

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.)

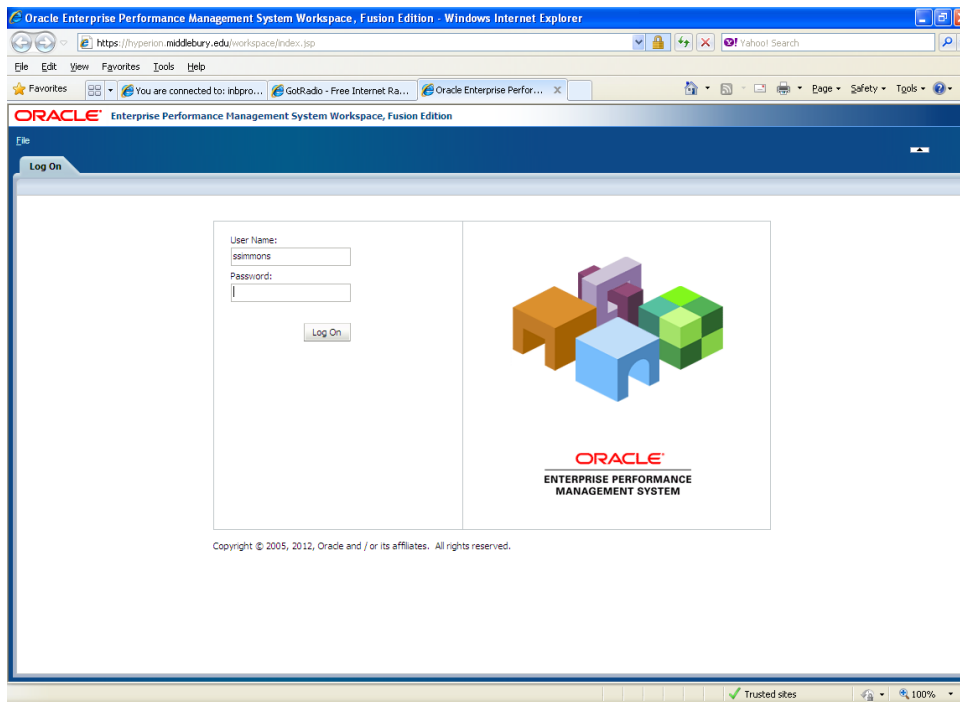
Quick Reference appears at the end.

To begin:

Open a new session of Internet Explorer.

Type [go/hyperion](https://hyperion.middlebury.edu/workspace/index.jsp) 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.

