New Hyperion (Oracle EPM11) Quickstart

August 2011

Hyperion logon page

To get started, replace your Hyperion bookmark in your Internet Explorer browser (Note: only IE version 8 or lower is supported) with the new link:
https://mureporting.millersville.edu/workspace/index.jsp

After you click on this new bookmark, the initial logon screen will be displayed. It should look like this. Use your Banner/Hyperion userid and password to Login.
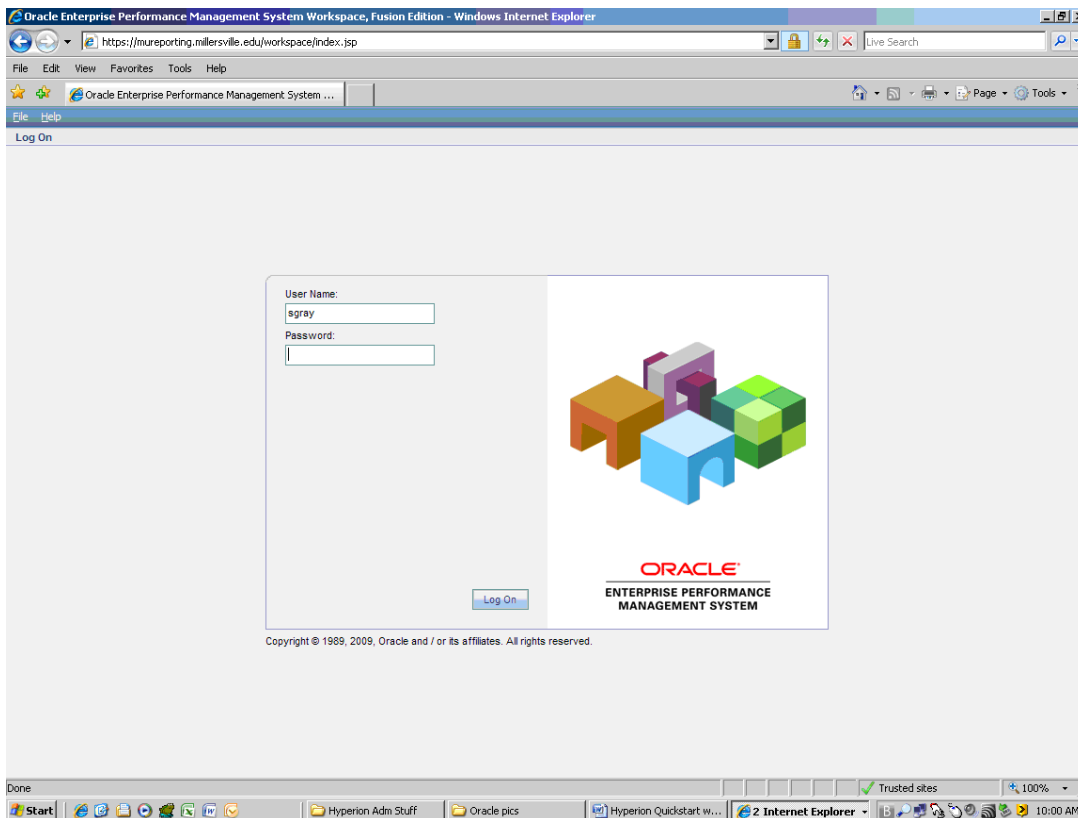
Once you have successfully logged in, you will see the following screen which is your homepage on the new system.

