Instructions for Grant Budget Dashboard

These instructions are for the #6 – Grant Budget and Activity Dashboard, located in the Hyperion Budget Reports folder.

(Please know that #7 – Grant Activity Code Dashboard is run in a very similar fashion.)

Quick Reference appears at the end.

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 Reporting 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 Login 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.....

You will probably only see two queries, numbered 6- and 7- for Grant Dashboards.
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Please note, these Grant Dashboard reports will give you *day-old data.*

Double-click on the 6 - Grant Budget and Activity Dashboard title to open.

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

After you press 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.
Now, simply enter your **Grant number**, and press **Enter**:

**Report Options** are displayed in a drop-down box. Choose either Detail or Summary Report. The Pivot report options are designed for those who want to have the data in Excel.
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 (below is a **test** report). 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.

![Print dialog box](image1)

If you have chosen the **Export** option from the Dashboard screen, you have 3 fields to fill:

![Export dialog box](image2)
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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].

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

To **Re-Run** the same query for another Grant or a different report:
← Left arrow back if necessary to return to the Dashboard screen.

Click **Refresh**, which clears all the parameter boxes.  You must re-enter them all.  
**You must click on the Grant box’s Enter button wherever you make an entry or a change, or your entry will not be noted!**

Then click on **Process**.

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.
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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.

**Quick Reference**

- Open a new session of Internet Explorer
- Type **go/hyperion** and click on the **Hyperion Reporting** link.
- Network Login
- Root → Budget → Budget Reports folder, select **Grant Budget and Activity Dashboard**
- Banner INB Login
- Enter Grant number
- Select desired Report
- Choose Display, Print or Export
- Process
- ← Left arrow back to dashboard to change parameters
- Click Refresh, then re-enter or change fields to rerun
- Process

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