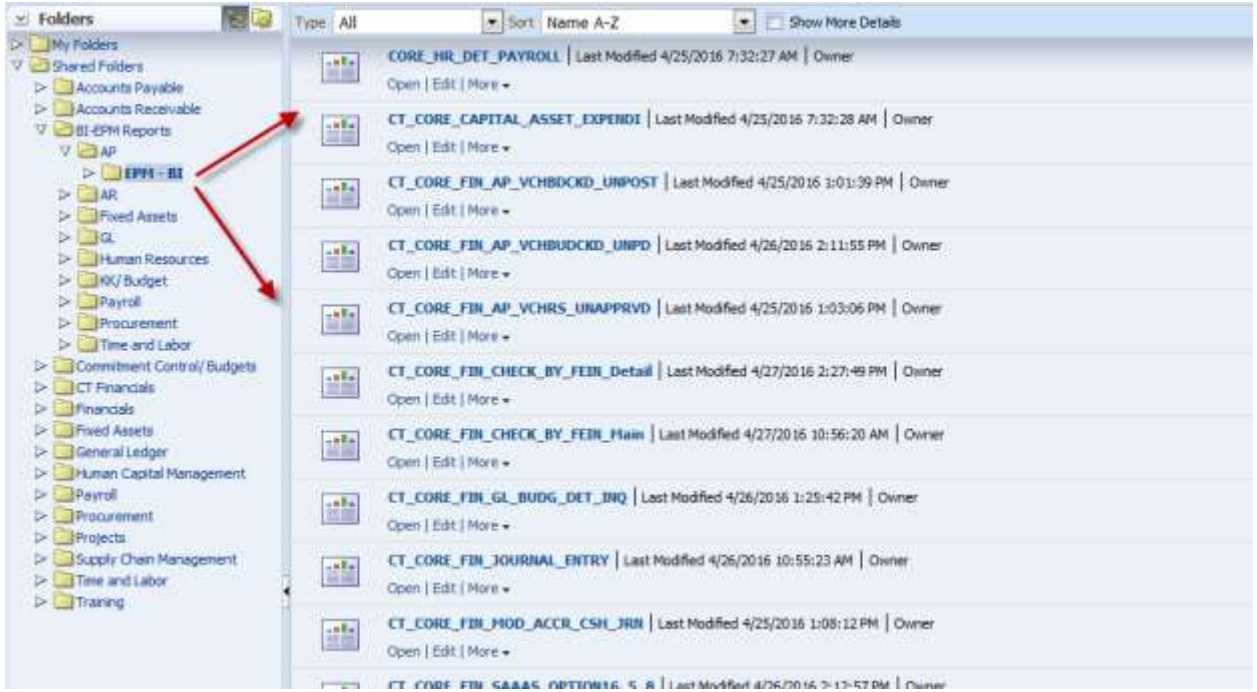
Navigation to EPM Analysis

Catalog>Shared Folders>BI-EPM Reports

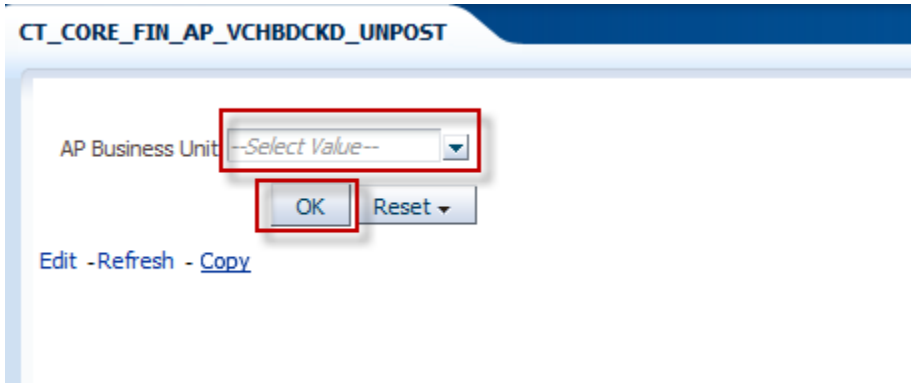
Select a Sub-Folder

In the Sub-Folder will be available Analysis

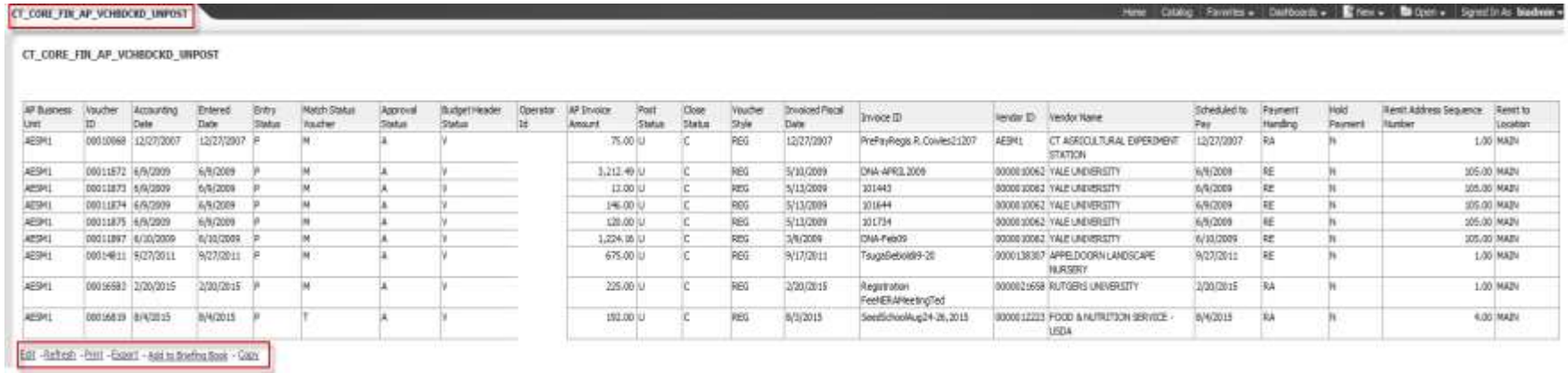


