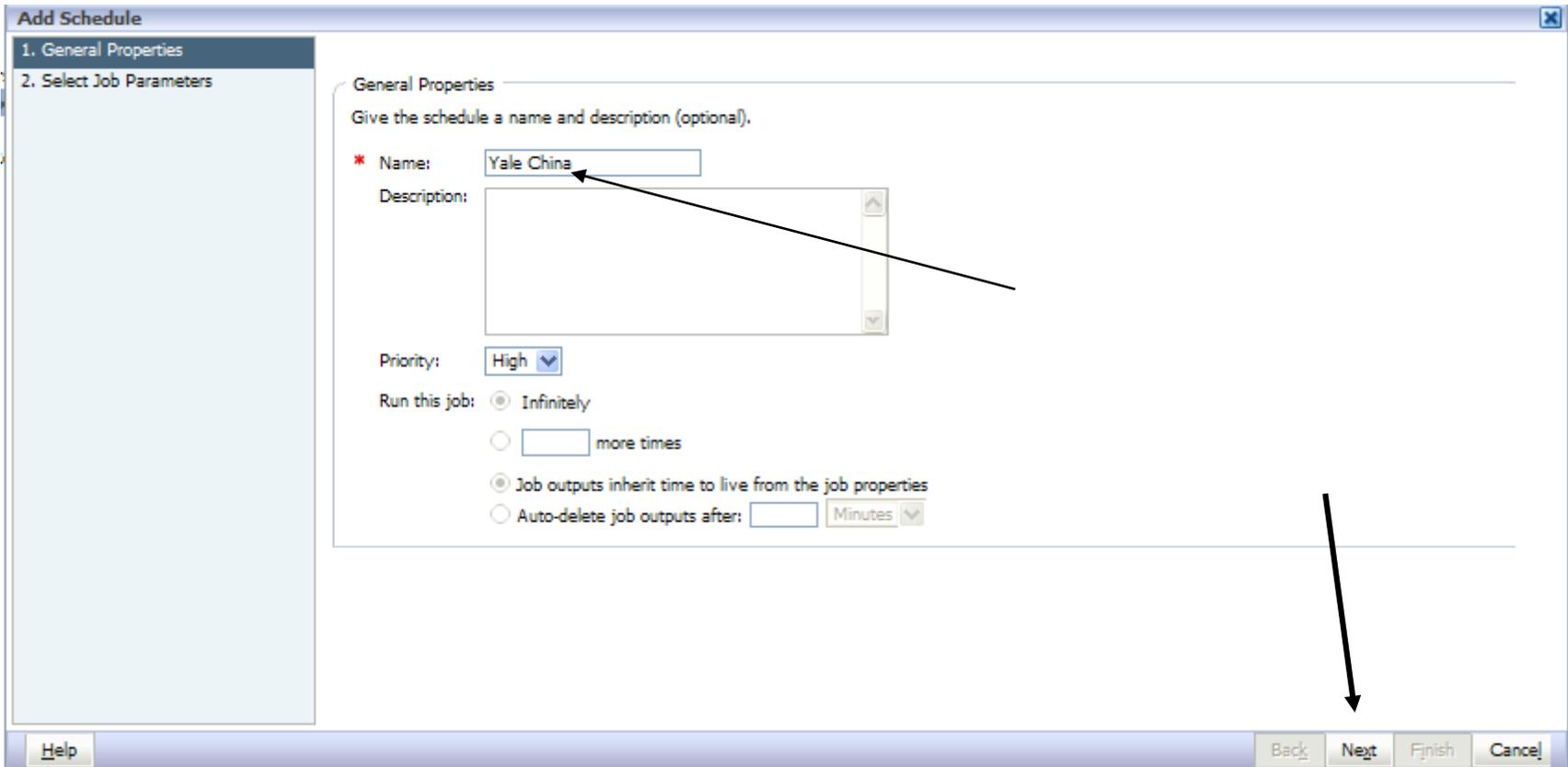
Folders

- SMART Space
 - Crystal Ball Workbooks
 - HSF
 - Metrics
 - Shared Workspace Pages
 - University Standard Reports
 - Finance
 - Account Holder By Person
 - Account Holder By Ptao**
 - Account Intersection
 - Capital Management Reports
 - Current Month Detail
 - Expense Management
 - Fund Balance Activity
 - General Accounting
 - Grant Balance
 - Payroll Earnings Detail
 - Position Plan
 - Review Tools
 - Source Group Activity
 - HR
 - ISP
 - Procurement
 - Usage

