

Quick Reference Guide:

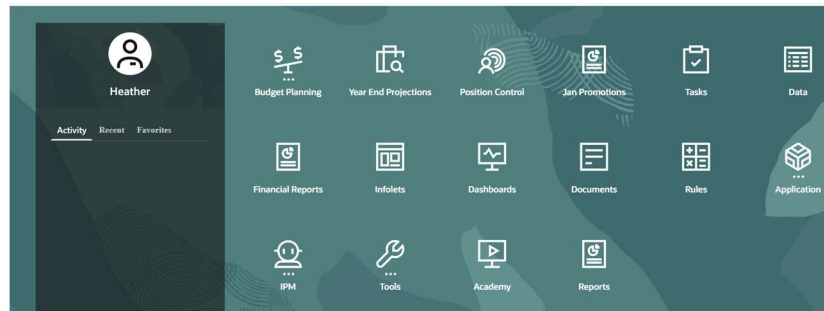
How to Review Revenue and Expense Activity in EPM

Purpose:

Reviewing Revenue and Expense Activity in EPM on the Revenue and Expense Summary Screen. These instructions are to see all Project values for a Cost Center. Users may choose different project, fund and classification options as applicable.

Step-by-Step:

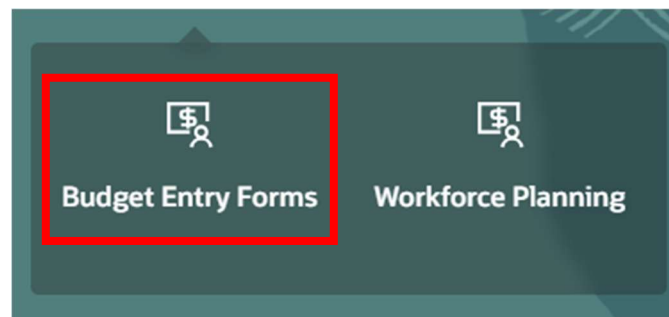
Start on EPM Home Page.




Navigate to Budget Planning.



Navigate to Budget Entry Forms.



Click on the Revenue and Expense Summary tab.

 Revenue and Expense Summary

This is at the bottom of the screen

Quick Reference Guide: How to Review Revenue and Expense Activity in EPM



Change Project Values
to All.



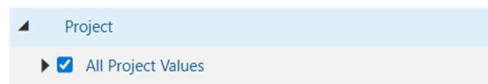
Click on the blue
hyperlink.



Click on the Arrow next
to Project.



Click the box next to All
Project Values.



Click Ok.



To change the Cost
Center, click the
hyperlink under Cost
Center.



Click the Arrow next to
Cost Center.



Click the box next to the
correct Cost Center.



Click Ok.



Make sure Fund is set
to Total Tulane, by
clicking on the
hyperlink under Fund.

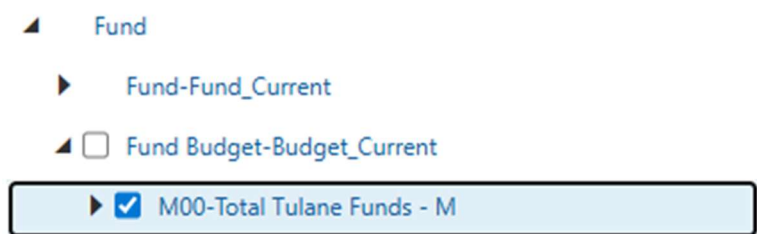


Quick Reference Guide: How to Review Revenue and Expense Activity in EPM

Click the Arrow next to
Fund Budget-
Budget_Current.



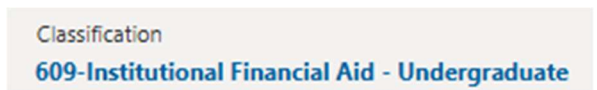
Check the box next to
M100-Total Tulane
Funds.



Click Ok.



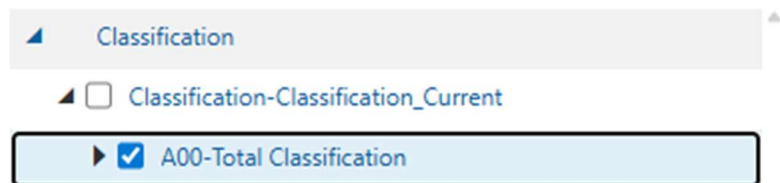
Change the
Classification to AOO-
Total Classification



Click the Arrow next to
Classification-
Classification_Current.



Click the box next to
Aoo-Total
Classification.



Click Ok.