Select an Analysis and Click the Open link. This will bring you to the Prompt tab.

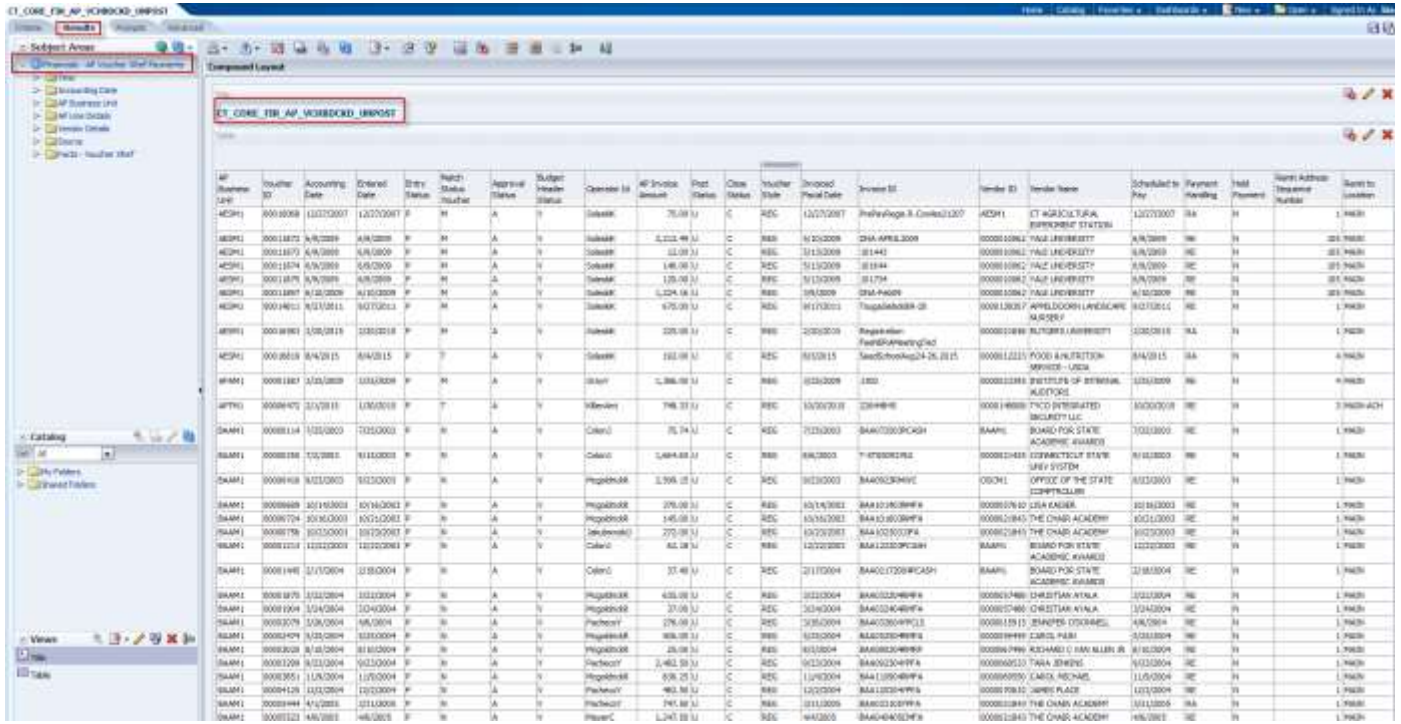
Select the prompt values and click OK



This will bring you to the Results view. You can Edit, Print, Export, or Copy the Analysis.

