



**United States Equal Employment Opportunity
Commission**

Office of Information Technology

**Oracle Enterprise Performance Management (EPM)
*Hyperion Reporting and Analysis Rel. 11.1.1***

Training Guide

**January 9, 2014
Version 1.0**

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Record of Changes

Version	Date	Originator	Requested Changes
Initial Draft Started	11/25/13	Sherry Burden	
Draft for Review	1/9/13	Sherry Burden	Sent to team for initial review
Final Draft			
Final/1.0			

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1 Introduction

This User Guide explains how users pre-configure internet explorer (IE), log in, run Hyperion interactive reporting documents and navigate Oracle Enterprise Performance Management (EPM). It will highlight the commonly used functions by user. This guide is not intended to cover all the advanced features of the application.

2 How to Pre-Configure Your Internet Explorer (IE)

Before accessing Hyperion, exit all IE sessions and follow the steps below to ensure no issues.

- A. Go to the control panel and select the “Internet Options” icon.



Figure 1 - Control Panel

- B. Select the “Security” Tab.
- C. Select the “Local Intranet” zone.
- D. Click the **Sites** button.

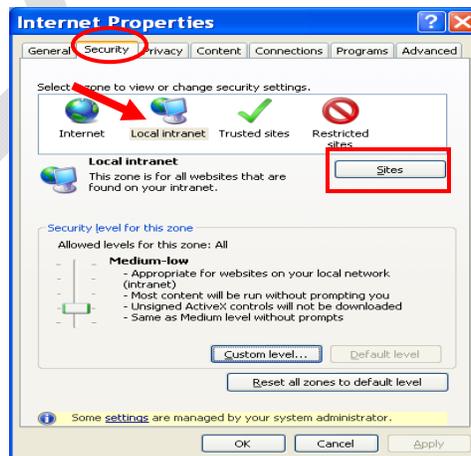


Figure 2 - Internet Properties

- E. Check “Automatically detect intranet network”.
- F. Click the **Advance** button.

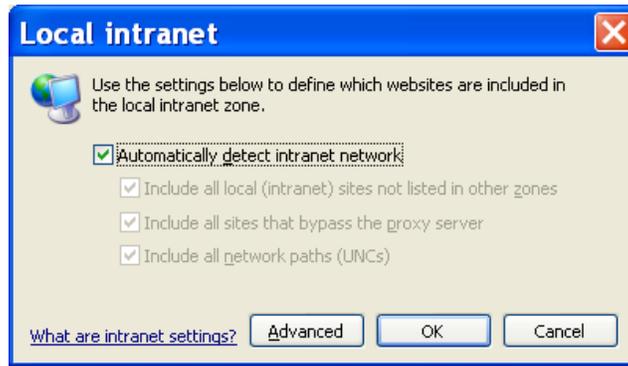


Figure 3 - Local intranet

- G. Enter <https://bi.eeoc.gov> in the field *Add this website to the zone*.
- H. Click the **Add** button to populate the link in the *Website* field.
- I. Click on the **Close** button.



Figure 4 - Local intranet Entry

3 How to Access Oracle EPM System

To access the system, you must put in a Service Now ticket requesting access to the system. After you have received your login information, you can access the system via EEOC Applications Menu, Shortcut Icon on Desktop or go to the website at <https://bi.eeoc.gov>. *If you don't have access to IMS, you should request BI access prior to IMS request.*

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A. After the Oracle EPM System Launch Page appears, click on the **Launch Application** button.



Figure 5 - Oracle EPM System Launch Page

B. On the *Log On* Window, enter your User Name and Password (*Same as IMS Login*).

C. Click on the **Log On** button.

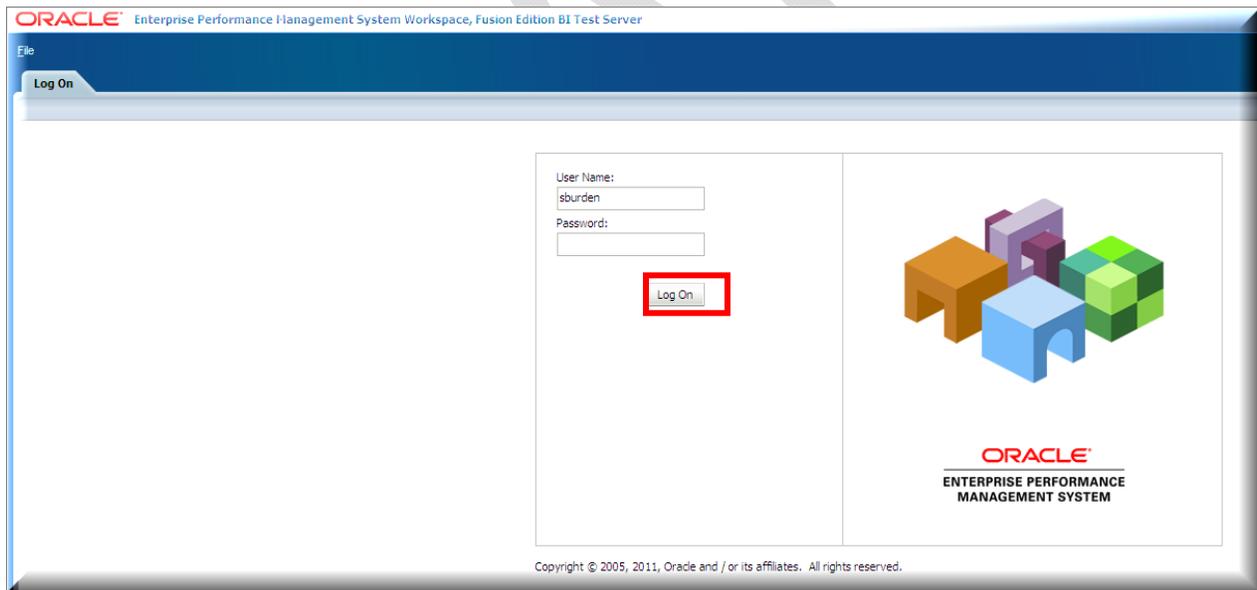


Figure 6 - Log On Window

The Oracle Home Page will display after you have successfully logged in.

4 Home Page Layout

Recently Opened Section lists the most recent reports you have accessed. *The Open folder consists of <>*.

Quick Links section lists links to access from the HomePage.