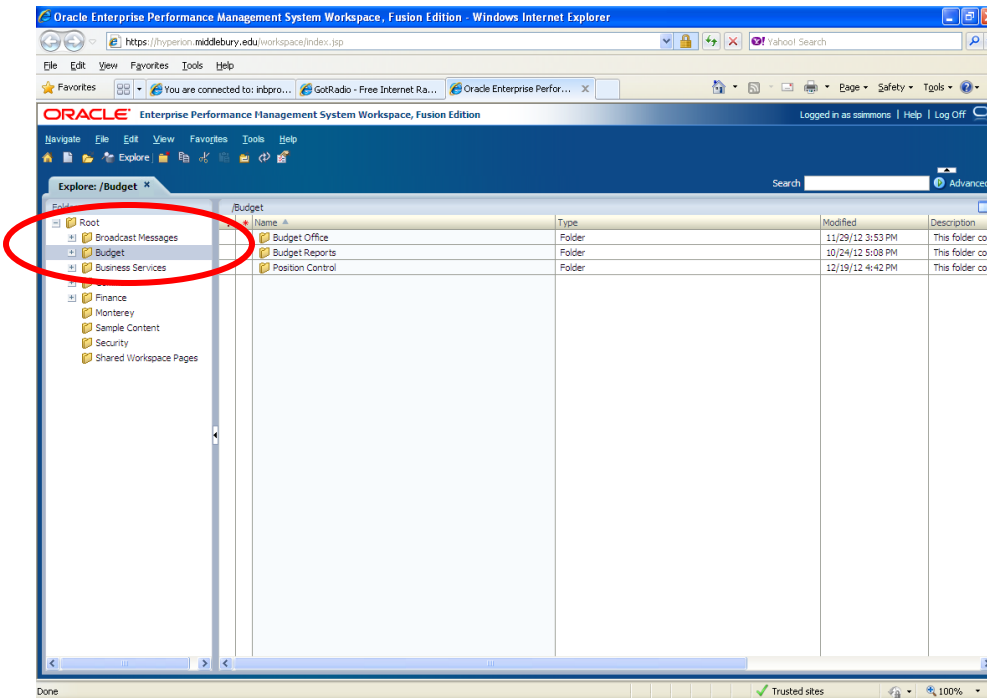


Enter your Network username and password as you would when starting up your computer in the morning, and click on the Login button.

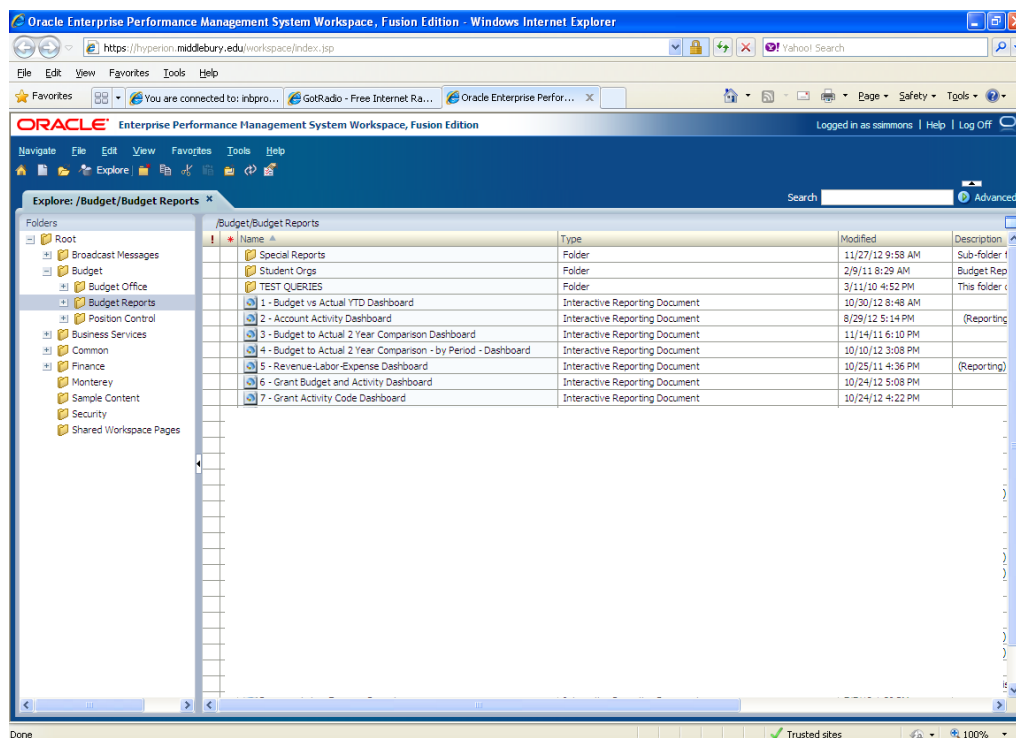
Instructions for Grant Budget Dashboard

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.....