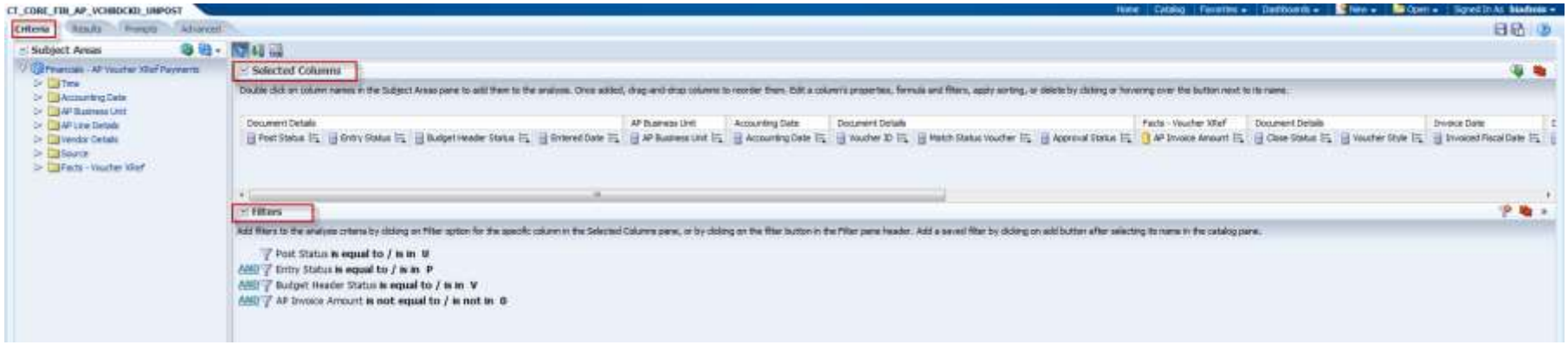


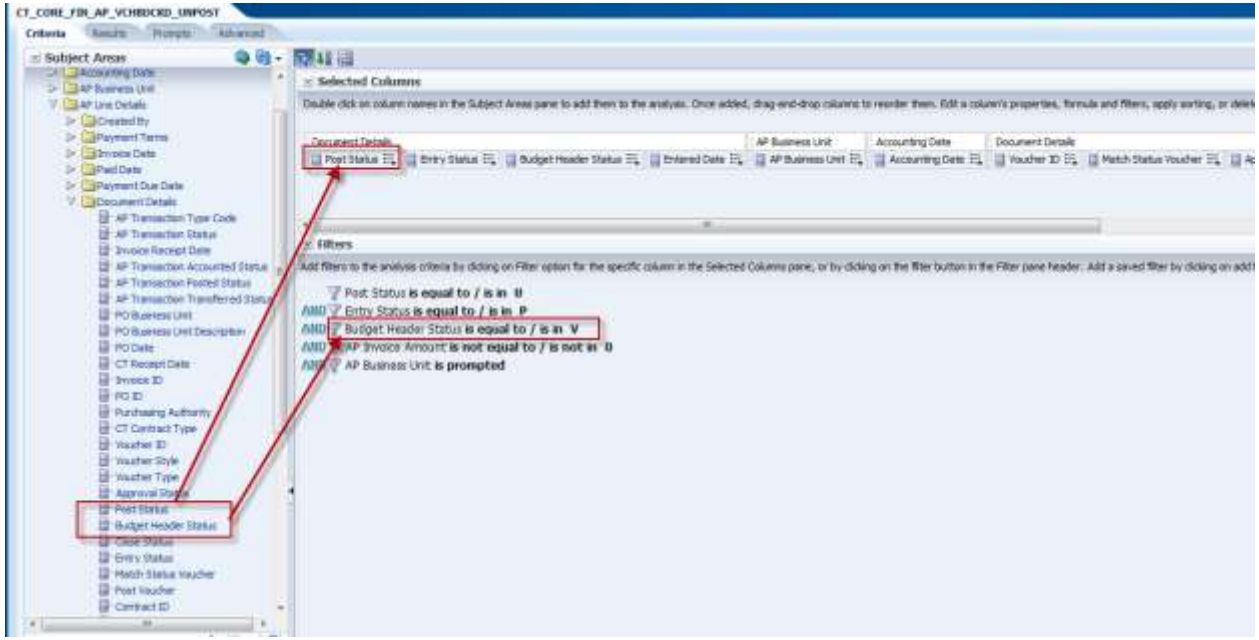
To Edit the Analysis: Click the Edit link. This will take you to the Criteria tab.



You have the option to modify the Selected Columns and Filters.

