Instructions for Hyperion Dashboard Budget Reports
Budget Fiscal-Year Reporting

For purposes of instruction, the following steps apply specifically to two reports:

MIIS Budget vs Actual YTD Dashboard – FY11 & Earlier
MIIS Account Activity Dashboard – FY11 & Earlier

These two reports have been set up to run either for general Fiscal Year budget data.
Explanations of query features and required keystrokes in these instructions will apply to all
other Dashboard Budget reports, as well.

Please note: now that MIIS has merged to Chart 1 as of July 1, 2011, these MIIS Dashboard
reports will only be used for FY11 and earlier years’ budget reporting. For FY12 and forward,
please use the dashboard reports numbered 1-7.

Shortened Quick Reference instructions appear on the last page.

To begin:
Open a new session of Internet Explorer.

Type go/hyperion in the address line. This takes you to the LIS Hyperion Reporting webpage.
Set a bookmark to this location.
Click on Hyperion Workspace to get to Hyperion’s opening screen.

Enter your Network username and password as you would when starting up your computer
in the morning, and click on the Log On button.

Next you will see the Browse, or Menu screen, where department folders reside.
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Folders will contain queries that you have access to. If a folder is empty, it’s just that you do not have access to any queries there.

For Budget reports, go to Root → Budget → Budget Reports

Each query there shows a short description of its function next to its title. Click on the MIIS Budget vs Actual YTD Dashboard query to open.
In the **Login** box, enter this time your **BANNER INB username and password**, as the query is pulling data directly from Banner, and accesses must be matched.

At the **Revenue check box**, you have the option to see Revenues in your report, or to exclude Revenues. Simply check the box if desired.

After you hit **Enter** you may wait a minute or so……things are loading! After this pause, a message box will appear “Connected to database.” Click on **OK** to continue.

**Budget vs Actual YTD (Budget Viewers)……Report Parameters** section is now activated.

**NOTE**: for all boxes in this section, you will need to place your cursor in the box, make your entry, and then click the **Enter** button below. As each box is entered, the next becomes available.
Enter the Fiscal Year in ‘yyyy’ format; that is, for FY11 data, enter 2011….for FY10 data, enter 2010, etc. Click on Enter.

Enter the Fund and Org fields next, clicking Enter each time.

Two more boxes, Account and Activity Code, are next. You may make an entry to see only one Account or Activity code, or check the “ALL” box and you will get all.

Once you enter the last box, Activity Code, or click on All, the Report Options section becomes available.
Report Options are displayed in a drop-down box. Select the report you want.

Then choose to either Display it to the screen, Print it, or Export it. Click on Process.

If you have chosen the Display option.....
You will see the actual report on the screen. You can still Print the report from here, from the drop-down menu, File → Print.
The **yellow arrows** that you see to the top-right side are the “back and forth buttons.” To get back to the dashboard screen from the displayed report, click on the ← left yellow arrow. The → right yellow arrow is for moving forward to the next screen in a series.

If you have chosen the **Print** option from the Dashboard screen, a standard Print box pops up. Choose printer, number of copies, etc. and click OK.

If you have chosen the **Export** option from the Dashboard screen, you have 3 fields to fill:
Save in: Select the folder where you want to export (save) the report to

File Name: Enter an appropriate File name

Save as File Type: this will default to HTML. Change this at the drop-down menu.
Save as type Excel (*.xls) when exporting the Pivot
Save as type PDF (*.pdf) when exporting the Reports as Acrobat Reader format

Regardless of your choice, you do not need to leave this query to re-run it.

To Re-Run the same query with different parameters (that is, to change a limit), left yellow arrow back if necessary to return to the Dashboard screen. You have two choices:

Click Refresh, which clears all the parameter boxes. You must re-enter them all. Then click on Process.

Or.....

You can click in only the box(es) that you want to change
Remove the entry using the backspace key, or highlight the entry and overwrite it.
Click on that box’s Enter button
Then click on Process.

**You must click on each box’s Enter button, wherever you make an entry or a change, or your entries will not be noted!**
To **Exit the query**, click on the **X**, top-right corner.

When asked “Save changes?”…..just say **No**.

It is not possible to overwrite these published reports, and you should *not* save them to your own computer. They use a lot of space and memory, and versions saved off-line would not receive the corrections or improvements made to the published versions.

Hyperion maintains a **30-minute allowance for inactivity**. If you return to a query that has been open yet inactive for more than 30 minutes, you will be taken back to Hyperion's opening login screen. Simply enter your password, click Log On, and you'll need to repeat the process.

It is possible to have **two queries open at once** from Hyperion's Budget Reports menu. Click on the first query to open, and process as usual.

To open a second query:

- Go back to the Budget Reports folder by clicking on the prior icon on your taskbar.
- **Right-click** on another query and select **“Open”**

Now, from the toolbar, you can switch between queries.

Another option is to open another completely new Internet Explorer session.

**Additional Features:**
Display Available Funds and Display Available Orgs buttons
Located at the bottom of the screen for reference.

A click on either button opens a complete list of Funds and Orgs
You may change their viewed order to either numerical or alphabetical:
  Click within the column that you want to reorder, so that it is completely
  highlighted.
  Right-click and choose either Sort Ascending or Sort Descending
Use the scroll bar to move within this list
When done, click on the Hide button.

Other Hyperion Budget queries also in the Dashboard format that you might be interest in:

  MIIS Account Activity Dashboard
  MIIS Grant Budget and Activity Dashboard
Quick Reference for Running Fiscal-Year Budget Reports

- Open a new session of Internet Explorer
- Type go/hyperion and click on Hyperion Workspace
- Network Login
- Root → Budget → Budget Reports folder, select Budget vs Actual YTD Dashboard
- Banner INB Login and.....
  - Include Revenues? - check box or leave blank
  - Enter
  - Connect to Database, OK
- Enter Year (ex. 2011), Fund, Org, clicking Enter button each time
- Enter Account and Activity Code, or check the “ALL” boxes
- Select desired Report
- Choose Display, Print or Export and click Process
- ← Left yellow arrow back to dashboard to change parameters
- Click Refresh (re-enter all fields) or change a field, clicking Enter button for each change
- Process
- ← Left yellow arrow back to Login, to change Report Type

If you ever have any difficulties or questions, please feel free to contact the Budget Office.