BIS-on-the-Web
Hyperion Intelligence Quickstart Tutorial

I. Objective

- The objective of this tutorial is to provide the necessary training to enable users to begin using Hyperion Intelligence with BIS-on-the-Web.

- This tutorial is meant to be printed and used interactively with Hyperion Intelligence.

- Before using this tutorial, the user should have the following prerequisites completed:

    - own an active BR Portal login and password
    - have access to BIS

II. Introduction

- **Hyperion Intelligence**

  Hyperion Intelligence is an internet browser plug-in that is used for ad-hoc data retrieval from a data warehouse.

- **BIS Data Warehouse**

  The BIS Data Warehouse is a database that has been structured in such a way that current and historical data is stored in a collection of read-only tables. Data can be extracted from these tables and then browsed, analyzed, refined, and presented in a meaningful form to answer your business questions.

  The data warehouse contains information from multiple campus systems (PPS, BFS, BIBS, Enrollment) and is built to retain many years of history for trend and strategic analysis.

- **BIS query templates**

  ASD has created many query templates for BIS users. There are templates for BIS (new chart of accounts) and for Legacy BIS (chart of accounts prior to July 1, 2000).

  The templates are accessed via the Berkeley Reporting Portal and are in a user-friendly format. All the required tables have been pre-joined (behind the scenes), and some commonly used calculations have been created.

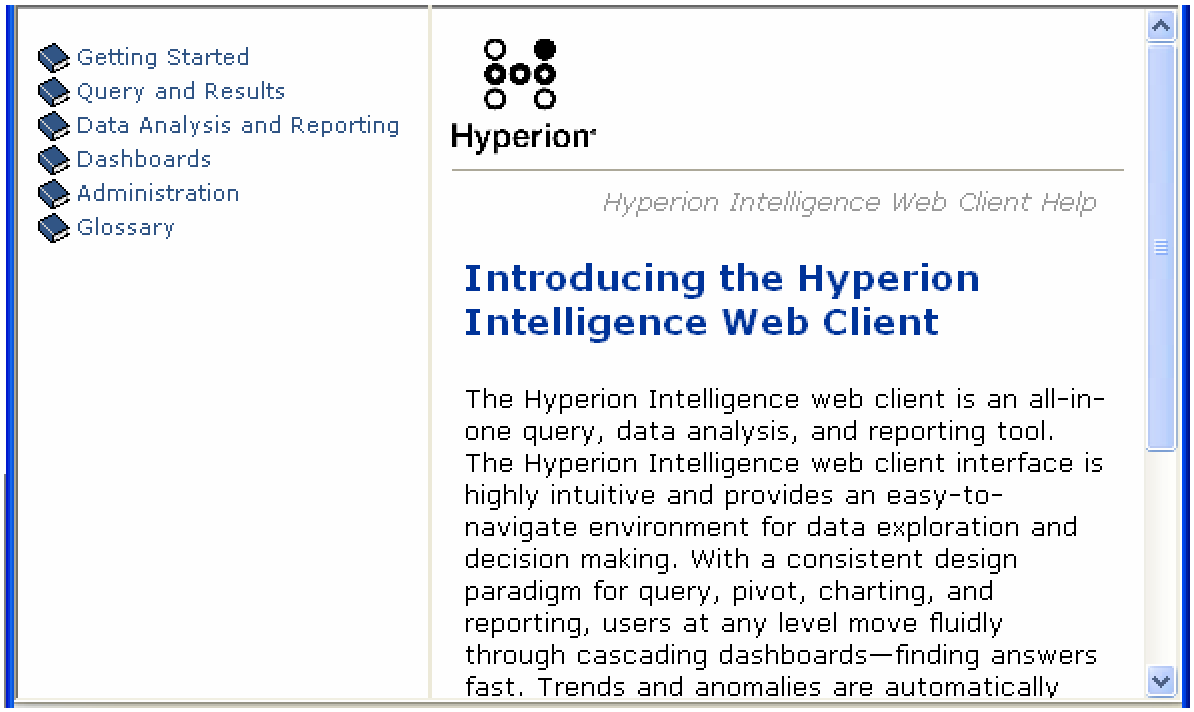
  The BIS templates are meant to be a starting point for users. Beginning users simply need to:

  - login to the Berkeley Reporting Portal
  - select and open the template
  - select and drag additional items from the meta topics to the request line as needed
  - impose some limits, if needed
  - click the **Process button**

  Security is built into the user login, and only appropriate data will be returned to the users.

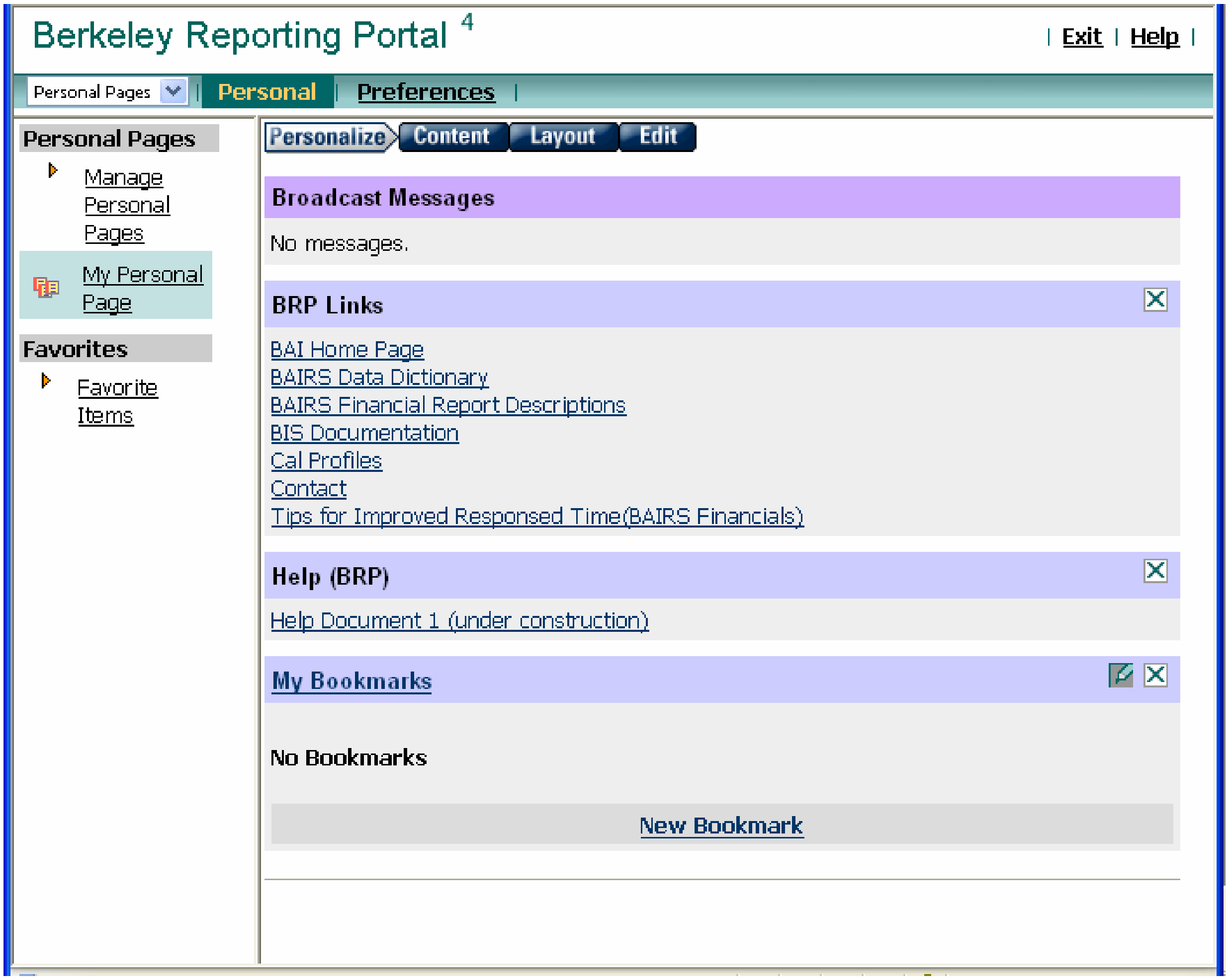
III. Getting Started with Hyperion Intelligence