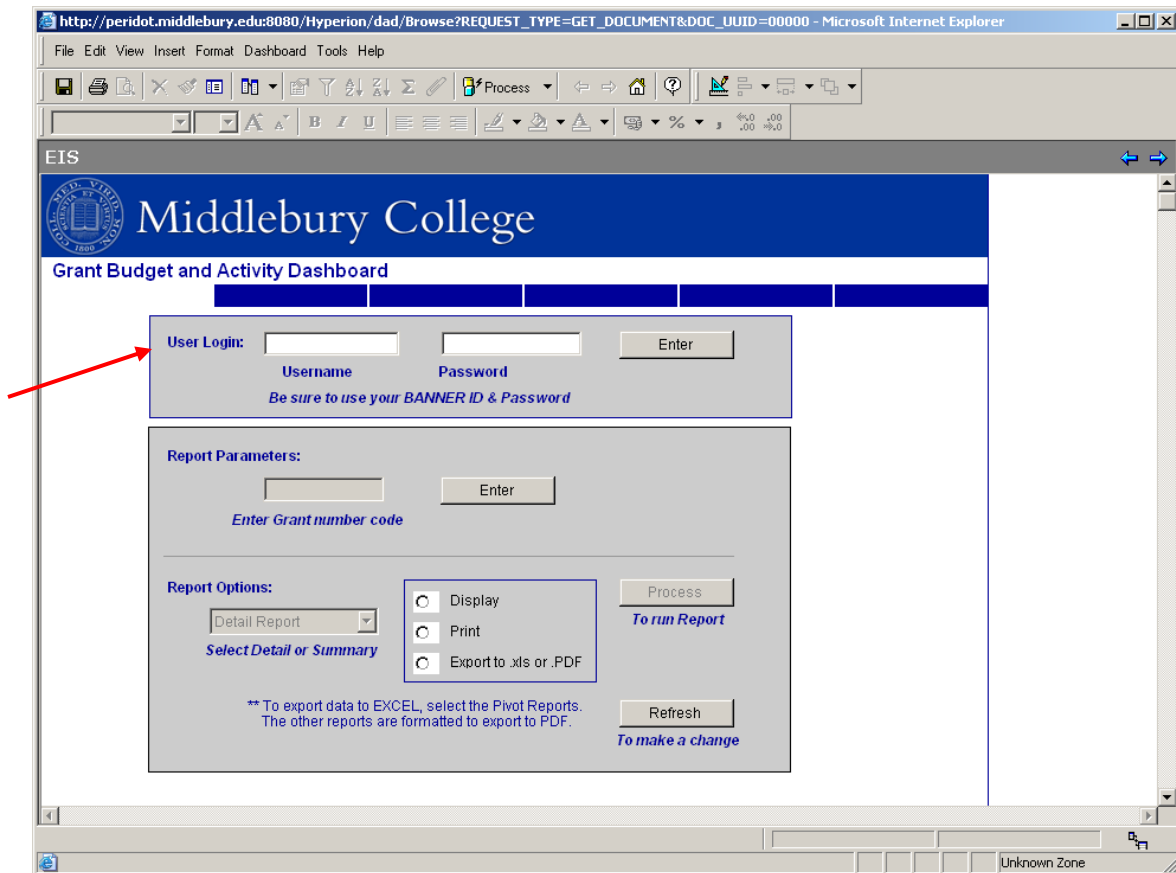
You will probably only see two queries, numbered 6- and 7- for Grant Dashboards.

Instructions for Grant Budget Dashboard

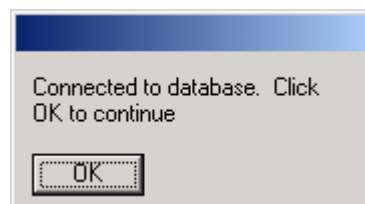
Please note, these Grant Dashboard reports will give you *day-old data.*

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.



