Instructions for Hyperion Budget Dashboards

Budget Fiscal-Year and Summer Program Reporting

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

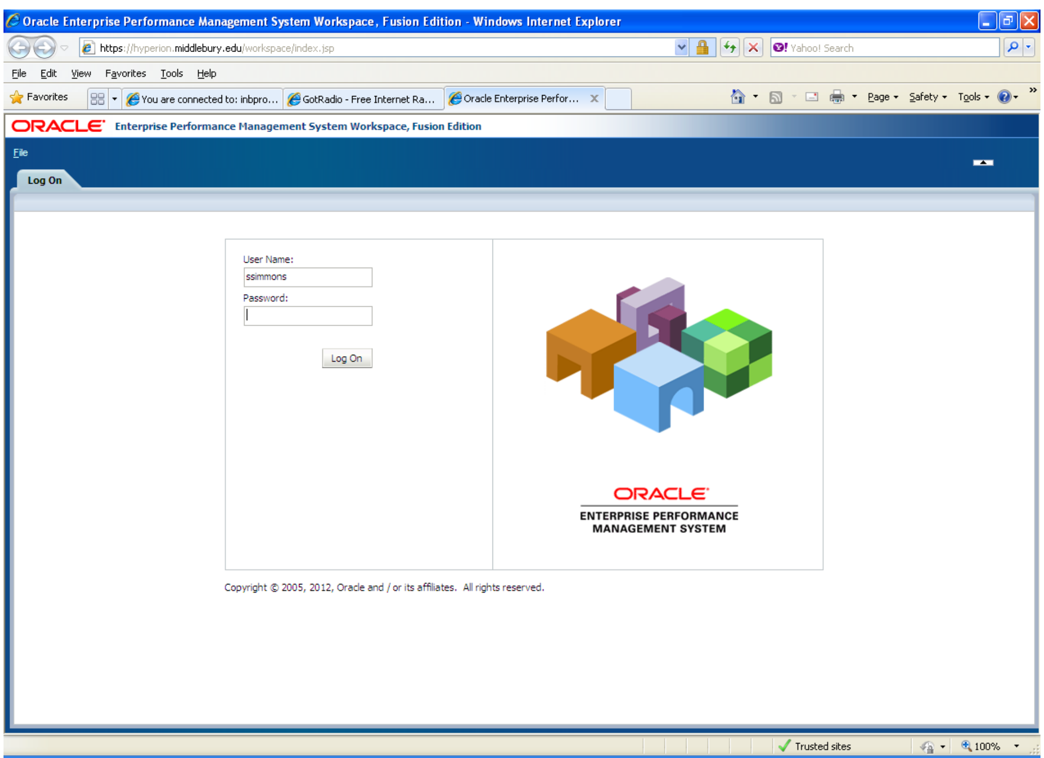
Budget vs Actual YTD Dashboard
Account Activity Dashboard

These two reports have been set up to run either for general fiscal year budget data, or for summer programs' data (Bread Loaf, Language Schools and Summer Intensive Language Program [referred hereafter as SILP]). The choice is made in the Login box. However, 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 reports will be used by MIIS for FY12 and forward budget reporting.

Shortened **Quick Reference** instructions appear on the last page.

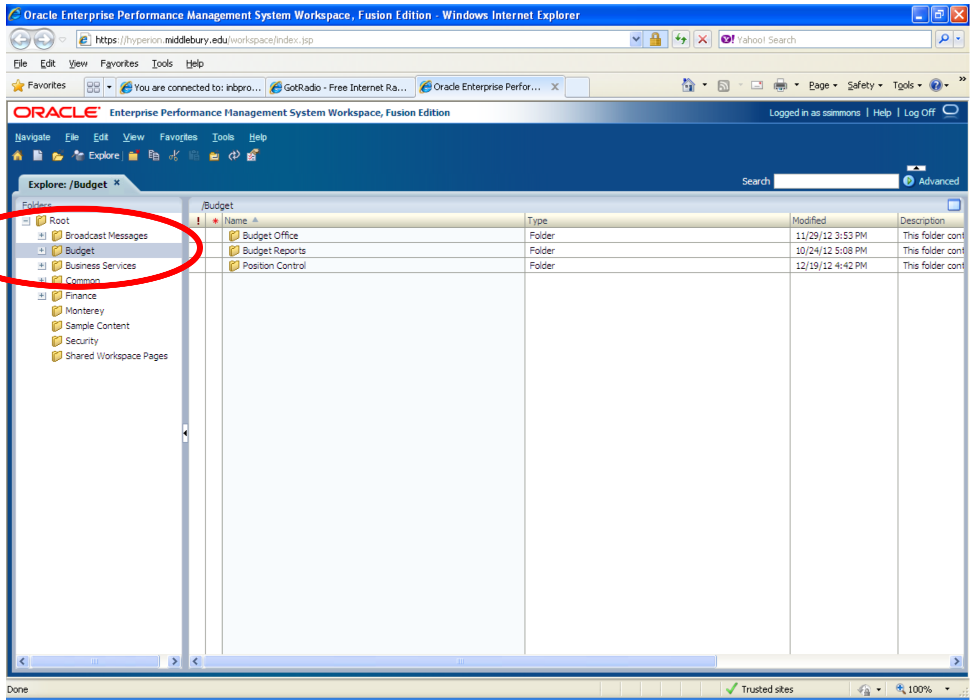
To begin:
Open a new session of Internet Explorer.
Type **go/hyperion** in the address line. This takes you to the LIS Hyperion Reporting webpage.
Set a bookmark to this location.
Click on **Hyperion WorkSpace** to get to Hyperion's opening screen.