Click on **"Explore"** (see red circle below) to run queries and reports and to access your folders.
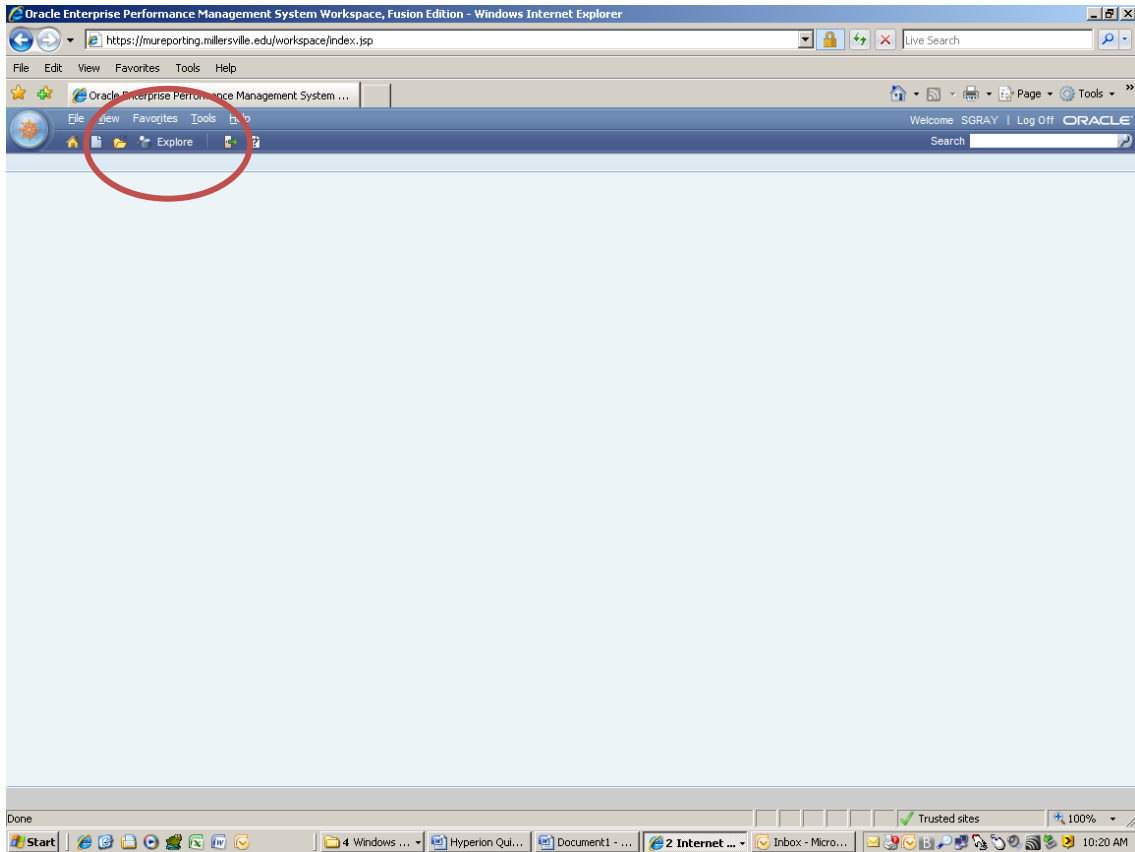
Select a query

In the new Hyperion Quickstart, you must look at the **Type** to find a query, job or output. It is recommended that you stretch the **Type** column so you can see the complete description.

The descriptions will be
        Interactive Reporting Document
        Interactive Reporting Job
        Interactive Reporting Job Output

Notice the new icons representing the 3 new types to the left of the file name.

Select the folder (where your queries reside ex. Banner Queries) from the folders section on the left. Double Click on the report name (Interactive Reporting Document) to select your query.

Navigation

1. Section Title Bar
   The Section Title bar displays the section you are currently working in.
   To hide or close the Section title:
   On the **View** menu, click the section title bar.

2. Section Pane
   This displays all the sections or tabs in a document. There are several types of sections, queries, results, pivots, and report sections.
   To hide or close the Section pane:
   Click the **X** icon to the right of the section heading. This creates a larger viewing area for reports.
   To unhide the section pane, go to the View menu and select 'Section/Catalog'.