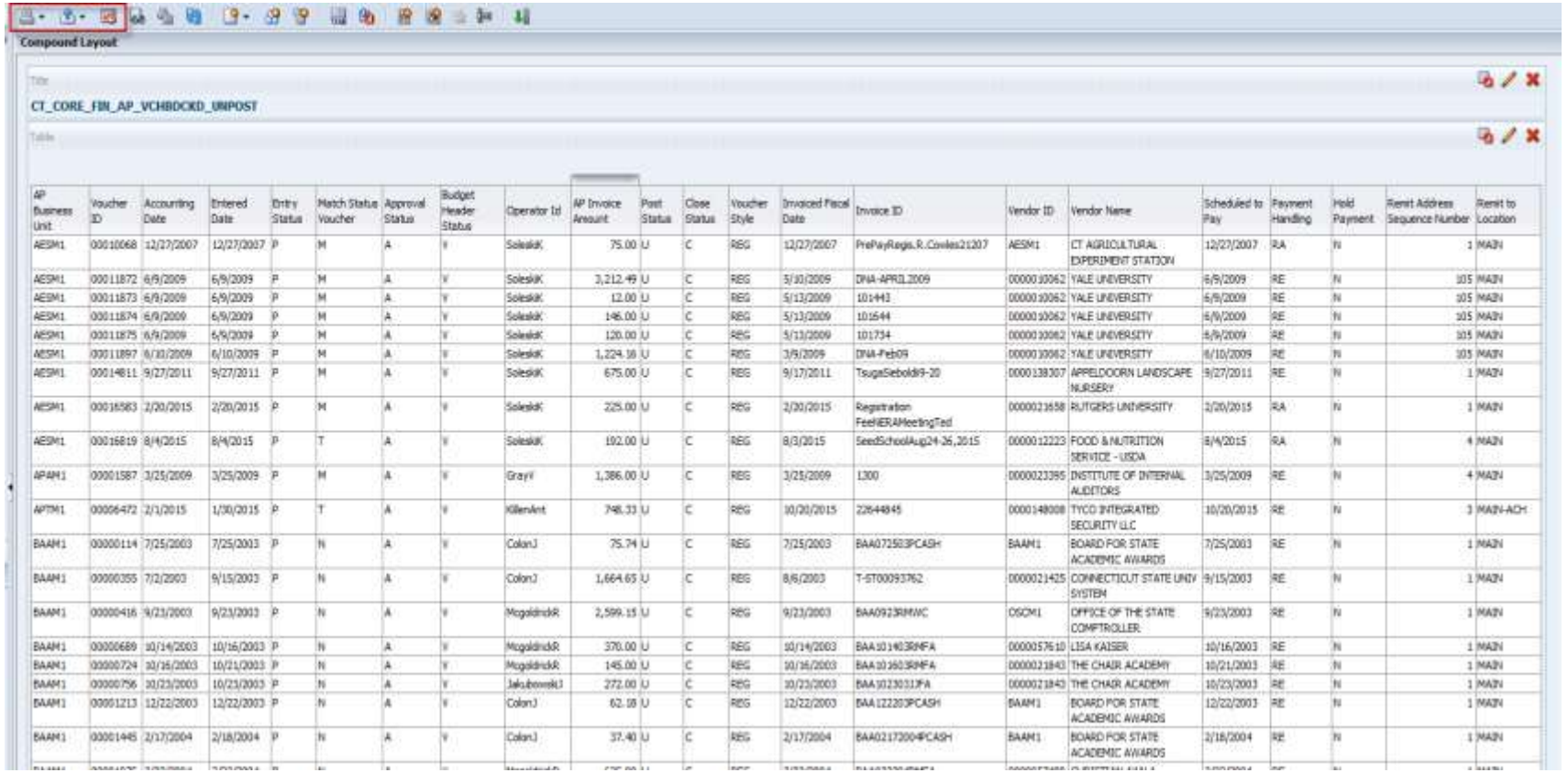
To modify an Analysis: Click the Criteria Tab to view the Selected Columns and Filters





You can save the updated Analysis by clicking the Save As *and save the analysis in My Folders* ***(also refer to the OBI-STARS Advanced User Guide Section 3.1 Create and Save Analysis and Section 7.2 and 7.3 on Printing and Export an Analysis).***

To Print, Export or Schedule this analysis: Select the Icons from the Catalog Toolbar