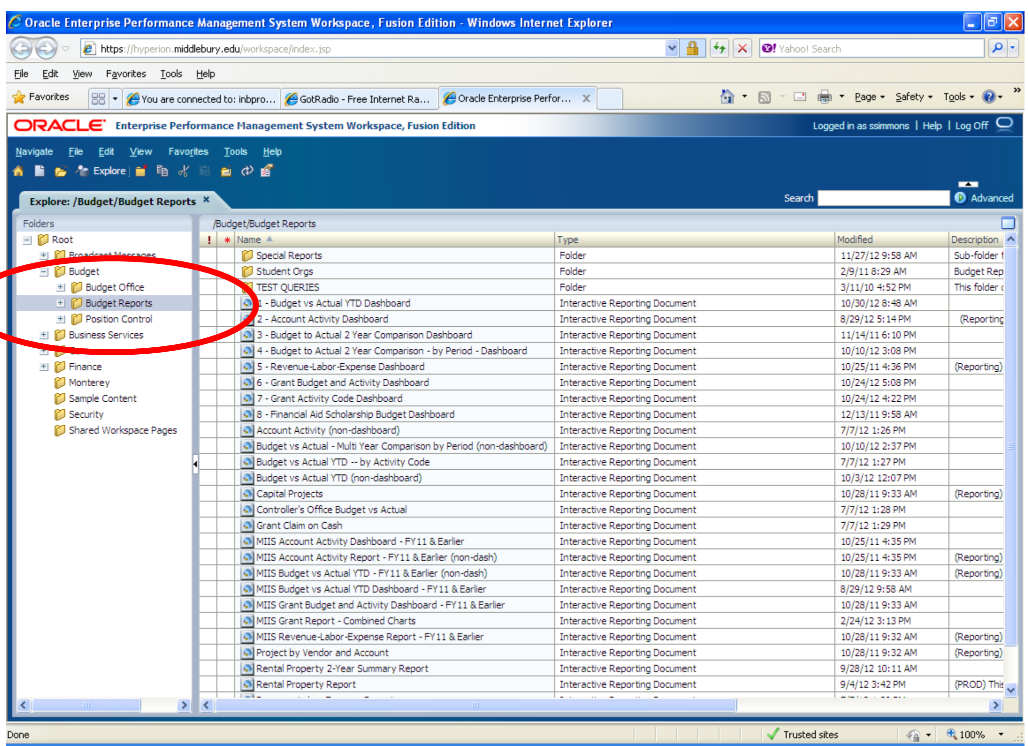
Enter your Network username and password as you would when starting up your computer in the morning, and click on the **Logon** button.

Next you will see the **Folder menu screen**, where department folders reside.

Folders will contain queries that you have access to. If a folder is empty, it means that you do not have access to any queries there.