3. Content Pane
   The Content pane in the lower right hand corner of the window provides a view of the section or tab you are using such as pivot, detail, results or report sections. To obtain a larger viewing area, close the section pane.
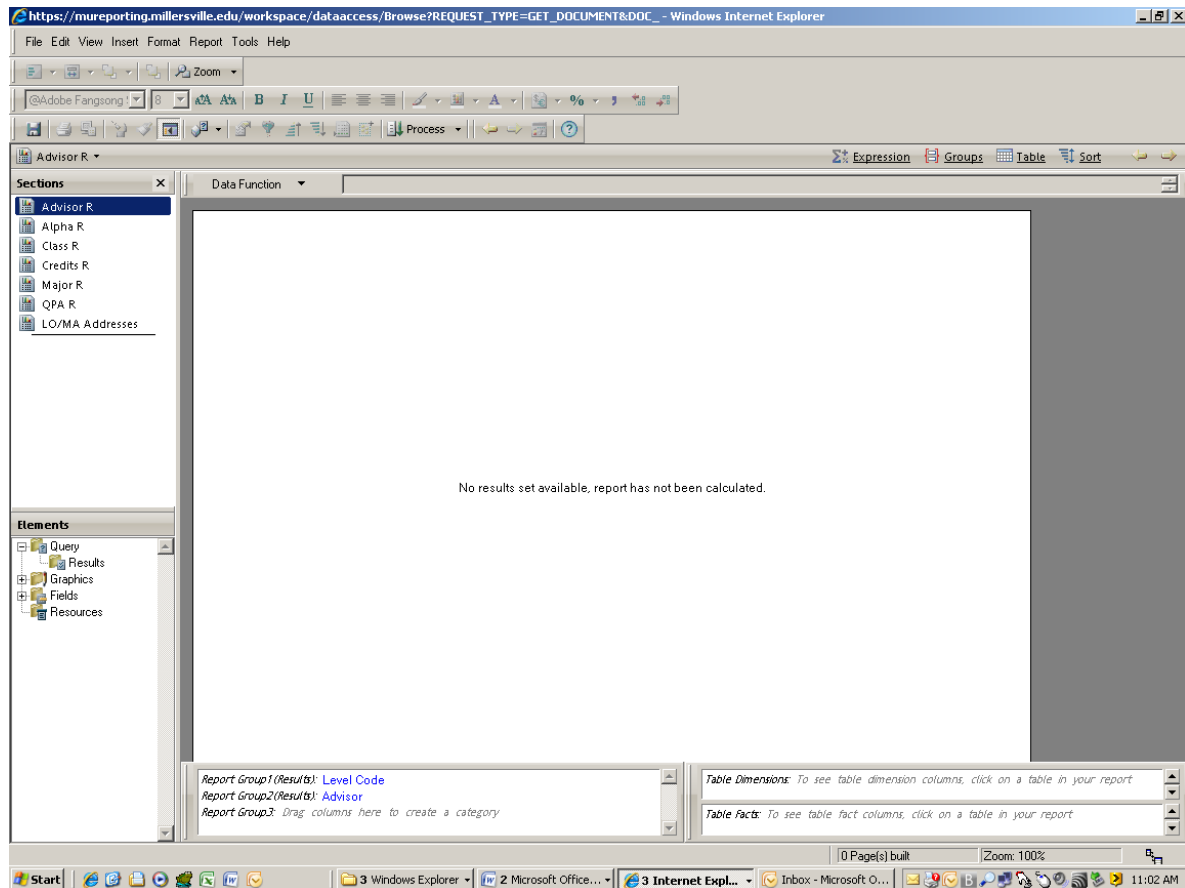
Process the query

Click on the **Process** button to process the current query and enter your Banner user id and password.