- for an introduction to Hyperion Intelligence and assistance in navigation, use the on-line help feature
    - click **HELP** ⇒ **Help**
    - click **Basics** ⇒ **Command Lines**

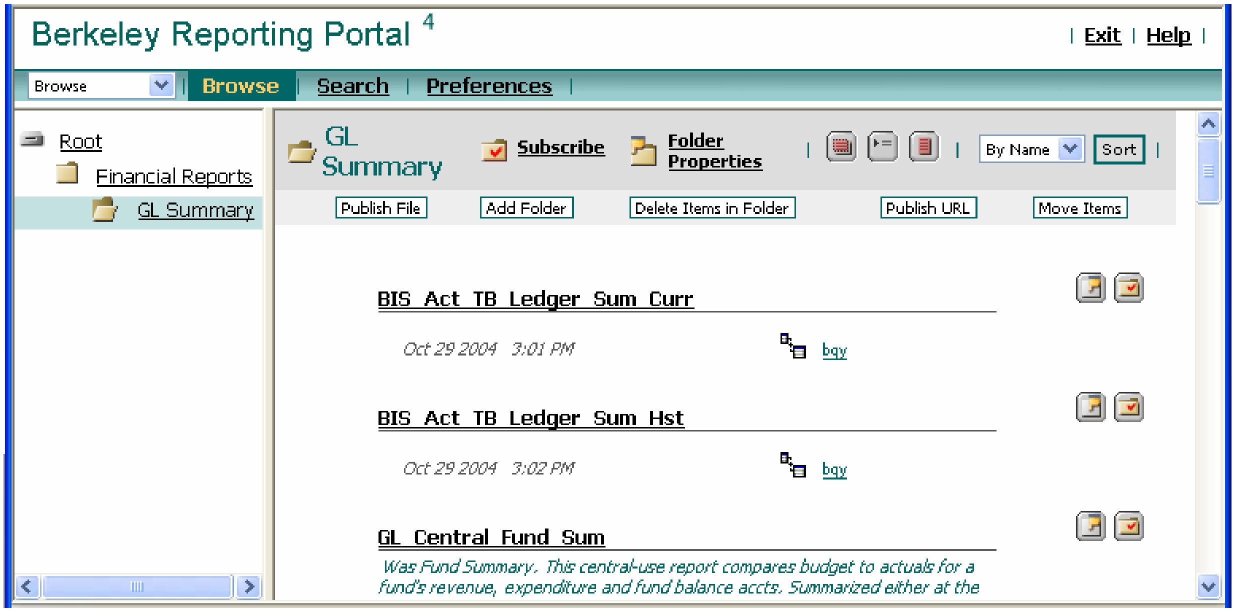


IV. Opening a Query Template

- log into the BR Portal



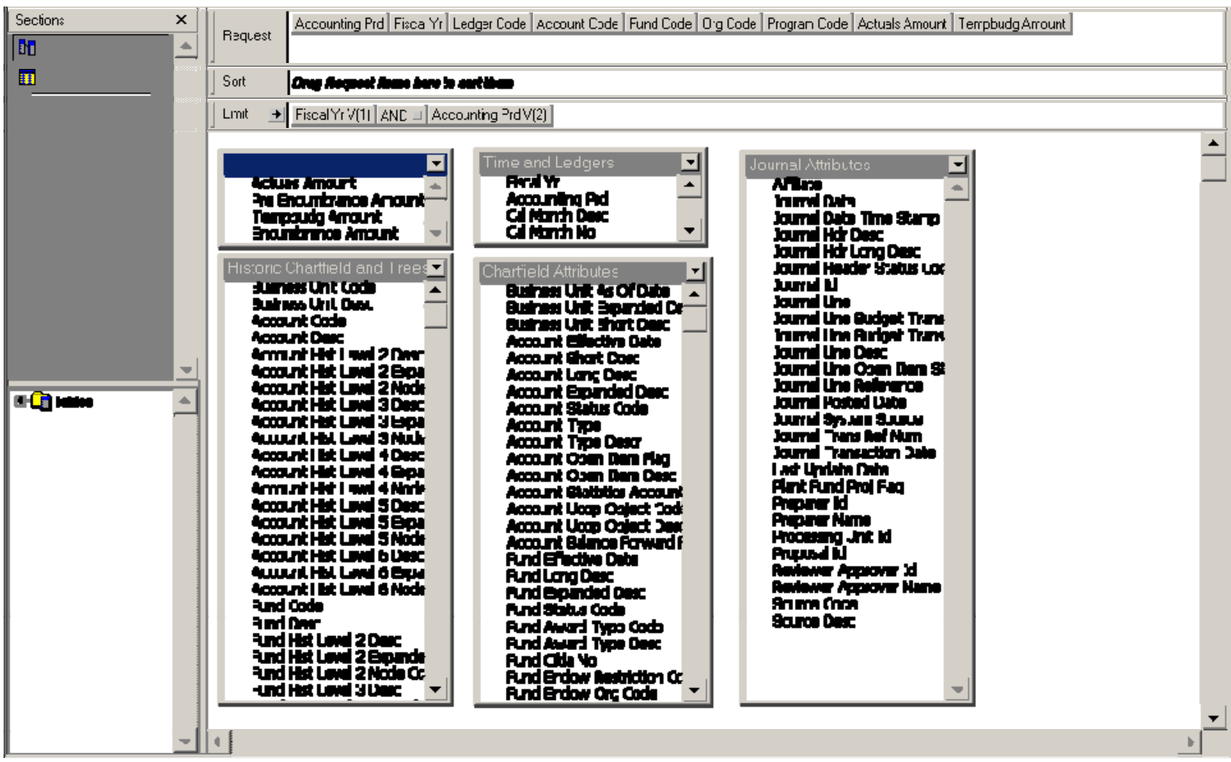
- double-click on the template name to select.