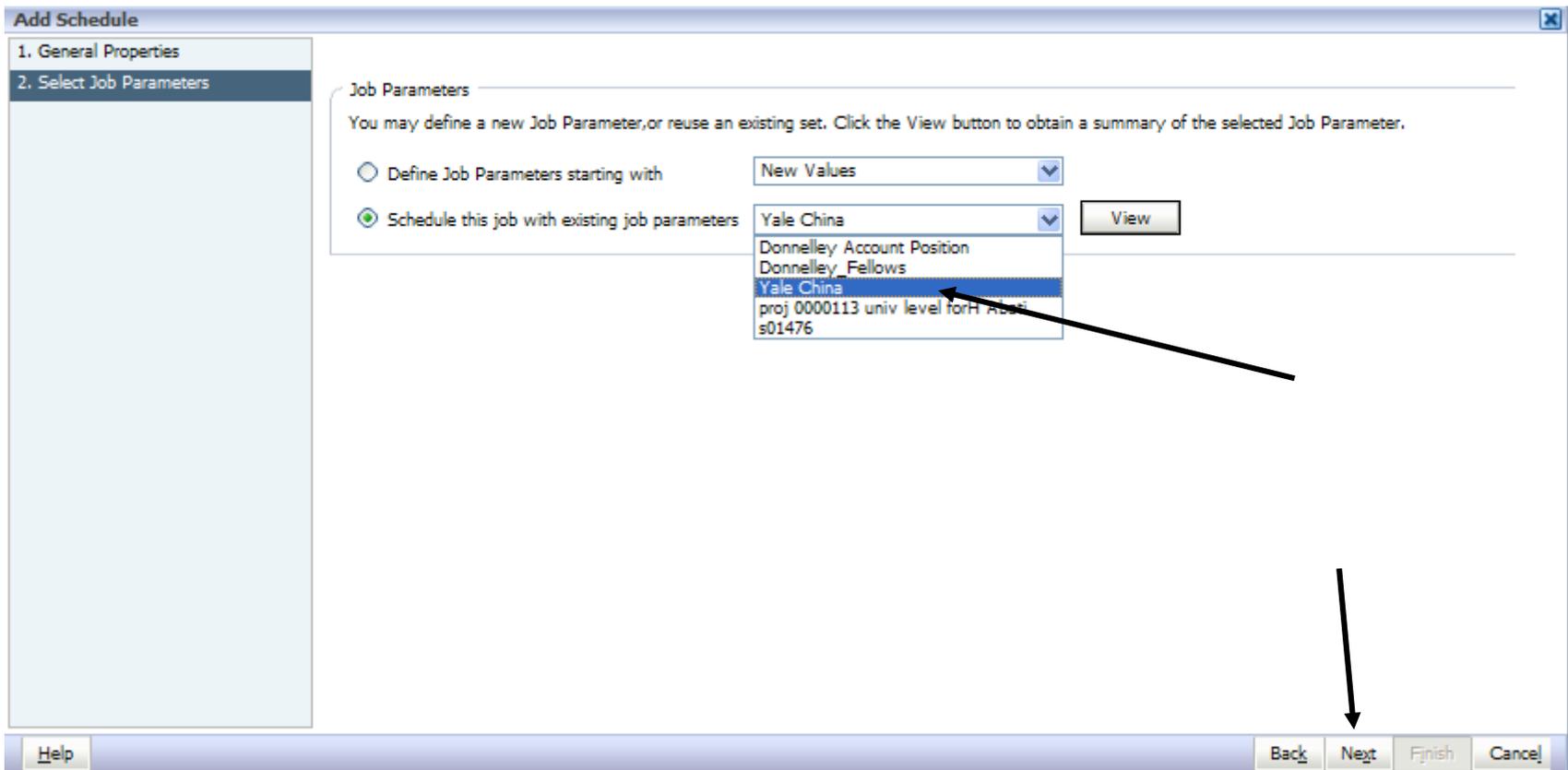
Name	Description	Type	Modified
FINAH2 Account Holder By PTAO		Collections	5/17/13 10:59 AM
FINAH2 527013_MAY13 - Output Folder		Collections	5/30/13 11:24 AM
FINAH2 690215_MAY13 - Output Folder		Collections	5/7/13 8:50 AM
FINAH2 945001_APR13 - Output Folder		Collections	5/10/13 3:33 PM
FINAH2 cancer center_APR13 - Output Folder		Collections	4/30/13 11:18 AM
FINAH2 Donnelley_Account_Position_MAY13 - Output Folder		Collections	5/4/13 8:53 AM
FINAH2 Donnelley_Fellows_MAY13 - Output Folder		Collections	5/4/13 11:38 AM
FINAH2 drama_APR13 - Output Folder		Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Output Folder		Collections	5/1/13 4:16 PM
FINAH2 Master_project_0000113_forH_Abati_APR13 - Output Folder		Collections	5/4/13 11:10 AM
FINAH2 Yale_China_MAY13 - Output Folder		Collections	5/4/13 9:27 PM