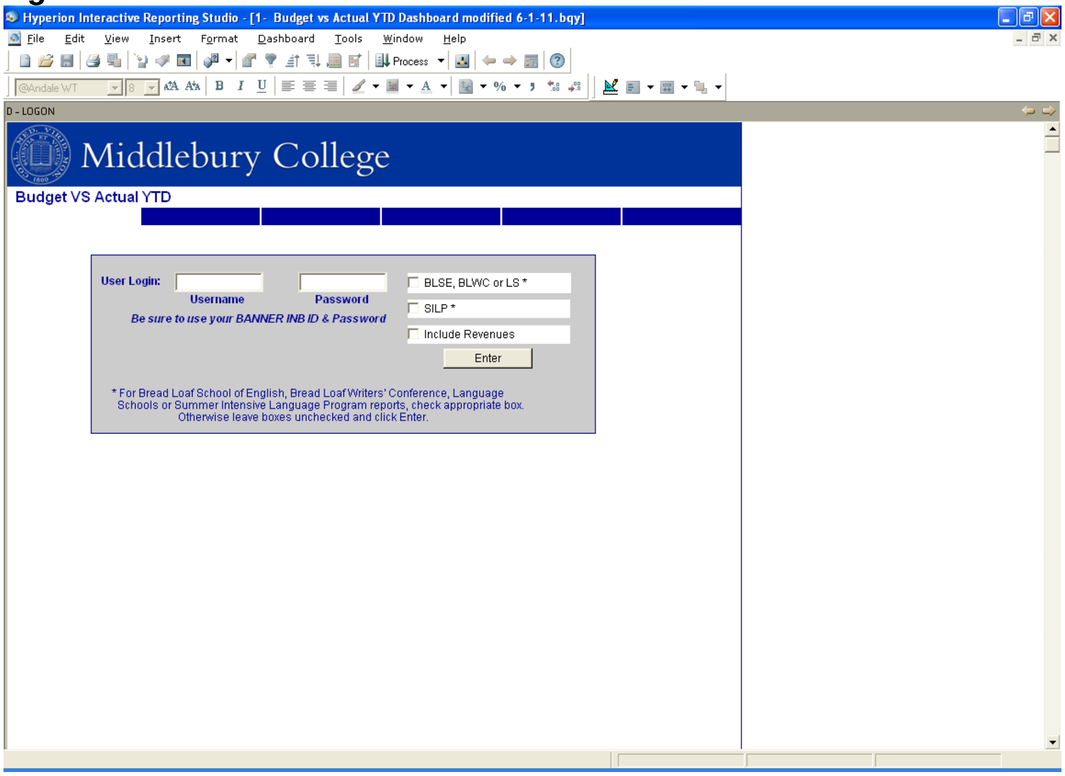
Double-click on the **Budget** folder, and then double-click on the **Budget Reports** folder…..



Instructions for Hyperion Budget Dashboards
Budget Fiscal-Year and Summer Program Reporting

Each query there shows a short description of its function if you scroll to the right. Double-click on the **1- Budget vs. Actual YTD Dashboard** query to open.

User Login Box:



In the **User Login** box, enter this time your *BANNER INB* username and password, as the query is pulling data directly from Banner, and security accesses must be matched.

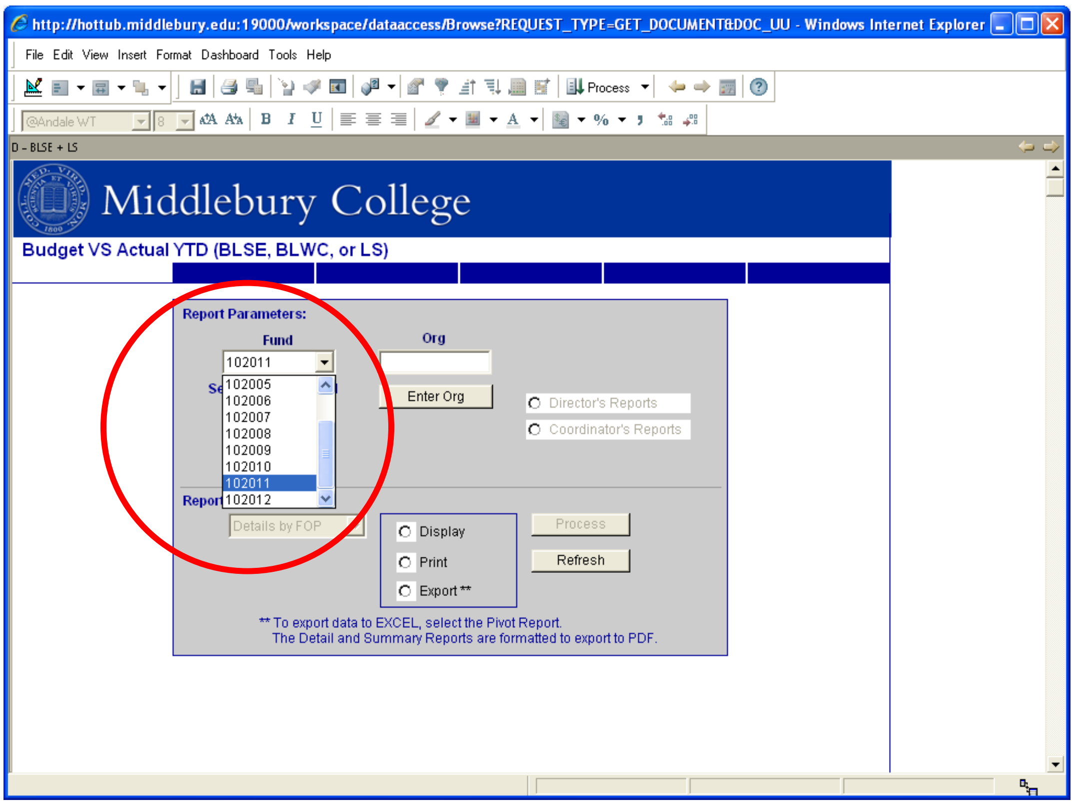
The next fields, **checkboxes for either BLSE-BLWC-LS, or SILP** reports, tell the system which kind of budget report you want.