Quick Reference Guide: How to Review Revenue and Expense Activity in EPM

Change Rev&Exp Accounts to All Natural Accounts by clicking on the hyperlink under Rev&Exp Accounts.

Rev&ExpAccounts
A4000-Statement of Activities Base Balance

Click on the arrow next to Natural Account-Natural Account Current.

Account
▶ Natural Account-Natural Account Current

Click on the arrow next to A000-All Natural Accounts

Account
▶ Natural Account-Natural Account Current
▶ A0000-All Natural Accounts

Click on the box next to A4000-Statement of Activities.

Account
▶ Natural Account-Natural Account Current
▶ A0000-All Natural Accounts
▶ A4000-Statement of Activities

Click Ok.

 ▼ **OK** Cancel

Select the Period to View by clicking on the hyperlink.

VarPeriod
Jul



Quick Reference Guide: How to Review Revenue and Expense Activity in EPM



Click the arrow next to Year total.

- Period
 - YearTotal
 - Close2
 - Close3
 - Close4

Click the arrow next to the appropriate Quarter for those options or click on the box for the entire Quarter.

- Period
 - YearTotal
 - Q1
 - Q2
 - Q3
 - Q4

Remember that Q1 starts in July with our Fiscal Year
Values will load from the beginning of the Fiscal Year through the selected option

Click Ok.

OK Cancel

Data will load. Scroll down or over to see additional information.

FY26	FY26	FY26		FY27
Original	Revised	YTD Actuals	Revised - YTD Actuals	Proposed
Base Data	Base Data	Base Data		Final Proposed
Jul	Jul	Apr		Jul

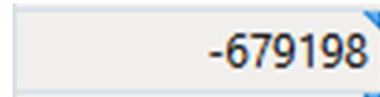
Gray is Revenue
Blue is Payroll
Orange is Non-Salary

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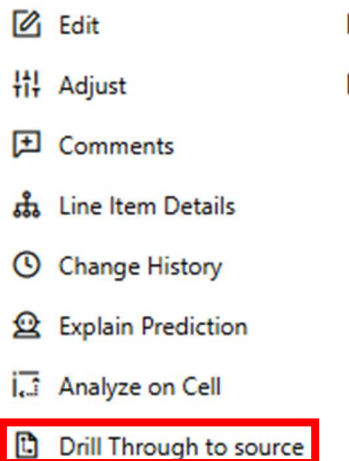
Search for a line with
the search in the upper
right corner.



To Drill Down to
expenses, right click on
the square with a blue
arrow.



Choose Drill Through to
Source.



This will bring you to the main WaveWorks screens

Quick Reference Guide:

How to Review Revenue and Expense Activity in EPM

Purpose:

Reviewing Revenue and Expense Activity in EPM on the Revenue and Expense Summary-by Fund. This allows viewing by fund types- unrestricted, restricted or by total. These instructions are to see all Project values for a Cost Center. Users may choose different project, fund and classification options as applicable.

Step-by-Step:



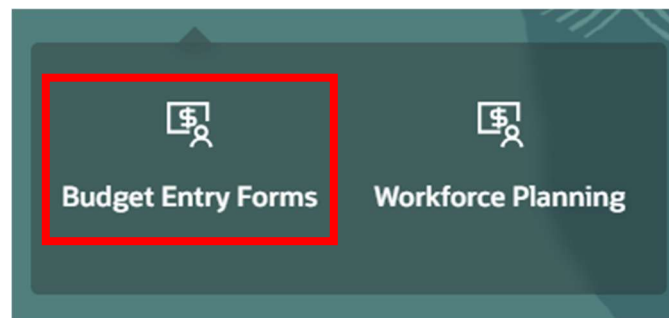
Start on EPM Home Page.



Navigate to Budget Planning.



Navigate to Budget Entry Forms.



Click on the Revenue and Expense Summary-by Fund tab.

Revenue and Expense Summary - ...

This is at the bottom of the screen



Quick Reference Guide: How to Review Revenue and Expense Activity in EPM



Change Project Values
to All.

Project
[00000000-Undefined Project](#)

Click on the blue
hyperlink.

Project
[00000000-Undefined Project](#)

Click on the Arrow next
to Project.

▶ Project

Click the box next to All
Project Values.

Project
 All Project Values

Click Ok.

▼ **OK** Cancel

To change the Cost
Center, click the
hyperlink under Cost
Center.

CostCenter
[811100-BON TEMP](#)

Click the Arrow next to
Cost Center.

▶ Cost Center

Click the box next to the
correct Cost Center.

