A Guide to using Hyperion Reports
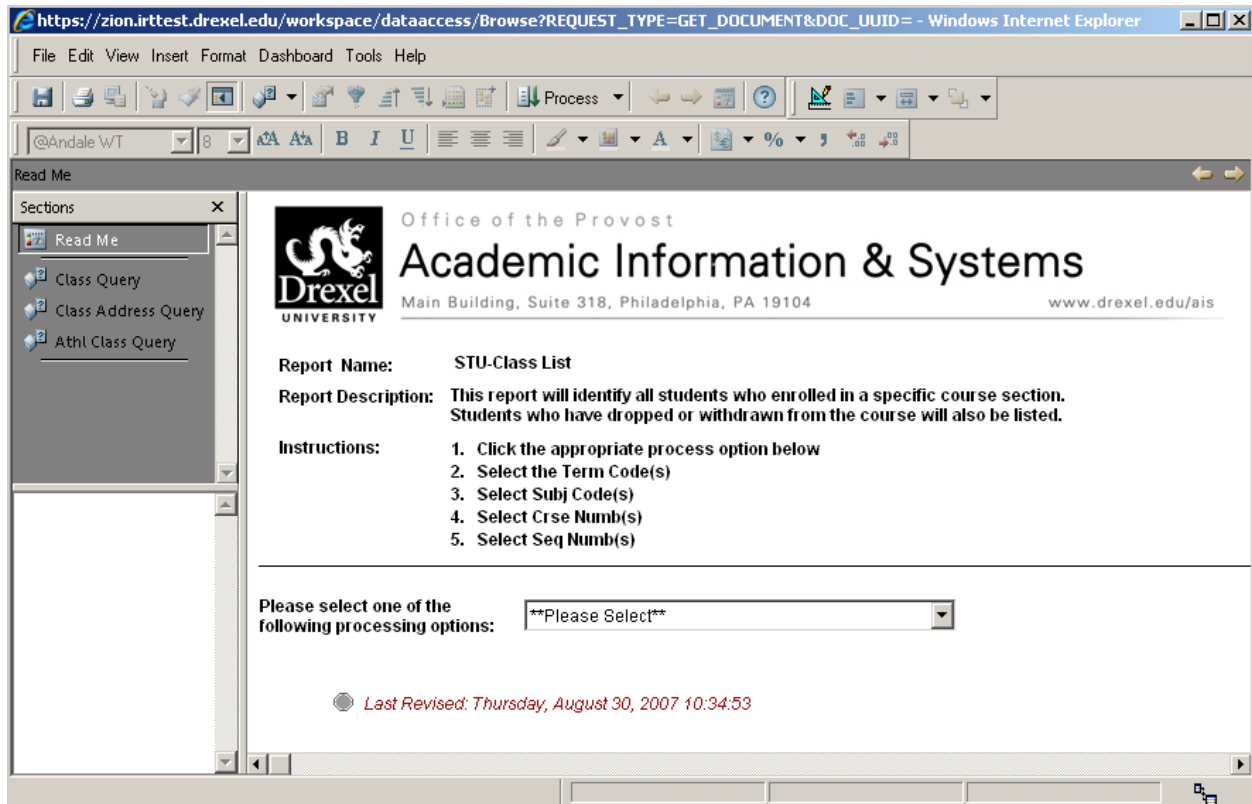
Contents

Running a report

Double click on the report name to launch the report document in a new window:
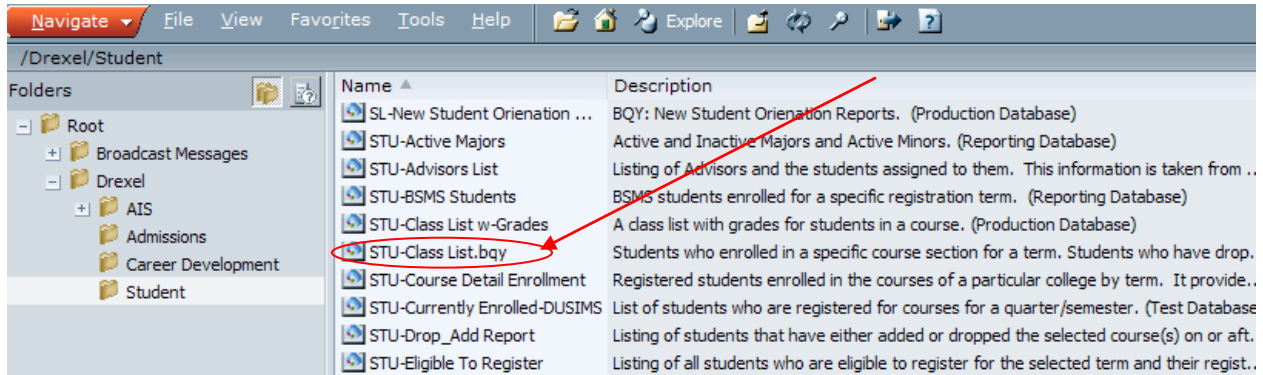
Follow the Read Me page instructions to run the report:

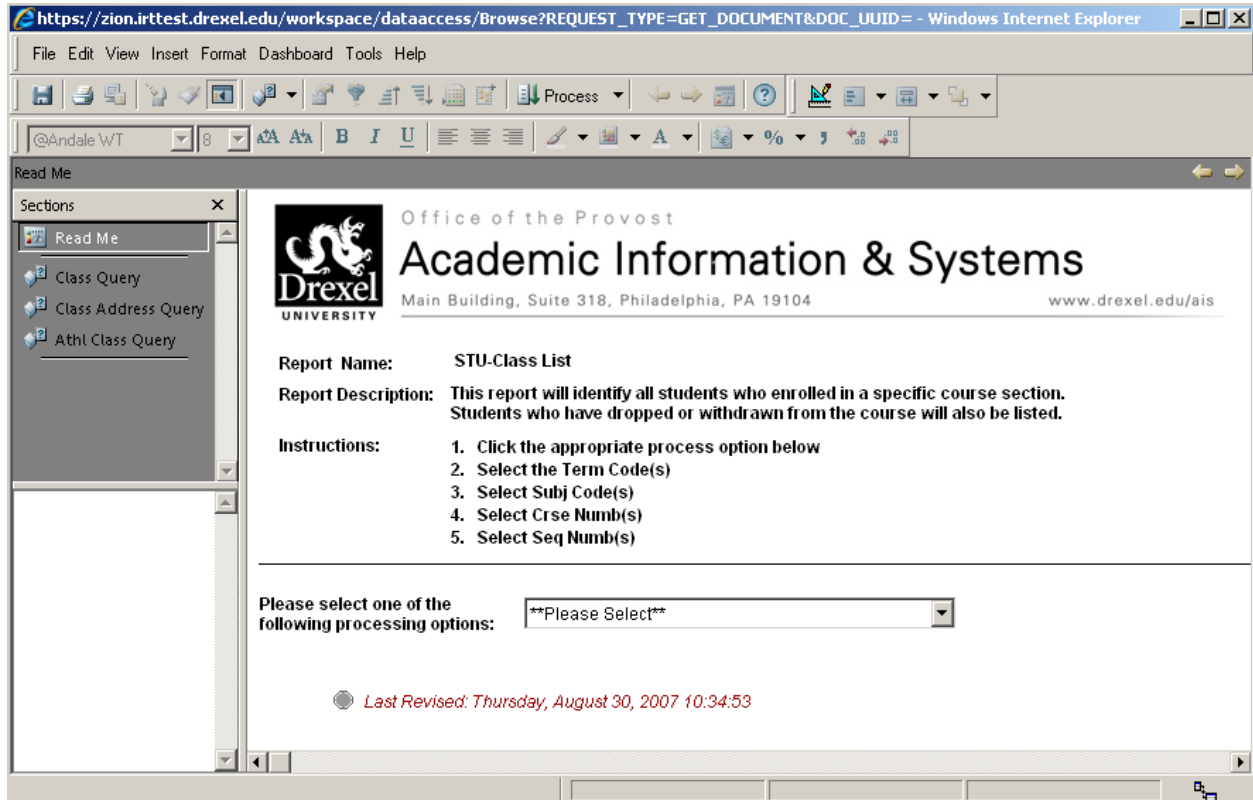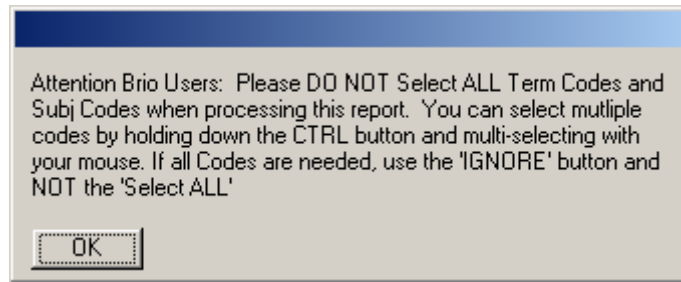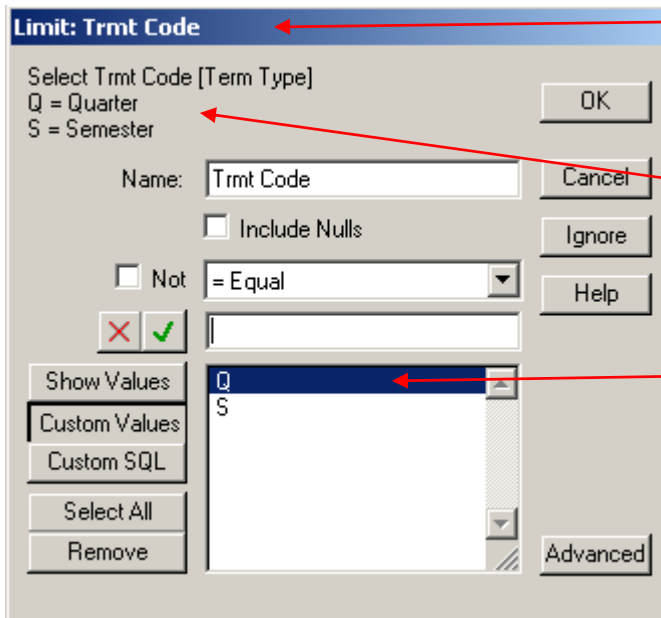Warning about selecting values in Limit/Filter Dialogs boxes