> Check either of these boxes *only* if you want the specific budget reports for Bread Loaf Schools of English (BLSE), Bread Loaf Writers' Conference (BLWC), Language Schools (LS), or Summer Intensive Language Program (SILP).
> Otherwise, boxes are left un-checked.

Some dashboards contain a **Revenue check box**, giving you to option to see Revenues in your report, or to exclude Revenues. Simply check the box as 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.

With the **BLSE-BLWC-LS** box ***CHECKED*:** **Budget vs Actual YTD (BLSE, BLWC, LS)**



Note that there is <u>no Fiscal Year option</u>. Because these Summer Programs cross fiscal years, their timeframe is determined by the Summer Fund code. The timeframe associated with these Summer Programs is December 1st to November 30th. The year seen within the Summer Fund code ('2011' as part of 102011) reflects the summer in which the program is happening.

Also note: for all boxes in this section, you will need to place your cursor <u>in the box</u>, make your entry, and then click the **Enter** button below. As each box is entered, the next becomes available.

Fund: Using the arrow key, select the desired Summer Fund code.

Org: Enter the desired Org, and click on **Enter Org**.

Reports: Select either **Director's Reports…**

These will contain only expense accounts, but no Scholarship data.

Instructions for Hyperion Budget Dashboards

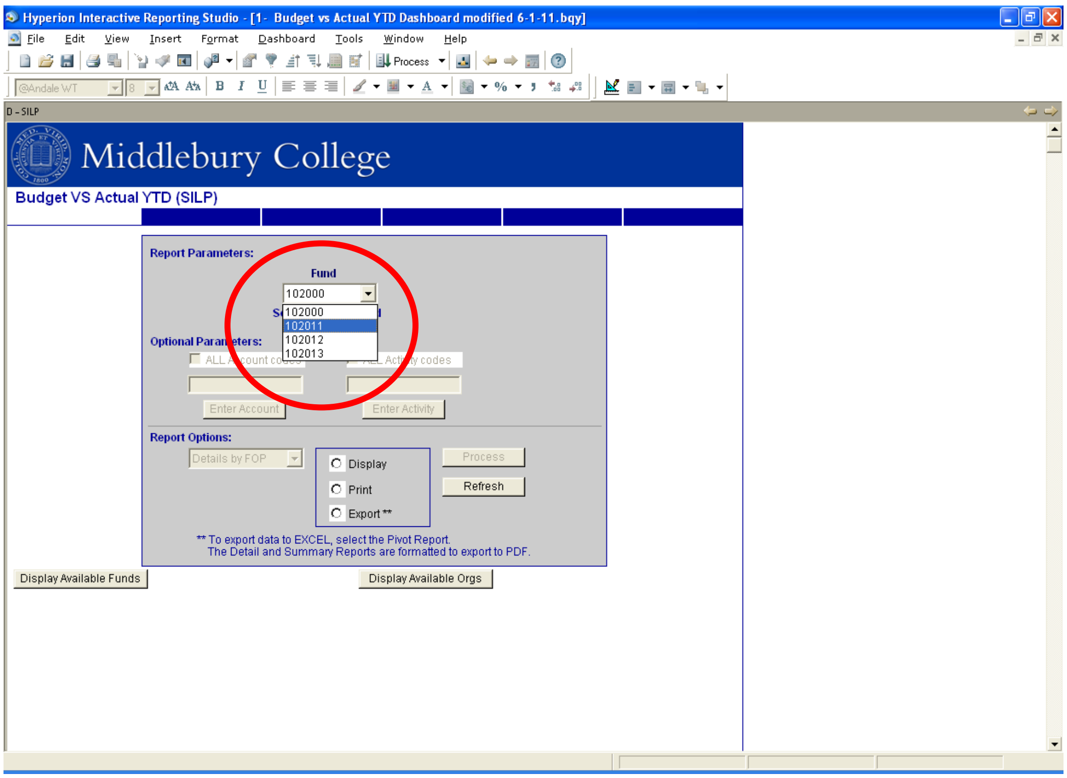
Budget Fiscal-Year and Summer Program Reporting

or **Coordinator's Reports**

These will contain all accounts: revenue, labor and expense.

Once you enter the last box, the Report Options section becomes available, described on pg 7.