Workspace Pages Section will not be available during the 1st release of this application but will be designed to lists

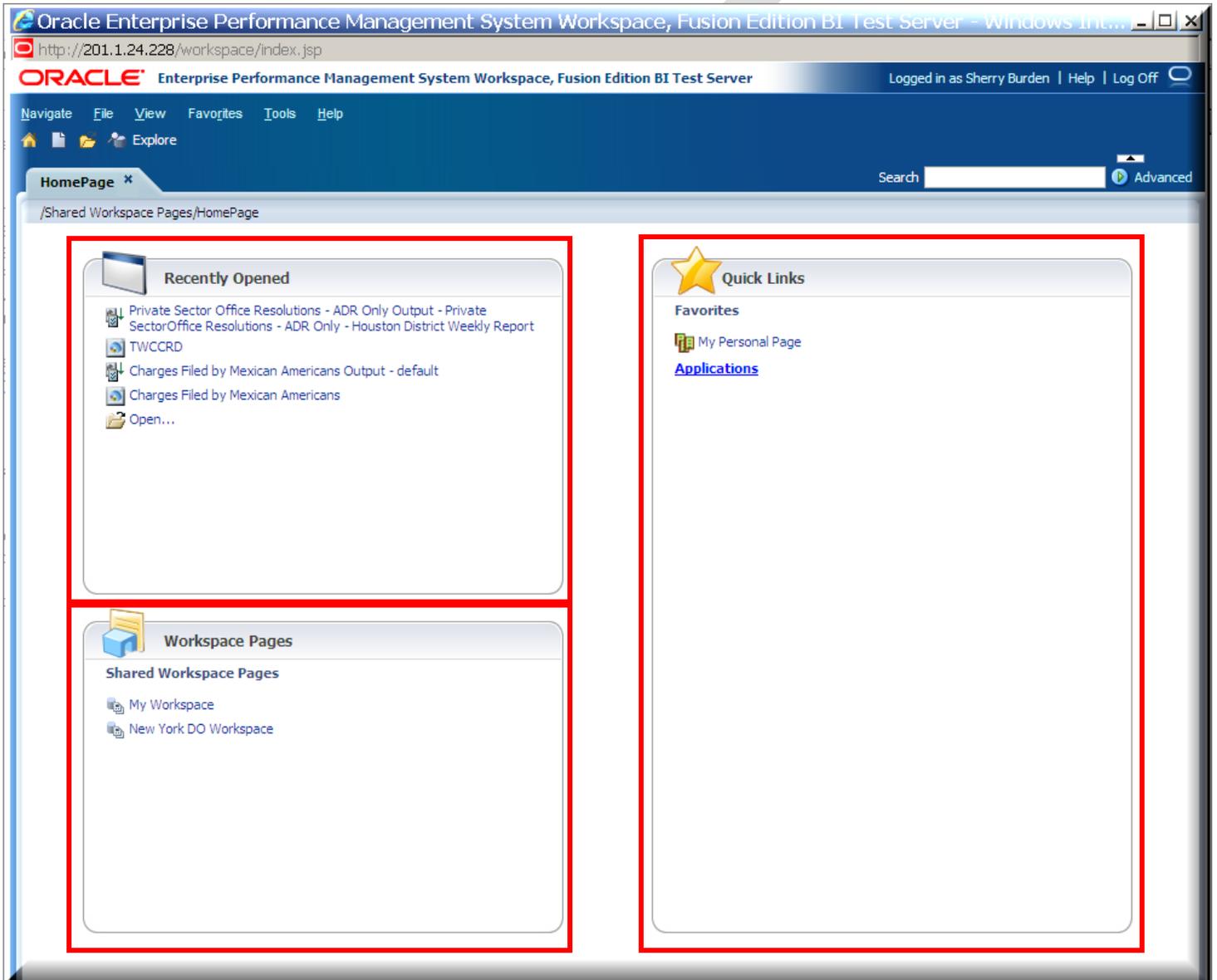


Figure 7 Home Page

5 Navigating Oracle EPM (Home Page)

The Oracle EPM home page presents you with many navigation options based on your permissions. We will focus on the following most commonly used options: Explore, Tools and Search.

6 Accessing District and Office Reports

Reports can be found at the District and Office level. (See Figures 8 and 9)

To access your District (Root Folder) level reports

- A. Click on the Explore item from the toolbar on the Home Page.
- B. Click on the District (Root Folder)
- C. Select your desired District report

To access your Office level reports

- A. Click on the Explore item from the toolbar on the Home Page.
- B. Click on the District (Root Folder)
- C. Click on the to expand the folder to display the Office folders
- D. Select the Office (Subfolder)
- E. Select your desired Office report

Note: You have to have permission to view Alternative Dispute Resolution (ADR) reports.