Run Job
Run Job in
Open As
E-mail Link...
Add to Favorites
Properties...
Refresh F5
Retrieve
Add a schedule
Manage Job Schedules

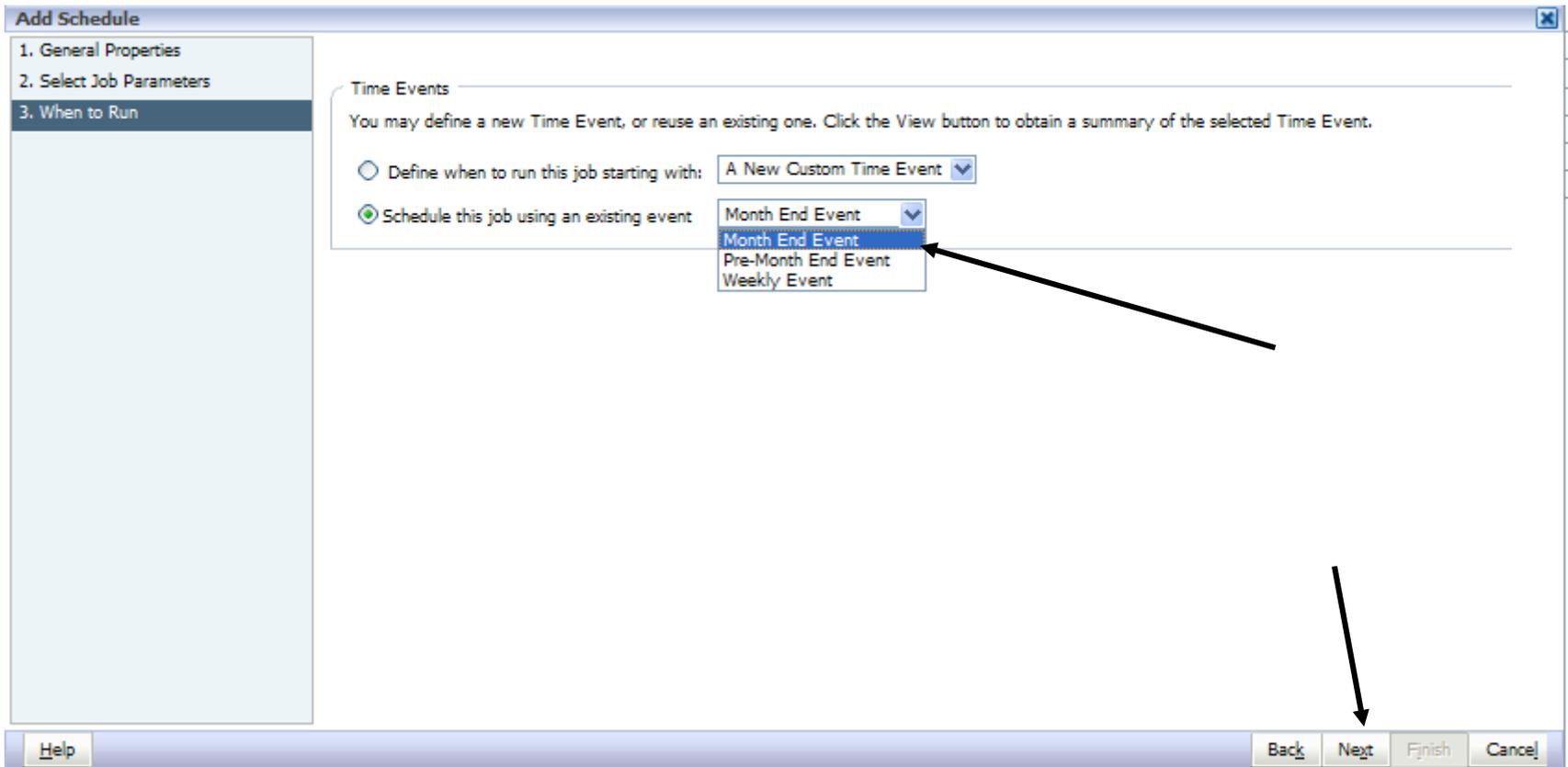
("Explore" tab) – Right-Click report line – select "Add a Schedule"