Cost Center
Training CostCenter
 811100-BON TEMP
 911100-PURPLE GREEN GOLD

Click Ok.

▼ **OK** Cancel

Change the
Classification to AOO-
Total Classification

Classification
[609-Institutional Financial Aid - Undergraduate](#)

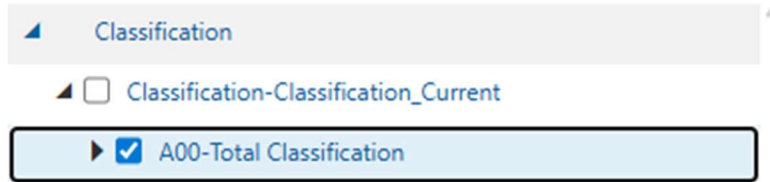
Quick Reference Guide: How to Review Revenue and Expense Activity in EPM



Click the Arrow next to
Classification-
Classification_Current.



Click the box next to
A00-Total
Classification.



Click Ok.



Change Rev&Exp
Accounts to All Natural
Accounts by clicking on
the hyperlink under
Rev&Exp Accounts.



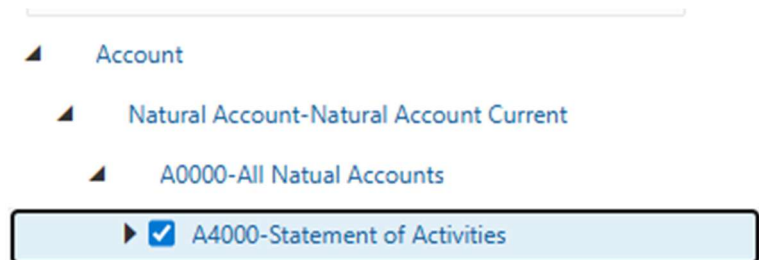
Click on the arrow next
to Natural Account-
Natural Account
Current.



Click on the arrow next
to A000-All Natual
Accounts



Click on the box next to
A4000-Statement of
Activities.



Quick Reference Guide:

How to Review Revenue and Expense Activity in EPM

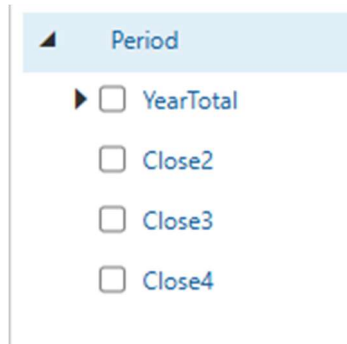
Click Ok.



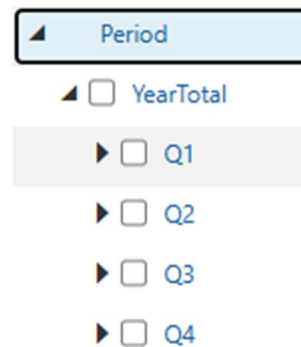
Select the Period to View by clicking on the hyperlink.



Click the arrow next to Year total.



Click the arrow next to the appropriate Quarter for those options or click on the box for the entire Quarter.



Remember that Q1 starts in July with our Fiscal Year
Values will load from the beginning of the Fiscal Year through the selected option

Click Ok.



Quick Reference Guide:
How to Review Revenue and Expense Activity in EPM



Data will load. Scroll down or over to see additional information.

Open the fund options with the arrows next to Moo-Total Tulane Funds

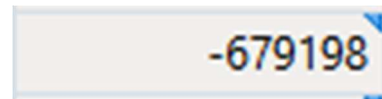
FY26	FY26	FY26		FY27	FY27	
Original	Revised	YTD Actuals	Revised - YTD Actuals	Proposed	Proposed	
Base Data	Base Data	Base Data		Final Proposed	Final Proposed	
Jul	Jul	Apr		Jul	Jul	
▶ M00-Total Tulane Funds - M	▶ M00-Total Tulane Funds - M	▶ M00-Total Tulane Funds - M		M10-Unrestricted - M	M40-Restricted - M	M00-Total Tulane Funds - M

Gray is Revenue
Blue is Payroll
Orange is Non-Salary

Search for a line with the search in the upper right corner.



To Drill Down to expenses, right click on the square with a blue arrow.



Choose Drill Through to Source.