With the **SILP** box ***CHECKED***: **Budget vs Actual YTD (SILP)**



The Summer Intensive Language Program runs as a Summer Program and thus crosses fiscal years. ***Note that there is *no Fiscal Year option*.** SILP has its own timeframe: October 1^{st} to September 30^{th}. The year seen within the Summer Fund code ('2011' as part of 102011) reflects the summer in which the program is happening.

Select the **Fund** using the drop-down box. Click on the desired Fund code.

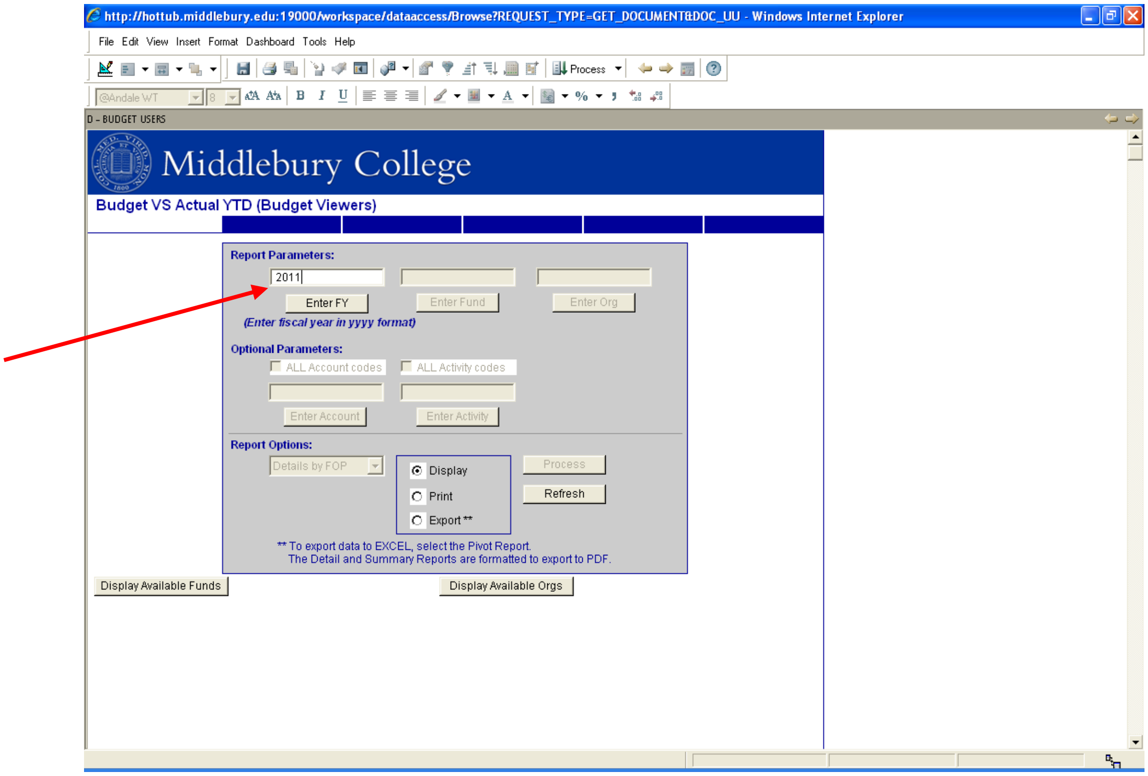
Two more boxes, **Account** and **Activity Code**, are next. You have 2 options:

1. You may make an entry to see only *one* Account or Activity code at a time.
   Enter a specific code and click the **Enter** button below
2. Check the **ALL** box to return *all* codes.

Once you enter the last box, the Report Options section becomes available, described on pg 7.

With the **BLSE-BLWC-LS and SILP** boxes ***UN-CHECKED***:

Budget vs Actual YTD (Budget Viewers)



Enter the **Fiscal Year** in ‘xxxx’ format. That is, for FY11 data, enter 2011….for FY10 data, enter 2010.

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.

