Orientation to....

Penn’s Business Applications

IT Orientation – December 10, 2008
Orientation to....

Budget Planning Tools

IT Orientation – December 10, 2008
Budget Planning Tools

• To prepare and analyze budget and forecast data, Penn uses Hyperion Planning and Hyperion Reports software. The applications include:
  • PennPlan(1,2,3) – used to enter budget and forecasts
  • PennHist – used with Hyperion Reports or Excel add-in review summarized financial information.

• Links to access forms, password manager, additional documentation and the actual application links are accessible from the U@Penn portal under Administrative Systems or directly at:
  http://www.budget.upenn.edu/plantools

• Current Hyperion Planning Application (accessed via a web browser) is compliant with IE6. On target to be upgraded by the end of FY09 and will be Vista and IE7 compliant at that time.

• If your user wants to use the Excel Add-in tool, instructions for installation and use are available under menu option Essbase Add-in. Currently, only available for Excel 2003, but will be upgraded to 2007 in next few months.

Please direct questions or report errors by email to:
  PLANNINGHELP-L@LISTS.UPENN.EDU
What is Payroll/Personnel System?

- Payroll/Personnel system on University Administrative Mainframe (sometimes referred to as UMIS)
- Multiple Modules:
  - Payroll/Personnel On-Line Database – adding, updating biographical and job information
  - SALINC – yearly Salary Increase process
  - OTR – On Line Time Reporting
  - Salary Management – Mainframe payment reports and information and Reallocations
  - WESD – Web Enabled Salary Distribution System
  - U@Penn - My Profile, My Pay, My Benefits, My Tax Info, Update Direct Deposit
How is it Accessed?

• 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 Job School Center/Org.
    Request for Administrative Mainframe LOGON ID Access forms 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
Desktop Requirements

- **Terminal Emulation Software:**
  - Hummingbird Host Explorer (Windows)
  - dataComet-Secure (Mac)
  - [http://www.upenn.edu/computing/provider/product](http://www.upenn.edu/computing/provider/product)

- **Salary Management Mainframe Reports** – require access to BEN Financials Printer
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)
Orientation to....

BEN Financials

IT Orientation – December 10, 2008
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

- MarkView Imaging Software
- SciQuest - Catalog Content
Desktop Requirements

- Sun JRE 1.5.0.15 of 1.5.0.16 *
  - Replaced J-initiator desktop software
  - 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 6.0 SP1
  - Internet Explorer 7.0
  - Mozilla Firefox 3.0.x

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

*Later versions are also expected to work in accordance with Oracle’s Certifications
Certified web browser for Mac OS:
- Mozilla Firefox 3.0.x

The Mac OS Java story
- It’s already installed…
Desktop Requirements (cont)

- Build a Boot Camp volume
  - Install Windows XP or Windows Vista
  - Run all updates
  - Install JRE
  - Use Internet Explorer 6.0 SP1 of 7.0

This is the only Oracle-supported imaging configuration
Access Requirements

- **Required Training**
  - Knowledge Link – Web-based
  - Instructor-Led Hands-On Courses

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

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

- **FSP – Financial Support Providers**
  - BEN Financials users who are responsible for application support issues

- **BEN Helps – 6-HELP**
Additional Resources

- BEN Knows - http://www.finance.upenn.edu/benknows/

- Comptroller’s Office
  http://www.finance.upenn.edu/ben/benfin/desktop_req/
BEN Financials DEMO
Orientation to the *Data Warehouse*

IT Orientation – December 10, 2008
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!
What is Required for Access?

- 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](http://www.upenn.edu/computing/da/orapass.html)

Access request forms are located at:

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

- **Business Objects**
  - *Desktop Intelligence (aka Deski, XIR2)* client/server tool for ad hoc & canned queries
  - *InfoView* for refreshing canned reports over the web

- **BEN Reports**
  - Canned web query (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 – Deski and InfoView

- **Desktop Intelligence (aka Deski, XIR2)** client/server tool for ad hoc & canned queries
  
  http://www.upenn.edu/computing/da/bo/deskioverview.html
  
  - Users can create, edit, and refresh reports
  - Requires desktop install, power user privileges
    
    Be sure to follow the instructions!
    
    http://www.upenn.edu/computing/da/bo/busobjupgrade/install.html

- **InfoView** for refreshing canned reports over the web
  
  http://www.upenn.edu/computing/da/bo/infoviewoverview.html
  
  - No local software required
  - Users can only refresh reports, can’t create new ones
  - An easy way to navigate the repository of pre-built reports

- Common Tips and Error messages
  
  http://www.upenn.edu/computing/da/bo/busobjtips.html
Tools of the (Warehouse) Trade

- Business Objects
  - *Desktop Intelligence* (aka Deski, XIR2) client/server tool for ad hoc & canned queries
  - *InfoView* for refreshing canned reports over the web

- BEN Reports
  - Canned web query (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
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
  - 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?