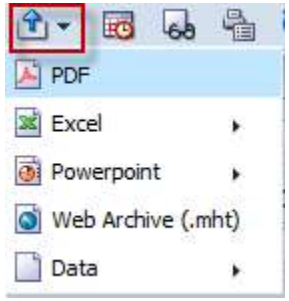
Compound Layout

CT_CORE_FIN_AP_VCHBDCKD_UNPOST

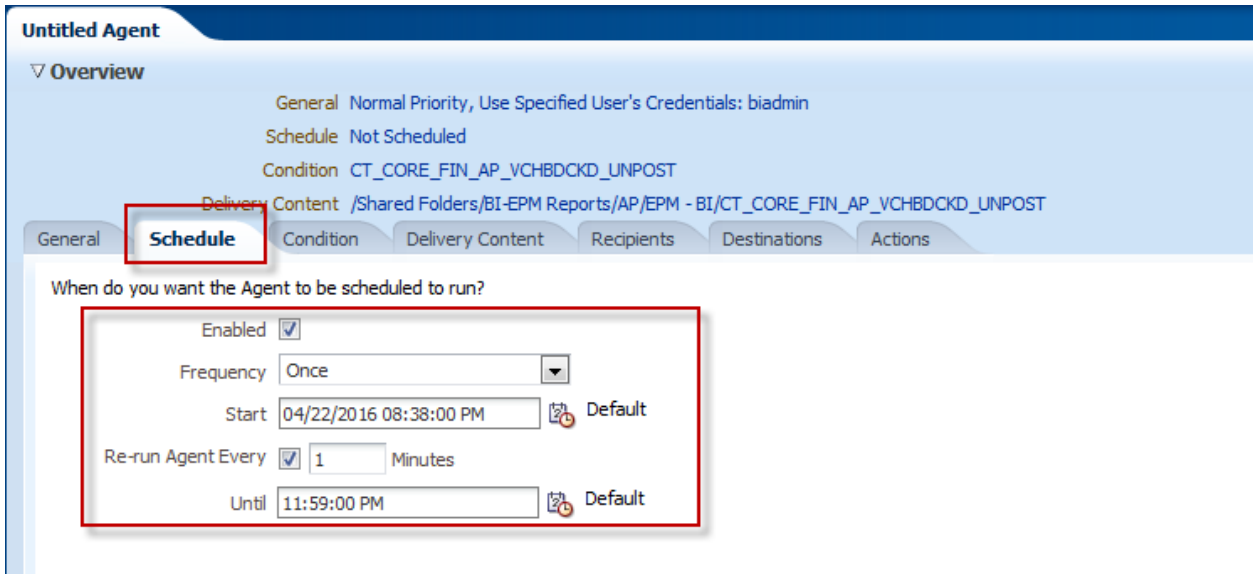
AP Business Unit	Voucher ID	Accounting Date	Entered Date	Entry Status	Match Status Voucher	Approval Status	Budget Header Status	Operator Id	AP Invoice Amount	Post Status	Close Status	Voucher Style	Invoiced Fiscal Date	Invoice ID	Vendor ID	Vendor Name	Scheduled to Pay	Payment Handling	Hold Payment	Remit Address Sequence Number	Remit to Location
AESM1	00010068	12/27/2007	12/27/2007	P	M	A	V	SoleskiK	75.00	U	C	REG	12/27/2007	PrePayRegis.R..Cowles21207	AESM1	CT AGRICULTURAL EXPERIMENT STATION	12/27/2007	RA	N	1	MAIN
AESM1	00011872	6/9/2009	6/9/2009	P	M	A	V	SoleskiK	3,212.49	U	C	REG	5/10/2009	DNA-APR12009	0000010062	YALE UNIVERSITY	6/9/2009	RE	N	105	MAIN
AESM1	00011873	6/9/2009	6/9/2009	P	M	A	V	SoleskiK	12.00	U	C	REG	5/13/2009	101443	0000010062	YALE UNIVERSITY	6/9/2009	RE	N	105	MAIN
AESM1	00011874	6/9/2009	6/9/2009	P	M	A	V	SoleskiK	146.00	U	C	REG	5/13/2009	101644	0000010062	YALE UNIVERSITY	6/9/2009	RE	N	105	MAIN
AESM1	00011875	6/9/2009	6/9/2009	P	M	A	V	SoleskiK	120.00	U	C	REG	5/13/2009	101734	0000010062	YALE UNIVERSITY	6/9/2009	RE	N	105	MAIN
AESM1	00011897	6/10/2009	6/10/2009	P	M	A	V	SoleskiK	1,224.16	U	C	REG	3/9/2009	DNA-Feb09	0000010062	YALE UNIVERSITY	6/10/2009	RE	N	105	MAIN
AESM1	00014811	9/27/2011	9/27/2011	P	M	A	V	SoleskiK	675.00	U	C	REG	9/17/2011	TsugaSieboldi9-20	0000138307	APPELDOORN LANDSCAPE NURSERY	9/27/2011	RE	N	1	MAIN
AESM1	00016583	2/20/2015	2/20/2015	P	M	A	V	SoleskiK	225.00	U	C	REG	2/20/2015	Registration FeeNERAMeetingTed	0000023658	RUTGERS UNIVERSITY	2/20/2015	RA	N	1	MAIN
AESM1	00016819	8/4/2015	8/4/2015	P	T	A	V	SoleskiK	192.00	U	C	REG	8/3/2015	SeedSchoolAug24-26,2015	0000012223	FOOD & NUTRITION SERVICE - USDA	8/4/2015	RA	N	4	MAIN
APAM1	00001587	3/25/2009	3/25/2009	P	M	A	V	GrayV	1,386.00	U	C	REG	3/25/2009	1300	0000023395	INSTITUTE OF INTERNAL AUDITORS	3/25/2009	RE	N	4	MAIN
APTM1	00006472	2/1/2015	1/30/2015	P	T	A	V	KillenAnt	748.33	U	C	REG	10/20/2015	2264845	0000148008	TYCO INTEGRATED SECURITY LLC	10/20/2015	RE	N	3	MAIN-ACH
BAAM1	00000114	7/25/2003	7/25/2003	P	N	A	V	ColonJ	75.74	U	C	REG	7/25/2003	BAA072503PCASH	BAAM1	BOARD FOR STATE ACADEMIC AWARDS	7/25/2003	RE	N	1	MAIN
BAAM1	00000355	7/2/2003	9/15/2003	P	N	A	V	ColonJ	1,664.65	U	C	REG	8/6/2003	T-ST00093762	0000021425	CONNECTICUT STATE UNIV SYSTEM	9/15/2003	RE	N	1	MAIN
BAAM1	00000416	9/23/2003	9/23/2003	P	N	A	V	McgoldrickR	2,599.15	U	C	REG	9/23/2003	BAA0923RMWC	OSCM1	OFFICE OF THE STATE COMPTROLLER	9/23/2003	RE	N	1	MAIN
BAAM1	00000689	10/14/2003	10/16/2003	P	N	A	V	McgoldrickR	370.00	U	C	REG	10/14/2003	BAA101403RMFA	0000057610	LISA KAISER	10/16/2003	RE	N	1	MAIN
BAAM1	00000724	10/16/2003	10/21/2003	P	N	A	V	McgoldrickR	145.00	U	C	REG	10/16/2003	BAA101603RMFA	0000021843	THE CHAIR ACADEMY	10/21/2003	RE	N	1	MAIN
BAAM1	00000756	10/23/2003	10/23/2003	P	N	A	V	JakubowskiJ	272.00	U	C	REG	10/23/2003	BAA1023031FA	0000021843	THE CHAIR ACADEMY	10/23/2003	RE	N	1	MAIN
BAAM1	00001213	12/22/2003	12/22/2003	P	N	A	V	ColonJ	62.18	U	C	REG	12/22/2003	BAA122203PCASH	BAAM1	BOARD FOR STATE ACADEMIC AWARDS	12/22/2003	RE	N	1	MAIN
BAAM1	00001445	2/17/2004	2/18/2004	P	N	A	V	ColonJ	37.40	U	C	REG	2/17/2004	BAA021720004PCASH	BAAM1	BOARD FOR STATE ACADEMIC AWARDS	2/18/2004	RE	N	1	MAIN