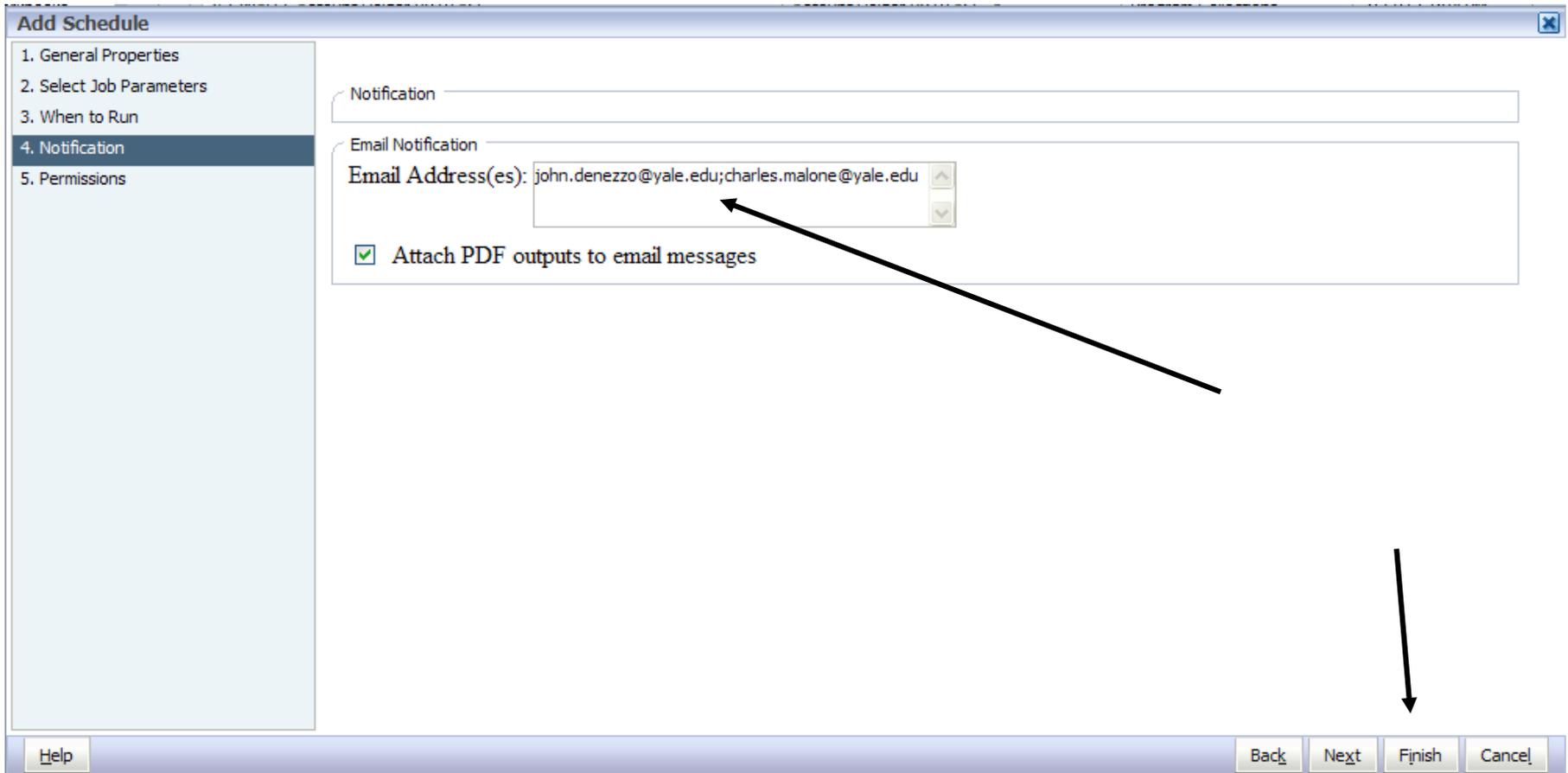
("Job Schedule" window) enter schedule name & description (optional) for report output – then select "Next"



("Job Schedule" window) – select parameters – then select "Next"



("Job Schedule" window) – select an existing event – then select "Next"



("Job Schedule" window) enter multiple addresses separated by a semi-colon with no space – then select "Finish"

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore: /University Standard Reports/Finance/Account Holder By Ptao

Search: [] Adv...