Selection techniques for variables in the query

To select a contiguous range of items:
- Click the first item in the range.
- Hold the Shift key and click the last item in the range. The entire range of items is selected.
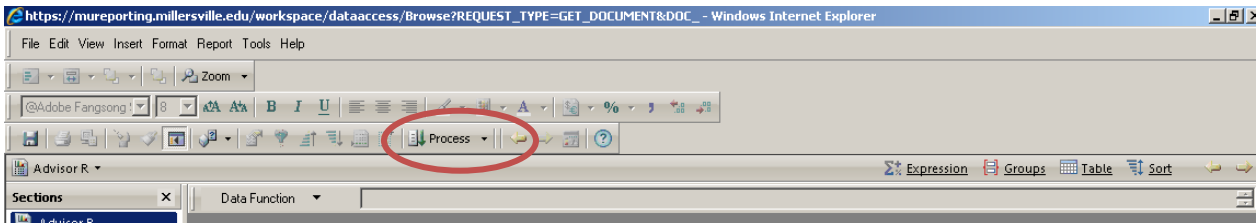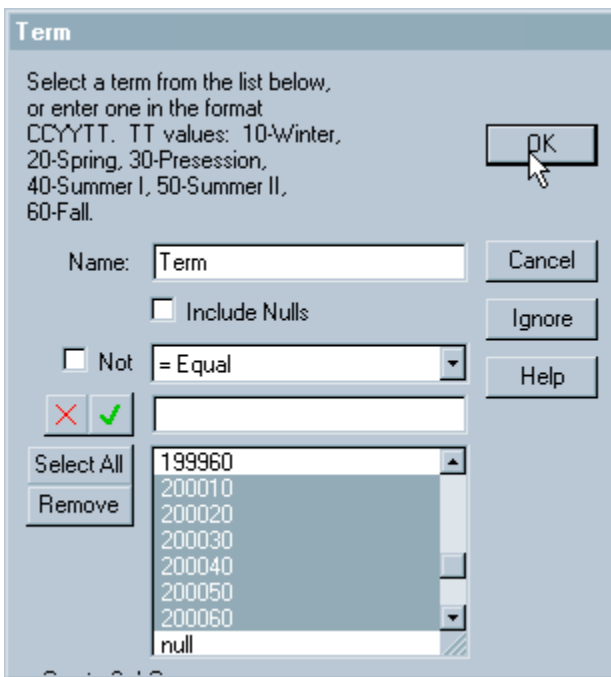
To select discontinuous items:
CTRL-click each item (Windows)
Click the green check mark and press ok.

If a value is not available, type it in and click the green check mark.

Choosing another section in the document

If the section pane is hidden, unhide it by clicking on the section/catalog icon on the standard toolbar and highlight the section. Another option is to click the drop down arrow next to the section name in the section title bar. See **Orange box**. You will see available sections and can select another section from that list.
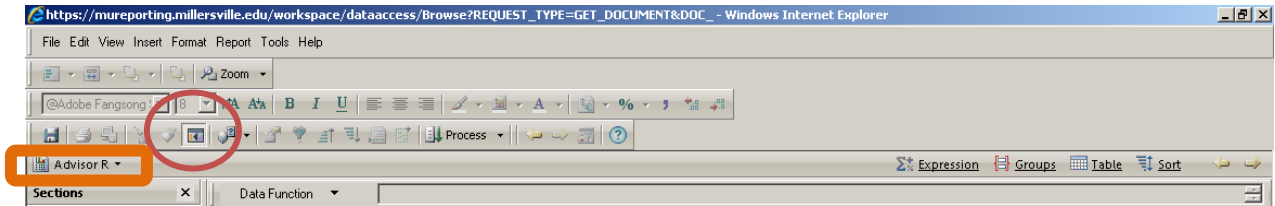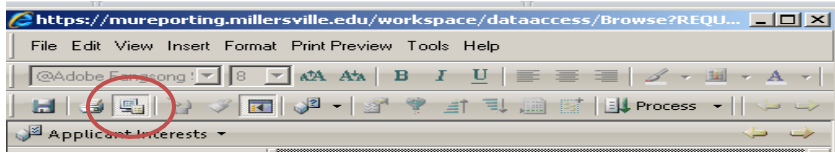