V. Query Section

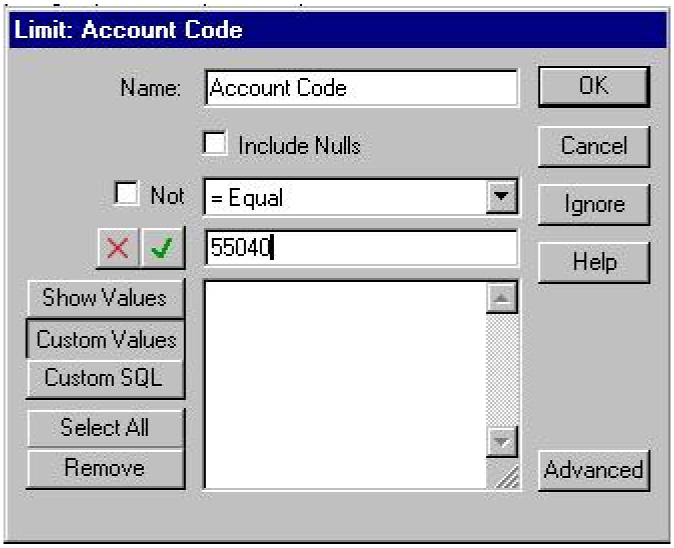
- when a template is opened, you will automatically be in the Query section
  - minimal chartfields and basic calculations will already be on the Request Line for current BIS template.

- Request Line Items -- items for which data is to be retrieved from the warehouse
  - *remove items:* click **item** on Request Line ⇒ **delete key**
  - *change column names:* double-click **item** on Request Line ⇒ Modify window ⇒ change name ⇒ **OK**



- limits

  - *to add limits:* click **item** in template ⇒ drag to Limit Line to open limit window ⇒ select **comparison operator** (= Equal, < Less Than, > Greater Than, etc.) ⇒ type in values (separate with commas) ⇒ √ **button**



    - *Not:* negate comparison operator
    - *Show Values:* display range of valid values for item
    - *Custom Value:* allows custom values to be entered
    - *Custom SQL:* allows custom SQL code to be entered
    - *Select All:* selects all items in the values window
    - *Remove:* removes selected values from values window
    - *Ignore:* temporarily disable limit
    - *to remove limits:* click **item** on Limit Line ⇒ **delete key**

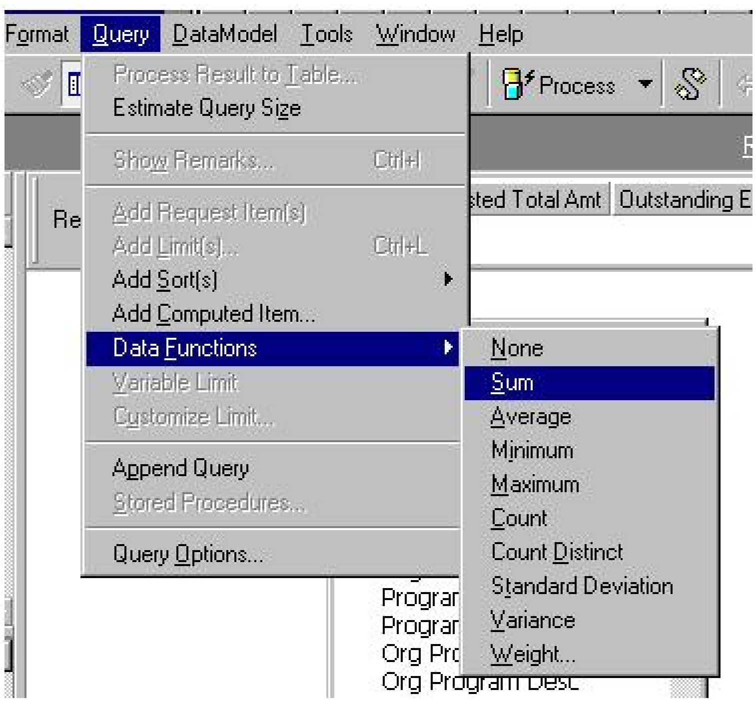
- complex limits -- options for building compound limits for items already on the Limit Line (click the **arrow button** to display the **( )** and **VAR buttons**)

  - *( ):* to define order of operations
    - click **items** to be grouped ⇒ **( ) button**
    - to remove parenthesis, click one of the **parenthesis** ⇒ **( ) button**

  - *AND:* default operator between two limits
    - to change operator to OR, click **AND button**

