Orientation to...

Penn’s Business Applications

IT Orientation – October 19, 2011
Orientation to....

Budget Planning Tools

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Budget Planning Tools

• To prepare and analyze budget and forecast data, Penn uses Hyperion Planning and Hyperion Reports software. The applications include:
  • Planning or PennPlan(1,2,3) – used to enter budget and forecasts
  • PennHist – used with Hyperion Reports or Smart View Add-in to review summarized financial information.
  • Hardware in Michigan as of December, 2010

• **Planning** (meaning all the PennPlan applications and Reports) will generally be **available from 7:00 am to Midnight**, except Friday afternoons, starting at 1PM, which is reserved in case maintenance is necessary.

• **PennHist**, the database used for most reports, will be refreshed with your latest forecasts and budgets from **PennPlan**:  
  Daily at 8:00 am, 12 noon, 4:00 pm, 8:00 pm

• Links to access forms, password manager, additional documentation including user guides and FAQs, as well as the actual application links are accessible at:  
  [http://www.budget.upenn.edu/plantools](http://www.budget.upenn.edu/plantools)  
  (also accessible from the U@Penn portal under Administrative Systems)

UPHS users access separate Hyperion Application.
Budget Planning Tools

• Current Hyperion Planning Application (accessed via a web browser) is compliant with IE7 and IE8 as well as Firefox 3.5

• If your user wants to use the Smart View Add-in tool, instructions for installation and use are available under menu option Smart View Add-in.

Note: Only users on Windows platforms can install because Smart View is an add-in to Microsoft Office products.

All support issues should be directed by email to:

PLANNINGHELP-L@LISTS.UPENN.EDU
Orientation to....

PennWorks and Payroll/Personnel System

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What is PennWorks?

- Web-based front-end to Payroll/Personnel system on University Administrative Mainframe

- Multiple Modules:
  - Browsing, adding, and updating biographical information, role information, and Faculty compensation
  - Salary Increase Program (SALINC) – annual merit increase process
  - Additional Pay – processing of additional compensation for duties outside scope of normal role, reward extraordinary performance, etc.
What is Payroll/Personnel System?

• Payroll/Personnel system on University Administrative Mainframe (sometimes referred to as UMIS)

• Multiple Modules:
  ➢ Payroll/Personnel Online Database – browsing biographical and job information
  ➢ OTR – Online Time Reporting
  ➢ Salary Management – Mainframe payment reports and information and Reallocations
  ➢ U@Penn - My Profile, My Pay, My Benefits, My Tax Info, Enroll/Update Direct Deposit
PennWorks/Payroll - Access Requirements

• Training
  Required Hands On – Instructor Led Courses from Financial Training
  http://www.finance.upenn.edu/ftd/coursedesc.shtml#pay

• Access
  ➢ Business Administrator Access by Home or Role School Center/Org.
    Request for Administrative Mainframe LOGON ID (includes PennWorks) form at:
    http://www.finance.upenn.edu/comptroller/forms/#Payroll
  ➢ Employee self-service access to certain payroll information (address, contact information, direct deposit enrollment) through U@Penn portal
  ➢ PennWorks accessed through U@Penn portal from Business tab
Payroll/Personnel System
• Terminal Emulation Software, Hummingbird Host Explorer. Can be downloaded at:
  ➢ http://www.upenn.edu/computing/provider/product
• Salary Management Mainframe Reports – require access to BEN Financials Printer

PennWorks
• Supported Computing Products at Penn
  ➢ http://www.upenn.edu/computing/product/
• Configure web browser to allow pop-ups
  ➢ http://www.upenn.edu/computing/help/doc/browser/popup.html
Payroll/Personnel Support

• Payroll/Personnel Questions
  ➢ Payroll Office: http://www.finance.upenn.edu/comptroller/payroll
  ➢ Human Resources Office: http://www.hr.upenn.edu/

• Access questions including changing Administrative Mainframe Passwords:
  ➢ Customer Service ISC Hotline 215-898-1099

• Host Explorer questions:
  ➢ ISC Provider Desk (prodesk@isc.upenn.edu)
PennWorks Support

• LSP – Local Support Providers
  - Support of desktop issues
  - Subscribed to LSP-ADSYS listserv for communications from Financial Systems for PennWorks/Payroll, BEN, etc.

• PennWorks Questions
  - 6-HELP (215-746-4357), enter 2-digit School/Center (1st 2 digits of CNAC), choose Option 5 for PennWorks
Orientation to....

BEN Financials

IT Orientation – October 19, 2011
What is BEN Financials?