If the section pane is visible, highlight the section and note the change on the section title bar.
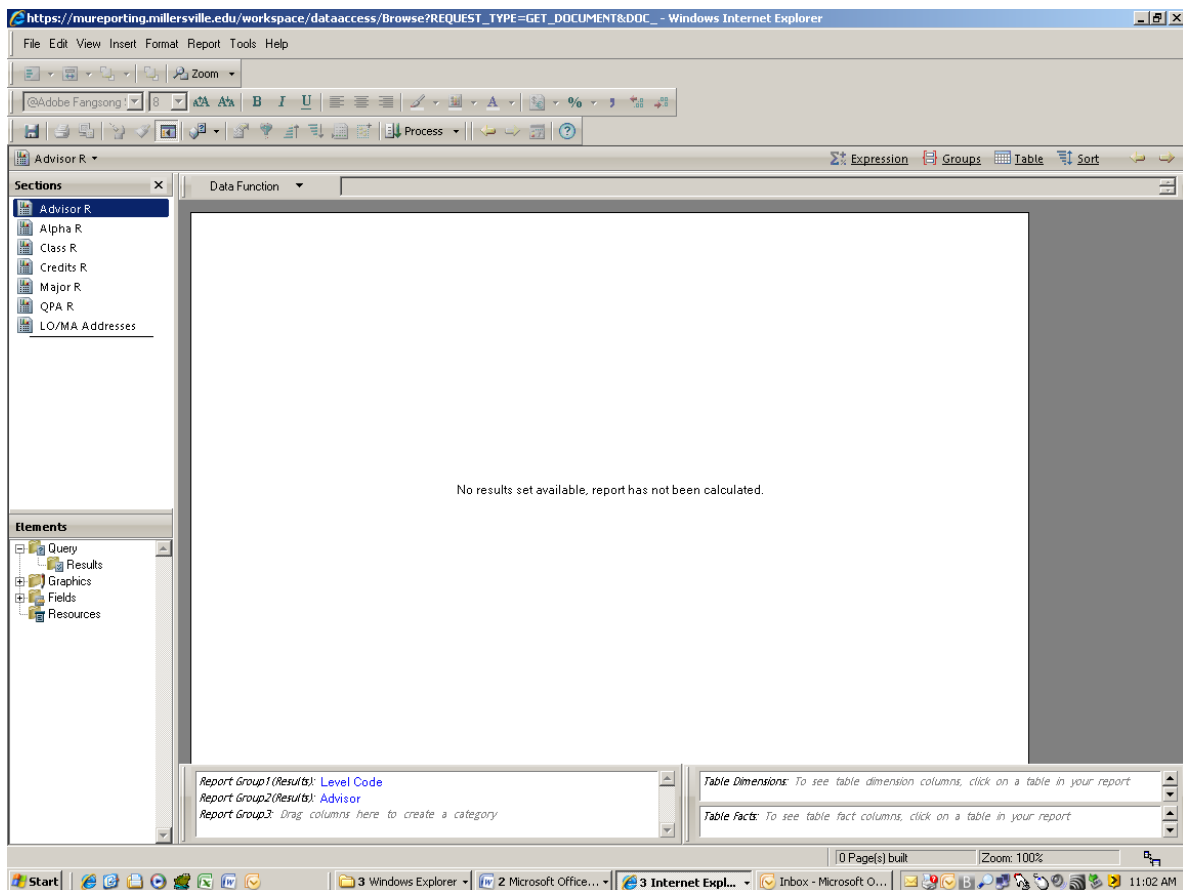
Preview document before printing (Pivots, results, tables)

(Not necessary for report sections (red white and blue page icon with the right corner folded down)