Instructions for Grant Budget Dashboard

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

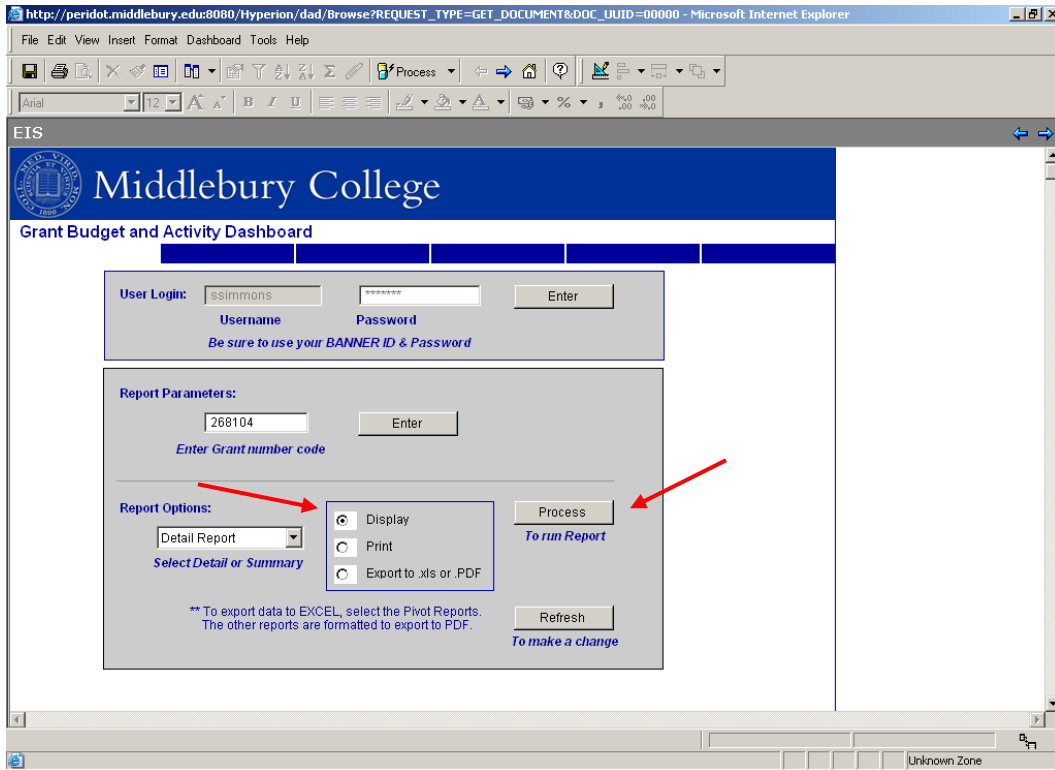
The screenshot shows the 'Middlebury College Grant Budget and Activity Dashboard' in a Microsoft Internet Explorer browser window. The page has a blue header with the college logo and name. Below the header, there are three main sections: 'User Login', 'Report Parameters', and 'Report Options'. The 'User Login' section has fields for 'Username' (containing 'ssimmons') and 'Password' (containing '*****'), with an 'Enter' button. The 'Report Parameters' section has a text box containing '268104' and an 'Enter' button. The 'Report Options' section has a dropdown menu set to 'Detail Report' and three radio buttons: 'Display', 'Print', and 'Export to .xls or .PDF'. There are also 'Process' and 'Refresh' buttons. A red circle highlights the 'Report Parameters' section.

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.

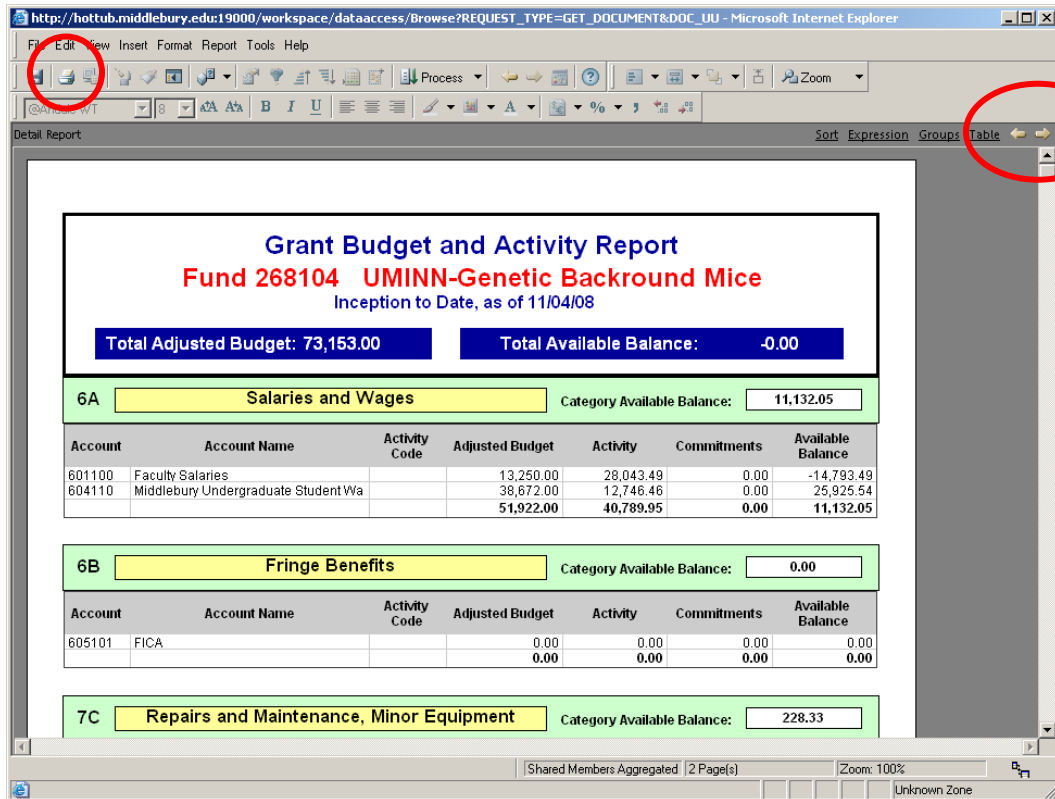
This screenshot is similar to the previous one, but the 'Report Options' dropdown menu is open, showing four options: 'Detail Report', 'Summary Report', 'Detail Pivot for Excel', and 'Summary Pivot for Excel'. A red circle highlights the dropdown menu. The 'Report Parameters' section is also visible, with the number '268104' entered in the text box.