Folders

- SMART Space
 - Crystal Ball Workbooks
 - HSF
 - Metrics
 - Shared Workspace Pages
 - University Standard Reports
 - Finance
 - Account Holder By Person
 - Account Holder By Ptao
 - Account Intersection
 - Capital Management Reports
 - Current Month Detail
 - Expense Management
 - Fund Balance Activity
 - General Accounting
 - Grant Balance
 - Payroll Earnings Detail
 - Position Plan
 - Review Tools
 - Source Group Activity
 - HR
 - ISP
 - Procurement
 - Usage

Name	Description	Type	Modified
FINAH2 Account Holder By PTAO	older By PTAO - A	Program Collections	5/17/13 10:59 AM
FINAH2 527013_MAY13 - Output Fol	older By PTAO - A	Output Collections	5/30/13 11:24 AM
FINAH2 690215_MAR13 - Output Fol	older By PTAO - A	Output Collections	5/7/13 8:50 AM
FINAH2 945001_APR13 - Output Fold	older By PTAO - A	Output Collections	5/10/13 3:33 PM
FINAH2 cancer center_APR13 - Outpu	older By PTAO - A	Output Collections	4/30/13 11:18 AM
FINAH2 Donnelley_Account_Position_	older By PTAO - A	Output Collections	5/4/13 8:53 AM
FINAH2 Donnelley_Fellows_MAY13 -	older By PTAO - A	Output Collections	5/4/13 11:38 AM
FINAH2 drama_APR13 - Output Folde	older By PTAO - A	Output Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Output Folder	older By PTAO - A	Output Collections	5/1/13 4:16 PM
FINAH2 Master_project_0000113_forH	older By PTAO - A	Output Collections	5/4/13 11:10 AM
FINAH2 Sale_China_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 9:27 PM

Context Menu:

- Run Job
- Run Job in
- Open As
- E-mail Link...
- Add to Favorites
- Properties... Alt+Enter
- Refresh F5
- Retrieve
- Add a schedule
- Manage Job Schedules

("Explore" tab) Right-Click – Select "Manage Job Schedules"

Job Name	Job Ow...	Schedule Name	Schedul...	Last Run Date	Next Run Date	Event Name	Last Status
FINAH2 Account ...	administ...	Job Owner's month end	MMO3	5/4/13 6:16 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Dani Ofsuka 271 ...	LMC49	5/4/13 3:52 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	728027_Kidd_insta...	JMC266	5/4/13 6:37 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	728007_Centrella_...	JMC266	5/4/13 9:10 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	728007_Thomson...	JMC266	5/4/13 5:45 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	PET CT Scanner ...	TR244	5/4/13 9:44 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Dr. Park's YCCI S...	DMM73	5/5/13 2:58 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Young IRIS OTC ...	LAG6	5/4/13 5:53 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	696301	ED277	5/5/13 9:23 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Groisman_Dowry...	EP363	5/5/13 7:02 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Groisman_A08255...	EP363	5/4/13 9:00 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Shared Equipmen...	EP363	5/4/13 2:07 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	691106 Admission...	EM228	5/5/13 11:01 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	GUARD SERVICES	TD248	5/5/13 10:55 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	842000 - Director	JLF52	5/5/13 8:48 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Fidelity Grant R07...	JMG43	5/4/13 9:17 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Krauthammer 104...	LBP3	5/4/13 8:53 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Krauthammer - 10...	LBP3	5/4/13 10:50 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Vazquez 0035224 ...	FVF2	5/4/13 6:55 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Krauthammer - 10...	LBP3	5/4/13 7:35 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	ASLANIAN SPEC...	TN33	5/5/13 10:23 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Rose 1030397.00...	LBP3	5/4/13 2:09 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Cleary-RAND Hos...	AR39	5/4/13 9:48 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Rose 1052868.1.A...	LBP3	5/5/13 2:12 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Rose 1066520.1.A...	LBP3	5/5/13 10:08 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	BINDERS- FLIND...	TN33	5/5/13 10:16 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Yan 1049385.31.0...	LBP3	5/4/13 5:47 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Cappello Non-Gra...	NS399	5/4/13 6:16 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Vortmeyer 00352...	LBP3	5/4/13 2:23 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Vortmeyer 10497...	LBP3	5/5/13 9:29 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Tavassoli 0035216...	LBP3	5/4/13 10:21 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Levy - COC	DMM73	5/5/13 3:45 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	OIKONOMOU U...	TN33	5/4/13 1:05 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Folkers B Funds	CAD5	5/5/13 10:45 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Taddei Detail	SAB65	5/4/13 4:37 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Giannotti- Tellides ...	CRISP1...	5/5/13 6:18 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Dept - AP Bounce...	PREMA	5/4/13 10:11 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Yan 1057462.1.R0...	LBP3	5/5/13 7:04 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	HUTTNER 00351...	AG372	5/4/13 11:10 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Bossuyt 1053367 ...	LBP3	5/4/13 9:34 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Weatherbee	MW576	5/25/13 8:53 AM	EventInactive	Weekly Event	Done
FINAH2 Account ...	administ...	KLEINSTEIN 103...	AG372	5/4/13 12:10 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	KLEINSTEIN 104...	AG372	5/4/13 11:23 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	KLEINSTEIN 107...	AG372	5/4/13 7:01 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	ZHOU - TG 10697...	AC397	5/5/13 5:21 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Phatak 1069116 0...	AT478	5/4/13 6:02 AM	EventInactive	Month End Event	Done

