

Produce Summary for the UO PO Hierarchy report

This *How To* document gives an overview of an Excel Add-In developed to produce a summary of the output from the **UO PO Hierarchy** and **UO FAS PO Hierarchy** reports. Once a report has been run in Oracle and the output opened, this add-in will produce a presentable summary.

Using this How To document

Text in **bold** identifies form/window titles, field or button names, or text to be input

Text in *italic* identifies an area of a window or a tabbed region name

[Text] indicates where your own department/name should be inserted

Package and Contents

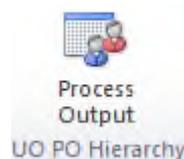
The zip file for the “UO PO Hierarchy Add-In” consists of two files:

- How to Install and Run UO PO Hierarchy Add-In (this file)
- UO PO Hierarchy Add-In (Excel.xlam file)

Installation and Setup

Installation of the UO PO Hierarchy Add-In

1. Close all instances of Excel if any are open.
2. Open the UO PO Hierarchy Add-In zipped file in Windows Explorer.
3. Copy the UO PO Hierarchy Add-In Excel file and Paste to an appropriate folder and make a note of the location.
4. Open Excel and click the **File** tab (Excel 2010) or the **Office** button  (Excel 2007).
5. Click **Options**.
6. Click **Add-Ins**.
7. In the **Manage** dropdown list make sure that **Excel Add-Ins** is selected and click **Go**.
8. Click **Browse**.
9. Find and select the UO PO Hierarchy Add-In file from Step 2 and click **OK**.
10. Tick the box against the UO PO Hierarchy Add-In in the **Add-Ins** window.
11. Click **OK**. There should now be a *UO PO Hierarchy* tab on the Excel ribbon interface, containing a button labelled *Process Output* section as below:



Using the UO PO Hierarchy Add-In

1. Open Oracle Financials and run either the **UO PO Hierarchy** or **UO FAS PO Hierarchy** report.



Note: Notes on running the UO PO Hierarchy report can be found at:

<https://www.admin.ox.ac.uk/finance/support/reportslibrary/useraccess/>

2. Once the report has completed, open the **Excel** output.
3. Click the **Process Output** button on the UO PO Hierarchy ribbon interface.
4. After a few seconds you should now be see a new sheet called **Formatted Summary**. The summary is now formatted and print ready.