Attention Brio Users: Please DO NOT Select ALL Term Codes and
Subj Codes when processing this report. You can select mutliple
codes by holding down the CTRL button and multi-selecting with
your mouse. If all Codes are needed, use the 'IGNORE' button and
NOT the 'Select ALL'

OK

This **warning** reminds to :

- **only** select terms needed for report

- **avoid clicking the 'Select All' button** (which can make the report generate a very long query command that could bring the Reporting server down).

Completing a Limit/Filter Dialog box

Limit: Trmt Code

Select Trmt Code [Term Type]
Q = Quarter
S = Semester

Name: Trmt Code

☐ Include Nulls

☐ Not = Equal

✗ ✓ |

Show Values
Custom Values
Custom SQL
Select All
Remove

Q
S

OK
Cancel
Ignore
Help
Advanced

1. Review column limit or filter being applied to, to reduce data retrieved.

2. Refer to note regarding column being limited.

3. Select value needed by clicking and highlighting to select.

   Click OK to submit limit i.e. complete this filter.

Limit: Term Code

Select Term Code(s)
**DO NOT SELECT ALL
TERMS**

Name: Term Code

☐ Include Nulls

☐ Not   = Equal

Show Values
Custom Values
Custom SQL
Select All
Transfer

200335
200345
200415
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200825
200835
200845
200915
200925
200935
200945
201015
201025
201035
201045
201115

OK
Cancel
Ignore
Help
Advanced

Select value needed by clicking and highlighting to select.

Click OK to submit limit i.e. complete this filter.

Limit: Subj Code

DO NOT SELECT ALL SUBJ
CLICK "IGNORE" if all SUBJ are
needed
OR use CTRL key to multi-select

Name: Subj Code

☐ Include Nulls

☐ Not   = Equal

Show Values
Custom Values
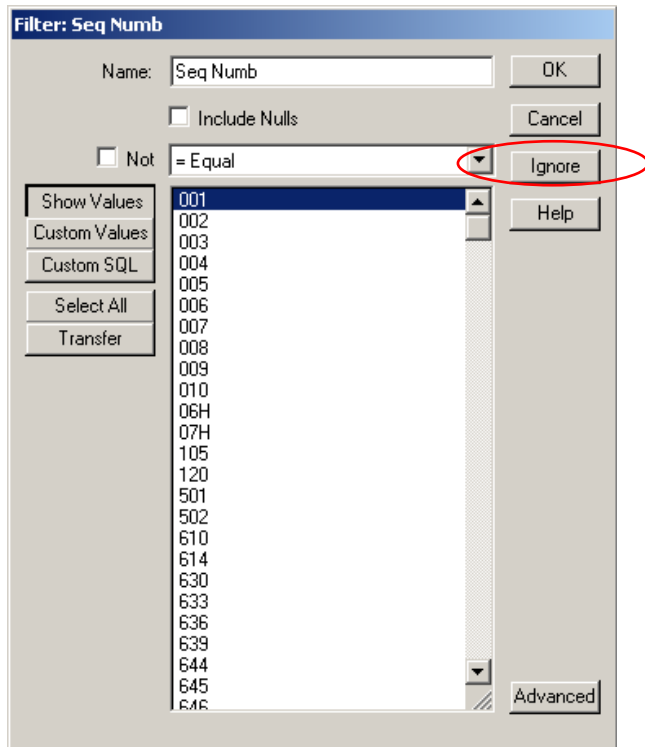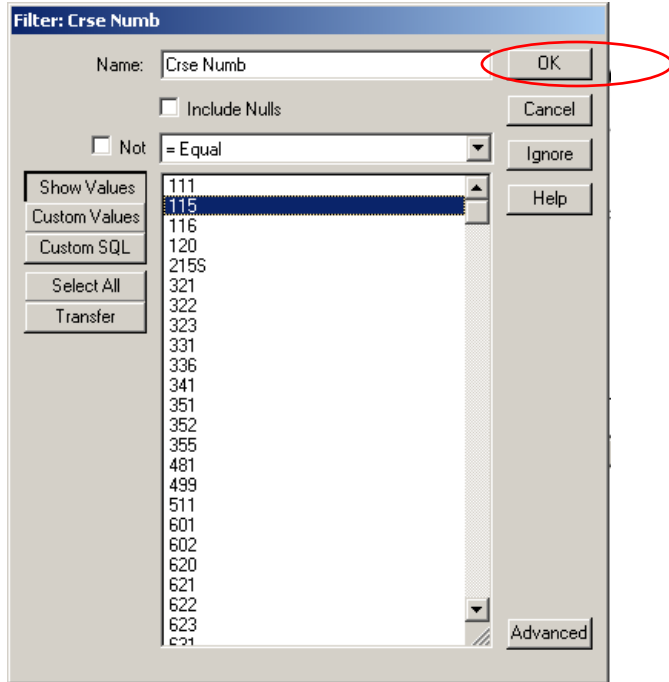Custom SQL
Select All
Transfer

0000
AADM
ABRD
ACCT
ADCS
ADGD
AE
AFAM
AFAS
ANAT
ANES
ANTH
ARBC
ARCH
ARTH
ARTS
AS-A
AS-I
BACS
BCCE
BCS
BIO
BIOC
BIOL

OK
Cancel
Ignore
Help
Advanced

If multiple items need to be selected:

- select first limit value
- hold down CTRL key on your keyboard.
- while CTRL is pressed, click values to multi-select.
- when the values needed are selected, click OK to submit limit

Filter: Crse Numb

Name:	Crse Numb

☐ Include Nulls

☐ Not = Equal ▼

Show Values	111
Custom Values	115
Custom SQL	116
	120
Select All	215S
Transfer	321

322
323
331
336
341
351
352
355
481
499
511
601
602
620
621
622
623

OK
Cancel
Ignore
Help

Advanced

Filter: Seq Numb

Name:	Seq Numb

☐ Include Nulls

☐ Not = Equal ▼

Show Values	001
Custom Values	002
Custom SQL	003
	004
Select All	005
Transfer	006

007
008
009
010
06H
07H
105
120
501
502
610
614
630
633
636
639
644
645
646

OK
Cancel
Ignore
Help

Advanced

Use the Ignore button to choose to not set this limit **after sufficient limits have already been set** to reduce the result set.

E.g. Ignore to only select **ALL** course sections after already setting limits for term, subject and course number to get all section of a course