- Edit ▶
- Adjust ▶
- Comments
- Line Item Details
- Change History
- Explain Prediction
- Analyze on Cell
- Drill Through to source

This will bring you to the main WaveWorks screens

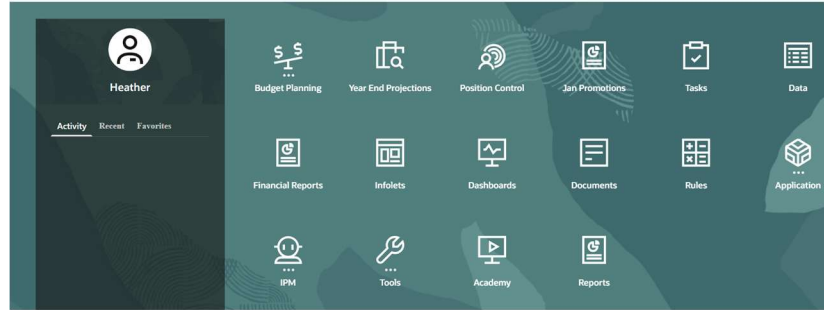
Purpose:

Quick Reference Guide: How to Review Revenue and Expense Activity in EPM

Reviewing Revenue and Expense Activity in EPM on the Revenue and Expense Summary-by Project. These instructions are to see individual project data. Users may choose different project, fund and classification options as applicable.

Step-by-Step:

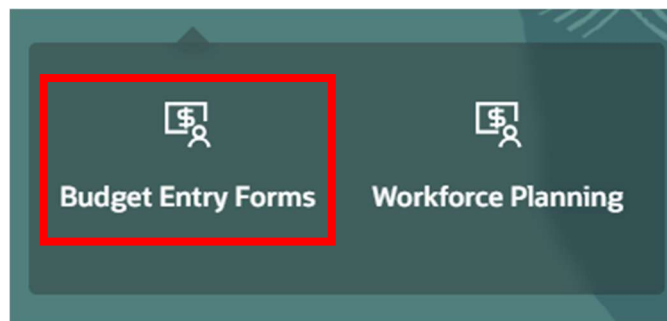
Start on EPM Home Page.



Navigate to Budget Planning.



Navigate to Budget Entry Forms.



Click on the Revenue and Expense Summary-by Fund tab.

Revenue and Expense Summary- b...

This is at the bottom of the screen

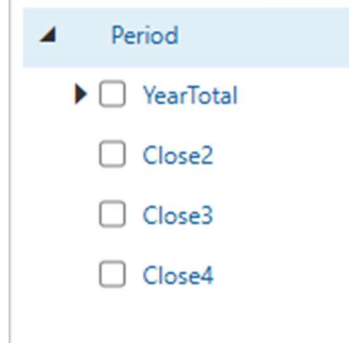
Select the Period to View by clicking on the hyperlink.

VarPeriod
Jul

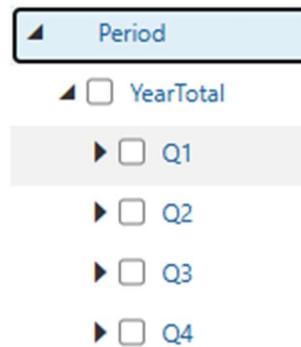
Quick Reference Guide:

How to Review Revenue and Expense Activity in EPM

Click the arrow next to Year total.



Click the arrow next to the appropriate Quarter for those options or click on the box for the entire Quarter.



Remember that Q1 starts in July with our Fiscal Year
Values will load from the beginning of the Fiscal Year through the selected option

Click Ok.



To change the Cost Center, click the hyperlink under Cost Center.



Click Member Selector.

[Member Selector ...](#)

Click the box next to the correct Cost Center.



Quick Reference Guide: How to Review Revenue and Expense Activity in EPM

Click Ok.



Choose the specific
project, by clicking on
the Project Field.



Click Member Selector.

Member Selector ...

All Tulane Projects will be listed if member selector is not chosen

Click on the Arrow next
to Project.



Click the arrow next to
All Project Values.



Scroll to the bottom to
the specific Cost Center
and click the arrow next
to it.



Click the box next to the
appropriate project.



Click Ok.



Quick Reference Guide:

How to Review Revenue and Expense Activity in EPM

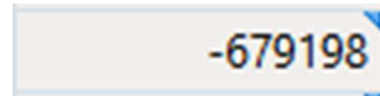
Data will load. Scroll down or over to see additional information.

FY26	FY26	FY26		FY27
Original	Revised	YTD Actuals	Revised - YTD Actuals	Proposed
Base Data	Base Data	Base Data		Final Proposed
Jul	Jul	Apr		Jul

Search for a line with the search in the upper right corner.



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- Adjust ▶
- Comments
- Line Item Details
- Change History
- Explain Prediction
- Analyze on Cell
- Drill Through to source**

This will bring you to the main WaveWorks screens