- compute new values

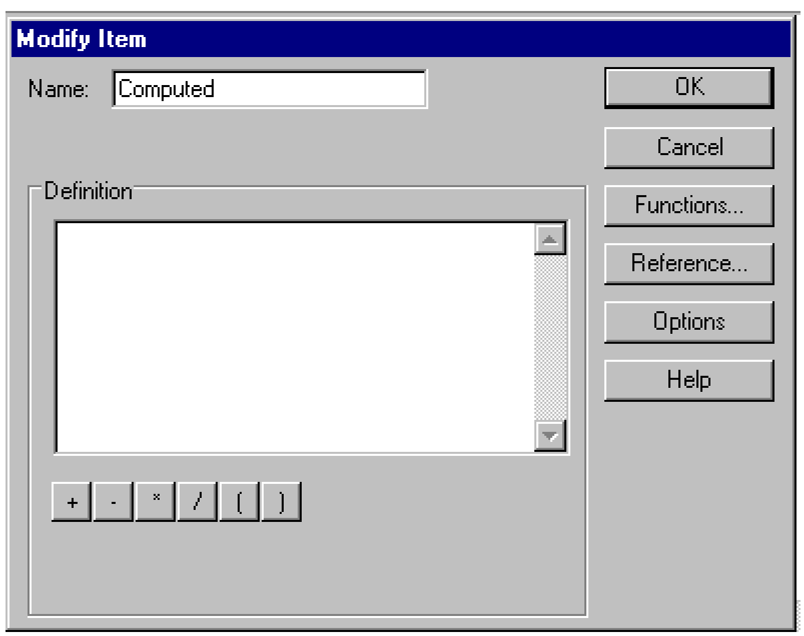
  - *data functions:* used to compute aggregate values to summarize data, including averages, maximums, counts and other statistics
    - click **item** on Request Line ⇒ **QUERY** ⇒ **Data Functions** ⇒ **function**
      OR
    - click **item** on Request Line ⇒ **right-click** ⇒ **Data Functions** ⇒ **function**



- *computed columns:* used to compute a column not in the database
  - put **cursor** on Request Line ⇒ **right-click mouse** ⇒ **Add Computed Item**

    OR
  - put **cursor** on Request Line ⇒ **QUERY** ⇒ **Add Computed Item**

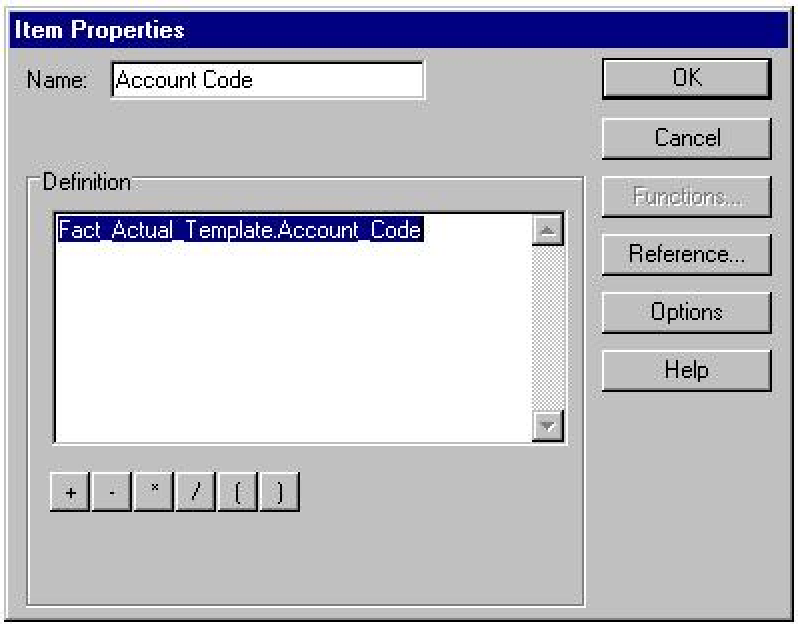
  - change the column name
  - click **Reference button** ⇒ **topic** from topic box ⇒ **item** from item box ⇒ **OK**
  - click appropriate **arithmetic function** from bottom of box
  - click **Reference button** ⇒ **topic** from topic box ⇒ **item** from item box ⇒ **OK**
  - click **OK** to return to Modify Item box if formula is complete, otherwise repeat steps to select an arithmetic function and topic/item from item box
  - click **OK** ⇒ column name will display on Request Line



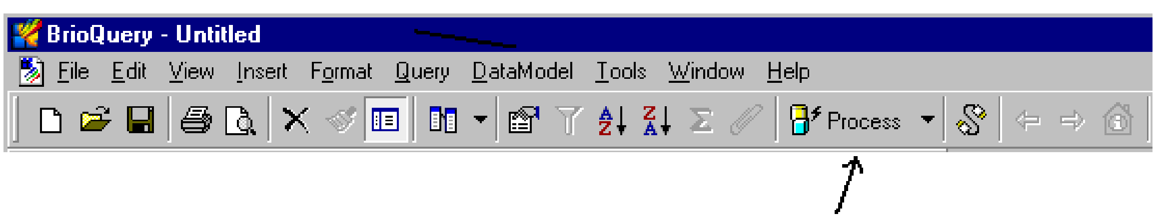
- sort items
  - click **item** on Request Line ⇒ **A-Z ↑ or A-Z ↓**

    OR
  - drag **item** from Request Line to Sort Line ⇒ **A-Z ↑ or A-Z ↓**
    - items are sorted from left to right on Sort Line: click **item** ⇒ drag to new location

- change column names (used to customize a column label)
  - double-click **item** on Request Line ⇒ change name in Name box ⇒ **OK**



- process query
  - click **Process button**



VI. Results Section

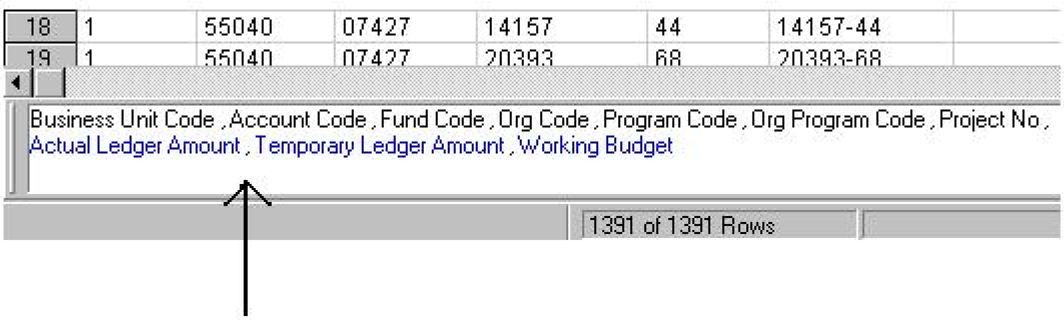
- when your query has been processed, you will automatically be in the Results Section

- setting local limits

  - double-click column ⇒ set limits in the limits window ⇒ results are automatically adjusted and displayed ⇒ status bar at bottom of screen displays current count of active rows