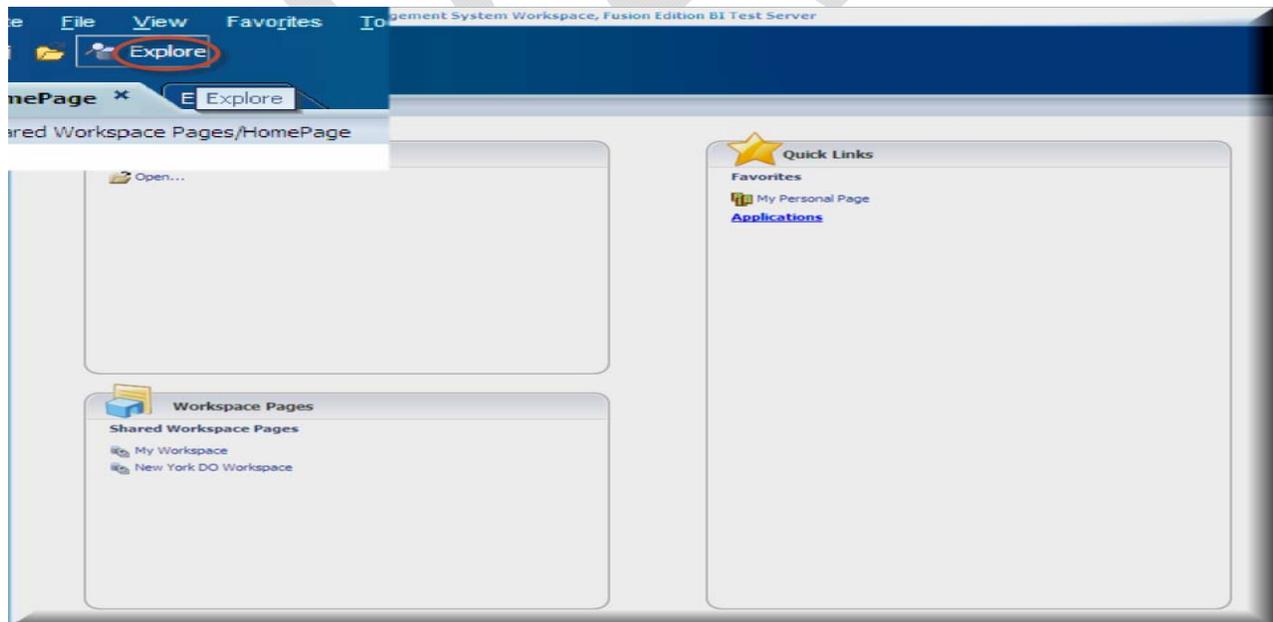


Figure 8 Accessing District Folder using Explore

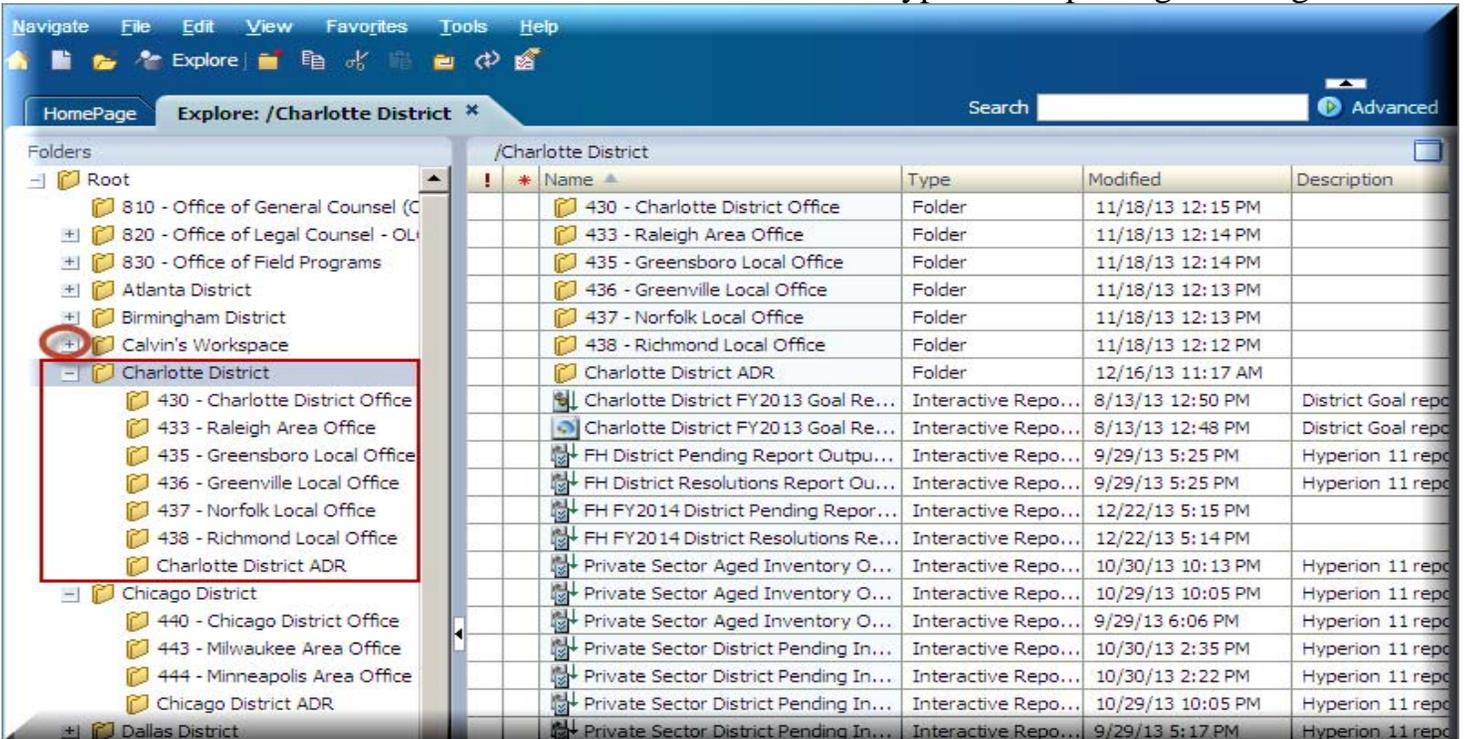


Figure 9 - District and Office Folders

7 Searching

In the upper right hand corner, you will notice the *Search* feature.

Here you may perform a full-text search. In this field, you may enter partial/full report title or any text that appears in a report and then click on the arrow next to the Search field. (See Figure 10)



Figure 10 – Search Field

If you would like to locate specific information, you may use the *Advance Search* feature by clicking on the *Advanced* link. (See Figure 10) The *Advance Search* screen will appear and you may enter as much or as little report information as you would like, then click the Search button. (See Figure 11)

After performing your Search, the *Search Results* screen will appear. (See Figure 12)

Advanced search

Advanced search filters

Enter Advanced Search filters and click 'Search'

Search Reset

All words

At least one word

Without the words

Written in (language)

Created in the past

Last modified in the past

In folder

Only search (document type)

Hidden file options

Priority

Order by

Enter Advanced Search filters and click 'Search'

Search Reset

Figure 11 - Advance Search Screen

Resolutions - ADR Only Output - Private SectorOffice Resolutions - ADR Only - Houston District Weekly Report

Search Results * Adv Search + (detroit) Advanced

Clusters and Controls

Order by

Score

Last modified date

Filters

Document Type

Interactive Reporting Job Output (2)

Updated

Today (0)

In the past 7 days (0)

In the past 30 days (0)

Older than 30 days (2)

Publish Location

Indianapolis District/471 - Detroit Field Office (2)

Search results

Search + (detroit) Search Advanced Search

Results 1 - 2 of 2 Search took 35 msec

Did you mean + (detail) ?