- University’s core integrated financial application providing the following functionality:
  - Accounts Payable: BEN Pays
  - General Ledger: BEN Balances
  - Internet Procurement & Purchasing: BEN Buys
  - Oracle Asset Management: BEN Assets
  - Integration with other School/Center administrative systems

- Oracle E-Business application software integrated with:
  - Kofax Imaging Software
  - SqiQuest - Catalog Content
BEN Financials - Desktop Requirements

- Sun JRE 1.6.0_24 to 1.6.0._x*
  - Required for all BEN Financials users except those who are limited to only requisitioning items from the Penn MarketPlace

- Certified web browsers for Windows are:
  - Internet Explorer 7.0 & 8.0
  - Mozilla Firefox 3.6.x

  Note: Users viewing invoice images are required to use Internet Explorer, no other browser is currently certified with the MarkView Imaging software

- Windows 7, XP SP3 & Vista SP 2 are the supported and recommended O/Ss

*Later versions are also expected to work in accordance with Oracle’s Certifications
Certified web browser for Mac OS:
- Internet Explorer 7.0 & 8.0
- Mozilla Firefox 3.6.x

Mac O/S needs to emulate windows (Virtual PC, intel-based, Vmware Fusion, etc…) native Mac is not supported

Details of all desktop requirements can be found here:
- [http://www.finance.upenn.edu/ben/benfin/desktop_req/requirements.shtml](http://www.finance.upenn.edu/ben/benfin/desktop_req/requirements.shtml)
Required Training

- Courses - http://www.finance.upenn.edu/ftd/courses.shtml
  - Knowledge Link – Web-based
  - Instructor-Led Hands-On Courses

Access Forms -
http://www.finance.upenn.edu/comptroller/forms/
- Application Logon ID Request Form
- BEN Financials Printer Registration form
- BEN Reports Access Request Form
**BEN Financials - Support Structure**

- **LSP – Local Support Providers**
  - First tier of support for desktop issues
  - ISC Provider Desk ([prodesk@isc.upenn.edu](mailto:prodesk@isc.upenn.edu))

- **FSP – Financial Support Providers**
  - BEN Financials users who are responsible for application support issues
  - Available via BEN Helps – 6-HELP

- **Online resources**
  - BEN Knows - [http://www.finance.upenn.edu/benknows/](http://www.finance.upenn.edu/benknows/)
Orientation to the *Data Warehouse*

IT Orientation – October 19, 2011
How it’s used – the Warehouse out in the field

Users run hundreds of queries a day, with a wide range of goals:

- Ad hoc query and analysis – longitudinal studies (employees, courses, finances)
- Day-to-day management by school/center administrative personnel
- Principal Investigators monitoring their grants and protocols
- Source for other applications (PennPortal/U@Penn, PennCommunity, CoursesInTouch)

….. and many more!
Salary Management Loads Schedule:

- Payments and Encumbrances for Weekly runs are loaded to Salary Management and the Data Warehouse Monday nights; loaded from Salary Management to BEN Financials on the following Thursday night.
- Payments and Encumbrances for Monthly runs are loaded Monday night of the third week of the month to Salary Management and the Data Warehouse; loaded from Salary Management to BEN Financials on the second-to-last working day of the month.
Data Warehouse – Access Requirements

- Permission (formal authorization to use the data)
- A query tool (software)
- Training (in both the use of the tool and data)
- Password
  - Use the password changer to reset passwords:
    
    http://www.upenn.edu/computing/da/orapass.html

Access request forms – now electronic! – are located at:

http://www.upenn.edu/computing/da/dw/forms.html
Tools of the (Warehouse) Trade

- **BusinessObjects**
  - *InfoView and Web Intelligence (aka Webi, XI3)* browser-based tool for ad hoc & canned queries
    - *Desktop Intelligence (aka Deski, XIR2)* discontinued as of October 2011

- **BEN Reports**
  - Canned web query (Facilities, Financial, Payroll, Sponsored Projects, GRAM, Learning Management)

- **MS Office via ODBC links** (school/ctr end-users and developers)
  - Requires Oracle Client and ODBC configuration

- **SQL*Plus** (primarily developers)

- **TOAD** (primarily ISC and some school/ctr developers)

- **Local school/center applications**
Business Objects – InfoView and Webi

- **InfoView** for refreshing and interacting with canned or personal reports over the web

- **Web Intelligence (aka Webi)** browser java-based tool for ad hoc & canned reports development and manipulation
  - Java configuration tweaks may be needed

- Important links:
  - General information, supported browsers: (currently IE 7/8; Firefox 3)
    [http://www.upenn.edu/computing/da/dw/querytools.html](http://www.upenn.edu/computing/da/dw/querytools.html)
  - How Tos: [http://www.upenn.edu/computing/da/bo/webi/how_to.html](http://www.upenn.edu/computing/da/bo/webi/how_to.html)
  - FAQs and tips: [http://www.upenn.edu/computing/da/bo/webi/faq_tips.html](http://www.upenn.edu/computing/da/bo/webi/faq_tips.html)

- As of October 2011: *Desktop Intelligence (Deski) is no longer supported*
Warehouse Information & Communications

- Support email addresses:
  - da-staff@isc.upenn.edu: Data Warehouse questions; Business Objects issues
  - oraclepass@pobox.upenn.edu: Oracle password change issues
  - Data collection listservs (FINQUERY-WH, STUDENT-WH, etc.)

- On the web:
  - Warehouse web site: http://www.upenn.edu/computing/da/dw
  - Business Objects information: http://www.upenn.edu/computing/da/dw/querytools.html
  - Load status page: https://medley.isc-seo.upenn.edu/warehouse/jsp/fast.do
  - Password changer application: http://www.upenn.edu/computing/da/orapass.html
  - U@Penn Business tab (Business Administration)

- In person:
  3401 Walnut Street, Suite 265C
  Philadelphia, PA 19104-6228
Thanks for your attention!

Any questions?