    OR
  - click column ⇒ drag to Limit Line ⇒ set limits in the limits window

    OR
  - drag column titles from the Outliner Section to the Limit Line ⇒ set limits in the limits window
  -



outliner section

- local sorting

  - click **column** ⇒ **A-Z ↑ or A-Z ↓**

    OR
  - drag item from Outliner Section to Sort Line ⇒ **A-Z ↑ or A-Z ↓**
    - items are sorted from left to right on Sort Line: click **item** ⇒ drag to new location

    OR
  - Click column ⇒ drag to Sort Line ⇒ **A-Z ↑ or A-Z ↓**

- moving or deleting columns

  - moving a column: click the **column** ⇒ drag it to desired place ⇒ Request Line automatically adjusts
  - deleting a column: click the **column** ⇒ **Remove button**

- suppressing duplicate values
  - click the **column** ⇒ **FORMAT** ⇒ **Suppress Duplicates**
    OR
  - click the **column** ⇒ **right-click mouse** ⇒ **Suppress Duplicates**

- computed columns
  - put cursor on a **column** ⇒ **right-click mouse** ⇒ **add computed item**

- calculating column totals
  - click **column** ⇒ click ∑ **button**

- retain results
  - saves results of query, as well as any computed columns generated while working in Results section
  - provides ability to work with results at later date without re-querying database
    - click **FILE** ⇒ File Options ⇒ **Save Query Results With Document -** √
    - click **FILE** ⇒ **Save**

- exporting results
  - display section to be exported
  - click **FILE** ⇒ **Export Section** ⇒ destination directory ⇒ type in file name ⇒ **Save button**

- reprocessing
  - click **Process button** ⇒ query can be reprocessed at any time to update results or choose different limits

- formatting the results
  - fonts: click **FORMAT** ⇒ **Font** ⇒ font, font style, and/or font size ⇒ **OK**
  - numbers: click **FORMAT** ⇒ **Number** ⇒ category ⇒ number format
  - justify: click **FORMAT** ⇒ **Justify** ⇒ left, center, right and/or top, middle, bottom from pull-down list
  - row numbers: click **FORMAT** ⇒ **Row Numbers -** √
  - grid lines: click **FORMAT** ⇒ **Grid Lines – horizontal lines** ⇒ vertical lines

- resizing columns

    - manually resizing columns: place cursor on column divider (cursor becomes ↔) ⇒ hold **mouse button** ⇒ drag column divider
    - automatically resizing columns:
        - place cursor on column divider (cursor becomes ↔) ⇒ double-click

          OR
        - click **FORMAT** ⇒ Column ⇒ **Auto-Size Width or Standard Width**

- wrapping text

    - wrapping text: click **FORMAT** ⇒ **Text Wrap - √**

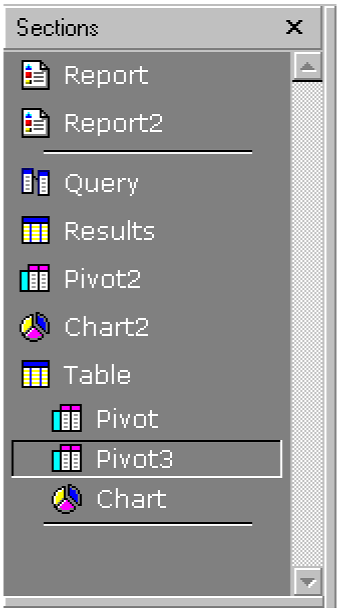
- adding header and footer

    - click **INSERT** ⇒ **Page Header or Page Footer** ⇒ type information in Edit Box ⇒ **OK**
        - click **<return> button** to create a multi-line header or footer
        - to create lines with different format options, create separate headers or footers for each style
        - styles are changed by selecting header or footer in Print Preview and using Format toolbar or menu

VII. General Reporting and Document Features

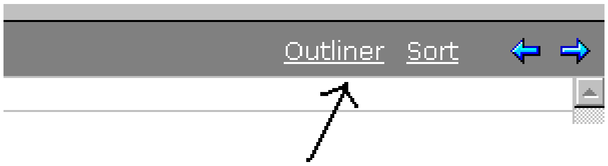
- Report Sections

    - Table section – single dimension tabular report with break and grand totals; subset of results section. Can create pivot or charts from the table section
    - Pivot section – can be attached to either the results section or the table section
    - Chart section – can be attached to either the results section or the table section
    - Report section – free form and flexible reports that can include a pivot or chart. Report section is not attached to the results set or table section
    - Diagram of how sections relate:

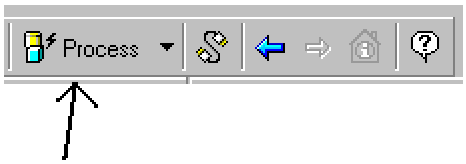


- Outliner – drag and drop template for creating reports

    - click **Outliner button**



- updating results
  - click **Process button** at any time, whether in Table, Pivot, or Report sections



- working with multiple reports
  - *moving from one report to another:* click **buttons** in the Section Pane
  - *create new table, pivot, or report:* click **INSERT** ⇒ **New Table, New Pivot, or New Report**
  - *rename the report:* double-click **button** in the Section Pane
  - *removing reports:* click **button** in the Section Pane ⇒ click **EDIT** ⇒ **Delete Section**

- duplicating reports
  - click **EDIT** ⇒ **Duplicate Section**

- export report text
  - click **FILE** ⇒ **Export** ⇒ **Section** ⇒ destination directory ⇒ type in file name ⇒ **Save button**