Private Sector Office Resolutions Output - Private Sector Office Resolutions - Detroit Field Office Weekly Report

Hyperion 11 report template capable of providing office level Private Sector resolutions data broken down to function, unit and staff le...
Interactive Reporting Job Output, 9/29/13 5:22 PM
[Indianapolis District/471 - Detroit Field Office/](#)
Owner/Author: cloving

Private Sector Office Pending Inventory Output - PS Office Pending Inventory Report - Detroit Field Office

Hyperion 11 report template capable of providing office level Private Sector pending inventory data broken down to function, unit and ...
Interactive Reporting Job Output, 9/29/13 5:27 PM
[Indianapolis District/471 - Detroit Field Office/](#)
Owner/Author: cloving

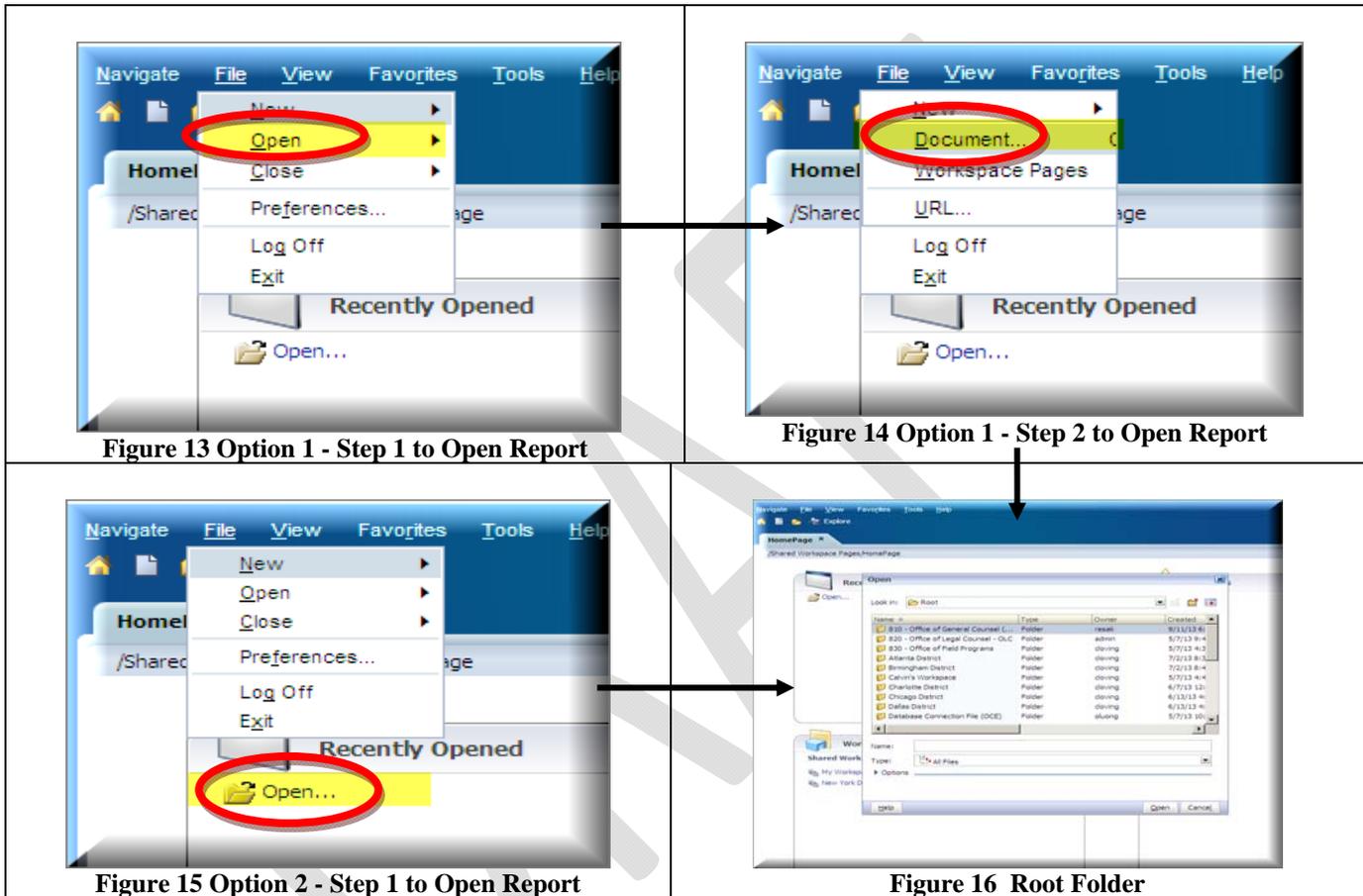
Result pages: Previous 1 Next

Figure 12 - Search Results Screen

8 Alternate Navigation to Report Folders

There are a couple of alternative ways to access your reports.

Select either **'Open'** from the *File Menu* OR Select the **Open Folder** located in the *'Recently Opened Section'* on the Home Page. This allows the user to access previously opened reports from the Home Page.



9 Understanding the Report Tab

There are different types of document sections that you can view from the report tab. You will find the following Sections/Views: Query, Results and Reports.

1. *Query View* will show you what data is being used to provide the reporting results. (See Figure 17)
2. *Results View* will show you the results from the query. (See Figure 18)
3. The *Report View* will display the report for you to print, email or save to your desktop. (See Figure 19)