Navigating inside a report

Click on section names in the **Section pane** to move between report sections
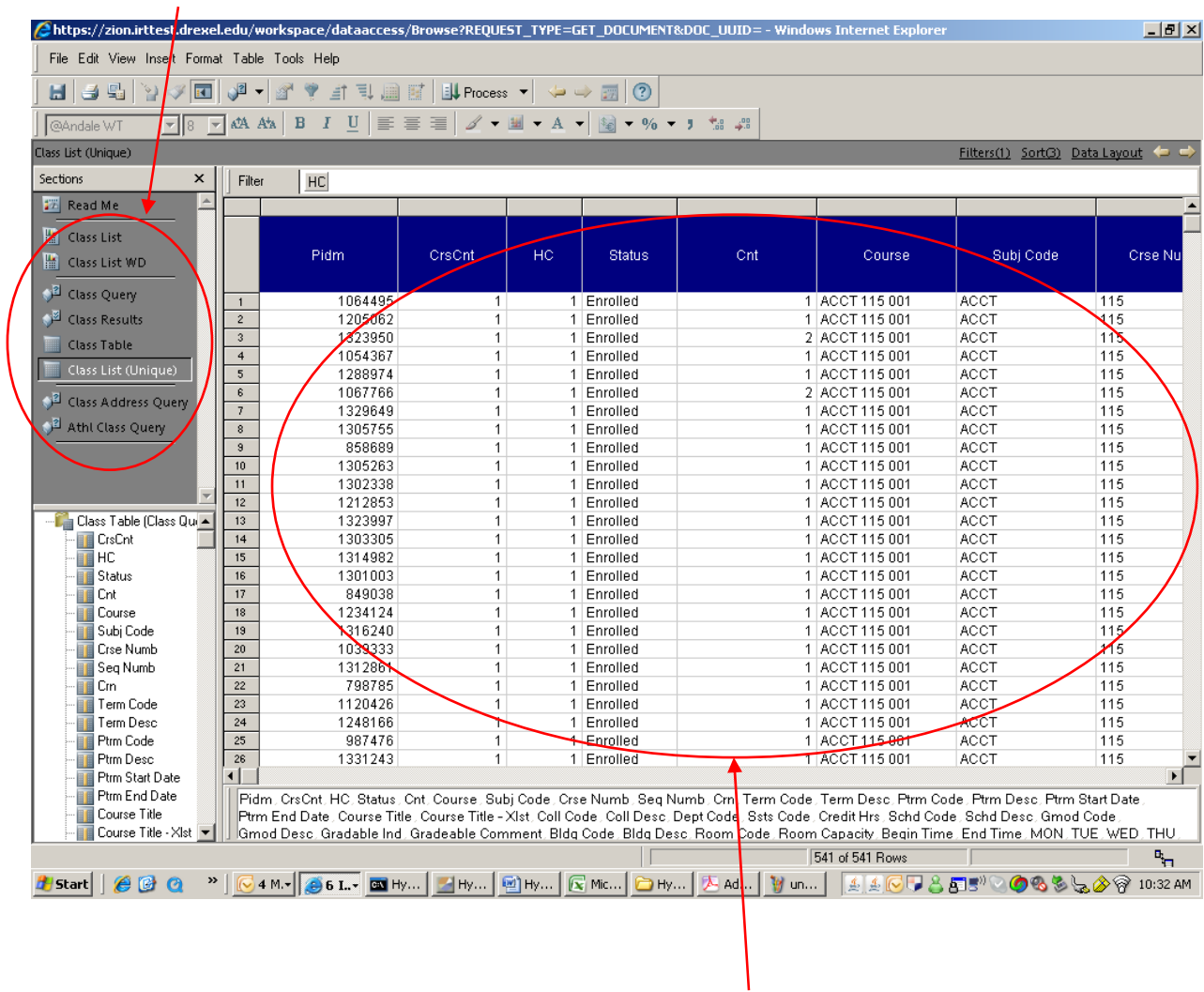
The report's **Content Pane** now shows the selected section, a Resultset.

A **Resultset** is comprised of rows of data retrieved from the database in response to the query submitted while running the report

Using the Data Layout Pane to rearrange columns in a Resultset

To display the Data Layout pane, click the Data Layout toggle button:
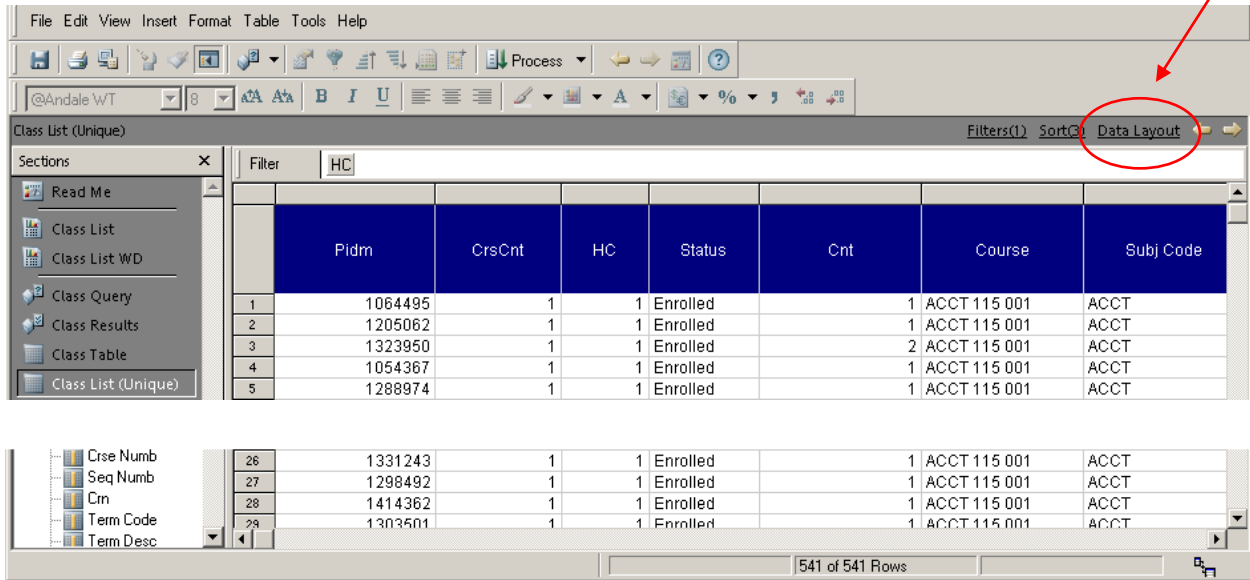
The Data Layout pane is displayed:
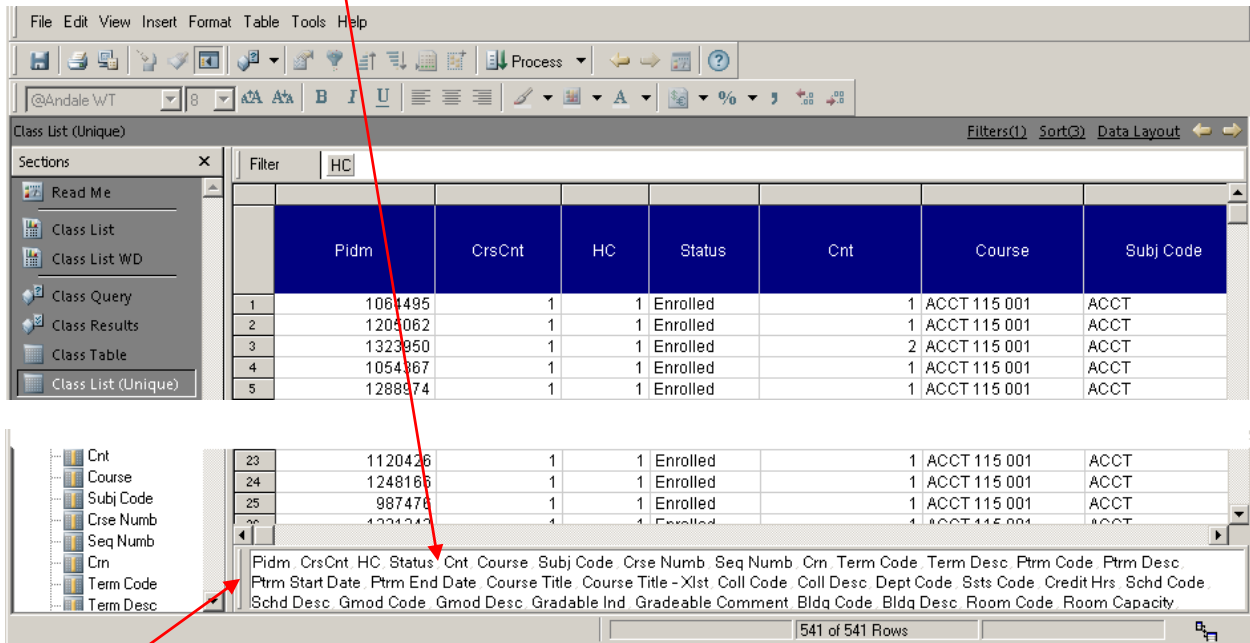
To open the Data Layout in a separate window, double click in area between the line and the list of columns.
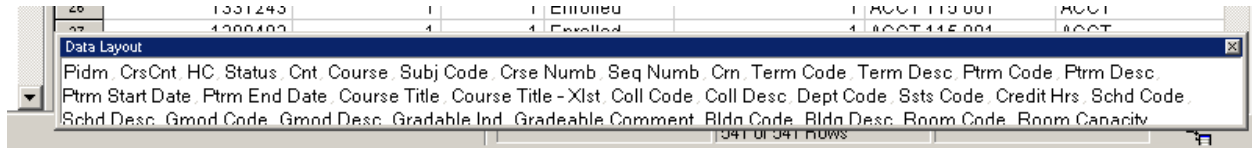
To expand open the window, bring the mouse over the lower edge of window till it becomes a double headed arrow, then drag open.