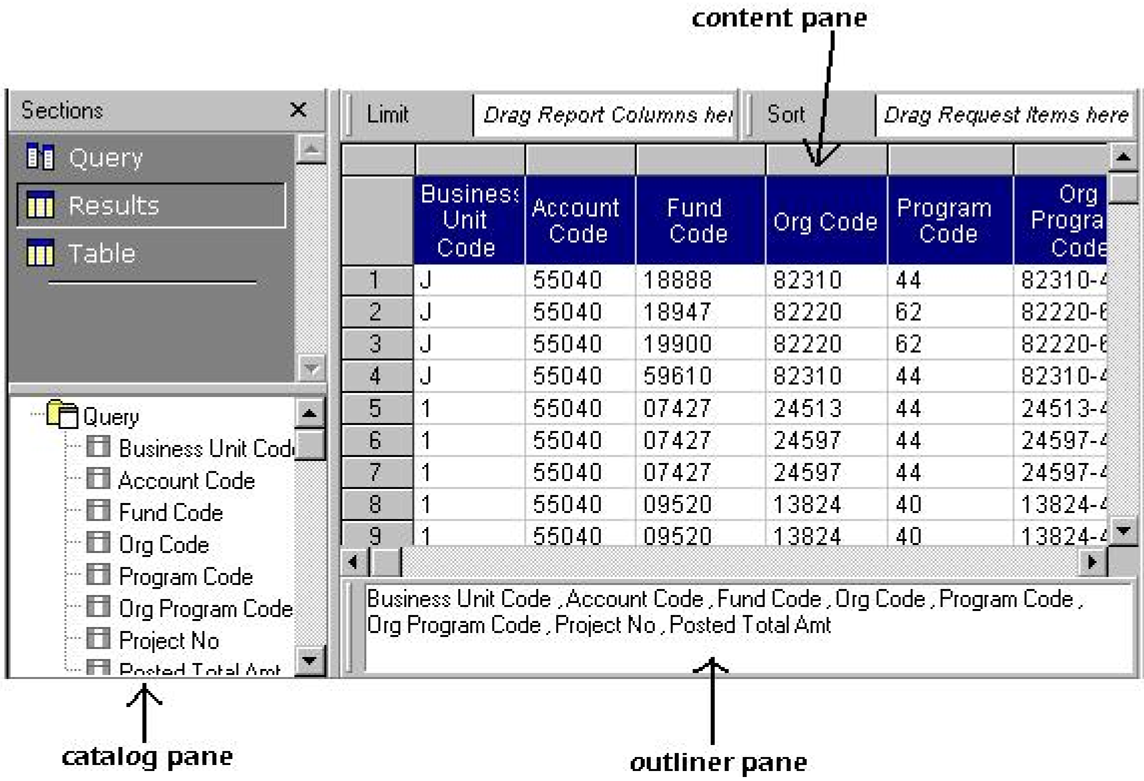
VIII. Table Section

- getting started
  - *create a Table:* click **INSERT ⇒ New Table**
  - *create additional Tables:* **click INSERT ⇒ New Table**
  - *delete a Table:* click on the **Table Section tab** in the Section Pane ⇒ click **EDIT ⇒ Delete Section**
  - *rename a Table:* double-click **Table Section tab** in the Section Pane ⇒ enter new name in dialog box

- Outliner – drag and drop templates for creating reports
  - **click Outliner button** on toolbar

Outliner Pane

- report layout
  - *displaying items:* click **items** in Catalog Pane ⇒ drag into Outliner pane
    - items are instantly displayed in the Content Pane



  - *sorting:* click **column** ⇒ **A-Z ↑ or A-Z ↓**
  - *delete items:* click **item(s)** in Outliner Pane or columns in Content Pane ⇒ **Delete key** or **Remove Button**

- totals
  - *create total:*
    - click **column** ⇒ ∑ **button**

      OR
    - click column ⇒ **TABLE** ⇒ Grand Total

- formatting
  - *automatic squeeze:* place cursor on column divider (cursor becomes ↔) ⇒ double-click
  - *wrap text on label:* click **label** ⇒ drag bottom edge down to provide room for second line of text

- headers and footers
    - click **INSERT** ⇒ **Page Header or Page Footer** ⇒ type information in Edit Box ⇒ **OK**
        - click **<return> button** to create a multi-line header or footer
        - to create lines with different format options, create separate headers or footers for each style
        - styles are changed by selecting header or footer in Print Preview and using Format toolbar or menu

IX. Pivot Section

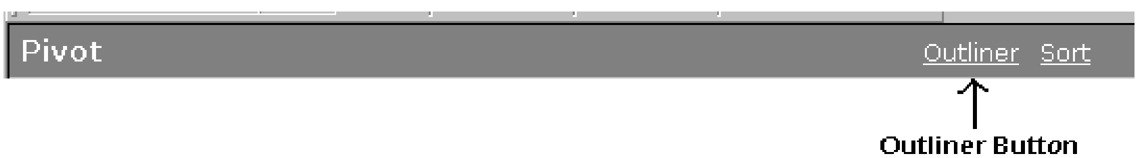
- getting started

  NOTE: Pivot Sections may be attached to either the Results Section or to a Table Section. Click on the Table Section button in the Section Pane before inserting the Pivot Section, to attach the Pivot Section to the Table Section, otherwise, it will be attached to the Results Section.

  - *create a Pivot:* click **INSERT** ⇒ **New Pivot**
  - *create additional Pivot reports:* click **INSERT** ⇒ **New Pivot**
  - *delete a Pivot report:* click on the **Pivot Section button** in the Section Pane ⇒ **EDIT** ⇒ **Delete Section**
  - *rename a Pivot report:* double-click **Pivot Section button** in the Section Pane ⇒ enter new name in dialog box

