Accessing eReports

CFAES Business Office, Columbus
http://cfaesfinance.osu.edu

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eReports Portal

- eReports is the reporting system for the University.
- It takes all of the information from the general ledger and organizes it into meaningful reports.
- Sometimes this is also referred to as the Financial Statements.
- Only OSU Employees may have access to these reports.

Permissions

- Only OSU Employees may have access to these reports.
Getting Access

If you are a new employee you must first activate your name.#
https://my.osu.edu/

Getting access to the eReports portal requires training through the University’s Carmen system.

The Business Office’s Financial System Access Form has the instructions on which courses to take and how to sign up for them.

Financial Systems Access Form

Name
Employee ID
Email address
Job Title
Phone number
PeopleSoft User ID (if known)
Org Number

The following five training courses are required by Ocio for all new financial systems users.
Please initial beside each course to indicate it has been completed.
All training is offered in Carmen: http://www.carmen.osu.edu
For help with joining Carmen training courses go to:
https://dcm.osu.edu/content/groups/public/@/group/customer_read/nets/documents/lab_pdfs/carmen_self_registration.pdf

| 2. Internal Controls | 5. Institutional Data Policy Course |
| 3. Understand & Prevent Fraud | (not the "faculty" course) |

After completing all five training courses, please select "add" from the drop down menu beside each system you need. If you do not need access to a system leave the drop down menu blank.

- PeopleSoft (inquiry only)
- eReports
- eRequest Approver
- eRequestor (to request on someone else’s behalf)

Permissions Summary

Activate your OSU Name.#

Take OSU Carmen Training:
- Business Responsibilities
- Internal Controls
- Understand and Prevent Fraud
- Business Expenditures
- Institutional Data Policy

Complete the Financial Systems Access Form

Problems? Questions?
Contact Jesse Buxton
Buxton.26@osu.edu
614-292-6338
System Software

System Requirements

- **Internet Access**: eReports are accessed through the Internet.

- **Internet Explorer**: The Office of the Chief Information Officer (OCIO) recommends you use Internet Explorer as your internet browser.
  - Sometimes when you sign on to eReports you will find it is not acting as it should. That probably means your browser isn’t set up properly to accommodate the system. The OCIO has a Technical Support Page to help you with browser set up or you can contact them at 614-688-HELP https://ocio.osu.edu/services/service-details/hrfin/general-information/techsupport/

- **Virtual Private Network**: If you are located off-campus or outside of a University network you will need to install the University’s Virtual Private Network (VPN) in order to access eReports.
  - *Remote VPN client software is available on Site License Software website. The VPN client allows OSU faculty, staff and students to gain “local access” to university resources from a remote, off-campus site using an internet service provider.*
More on the VPN

Cisco AnyConnect VPN Client (version 3.0):

Supported Versions: 3.0
Eligibility: Faculty, Staff, & Students; Main & regional use permitted; OSU & personal machines permitted.
Cost: No cost
System Requirements:
512 MB RAM, 5 MB free disk space.
OSUnet VPN service is designed as a solution for faculty, staff and students to be able to have remote usage to the OSUnet network that is authenticated and secure. This authentication is accomplished by a "client" VPN program which communicates with a server located at OSU. Available to faculty, staff and students at main and regional campuses and on your home computer. It is for university-related business only and must be left with your department and removed from your home computer when you leave OSU. This software may be requested through the Order Services link of OCIO Self Service.

For Windows: https://ocio.osu.edu/software/directory/slwin/#ciscovpnclient
For non Windows: https://ocio.osu.edu/software/

Help?
OCIO: Ereports_core@lists.service.ohio-state.edu
OCIO: 614-688-HELP
OCIO: 8help@osu.edu
Contact your CFAES Computer Technician

System Plug In
usually optional

After you have used the system a while you may notice that some reports have a different Report type. Usually you will use the SQR Production Report but if you need the Interactive reports you will need to install the following.

Hyperion Interactive Reporting Web Client a.k.a “the eReports plug-in” will need to be installed on user workstations in order to run many of the eReports ad-hoc reports.

Information and Instructions:

Help?
OCIO: Ereports_core@lists.service.ohio-state.edu
OCIO: 614-688-HELP
OCIO: 8help@osu.edu
Contact your CFAES Computer Technician
System Software Summary

- Internet access
- Internet Explorer Browser
- Virtual Private Network (VPN) for Off Campus/off Network access
- eReports plug-in for Interactive Reports usually for advanced users

Signing In
eReports Portal

Are you not on an OSU Network? You will first need to sign into the Cisco VPN. Go to your computers programs and find the program – then sign in with your username and password.

1. Go to the Business Office Website
2. Click on Links: http://osuebusiness.osu.edu/links.php
3. Click on eReports: http://ereports.osu.edu/
4. Click Log In

5. Login with name.#

6. The system will launch two windows.

Note: The first time you access eReports you may get a message about POP ups. This system requires that you turn pops ups on. Then click launch application and the navigation screen should appear.
Navigation

1. Use the Tabs at the top to access your favorites and past months’ reports. Use the Windows to access the reports you have opened.