Rearranging columns using the Data Layout:

1. Click column name to select:

2. Drag and drop into top row to move to first set of columns of section:
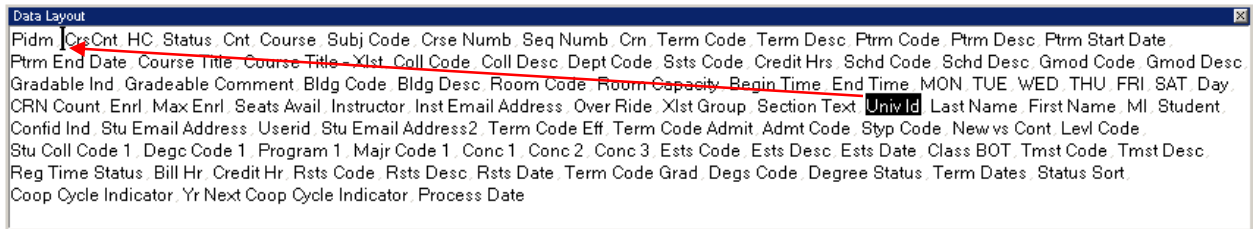
3. When selected column name is dropped to beginning of columns list, column in content pane is moved to the beginning next to Pidm, as updated in the Data Layout section.
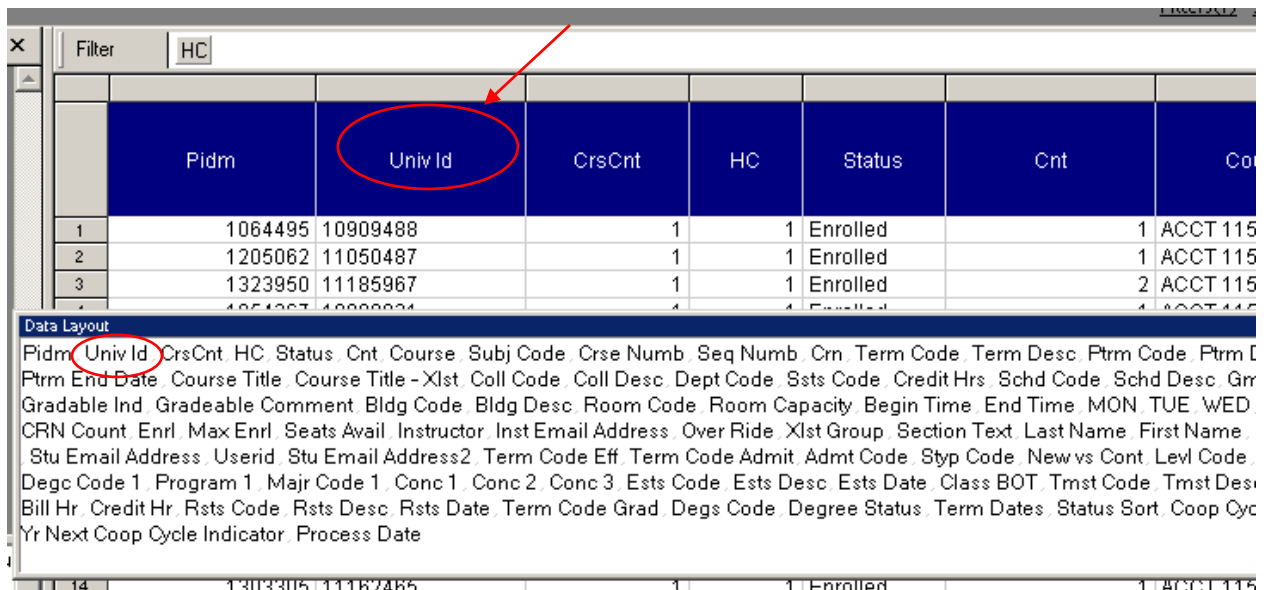
Applying Filters to reduce a resultset to a required population

Displaying the Filters line:

Click on the Filters toggle button:
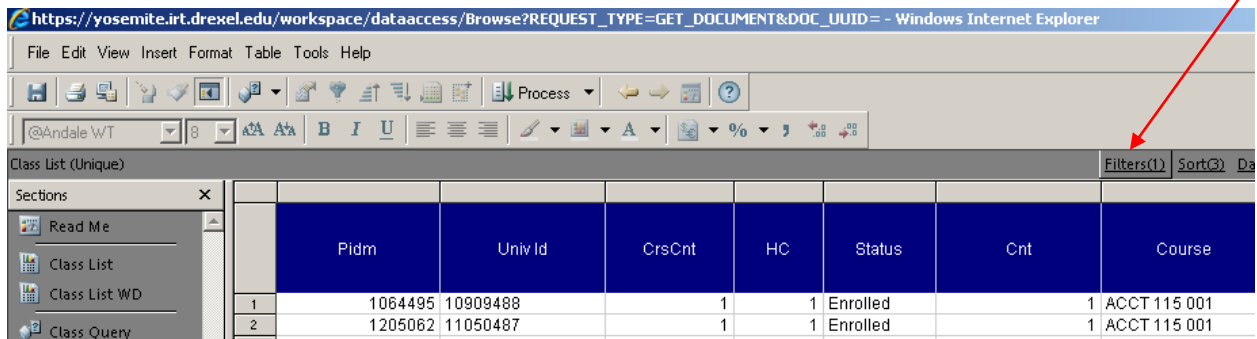
The Filters line is displayed with any applied filters e.g. HC as below:
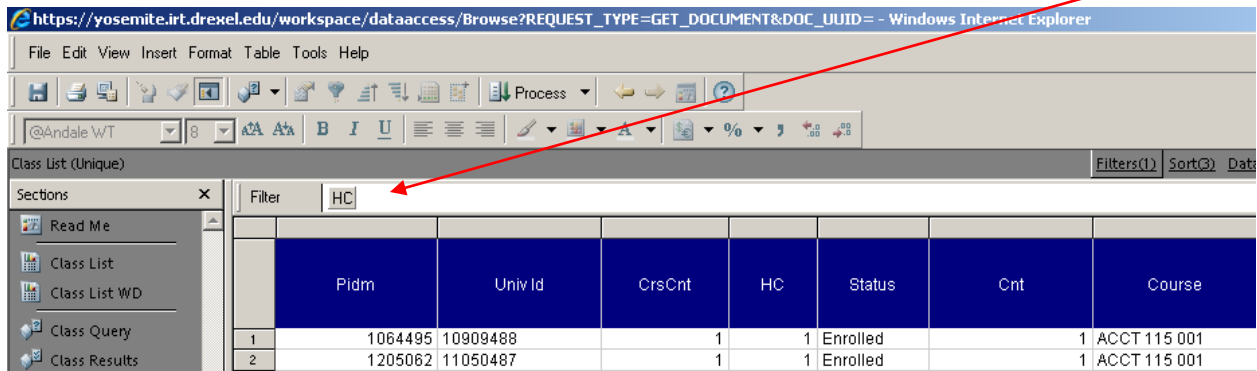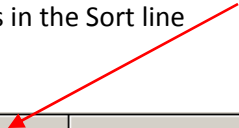
To apply a filter:
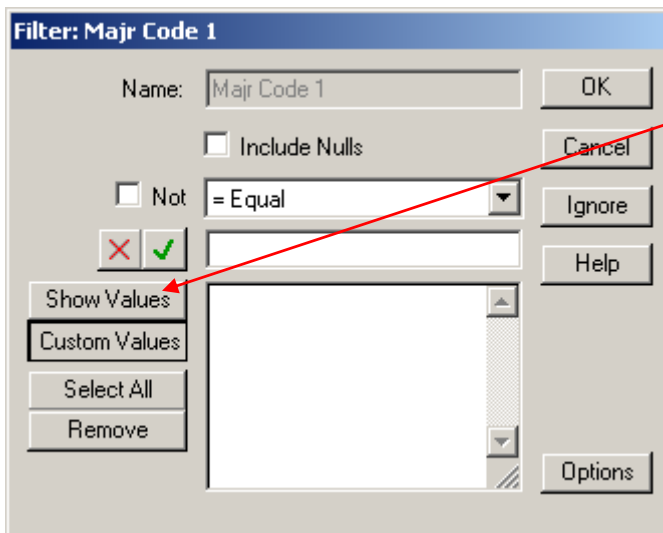
Click the column that report needs to be filtered to or limited to.

E.g. To filter report to show only BUSN major students, double-click Majr Code 1 column's **grey** portion containing the data and NOT the Blue Heading cell that contains the name of the column.

IMPORTANT: Do not double-click the name of the column, as it will modify the items in the Sort line which may affect the computed items.