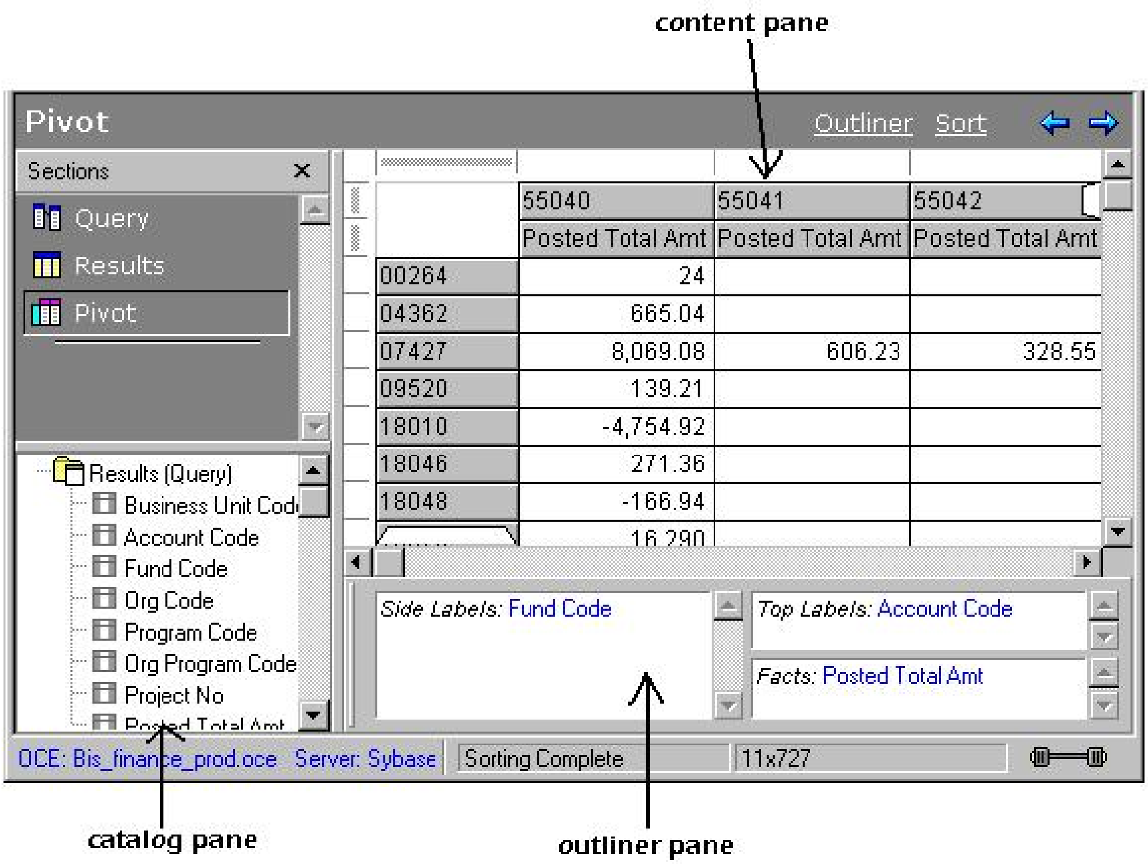
- Outliner – drag and drop templates for creating reports

  - click **Outliner button** on toolbar



Outliner Pane

- report layout
  - *displaying items:* click **items** in Catalog Pane ⇒ drag into Outliner pane
    - items are instantly displayed in Content Pane



  - *delete items:* click **item(s)** in Outliner Pane or columns in Content Pane ⇒ **Delete key** or **Remove Button**
  - *move side/top labels:* click **side/top label** ⇒ drag to new position
    - top labels can be dragged left to right
    - side labels can be dragged up or down
  - *pivot labels:* click **handle** at bottom of column or far right of row ⇒ drag handle over to other dimension
  - *data labels:* default is to show data labels along top below Top labels
    - *to show them down left side beside Side Labels:* **click FORMAT ⇒ Data Labels ⇒ Down Side -√**
    - *to restore them across the top: click* **FORMAT ⇒ Data Labels ⇒ Across Top -√**
    - *to remove data labels:* click **FORMAT ⇒ Data Labels ⇒ None -√**
    - *corner labels*: click **FORMAT ⇒ Corner Labels ⇒ None/Top/Side/Both -√**

- sorting
  - click column ⇒ **A-Z↑ or A-Z↓**
- drilldown
  - click **label** of item to analyze ⇒ **right-click mouse** ⇒ **Drill Anywhere** ⇒ **item** from Drill Anywhere submenu
    - report is redisplayed, breaking out additional data according to item selected for drilldown
- drill up
  - click **labe**l of item to analyze ⇒ **right-click mouse** ⇒ **Drillup** ⇒ **item** from drillup submenu
- grouping
  - *group:* click 2 or more **labels** from Side or Top Label (columns with handles) ⇒ **Paperclip button** ⇒ grouped items will fall under one heading with * beside it
  - *change name of group:* double-click **group label** ⇒ type new name in dialog box
  - *ungroup:* click **group** ⇒ **Paperclip button**
- totals
  - *create grand total:* click **row handle** ⇒ **∑ button** (the column to the farthest left will give a grand total)
  - *create subtotal:* click **row handle** of the column you want to see subtotals for ⇒ **∑ button** (any column other than the farthest left will give subtotals)
  - *delete total:* click **Total** in Content Pane ⇒ **Remove button**
- formatting
  - *automatic squeeze:* place cursor on column divider (cursor becomes ↔) ⇒ double-click
  - *wrap text on label:* click **label** ⇒ drag bottom edge down to provide room for second line of text
  - *displaying specific data:* click **labels** for data to be displayed ⇒ **PIVOT** ⇒ **Focus On Items**
  - *restoring all data:* click **PIVOT** ⇒ **Show All Items**
  - *hide certain labels:* click **labels** for data to be hidden ⇒ **PIVOT** ⇒ **Hide Items**
  - *restoring hidden data:* click **PIVOT** ⇒ **Show All Items**

- headers and footers

    - click **INSERT** ⇒ **Page Header or Page Footer** ⇒ type information in Edit Box ⇒ **OK**
        - click **<return> button** to create a multi-line header or footer
        - to create lines with different format options, create separate headers or footers for each style
        - styles are changed by selecting header or footer in Print Preview and using Format toolbar or menu

- spotlighting exceptional values

    - click **column** with numeric data to be highlighted ⇒ **FORMAT** ⇒ **Spotlighter**
        - *spotlight value(s):* click **comparison operator** ⇒ type in comparison value ⇒ text style ⇒ fill color ⇒ text color ⇒ **√ button**
        - *delete spotlighter condition:* click **spotlighter** condition in scrollbox ⇒ **Delete key**
        - *modify spotlighter:* double-click **spotlighter** condition ⇒ edit settings ⇒ **√ button**
        - *copying spotlighter settings:* click specific **setting** in scrollbox (or don't click any to select all) ⇒ Capture ⇒ **column** to apply spotlighter setting to (same or different report) ⇒ **Restore**

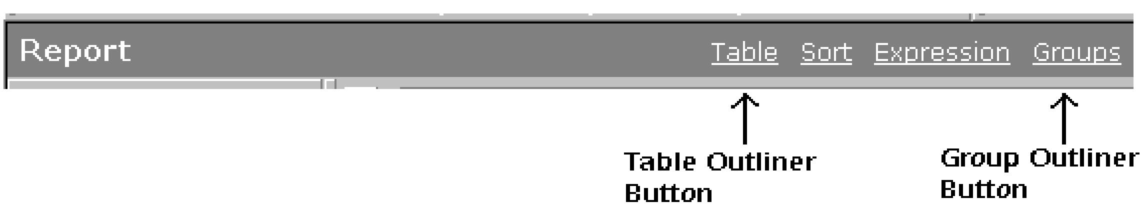
X. Report Section

- getting started

    - *create a Report:* click **INSERT** ⇒ **New Report**
    - *create additional Reports:* click **INSERT** ⇒ **New Report**
    - *delete a report:* click on the **Report Section button** in the Section Pane ⇒ click **EDIT** ⇒ **Delete Section**
    - *rename a Report:* double-click **Report Section button** in the Section Pane ⇒ enter new name in dialog box