Select the Print Icon to print

Select the Export Icon to export the analysis to report writer

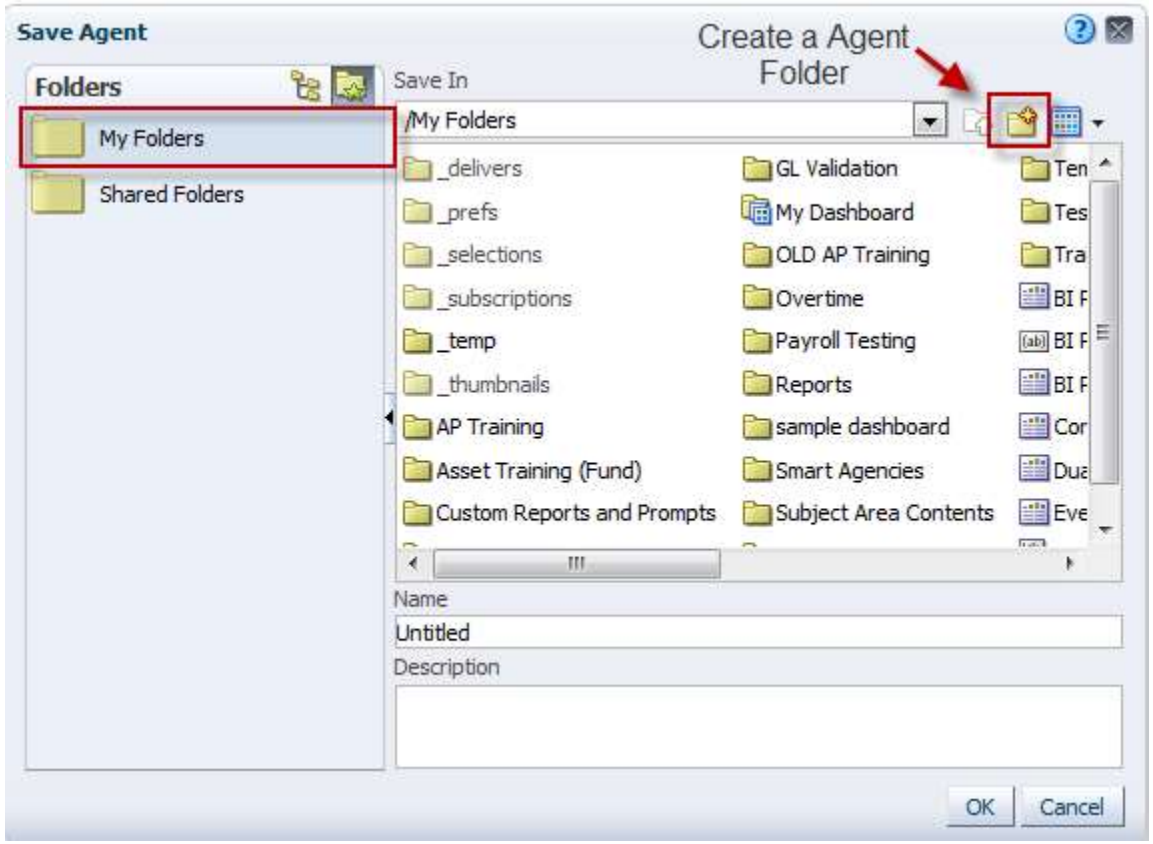


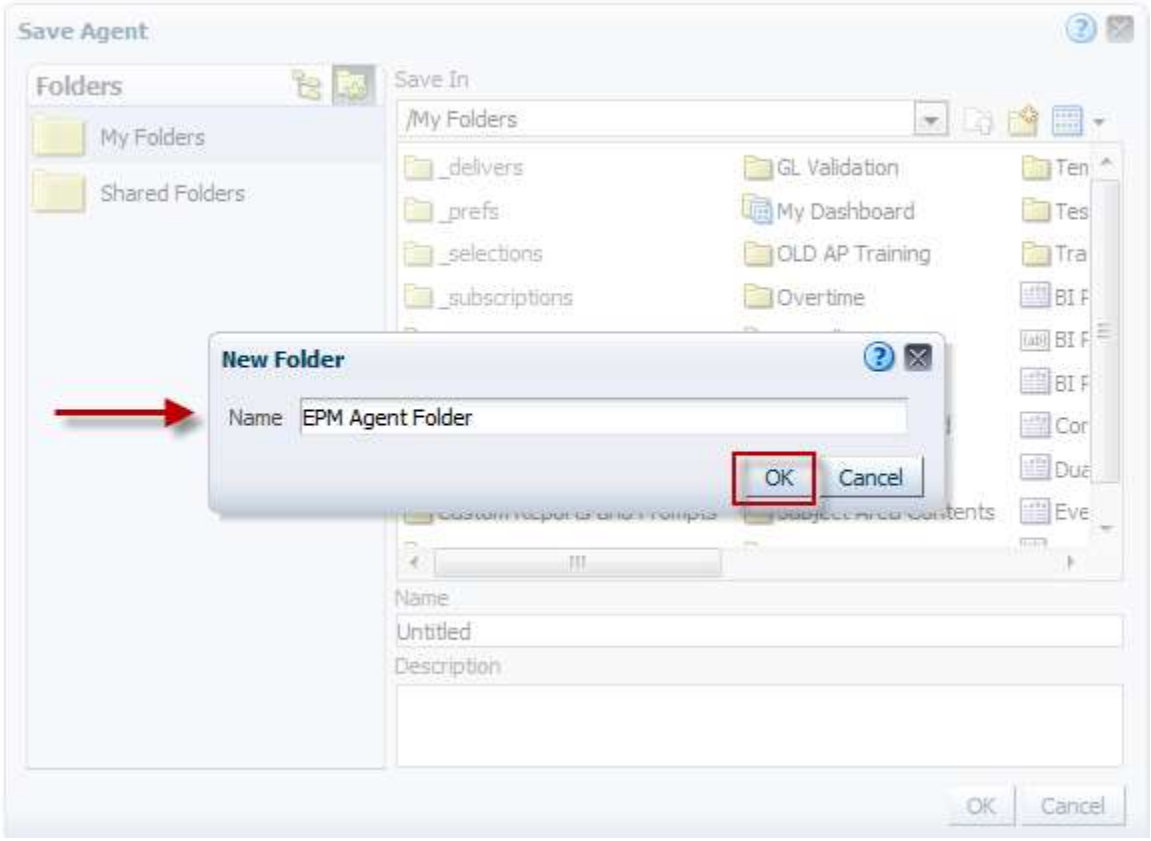
Select the Schedule Icon *to schedule an analysis. This will take you