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## EX.010.040 - Setting Up Real-Time Analysis Defaults

#### Trigger:

#### Concept

This topic demonstrates how to set up real-time analysis defaults. The Expenses Module is comprised of transactions that are in various stages. Expenses provides a tool for executives, managers, and auditors to easily identify and track transactions in progress so that they can gain insight into potential problem areas. This is the Real-Time Analysis functionality.

This tool provides the following types of information and data:

**Expense Reports:** Transactions in Process (TIP) data focuses attention on what needs to be resolved with regards to Expense Reports to ensure that your expenses system runs smoothly.

**Travel Authorizations:** Total Predicted Expenses (TPE) data focuses attention on what needs to be resolved with regards to Travel Authorizations to ensure that your expenses system runs smoothly.

**Expenses Pagelets:** Expenses Pagelets are an optional way for interested employees to see Real-Time Analysis figures on their initial log-in page to the Core Application.

The Real-Time Analysis functionality is covered in six separate topics:

1. EX.010.040 – Setting Up Real-Time Analysis Defaults (Admin function that is performed once per institution)

2. EX.010.043 – Setting Up Transactions in Progress methods (Must be performed once by each user who wishes to view Transactions in Progress)

3. EX.010.041 – Setting Up Expenses Pagelets (Must be performed once by each User who wishes to have pagelet information on their “Home” page)

4. EX.030.042 – Running the Update Expenses Pagelet Info Process (should be run at least daily)

5. EX.030.500 – Reviewing Transactions in Progress (Expense Reports) (used to review information as needed)

6. EX.030.501 – Reviewing Total Predicted Expenses (Travel Authorizations) (used to review information as needed)

This topic, Setting Up Real Time Analysis Defaults (EX.010.040), covers the initial Real-Time Analysis set-up, which is a one-time set-up step that must be performed before any of the other Real-Time Analysis tools can be used.

**Topic Objectives:**

Upon completion of this topic, you will be able to:

- Identify the purpose of the Real-Time Analysis functionality in Expenses.

- Identify when Real-Time Analysis Defaults must be set up.

- Identify what Transactions in Process (TIP) data is.

- Identify what Total Predicted Expenses (TPE) data is.

- Identify what Expenses pagelets are.

- Set up Real-Time Analysis Defaults.

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

For this topic, you need to set up Real-Time Analysis Defaults. Let’s see how this is done.

| Step | Action |
| --- | --- |
|  | Click the **Set Up Financials/Supply Chain** link. |
|  | Click the **Pagelets** link. |
|  | Click the **Enterprise Service Automation** link. |
|  | Click the **Portal Pack Defaults** link. |
|  | Click the **Top 5 Issues** link. |
|  | Make sure the **User Preferences** bubble is enabled in the Business Unit section. |
|  | Click the **Save** button. |
|  | Click the **Return to ESA Portal Pack Default Admin** link. |
|  | Click the **Total Predicted Expenses** link. |
|  | The **Administer Total Predicted Expenses** page is used to select the calendar and number of periods used in populating predicted travel authorization information. |
|  | Click the **Calendar ID** list. |
|  | Click the **BUDGET\_PERIOD ALL\_YEARS** list item.  Warning: This component will not work if you select Fiscal Year or Monthly at this time. |
|  | Click the **Number of Future Periods** list. |
|  | Click the **12** list item. |
|  | Click the **Save** button. |
|  | Click the **Return to ESA Portal Pack Default Admin** link. |
|  | Click the **Total Expense Costs** link. |
|  | The **Administer Total Expense Costs** page is used to select the calendar and number of periods used in populating transactions in progress expense report information. |
|  | Click the **Calendar ID** list.  Select a calendar to use in conjunction with the Number of Past Periods to define the date range for Expenses to retrieve pagelet data. |
|  | Click the **Fiscal Year** list item. |
|  | Click the **Number of Past Periods** list. |
|  | Click the **12** list item. |
|  | Click the **Save** button. |
|  | Click the **Return to ESA Portal Pack Default Admin** link. |
|  | Click the **Expense Report TIP** link. |
|  | You can select to view transactions by either Bar Graph or Pie Graph. |
|  | Click the **Save** button. |
|  | Click the **Return to ESA Portal Pack Default Admin** link. |
|  | Congratulations. You have just completed the **Setting Up Real-Time Analysis Defaults** topic. Below is a summary of the key concepts of this topic:  - Real-Time Analysis in the Expense Module provides executives, managers, and auditors tools to easily identify and track expense transactions in progress so that they can gain insight into potential problem areas.  - Real-Time Analysis Defaults must be set up before any of the other Real-Time Analysis tools can be used.  - Transactions In Process (TIP) data focuses attention on what needs to be resolved with regards to Expense Reports to ensure that your expenses system runs smoothly.  - Total Predicted Expenses (TPE) data focuses attention on what needs to be resolved with regards to Travel Authorizations to ensure that your expenses system runs smoothly.  - Expenses Pagelets are an optional way for interested employees to see Real-Time Analysis figures on their initial log-in page to the Core Application.  **End of Procedure.** |