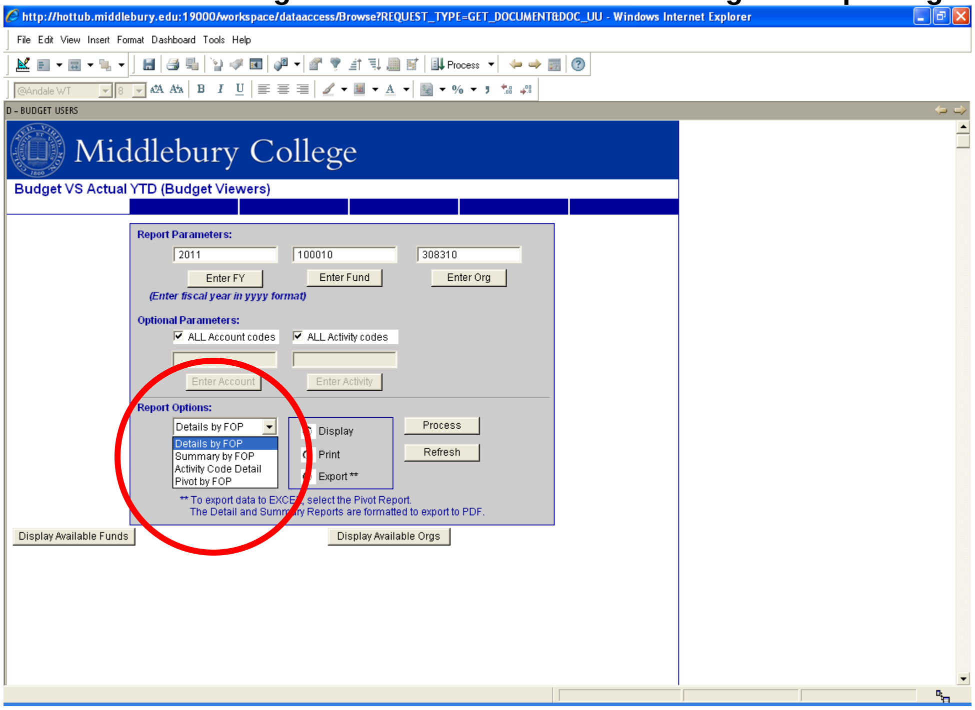
Enter the **Fund** and **Org**, using the Available Funds and Available Orgs buttons at the bottom of the screen as reference, if needed. (see pg. 10 for explanation)

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 to return *all* codes.

Once you enter the last box, the Report Options section becomes available.

Instructions for Hyperion Budget Dashboards

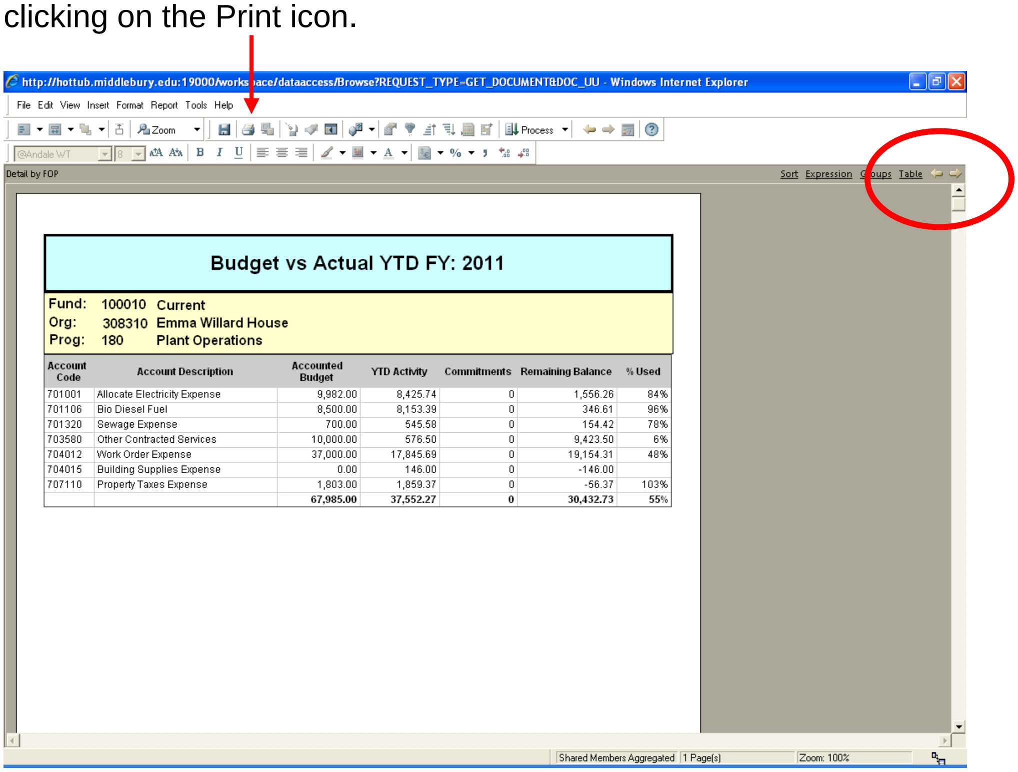
Budget Fiscal-Year and Summer Program Reporting