to the Untitled Agent Page>General. Click on the Schedule tab and setup your Agent.*



Click the Save Icon (located in the upper right hand corner of the screen)

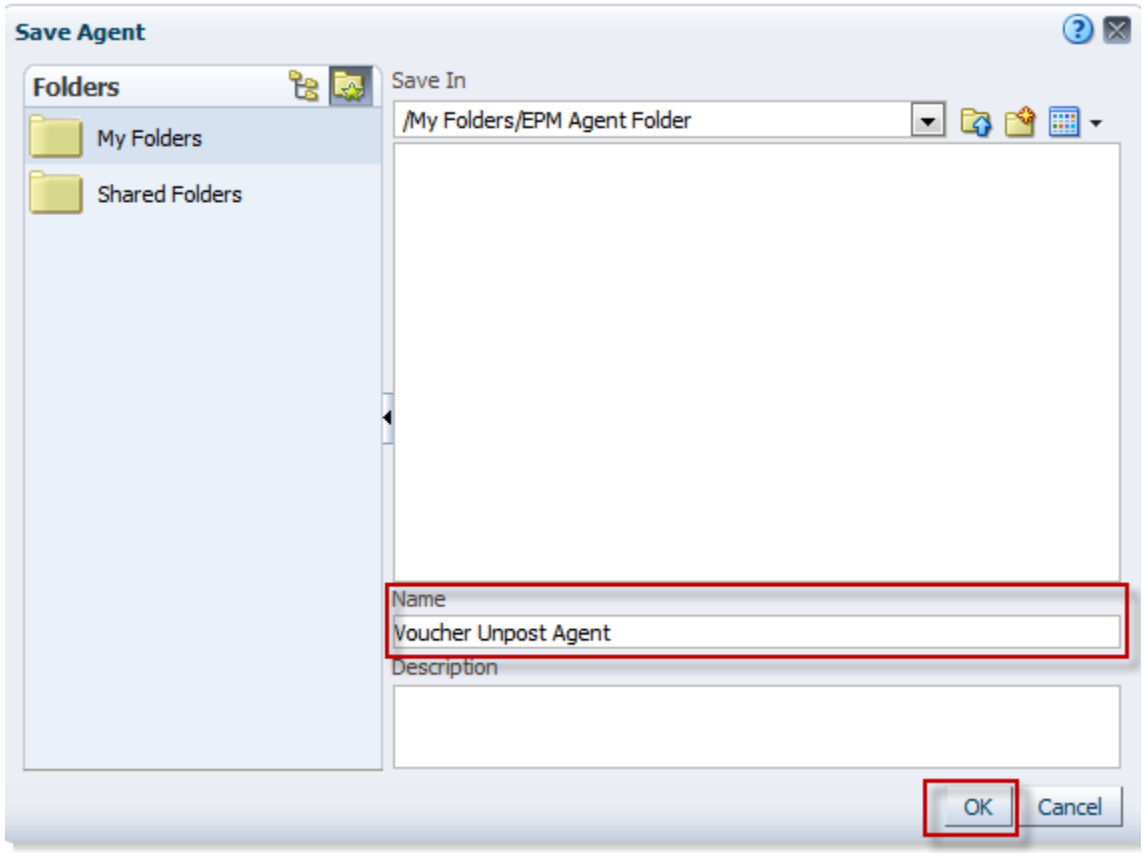
Open My Folders and create an Agent Folder