Print preview mode will display results, tables and pivots exactly as they will print with headers and footers. The only exception is those sections which are of the report type. These can be viewed in normal viewing mode exactly as they will print.
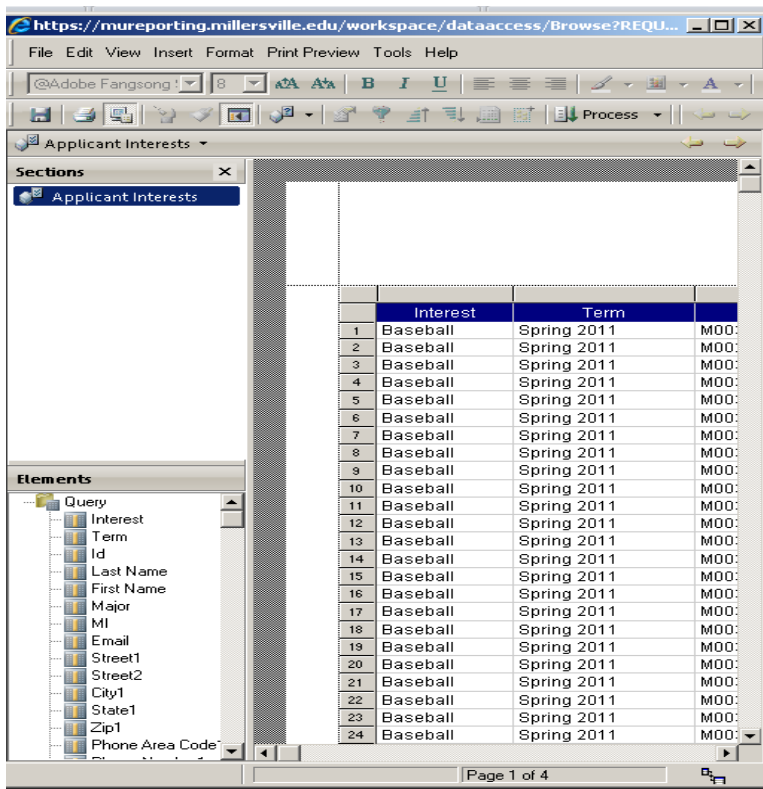

Before you print a pivot, result or table section in the document, review it in print preview mode where you can scroll up, down, left and right. You can only view one page at a time. Note the page margins (the dotted lines) which can be moved by pressing and holding the mouse over the margin until a two headed arrow appears. Drag the margin as needed.

Changing the page orientation

If the report doesn't fit on the page after scrolling left and right, change the page orientation. On the main menu bar choose File → page setup. Choose the appropriate orientation either landscape or portrait.
Landscape provides a much wider report.

This can also be accessed from print preview mode by right-clicking. Use this to add/change page header/footer.
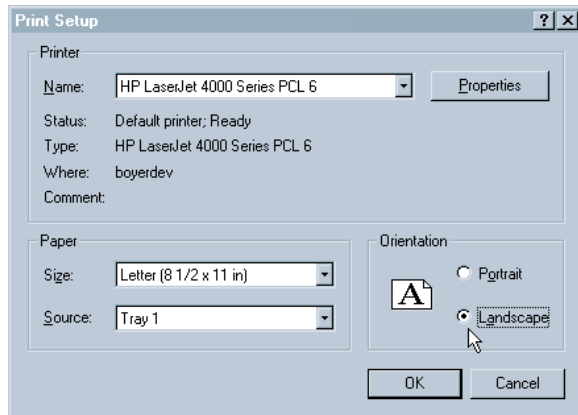
Printing a Document