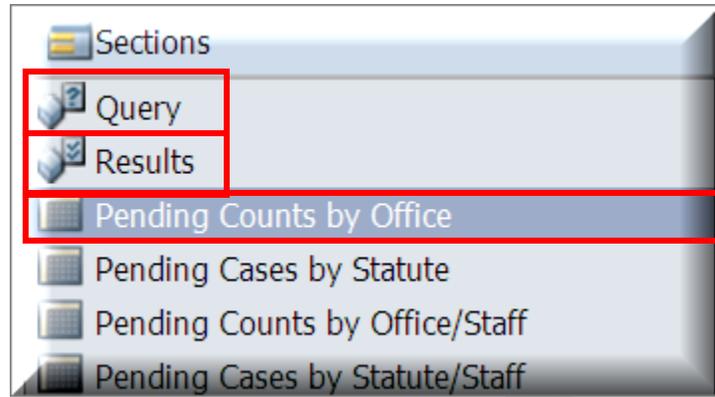


Figure 17 - Reports Tab Sections

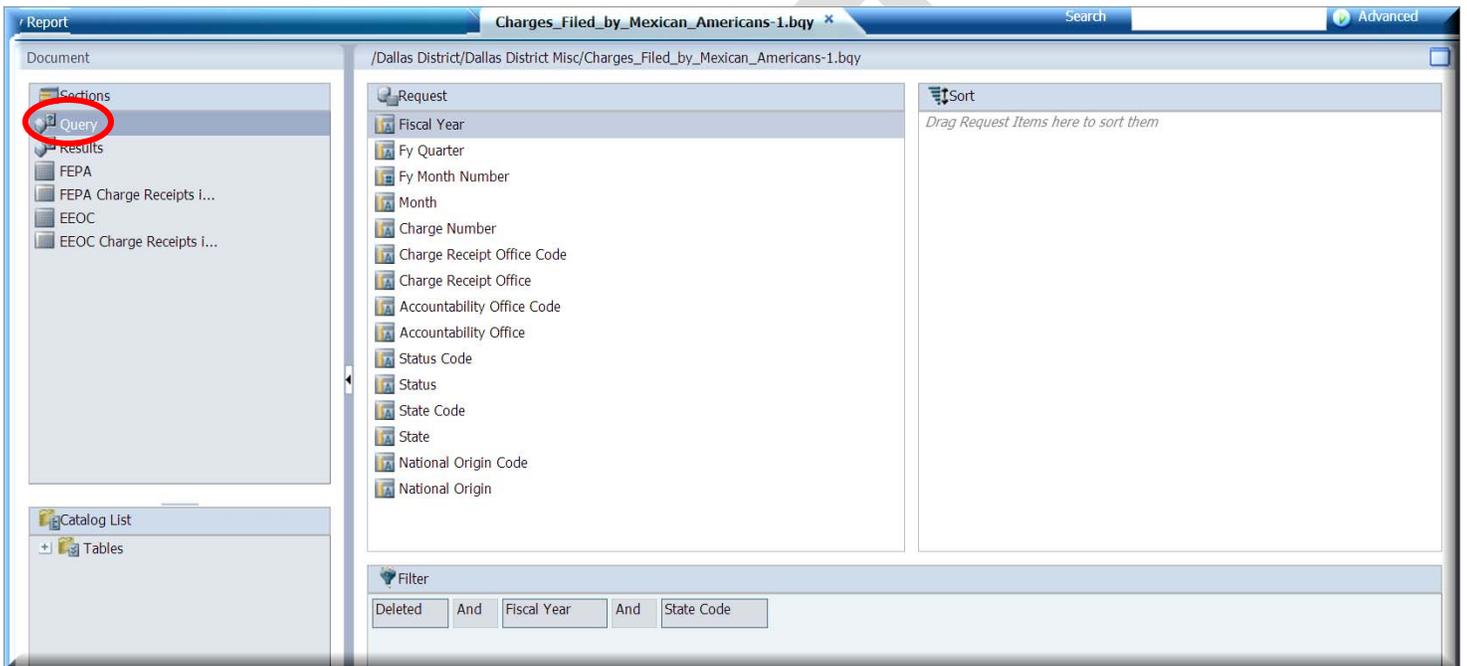


Figure 18 - Query Tab View

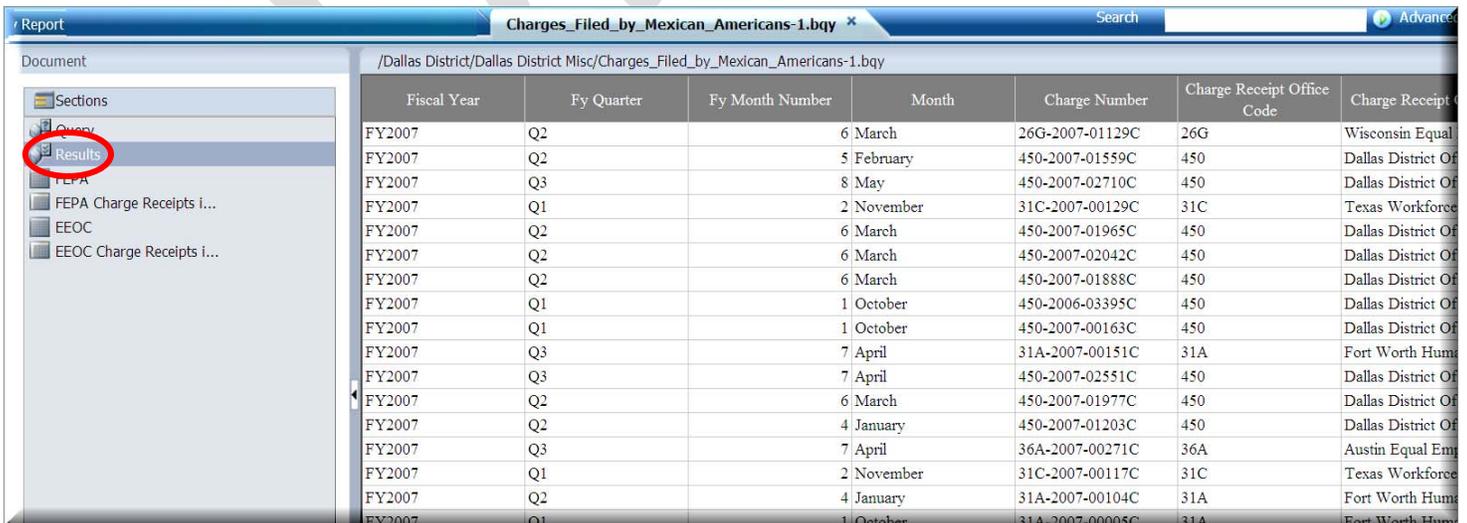


Figure 19 - Query Results Tab View

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				Hispanic - Obsolete	Mexican - Obsolete	Mexican National Origin	
				Charge Receipts	Charge Receipts	Charge Receipts	
Texas	FY2007	Q1	1	October	110	25	
			2	November	93	23	
			3	December	74	32	
				Total	277	80	
		Q2	4	January	92	28	
			5	February	117	57	
			6	March	134	38	1
				Total	343	123	1
		Q3	7	April	133	26	1
			8	May	130	35	2
			9	June	142	33	2
				Total	405	94	5
		Q4	10	July	125	30	2
			11	August	167	38	4
			12	September	124	29	6