	Levl Code	Stu Coll Code 1	Degc Code 1	Program 1	Majr Code 1	Conc 1
1	UG	B	BSBA	BSBA-COBA	BUSN	5COP
2	UG	B	BSBA	BSBA-COBA	BUSN	5COP
3	UG	B	BSBA	BSBA-COBA	BUSN	5COP
4	UG	B	BSBA	BSBA-COBA	BUSN	NCOP
5	UG	B	BSBA	BSBA-COBA	BUSN	5COP
6	UG	B	BSBA	BSBA-COBA	BUSN	5COP
7	UG	B	BSBA	BSBA-COBA	BUSN	5COP
8	UG	B	BSBA	BSBA-COBA	BUSN	5COP
9	UG	B	BSBA	BSBA-COBA	BUSN	5COP
10	UG	B	BSBA	BSBA-COBA	BUSN	4COP
11	UG	U	BS	BS-COEPS	SMT	5COP
12	UG	B	BSBA	BSBA-COBA	BUSN	5COP
13	UG	B	BSBA	BSBA-COBA	BUSN	5COP
14	UG	B	BSBA	BSBA-COBA	BUSN	5COP
15	UG	B	BSCAE	BSCAE-COBA	CAE	5COP

Filter: Majr Code 1

Name: Majr Code 1

☐ Include Nulls

☐ Not = Equal ▼

✕ ✓

Show Values

Custom Values

Select All

Remove

OK

Cancel

Ignore

Help

Options

Click 'Show Values' to bring up the list of all values in the column
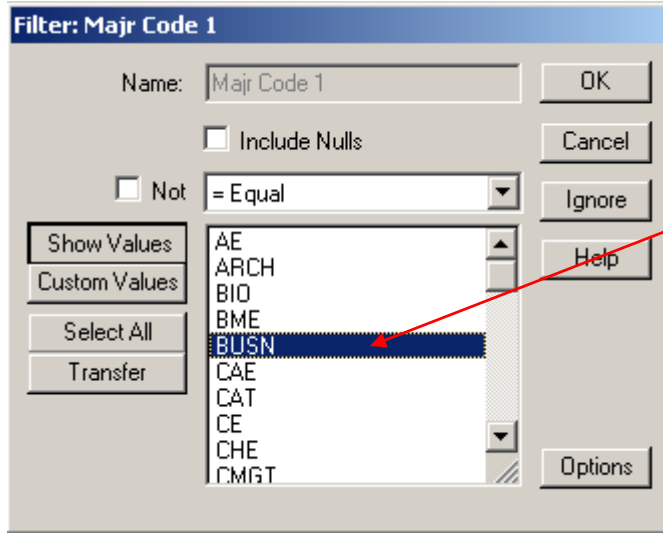
Select value to filter and click OK.

The report is now filtered to show only students who have BUSN as their major code 1:

To filter report to show rows with NULL or Blank Values only

E.g. To select students who do not have a concentration 2, i.e. Conc 2 is blank:

Check off 'Include Nulls' to allow rows with Null or blank values to be displayed

Pull open the operator list and select Is Null

Other Uses of the Filter Dialog
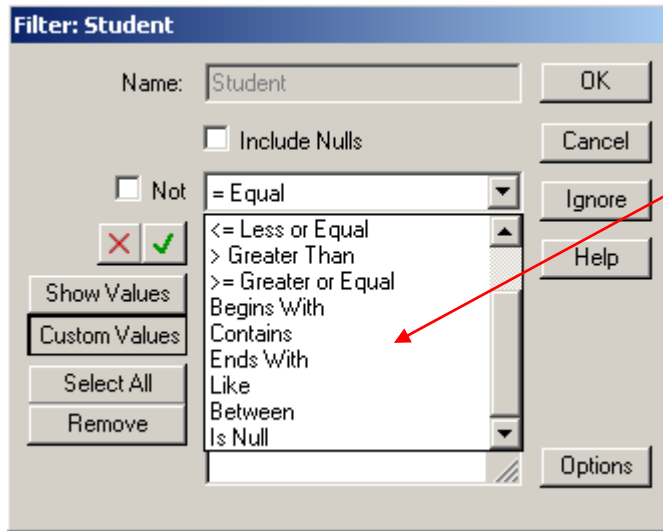
The Filter dialog can be used to find rows where column values:

- Begins with ...
- Ends with...
- Are between ... and ...
- etc

To Remove an item from the Filter line
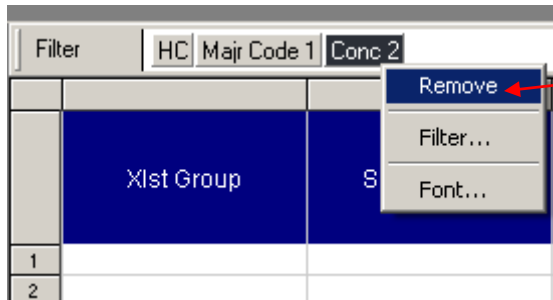
Right click and select Remove

Adding Totals

1. Select column to add total to by clicking in the white part of the column

2. Clict the Grand Total button
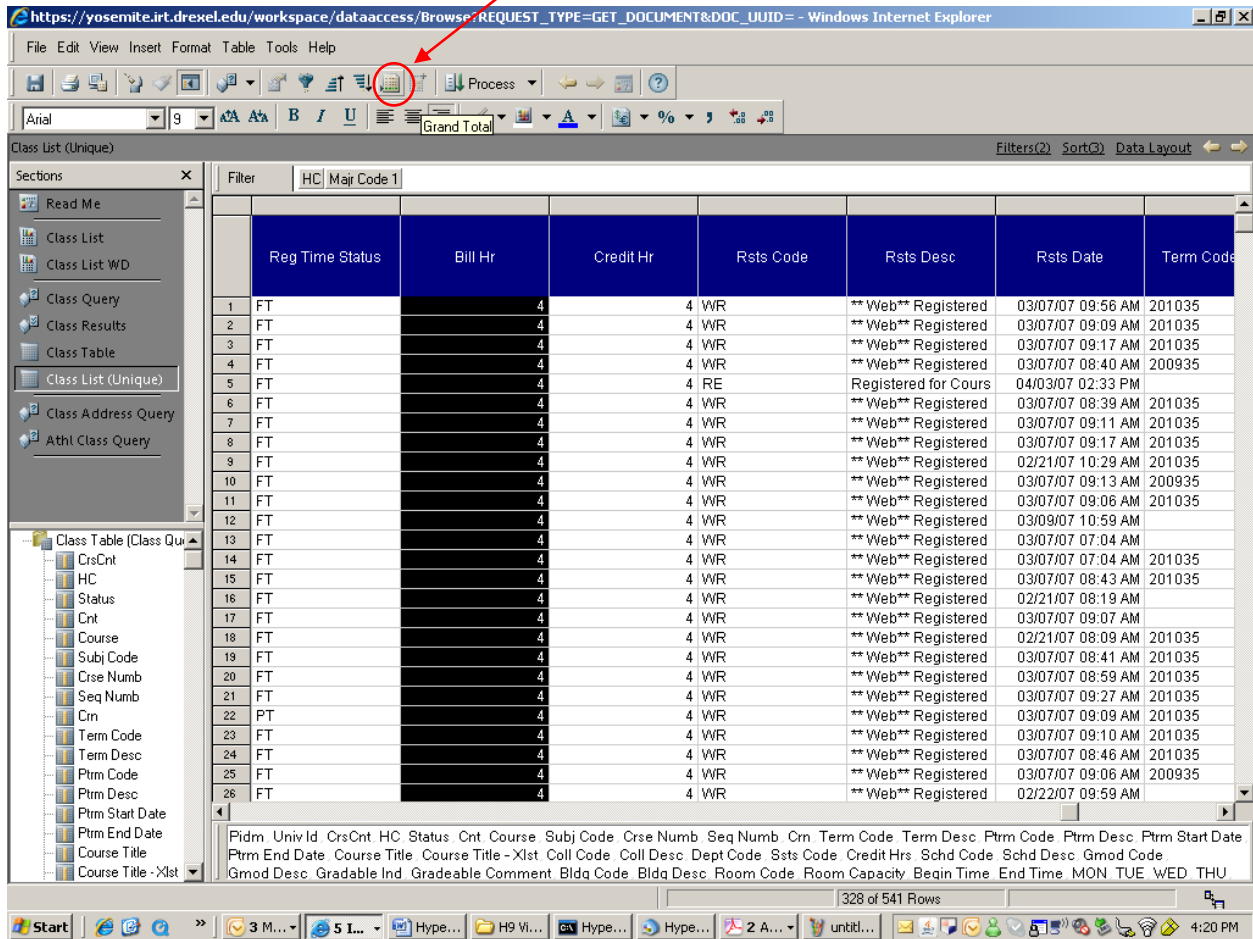
The total is added at the bottom of the column as below:
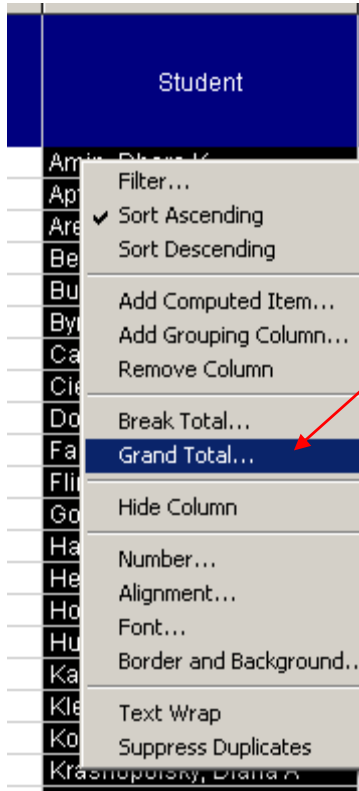
Counting

1. Select the column to count by e.g. Student
2. Right click and select Grand Total
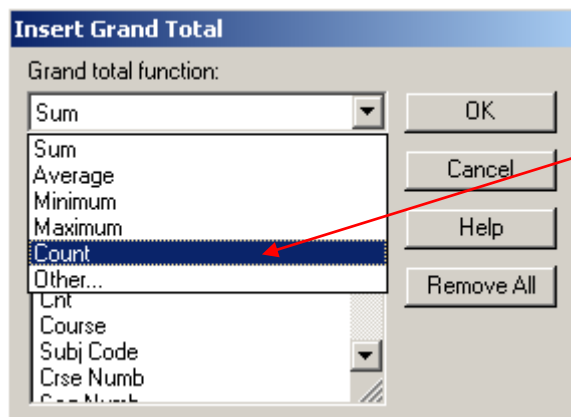
Pull open the function list, select Count and click OK.