To print a document after previewing and adjusting the page orientation, click on the print icon on the standard tool bar.
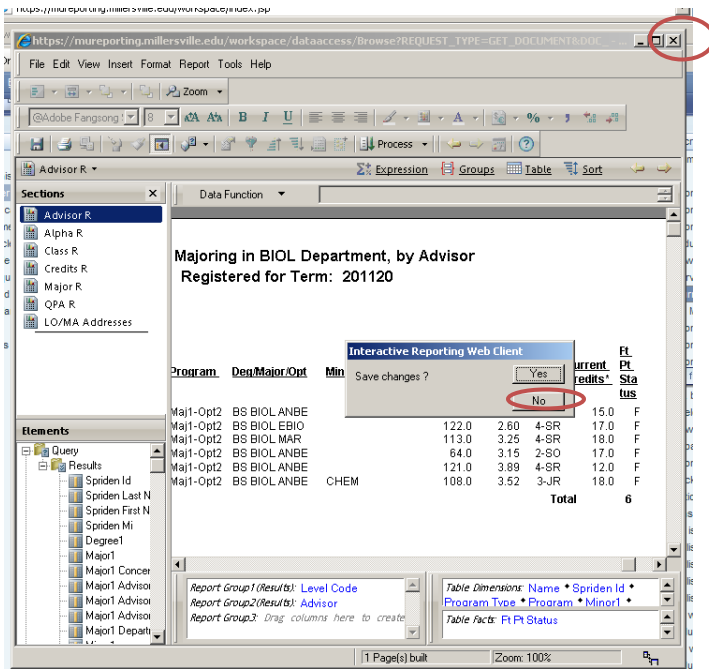
Exporting a section to excel or to pdf

- On the File menu, point to Export and click section.
- Select a destination directory, and type a name.
- Choose the file format Excel from the **Save as Type** menu and click **Save**.

Exiting your Query

Click the X in top right corner. A box will pop up 'Save Changes?'   Click '**No**'.

Exiting Hyperion Quickstart
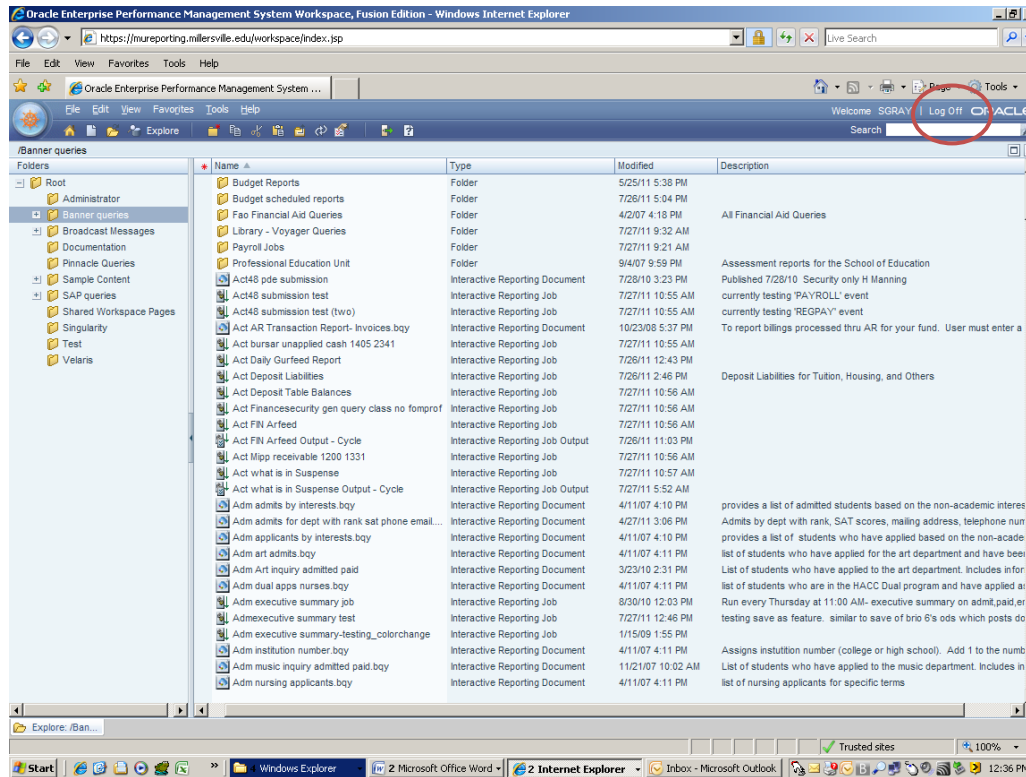
Always close Hyperion Quickstart by clicking 'Log Off' at top right.

What if you need support?

- Call the TAC at ext 2371 (who will direct your call appropriately).