__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**.

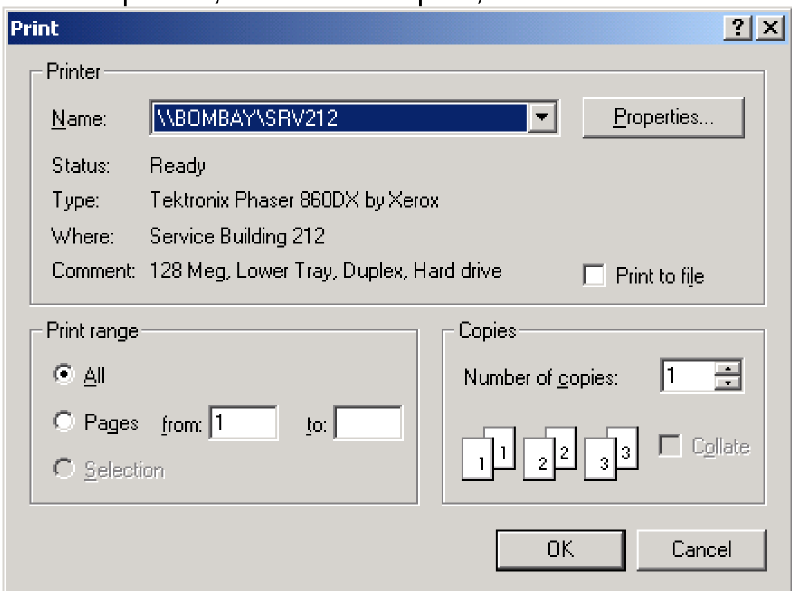
If you have chosen the **Display** option…..

You will see the actual report on the screen. You can still **Print** the report from here, clicking on the Print icon.

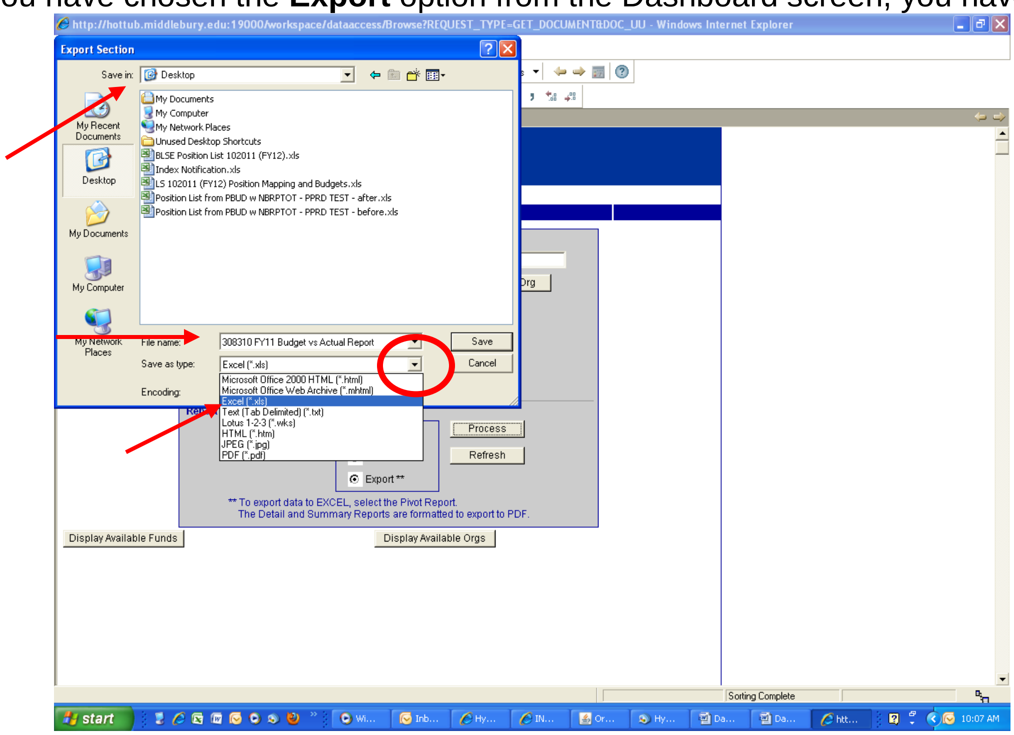


The **yellow arrows** that you see to the top-right side are the “back and forth buttons.” To get back to the dashboard screen from the displayed report, click on the ← left arrow. The → right arrow is for moving forward to the next screen in a series.

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:



1) Save in: Select the folder where you want to export (save) the report to
2) File Name: Enter an appropriate File name
3) Save as Type: Change the default file type at the drop-down menu.
   Save as type PDF (*.pdf) when exporting the Reports
   Save as type Excel (*.xls) when exporting the Pivot

Don't worry about the Encoding field. Leave as-is at Western European [Windows].

You do not need to leave this query to re-run it.