Long list of schedules appears

Job Name	Job Ow...	Schedule Name	Schedul...	Last Run Date	Next Run Date	Event Name	Last Status
FINAH2 Account ...	administ...	Master Project 00...	JD298	5/4/13 11:04 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Donnelley_Fellows	JD298	5/4/13 11:37 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Donnelley Accoun...	JD298	5/4/13 8:52 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Yale China - Tie o...	JD298	5/4/13 9:26 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Yale China 2	JD298		EventInactive	Month End Event	

To see your schedules only, click on the header “Next Run Date” or “Event Name”

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore Filter

Explore: /University Standard Reports/Finance/Account Holder By Prac Manage Job Schedules x

Se... Adva...

Job Name	Job Ow...	Schedule Name	Schedul...	Last Run Date	Next Run Date	Event Name	Last Status
FINAH2 Account ...	administ...	Master Project 00...	JD298	5/4/13 11:04 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Donnelley_Fellows	JD298	5/4/13 11:37 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Donnelley Accoun...	JD298	5/4/13 8:52 AM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Yale China - Tie o...	JD298	5/4/13 9:26 PM	EventInactive	Month End Event	Done
FINAH2 Account ...	administ...	Yale China 2	JD298		EventInactive	Month End Event	

- Modify Job
- Modify Schedule
- Delete
- Add Schedule
- Show Parameters

Right mouse click to either modify or delete schedules or choose “Show Parameters” to modify or delete parameter lists

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore: /University Standard Reports/Finance/Account Holder By Ptao

Manage Job Schedules Show Parameters

Search: [] Adv...

Folders

- SMART Space
 - Crystal Ball Workbooks
 - HSF
 - Metrics
 - Shared Workspace Pages
 - University Standard Reports
 - Finance
 - Account Holder By Person
 - Account Holder By Ptao**
 - Account Intersection
 - Capital Management Reports
 - Current Month Detail
 - Expense Management
 - Fund Balance Activity
 - General Accounting
 - Grant Balance
 - Payroll Earnings Detail
 - Position Plan
 - Review Tools
 - Source Group Activity
 - HR
 - ISP
 - Procurement
 - Usage