Note that an Average/Min/Max of a column can be found this way too.

Inserting a new Table
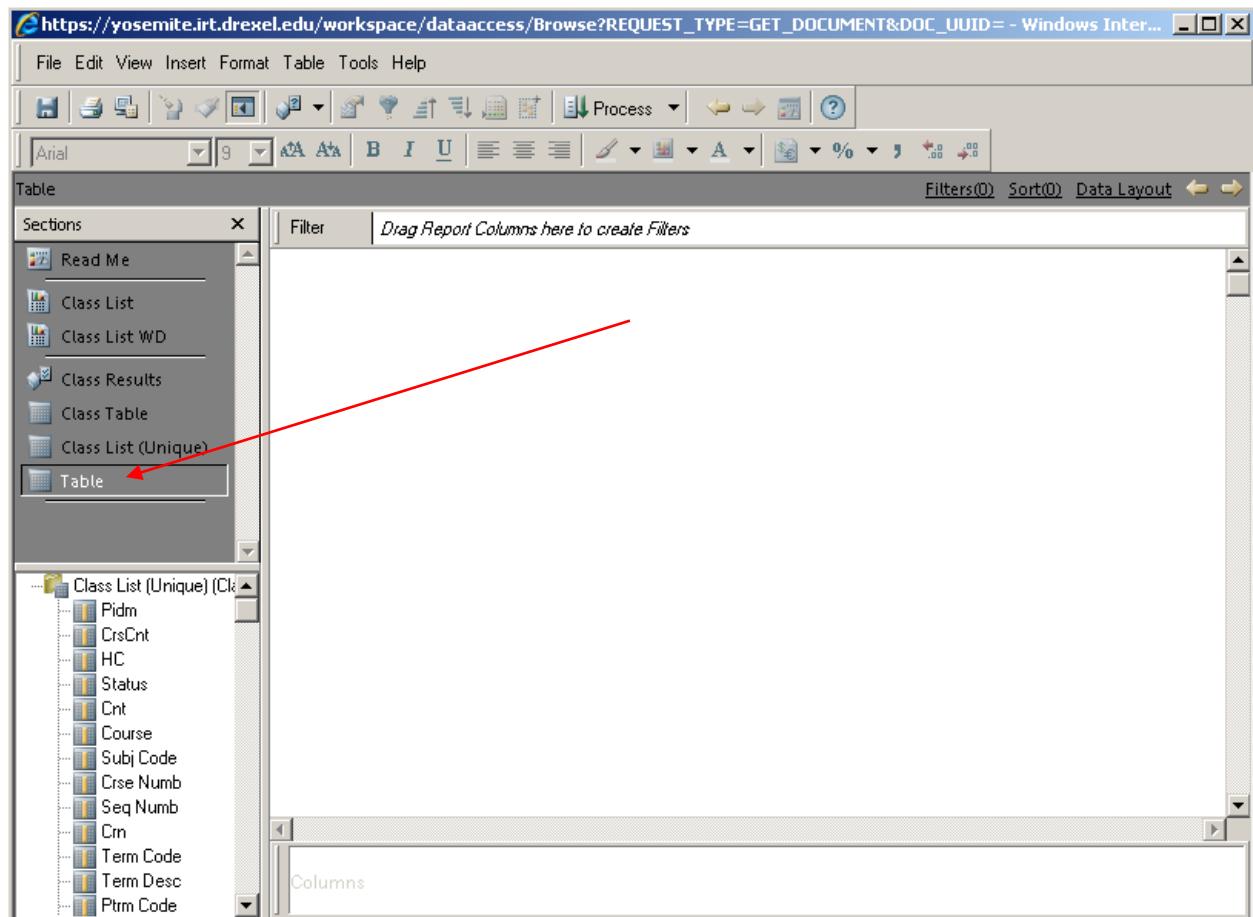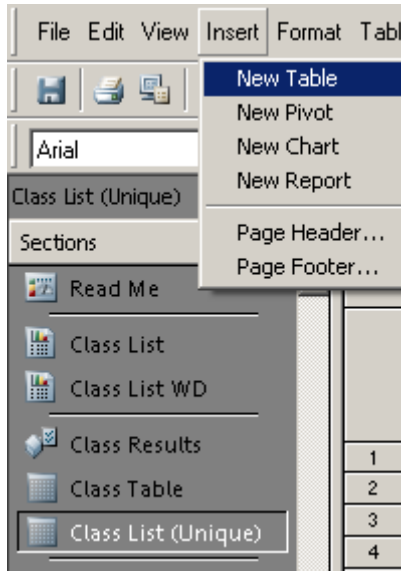
A new blank Child table is added below the Parent table previously selected in the Section pane. It has the properties, limits/filters and data of the Parent section.

To add columns to a new section, drag the column names from the Catalog Pane on the left and drop into the Data Layout pane
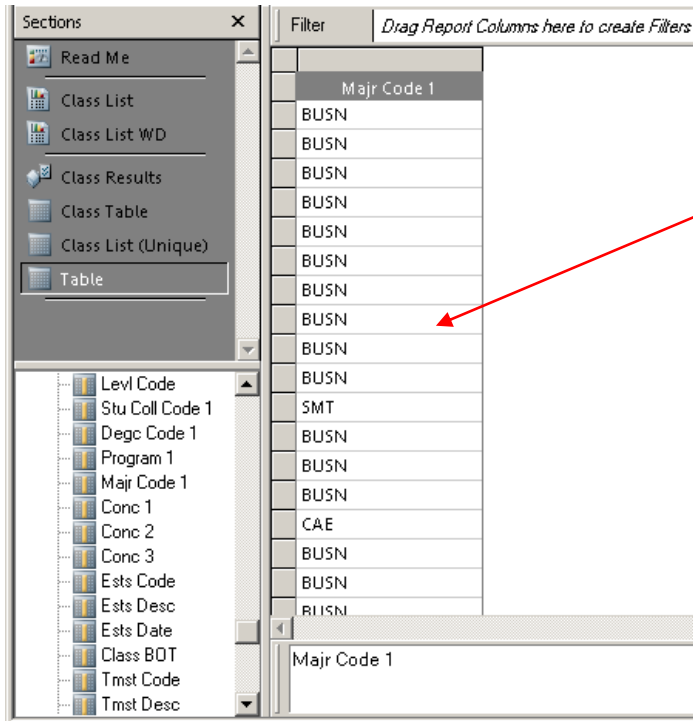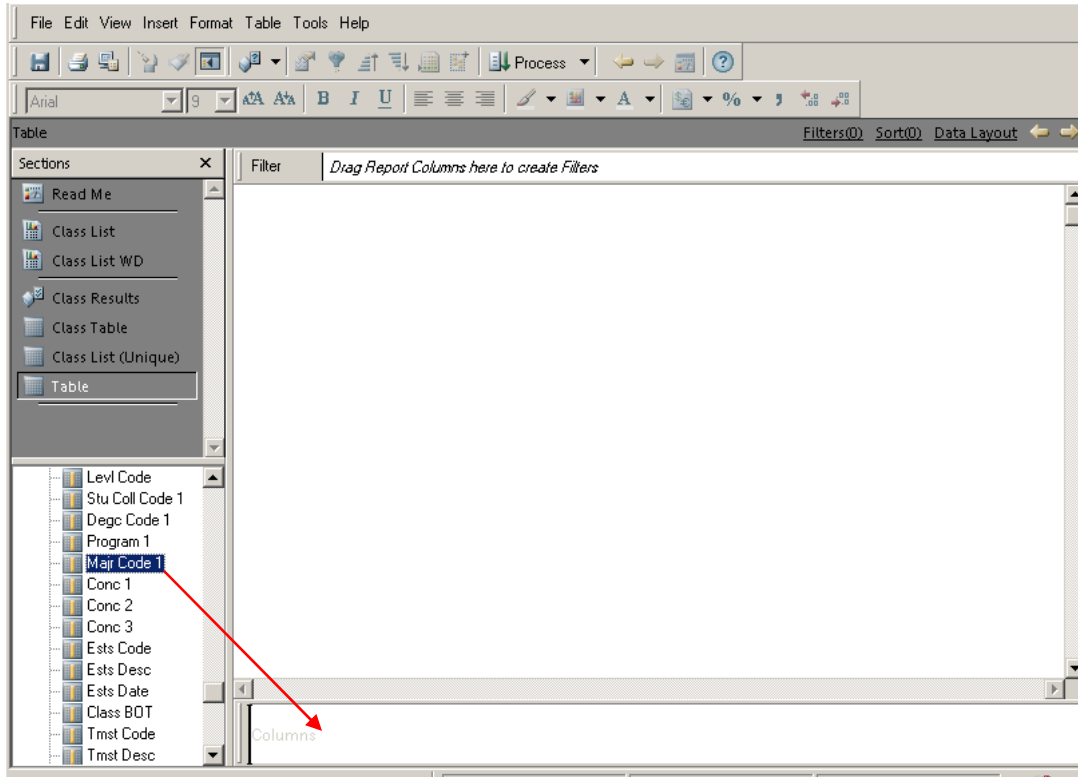
The column is added to the new table
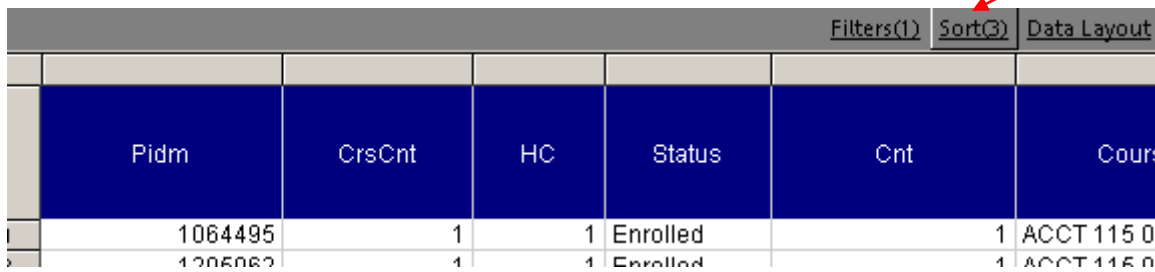
Sorting

TIP: It is better to sort in a new table so that existing computed items are not affected if dependent on the report data being sorted a certain way.