Figure 20 - Report View

10 Saving, Exporting (Downloading) and Printing Report Views

There are several ways to Save, Export and/or Print the views. (See Figure 21)

After you click on the **File** link from the *Main Toolbar*,

				Hispanic - Obsolete	Mexican - Obsolete	Mexican National Origin	
				Charge Receipts	Charge Receipts	Charge Receipts	
Texas	FY2007	Q1	1	October	110	25	
			2	November	93	23	
			3	December	74	32	
				Total	277	80	
		Q2	4	January	92	28	
			5	February	117	57	
			6	March	134	38	1
				Total	343	123	1
		Q3	7	April	133	26	1
			8	May	130	35	2
			9	June	142	33	2
				Total	405	94	5
		Q4	10	July	125	30	2
			11	August	167	38	4
			12	September	124	29	6

To Save the View

- Click on the **Save, Save As or Save Options** link from the dropdown

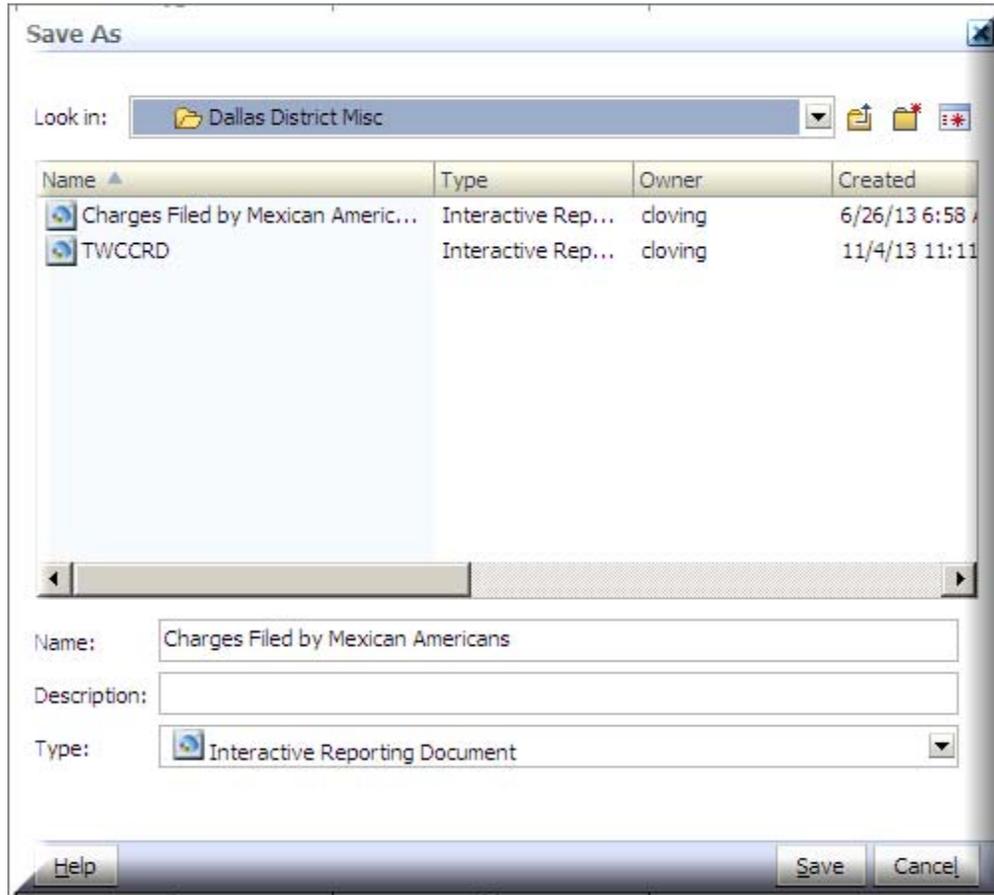


Figure 21 - File Menu Options

To Export the View (*Native File Format NOT Available*)

- Click on **Export** from the dropdown
- Select your available formats *Excel (*.xls)* or *Excel (*.mhtml)* (Web Format)

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	Texas	FY2007	Q1		October	110	25				
4	Texas	FY2007	Q1		November	33	23				
5	Texas	FY2007	Q1		December	71	32				
6	Texas	FY2007	Q1	Total		214	80				
7	Texas	FY2007	Q2		January	92	28				
8	Texas	FY2007	Q2		February	117	57				
9	Texas	FY2007	Q2		March	134	38				
10	Texas	FY2007	Q2	Total		343	123				
11	Texas	FY2007	Q3		April	133	26				
12	Texas	FY2007	Q3		May	130	35				
13	Texas	FY2007	Q3		June	142	32				
14	Texas	FY2007	Q3	Total		405	94				
15	Texas	FY2007	Q4		July	125	30				
16	Texas	FY2007	Q4		August	167	38				
17	Texas	FY2007	Q4		September	121	29				
18	Texas	FY2007	Q4	Total		413	97				
19	Texas	FY2007	Total	Total		1,441	394				
20	Texas	FY2008	Q1		October	100	30				
21	Texas	FY2008	Q1		November	136	36				
22	Texas	FY2008	Q1	Total		405	106				
23	Texas	FY2008	Q2		January	109	29				
24	Texas	FY2008	Q2		February	120	31				
25	Texas	FY2008	Q2		March	17	2				
26	Texas	FY2008	Q2	Total		251	62				
27	Texas	FY2008	Q3		April	2	2				
28	Texas	FY2008	Q3		May	3	3				
29	Texas	FY2008	Q3		June	3	1				
30	Texas	FY2008	Q3	Total		5	3				
31	Texas	FY2008	Q4		July	1	1				
32	Texas	FY2008	Q4		August	1	1				
33	Texas	FY2008	Q4		September	2	2				
34	Texas	FY2008	Q4	Total		4	4				

Figure 22 – Export to Excel (*.xls)

	A	B	C	D	E	F	G
1							
2							
3	Texas	FY2007	Q1	1. October		110	25
4				2. November		92	23
5				3. December		74	32
6				Total		277	80
7			Q2	4. January		92	28
8				5. February		117	57
9				6. March		134	38
10				Total		343	123
11			Q3	7. April		133	26
12				8. May		130	35
13				9. June		142	32
14				Total		405	94
15			Q4	10. July		125	30
16				11. August		167	38
17				12. September		121	29
18				Total		413	97
19			Total			1,441	394
20			FY2008	Q1	1. October	100	30

Figure 23 – Export to Excel for the Web

To Print the View

- Click on **Print via PDF** from the dropdown

				Hispanic - Obsolete	Mexican - Obsolete
				Charge Receipts	Charge Receipts
Texas	FY2007	Q1	1 October	110	25
			2 November	93	23
			3 December	74	32
			Total	277	80
		Q2	4 January	92	28
			5 February	117	57
			6 March	134	38
			Total	343	123
		Q3	7 April	133	26
			8 May	130	35
			9 June	142	33
			Total	405	94
		Q4	10 July	125	30
			11 August	167	38
			12 September	124	29
			Total	416	97

Figure 24 - Print via PDF Option

11 Interactive Reporting Document

The Interactive Reporting Document allows the user to create multiple reports and queries.