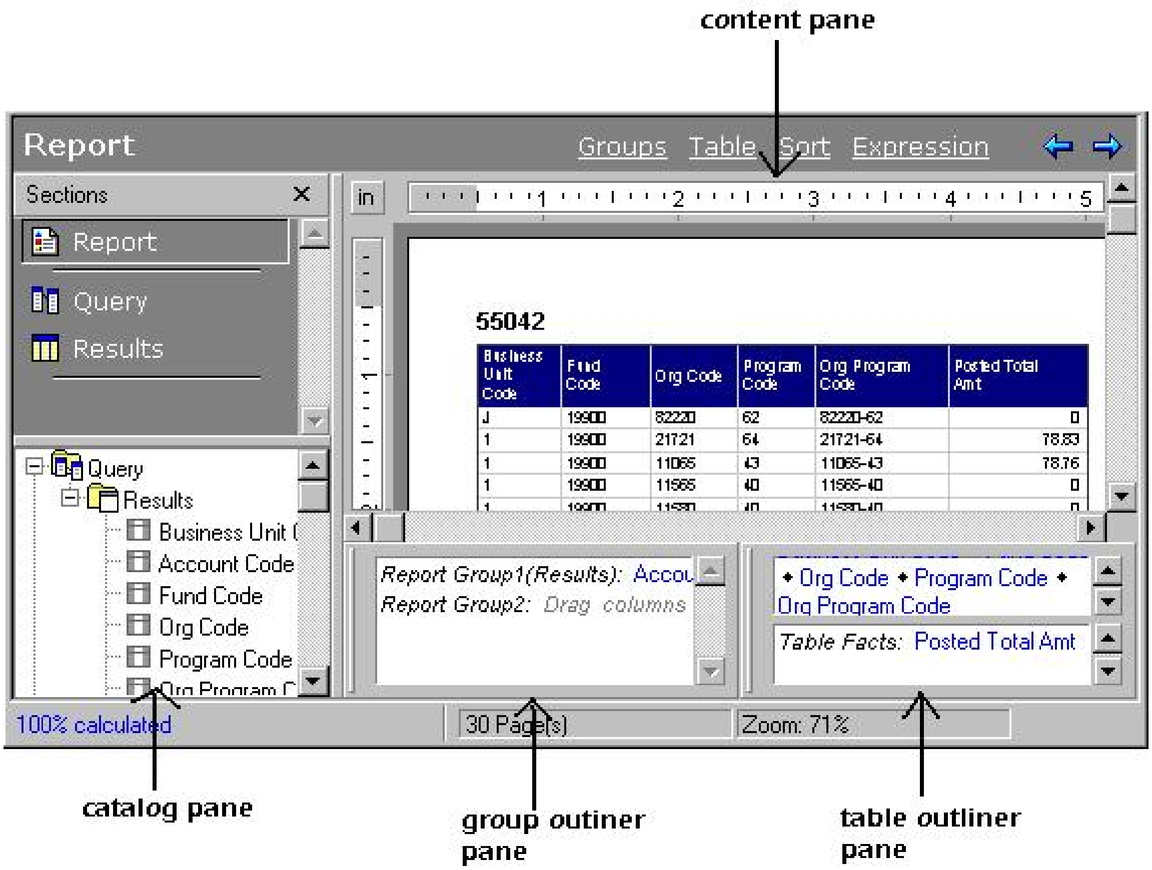
- outliner – drag and drop templates for creating reports

    - click **Outliner button** on toolbar



- report layout

  - **displaying items:** click **items** in Catalog Pane ⇒ drag into Outliner Pane
    - items are instantly displayed in Content Pane
    - items are automatically totaled



  - *delete items:* click **item(s)** in Outliner Pane ⇒ click **Delete key** or **Remove button**
  - *reordering categories:* click **item** in Outliner ⇒ drag to new location

- sorting

  - click **label tab** of column ⇒ **A-Z ↑ or A-Z ↓**

- adding graphics, text, Report Section fields, Chart Section, Pivot Section

    - *insert graphic:* open Graphics folder in Catalog Pane ⇒ select graphic from folder ⇒ drag graphic to report
    - *insert picture:* open Graphics folder in Catalog Pane ⇒ select Picture icon from folder ⇒ drag icon to report ⇒ select image
    - *paste graphic:* choose graphic from another application ⇒ **EDIT** ⇒ **Copy** ⇒ return to Report Section ⇒ **EDIT** ⇒ **Paste**
    - *insert text:* open Graphics folder in Catalog Pane ⇒ select Text Label icon from folder ⇒ drag icon to report ⇒ type text in text label
    - *insert Report Section fields:* open Fields folder in Catalog Pane ⇒ select fields from folder ⇒ drag field to report
    - *insert Chart Section:* select Chart Section from Catalog Pane ⇒ drag Chart Section to report
    - *insert Pivot Section*: select Pivot Section from Catalog Pane ⇒ drag Pivot Section to report

- formatting

    - *automatic squeeze:* place cursor on column divider (cursor becomes ↔) ⇒ double-click
    - *adjusting column or row widths:* **click item** ⇒ **margin marker** ⇒ drag marker (cursor becomes ↔) to enlarge/reduce width
    - *wrap text on label:* click **label** ⇒ drag bottom edge down to provide room for second line of text
    - *suppress duplicates:* click column ⇒ click **FORMAT** ⇒ **Suppress Duplicates**
    - *rearrange columns:* click column in Table Pane ⇒ drag column to new location

- spotlighting exceptional values

    - click column with numeric data to be highlighted **FORMAT** ⇒ **Spotlighter**
        - *spotlight value(s):* click **comparison operator** ⇒ type in comparison value ⇒ text style ⇒ **fill color** ⇒ **text color** ⇒ **√ button**
        - *delete spotlighter condition:* click **spotlighter** condition in scrollbox ⇒ **Delete key**
        - *modify spotlighter*: double-click **spotlighter** condition ⇒ edit settings ⇒ **√ button**
        - *copying spotlighter settings:* click specific **setting** in scrollbox (or don't click any to select all) ⇒ **Capture** ⇒ **column** to apply spotlighter setting to (same or different report) ⇒ **Restore**