To **Re-Run** the same query with different parameters, ← **Left yellow arrow** back if necessary to return to the Dashboard screen. You have two choices:

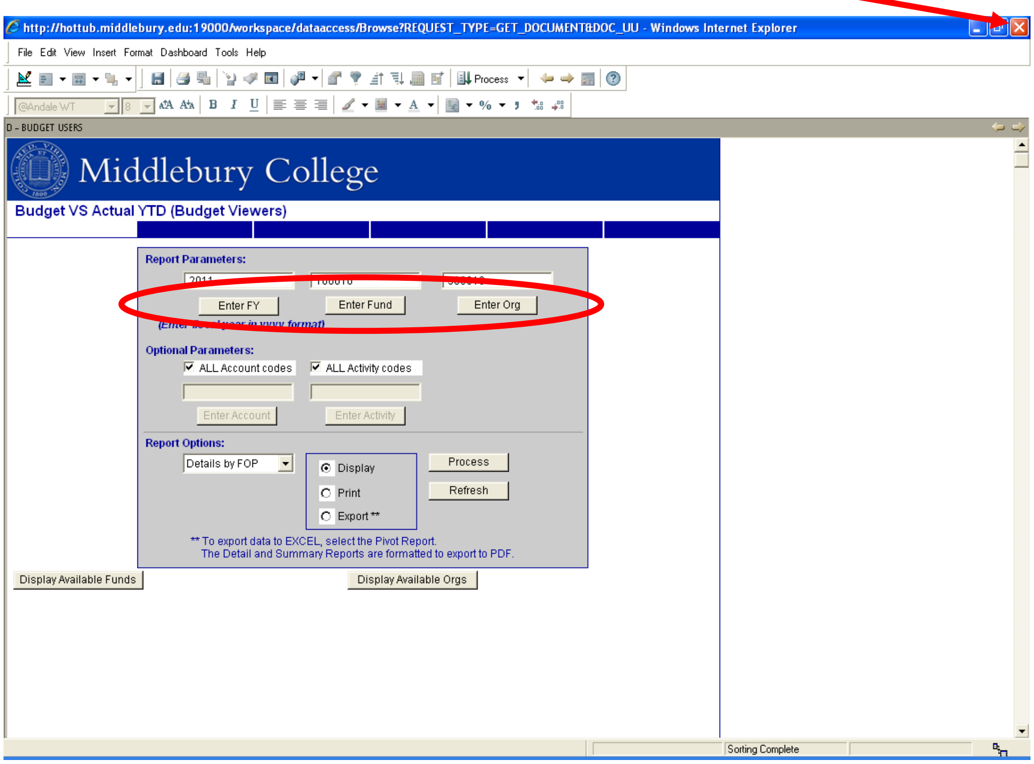
Click **Refresh**, which clears all the parameter boxes. You must re-enter them all.
Then click on **Process**.

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**.

Key points to remember:
You *must* click on each box's **Enter button, wherever you make an entry or a change, or your entries will *not* be noted! And you must place your cursor into the next box, when it's available.

To **Exit the query**, click on the red **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.

To exit Hyperion completely, from the Folder menu screen click on **File → Exit**. Answer the next two "are you sure?" questions with a "yes."

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 Login, and you'll be returned.

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.
Double-click on another query to open.
Now, from your task toolbar, you can switch between queries.

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

You can **switch between Summer Program reports and Budget Viewer reports,** without leaving the query.
At any time, you may ← **left yellow arrow** back to the query's original login screen, select the *other* type of budget report, then proceed again.
This is in place *only* for Budget vs Actual YTD and Account Activity reports.

Other Hyperion Budget queries, while also in the Dashboard format, run solely in the Budget Viewer mode, by fiscal year:
Budget to Actual 2-Year Comparison
Budget to Actual 2-Year Comparison – by Period
Revenue-Labor-Expense Report

If you ever have any difficulties or questions, please contact the Helpdesk x.2200.

Quick Reference

- Open a new session of Internet Explorer
- Type go/hyperion and click on Logon to Hyperion WorkSpace
- Network Login
- Root → Budget → Budget Reports folder, select Budget vs Actual YTD Dashboard
- Banner INB Login and…..

  1) For Report Type = Summer Programs
  Check either the BLSE, BLWC, LS box or the SILP box
  Include Revenues - check box or leave blank
  Enter
  Connected to Database, OK
  Select Fund, Org, Report

  or

  2) For Report Type = Budget Viewer, department budgets by fiscal year
  Do NOT check the BLSE, BLWC, LS or SILP boxes
  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 box for ALL
- Select desired Report
- Choose Display, Print or Export (Display first is suggested)
- ← 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

These steps refer specifically to Budget vs Actual YTD & Account Activity budget dashboards.

All other budget Dashboard queries will process the same way.

If you ever have any difficulties or questions, please contact the Helpdesk x. 2200.