Instructions for Grant Budget Dashboard

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



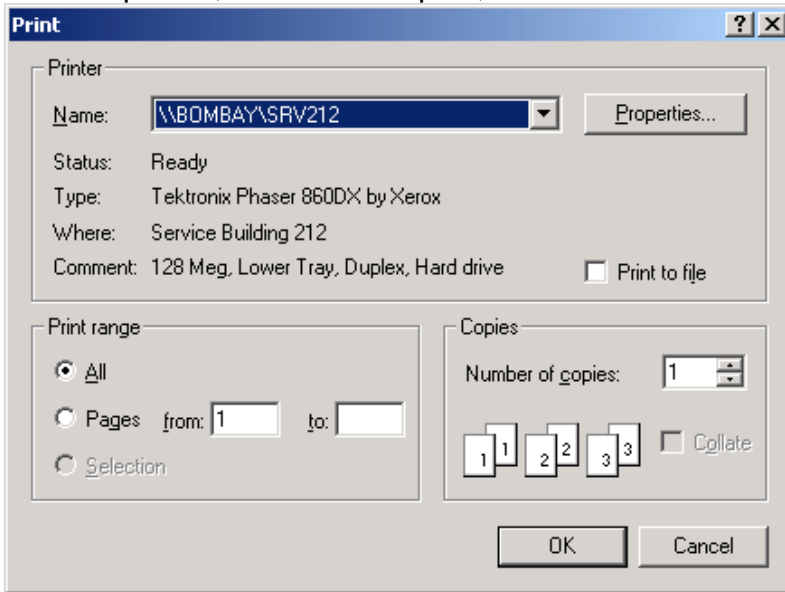
If you have chosen the **Display** option.....You will see the actual report on the screen (below is a **test** report). You can still **Print** the report from here, clicking on the Print icon.