E.g. The class list report suppresses duplicates by use of the computed item called HC (Head Count) that compares 2 rows of data at a time to see if the prior row's value for Student is the same as the current one. If the report was not sorted by Student, this column may function incorrectly.

Displaying the Sort line
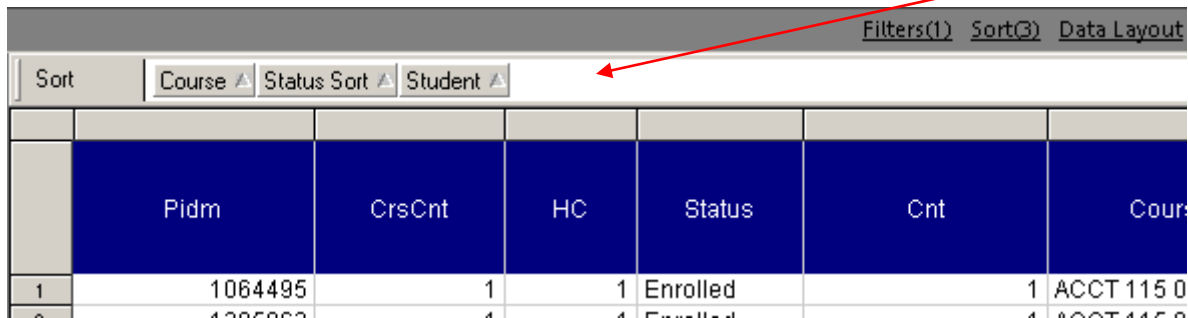
Click Sort toggle button:
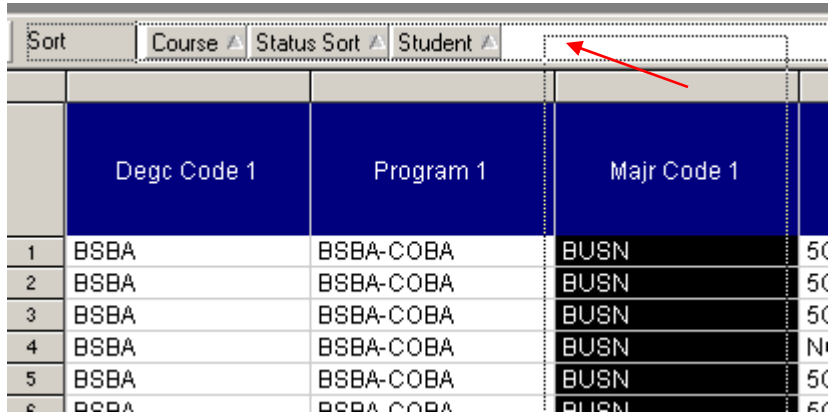
The Sort line is displayed with applied sorts in effect:

Adding items to the Sort line

Click and drag the grey cell above the name of the column and drop it into the Sort line.

The Sort Line now has the column name to sort by and viewing the results shows the report is now sorted by the new column .

Pivots

A pivot has 3 main sections and its Pivot Data Layout too has 3 corresponding sections

Row Labels   Column Labels   Facts

Row Labels

Items can be pulled into the row labels just like in the Data Layout in the Tables section. This causes values to be listed in columns next to each other but with related values aligned.

E.g. in the above example, the level codes related to the quarter calendar are aligned/grouped with the Q Term Type code where as the semester ones are listed with the semester Trmt Code.

Facts Section

This section is where calculations and data functions are applied. A column dropped into this section of the Pivot Data Layout will be added by default as the section's default function is sum.   In the above example, the Term HC (Term Headcount), which is a value of 1 for each student, is put into the Facts section to generate the total number of students registered for a level.

Column Labels

Allows items in the fact items to be grouped by items in the Column Labels.   In the example above, adding the term code to the Column Labels would cause the totals to be split into 2 columns showing the headcount totals for those registered for 200731 semester term separately from the 200735 quarter term.
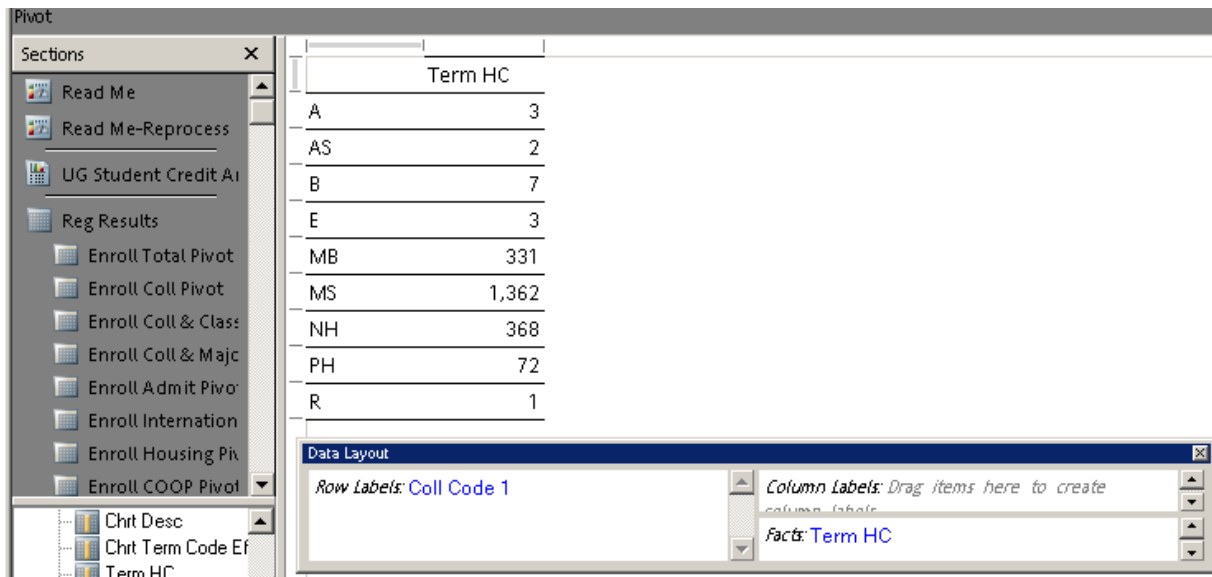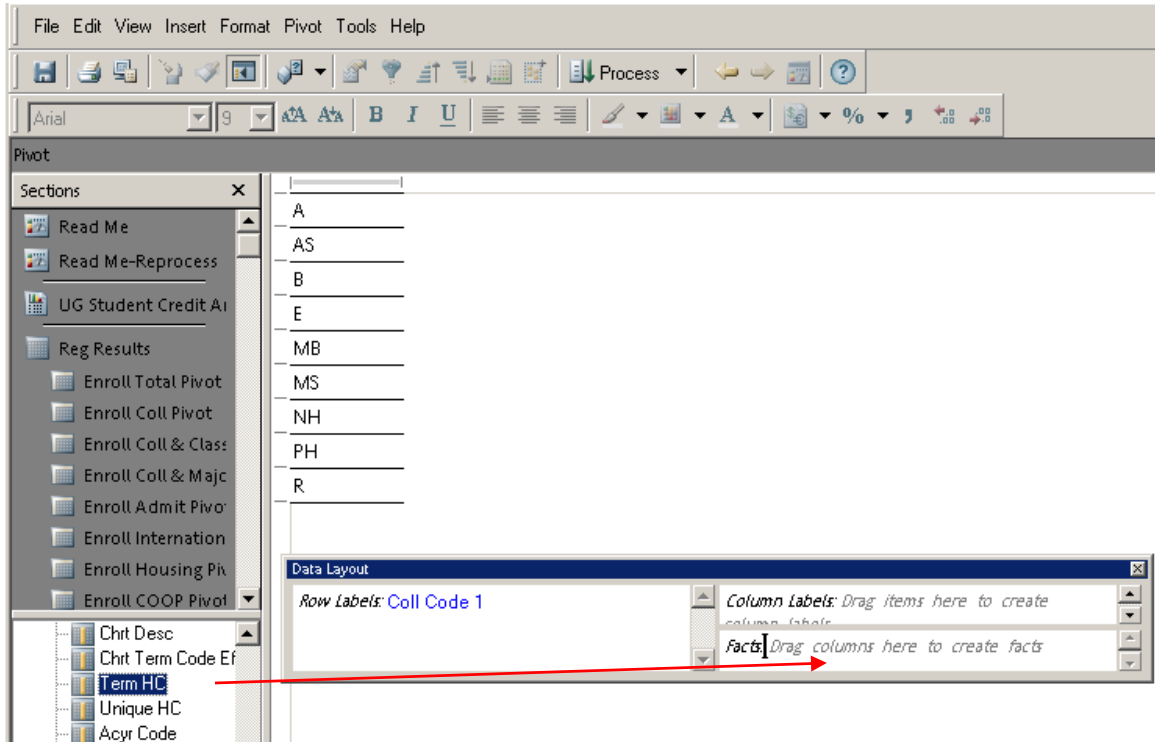
Creating a Pivot