Name	Description	Type	Modified
FINAH2 Account Holder By Ptao	Account Holder By Ptao - A	Program Collections	5/17/13 10:59 AM
FINAH2 527013_MAY13	Account Holder By Ptao - A	Output Collections	5/30/13 11:24 AM
FINAH2 690215_MAR13	Account Holder By Ptao - A	Output Collections	5/7/13 8:50 AM
FINAH2 945001_APR13	Account Holder By Ptao - A	Output Collections	5/10/13 3:33 PM
FINAH2 Donnelley_Account Holder By Ptao	Account Holder By Ptao - A	Output Collections	5/4/13 8:53 AM
FINAH2 Donnelley_Fellowship	Account Holder By Ptao - A	Output Collections	5/4/13 11:38 AM
FINAH2 drama_APR13	Account Holder By Ptao - A	Output Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Current	Account Holder By Ptao - A	Output Collections	5/1/13 4:16 PM
FINAH2 Master_project	Account Holder By Ptao - A	Output Collections	5/4/13 11:10 AM
FINAH2 Yale_China_M	Account Holder By Ptao - A	Output Collections	5/4/13 9:27 PM

Context Menu:

- Run Job
- Run Job in
- Open As
- E-mail Link...
- Add to Favorites**
- Properties... Alt+Enter
- Refresh F5
- Retrieve
- Add a schedule
- Manage Job Schedules

“Explore” tab) Right-Click on report line – select “Add to Favorites”

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Log ...

Navigate File View Favorites Tools Help

Explore: /Universit

Account Holder By Ptao * Manage Job Schedules Show Parameters

Standard Reports/Finance/Account Holder By Ptao

	Description	Type	Modified
FINAH2 Account Holder By PTAO	Account Holder By PTAO - A	Program Collections	5/17/13 10:59 AM
FINAH2 527013_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/30/13 11:24 AM
FINAH2 690215_MAR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/7/13 8:50 AM
FINAH2 945001_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/10/13 3:33 PM
FINAH2 Donnelly Account Position_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 8:53 AM
FINAH2 Donnelly Fellows_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:38 AM
FINAH2 drama_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/2/13 9:13 AM
FINAH2 fes_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/1/13 4:16 PM
FINAH2 Master_project_0000113_forH_Abati_APR13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 11:10 AM
FINAH2 Yale_China_MAY13 - Output Folder	Account Holder By PTAO - A	Output Collections	5/4/13 9:27 PM

ione Trusted sites 85%

("Explore" tab) Select "Favorites" from menu bar – click report to run desired report

Yale Enterprise Performance Management System Workspace, ...

Logged in as J... | H... | Loq ...

Navigate File View Favorites Tools Help

Explore

Explorer: /University Standard Reports/Finance/Account Holder By Ptao Manage Job Schedules Show Parameters x

Job Name	Job Type	Parameter Name	Ownership
FINAH2 Account ...	Generic Job	Donnelley_Fellows	JD298
FINAH2 Account ...	Generic Job	proj 0000113 univ lev...	JD298
FINAH2 Account ...	Generic Job	Donnelley Account Po...	JD298
FINAH2 Account ...	Generic Job	Yale China	JD298
FINAH2 Account ...	Generic Job	s01476	JD298

Open
Close
Close Others
Close All
Help

Se... Adva...

All tabs can also be closed by clicking small "X" in upper right hand corner

Trusted sites 85%

(for all tabs) to close Right-Click on desired tab – select “Close”

The screenshot shows the Oracle Enterprise Performance Management System Workspace interface. The browser window title is "Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer provided by Yale Managed". The address bar shows "https://epm.its.yale.edu/workspace/index.jsp". The page header includes "Yale Enterprise Performance Management System Workspace, ..." and "Logged in as ... | H... | Log ...". The main content area displays a "Table of Contents" for "FINAH2 945001_APR13 - Output Folder" with a date of "5/10/13 3:33 PM" and type "Output Collections". A table lists files, including "945001_APR13.pdf" (PDF File, 1285545 bytes). A "Windows Internet Explorer" dialog box is open, asking "Are you sure you want to navigate away from this page? If the session is closed, any unsaved data will be lost. Press OK to continue, or Cancel to stay on the current page." Two callout boxes are present: "Log Off Recommended" and "Log Off and resulting message". Arrows point from the "Log Off Recommended" callout to the "Log Off" icon in the top right of the workspace. Another arrow points from the "Log Off and resulting message" callout to the "Log Off" icon in the top right of the workspace. A third arrow points from the "Log Off and resulting message" callout to the "Windows Internet Explorer" dialog box.

Name	Description	Size
945001_APR13.pdf	PDF File	1285545

Windows Internet Explorer

Are you sure you want to navigate away from this page?
If the session is closed, any unsaved data will be lost.
Press OK to continue, or Cancel to stay on the current page.

OK Cancel

(Note many tabs present) Recommended logoff – use Portal “Log Off” icon