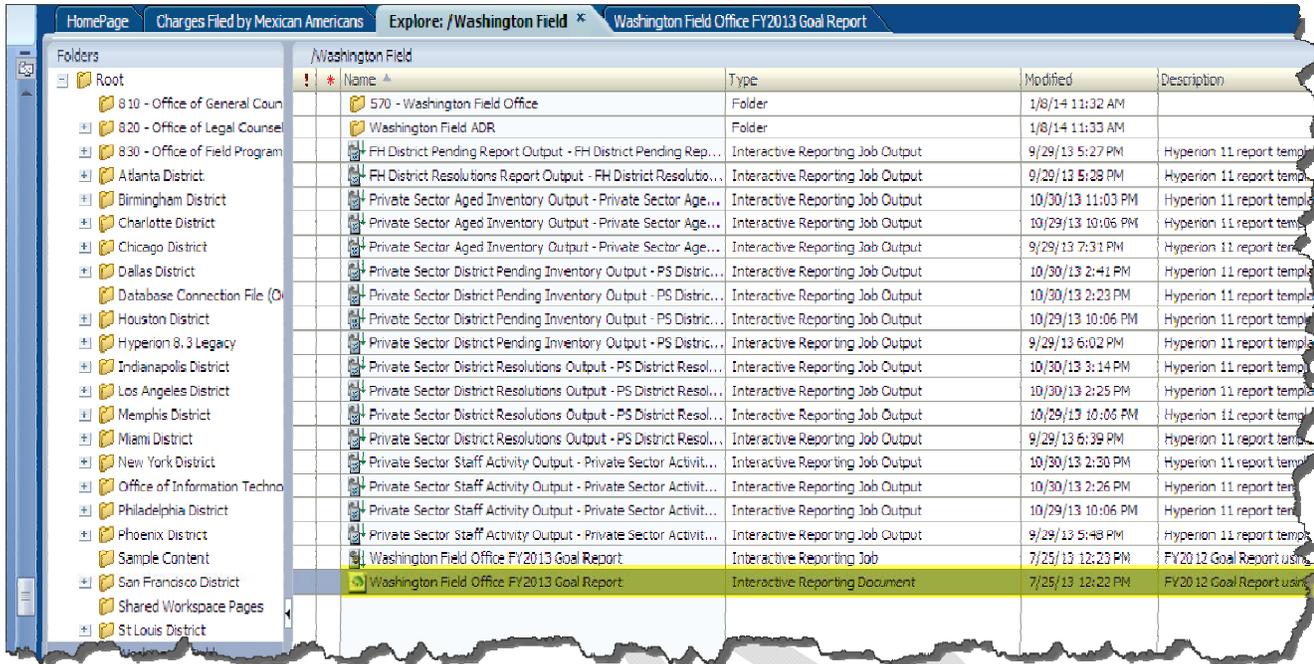


Figure 25 - Interactive Reporting

There are existing reports and reports created by users. The user is allowed to select the data to appear in the report by creating a query. Notice the different types of report sections: Existing Reports, Query Results and Query Creation. (See Figure 26) NOTE: Working with Queries will be covered in an Advance Training Session.