2. Use the X at the top to close eReports

3. Use this X to close individual windows

4. Use the Left and Right Frames to click to find reports

Standard Monthly Reports

In the LEFT FRAME double click Financials

In the left frame, double click through the following path:
Standard_Monthly_Reports – FY_20XX - FAES – Choose your unit (Academic, ATI, OARDC, OSU_Extension)

Then navigate to your unit and Dnode by single click in the left frame.

The D node for your unit should be gray. The DNode contains the reports for all units under that node.

For Extension Only:
D5502 – All County ORG numbers
D550X – All State & Academic Orgs

Find your ORG under the D plus the first 4 digits of your ORG number.

Note: Use the arrow at any time to expand the LEFT FRAME. Just click, hold and drag the arrow.
Favorites

Your standard monthly reports are in the right frame, as shown below. Notice your DNode in the report titles.

Remember your Dnode on the left should be shaded gray by clicking on it.

Click on Favorites at the top of the page.

Click Add to Favorites

To access the next time you enter eReports, simply click on Favorites and choose the D node.

You can also do this with Advanced Reports. It will need to be done again each fiscal year.

Accessing your reports

The reports appear in the right frame.

Start by downloading a report to PDF.
In this panel you may only download current available months report (usually one month behind the current month). Double click on the report title.

The report will open in the same window.

Download reports monthly:
- 3os-61
- 4os-91
- 6os-91 (some units)
- 7os-90
Click the adobe icon at the bottom of the page.

Use the “Find” feature at the top of the screen to type in your ORG number, then click Enter.

This will take you to the first page of your reports. Write down or remember the first number.

Then use the arrow to navigate through all of the pages of your reports.

Finally click the print icon.

Print just the page range that applies to your ORG.
Past Months Reports

Reports are only available in the shortcut menu for one month. If you don’t download it in time you will need to download the previous version using the long method. Follow the steps below to do this.

1. Select the Open Document Icon
2. Use the “Open” dialog box to navigate to your DNode:
   OSU >Financials > Standard_Monthly_Reports > FY20xx >FAES

Then find your unit and its Dnode

   For OSU Extension:
   OSU_Extension >D5xxx (5502 for county orgs, 55xx for state orgs)

3. Expand the Options List to view the Version list
4. Select the report you want to run
5. Use the Versions Drop down to choose the appropriate Month.
6. Click Open. This will open a PDF in the eReports window. Use the Find feature to search for and print only the pages for your org.

Note: Sometimes having an open PDF in eReports before coming to this dialog box will prevent you from seeing all versions of the report. If you don’t see the version you need, exit the dialog box, click on the explore tab and try again. You just can’t open a past report over a pdf report.
Advanced Reports – Want to know more?

In addition to the Standard Monthly Reports you may also need to access some of the Advanced reports available.

Examples: Detail Activity Report for Monthly eReports Reconciliation, Physical Inventory Reports for Capitalized equipment reporting.

Use the menu to navigate to the report you want to run.
Advanced Reports – Want to know more?

SQR Production Reporting Job

General eReports have a set of parameters that you enter to let you create flexible reports from the data that is available.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>GLU604DW-91</td>
<td>SQR Production Reporting Job</td>
<td>4/12/12 7:22 PM</td>
</tr>
<tr>
<td>GLU604DW-91-1</td>
<td>SQR Production Reporting Output</td>
<td>3/11/14 8:27 AM</td>
</tr>
</tbody>
</table>

The Detail Activity Report is an example of this type.

- Click on the REPORT.
- Enter the parameters for the report.
- Click Run.
- When the item has finished, it will appear underneath the Report on your navigation screen as OUTPUT. You may need to press the systems' Refresh button to get it to show.

Interactive Reporting Document

Interactive reports have a set of parameters that you enter to let you create pivot table reports that can be manipulated to achieve the data you are looking for. The eRequest report is an example of this type. This type requires you have the Hyperion Plug-in installed on your computer. If you have trouble installing contact your computer tech.

- Click on the REPORT.
- Enter the parameters for the report.
- Click Run.
- When the item has finished preparing it will give you options of printing, editing the pivot table or exporting the report.
Assistance

- OSU Carmen [https://carmen.osu.edu](https://carmen.osu.edu)
  - GL 6 eReports
- Business Office Policies and Procedures [http://cfaesfinance.osu.edu/training](http://cfaesfinance.osu.edu/training)
  - Accounting at OSU
  - Accessing eReports
  - Reading eReports
  - Reconciling eReports
  - Advanced eReports
- Business Office Financial Information
  - [http://cfaesfinance.osu.edu/resources](http://cfaesfinance.osu.edu/resources)
  - Common and Full Account Number list
  - Program Value List
- Business Office Forms
  - [http://cfaesfinance.osu.edu/forms](http://cfaesfinance.osu.edu/forms)
    - Financials Systems Access Form
- Business Office Representative: [http://cfaesfinance.osu.edu/aboutus](http://cfaesfinance.osu.edu/aboutus)