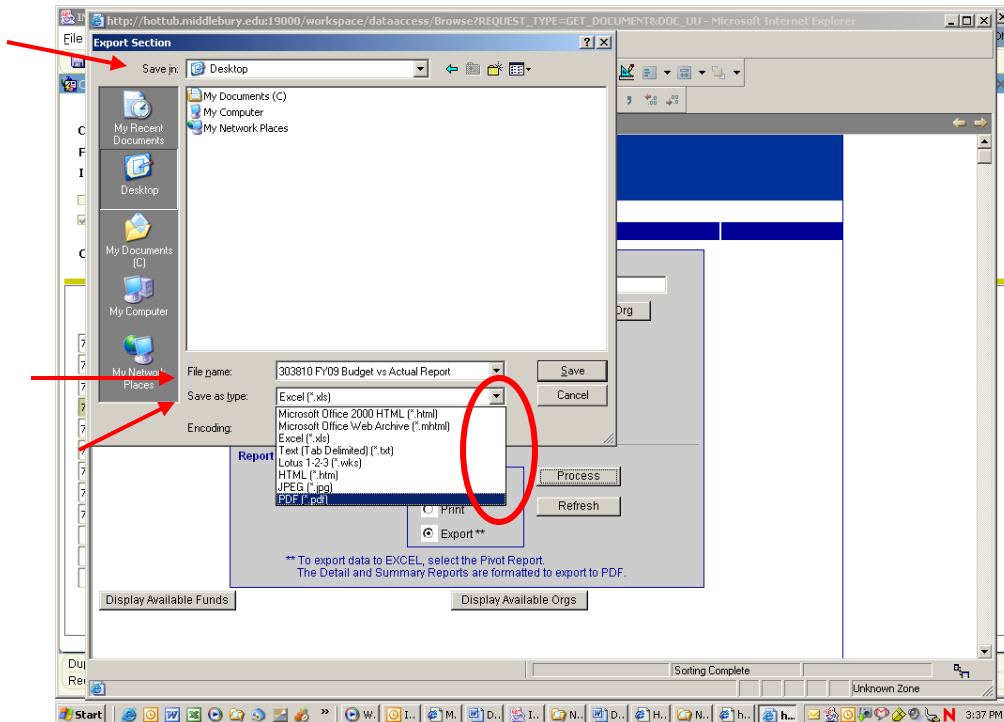
Instructions for Grant Budget Dashboard

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:



Instructions for Grant Budget Dashboard

- 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:

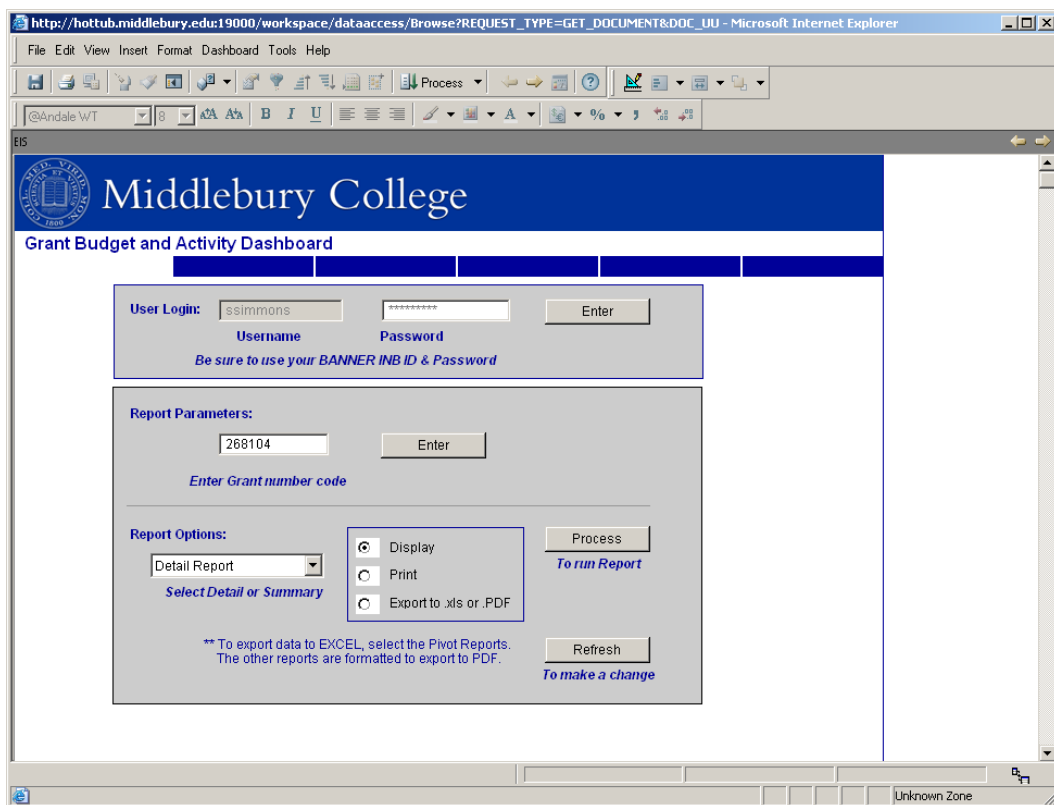
← Left arrow back if necessary to return to the Dashboard screen.

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.

Instructions for Grant Budget Dashboard

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.