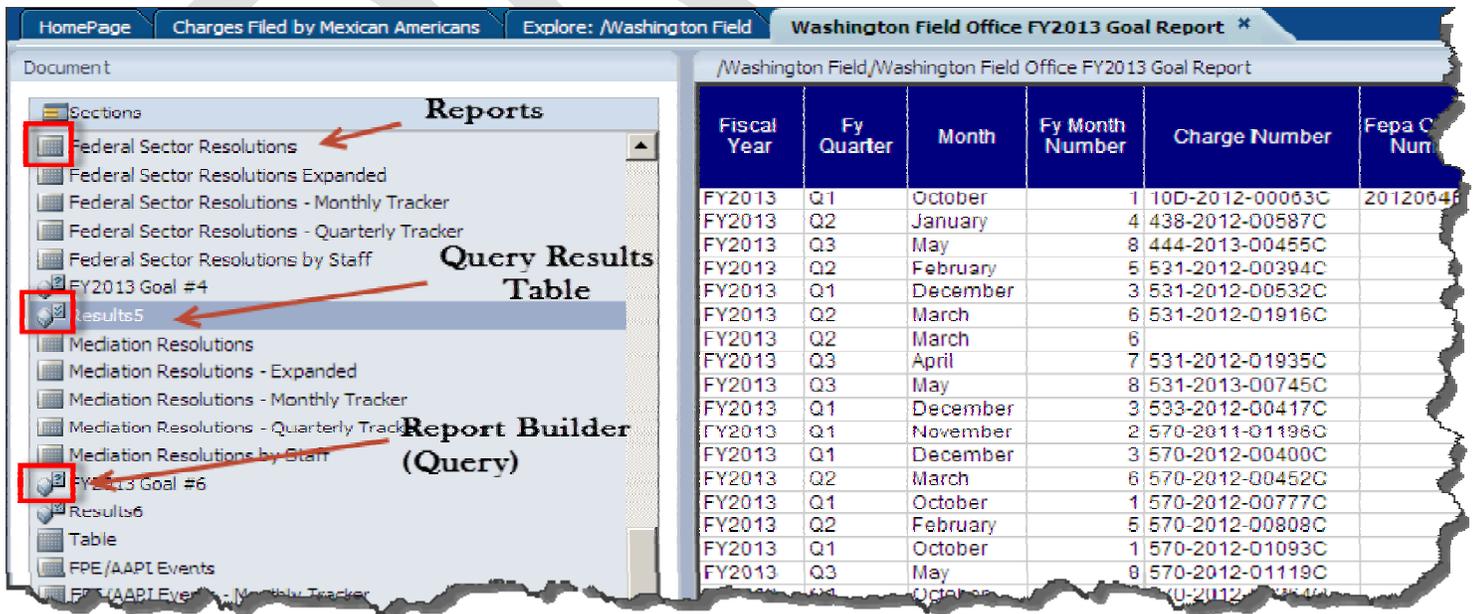


Figure 26 - Interactive Report Sections

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Fiscal Year	Fy Quarter	Month	Fy Month Number	Lead Office	Creation Office	Unique Id	Event	Initiative	Event Type Code	Revolving Fund Event?
FY2013	Q3	May	8	570	570	570052700	SALDEF KNOW YOU	SEP - Vulnerable Workers/Under	EOP	N
FY2013	Q3	May	8	570	570	570052702	MEXICAN MOBILE CC	SEP - Vulnerable Workers/Under	EOP	N
FY2013	Q3	May	8	570	570	570052751	ETHIOPIAN COMMUN	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q3	May	8	570	570	570052749	ETHIOPIAN COMMUN	SEP - Vulnerable Workers/Under	EOP	N
FY2013	Q3	April	7	570	570	570052695	COUNCIL ON ISLAMI	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q3	April	7	570	570	570052691	SAALT ADVOCACY D	SEP - Vulnerable Workers/Under	EXP	N
FY2013	Q3	April	7	570	570	570052688	SAALT SOUTH ASIAN	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q3	April	7	570	570	570052688	SAALT SOUTH ASIAN	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q2	March	6	570	570	570051839	LOUDOUN COUNTY	SEP - Vulnerable Workers/Under	EOP	N
FY2013	Q2	March	6	570	570	570051821	DC CRIMINAL JUSTI	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q2	February	5	570	570	570052607	MUSLIM AMERICAN	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q2	February	5	570	570	570052608	HAI HUA COMMUNIT	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q2	February	5	570	570	570051253	ETHIOPIAN COMMUN	SEP - Vulnerable Workers/Under	ESI	N
FY2013	Q2	January	4	570	570	570051293	GEORGETOWN UNIV	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q2	January	4	570	570	570051280	DEPT OF HHS/OFFIC	SEP - Vulnerable Workers/Under	ERA	N
FY2013	Q2	January	4	570	570	570051192	GREATER P. WILLIA	SEP - Vulnerable Workers/Under	EOP	N
FY2013	Q2	January	4	570	570	570051261	OFFICE OF PERSON	SEP - Vulnerable Workers/Under	ERA	N

Figure 27 - Results

	Agency Mediations	Contract Mediations	Mediation Resolutions	Mediation Resolutions Goal (75) Delta
FY2013	84	18	102	9

Figure 28 - Sample Report

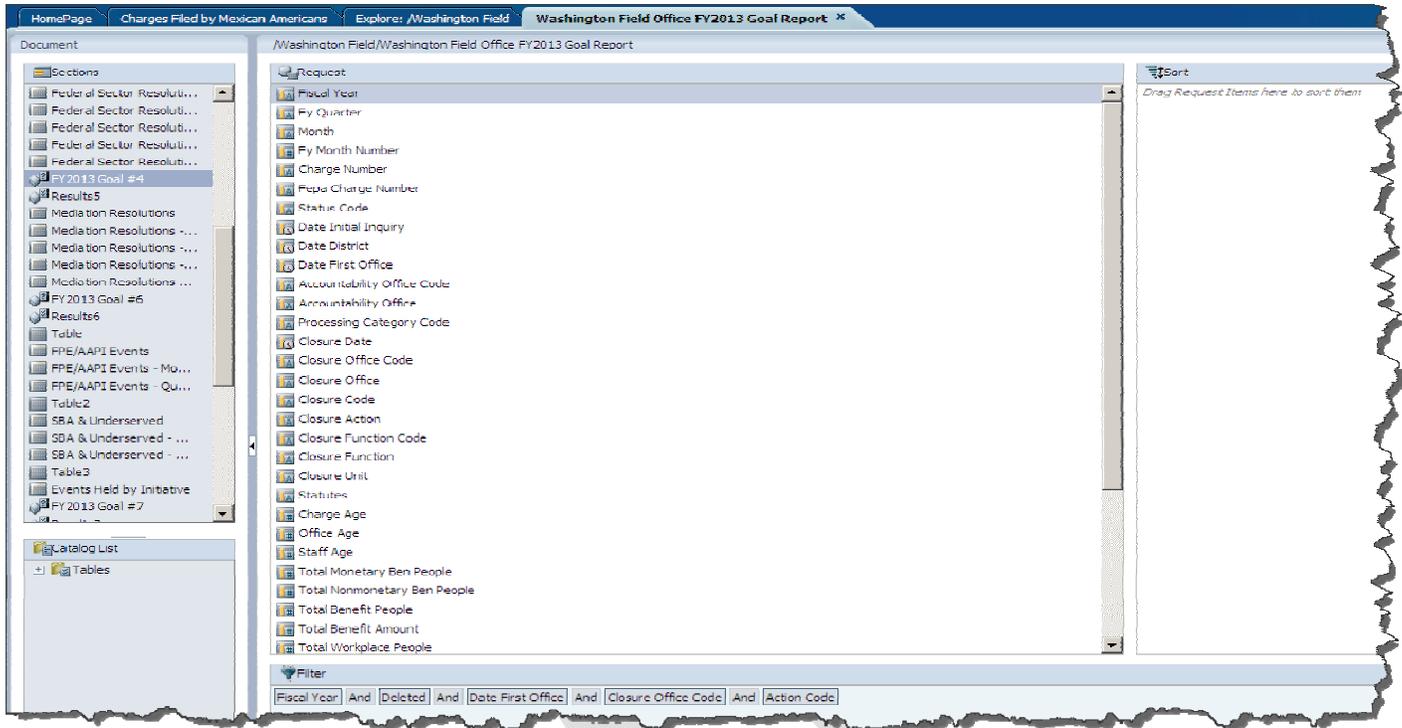


Figure 29 - Report Builder

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