Save Agent
Create a Agent Folder
Folders
Save In
/My Folders
My Folders
Shared Folders
_delivers
_prefs
_selections
_subscriptions
_temp
_thumbnails
AP Training
Asset Training (Fund)
Custom Reports and Prompts
GL Validation
My Dashboard
OLD AP Training
Overtime
Payroll Testing
Reports
sample dashboard
Smart Agencies
Subject Area Contents
Name
Untitled
Description
OK
Cancel

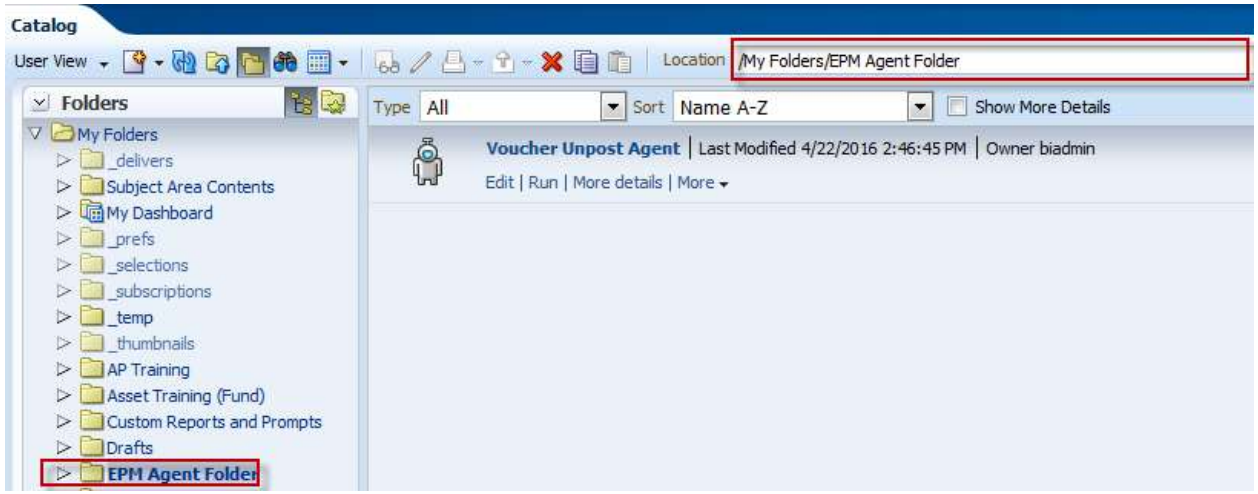


Click OK

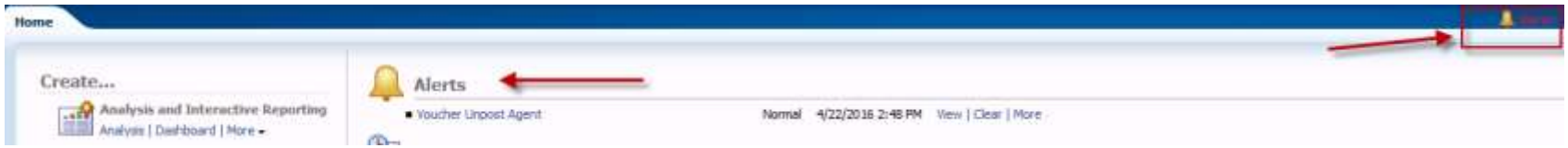
Type the Agent name in the Name field (you can add a description in the Description field. Then Click OK.


Save Agent
Folders
My Folders
Shared Folders
Save In
/My Folders/EPM Agent Folder
Name
Voucher Unpost Agent
Description
OK
Cancel

To view the Agent: Catalog>My Folders>Agent Folder



Once the Agent successfully runs you will get an Alert on your Home page.



End.