E.g. Find total number of students registered by College
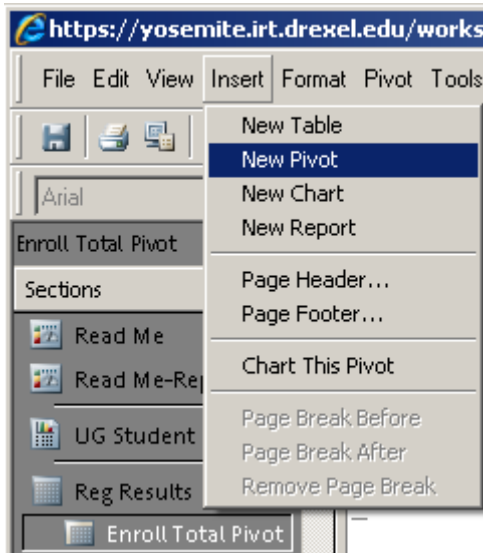
Click and drag Coll Code 1 Catalog Pane into the Row Labels to list all the colleges:
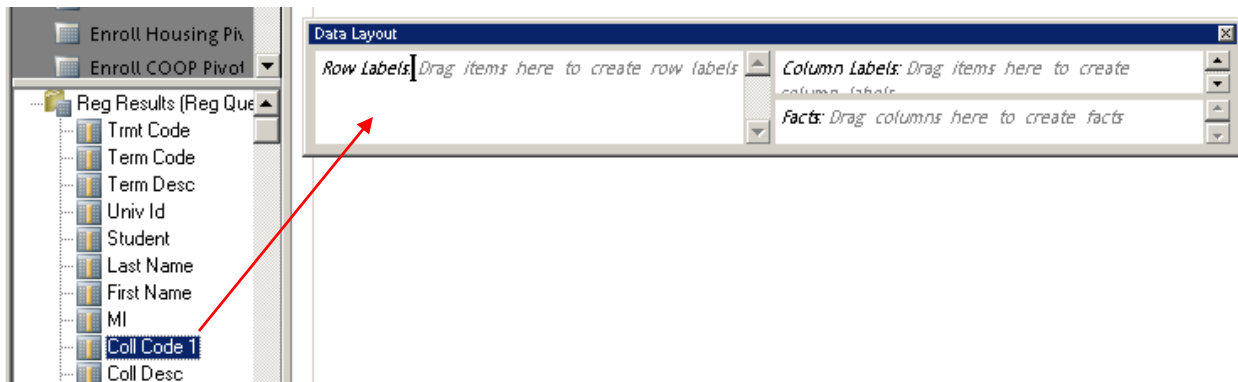
To get total students registered for each college, add the Term HC into the Facts section. Since the section's default data function is Sum, it adds all the ones to provide a sum.

To split the totals by Term Code student is registered for, add the Term Code into the Column Label section of the Pivot Data Layout:

To Convert a Pivot into a Chart
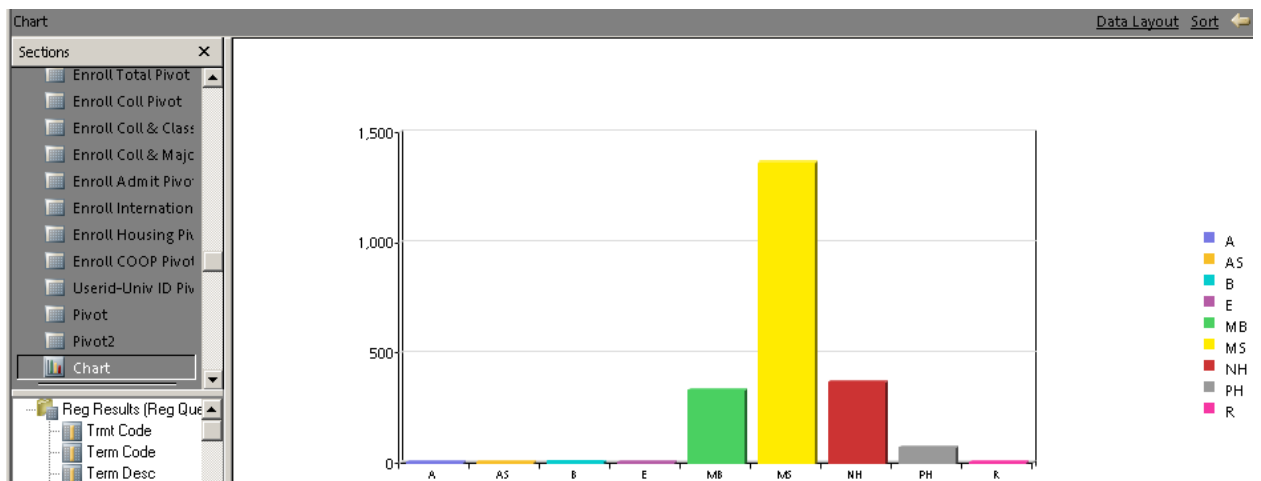
How to Focus on a group to analyze in depth

E.g. To find out how many coop students in College B are full-time undergraduate ECON majors:

Click on value FT under Reg Time Status to highlight all occurrences of FT.   Right-click and select Focus on Item to hide all non-FT values

Focus on College B next by right clicking value B in the Coll Code 1 column, and selecting Focus on Item. This will hide all other colleges.

The drill icons in the Pivot Data Layout indicate there is hidden data in these columns.

Similarly focus on UG to show only the undergraduate students:

Next to drill into the report to view majors for these full-time students, right-click value FT in the Reg Time status column, and put the mouse over 'Drill Anywhere' **without** clicking, to open the Catalog Pane:

Click Majr Code 1 to add it to the pivot:

Coll Code	Coll Desc	Levl Code	Reg Time	Majr Code 1	200731 Term HC	200731 Percent	200735 Term HC	200735 Percent
B	Bennett S. LeBow Coll. of Bus.	UG	FT	BUSN			2	100%
			Level Total				2	100%
		College Total					2	100%
Total							**2**	**100%**

Data Layout

Row Labels: ‡Coll Code 1 ◆ Coll Desc ◆ ‡Levl Code ◆ ‡Reg Time Status ◆ ‡Majr Code 1

Column Labels: Term Code

Facts: Term HC ◆ Percent

To view individual students in this population, select the majors, right click, Drill Anywhere and select Univ Id

Coll Code	Coll Desc	Levl Code	Reg Time	Majr Code 1	Univ Id	200731 Term HC	200731 Percent	200735 Term HC	200735 Percent
B	Bennett S. LeBow Coll. of Bus.	UG	FT	BUSN	10447431			1	50%
					11646203			1	50%
			Level Total					2	100%
		College Total						2	100%
Total								**2**	**100%**

Data Layout

Row Labels: ‡Coll Code 1 ◆ Coll Desc ◆ ‡Levl Code ◆ ‡Reg Time Status ◆ ‡Majr Code 1 ◆ Univ Id

Column Labels: Term Code

Facts: Term HC ◆ Percent

To go back up one level of detail (i.e. the opposite of 'Drill Anywhere'), right-click on Univ Id in the Pivot Data Layout and select 'Drill Up' :

Coll Code	Coll Desc	Levl Code	Reg Time	Majr Code 1	Univ Id
3	Bennett S. LeBow Coll. of Bus.	UG	FT	BUSN	10447431
					11646203
			Level Total		
		College Total			
Total					

Data Layout

Row Labels: ‡Coll Code 1 ◆ Coll Desc ◆ ‡Levl Code ◆ ‡Reg Time Status ◆ ‡Majr Code 1 ◆ Univ Id

Column Labels: Term Code

Term HC ◆ Percent

Remove
Drill Up

The report reverts to the former level of details:

					200731		200735	
Coll Code	Coll Desc	Levl Code	Reg Time	Majr Code 1	Term HC	Percent	Term HC	Percent
B	Bennett S. LeBow Coll. of Bus.	UG	FT	BUSN			2	100%
			Level Total				2	100%
		College Total					2	100%
Total							**2**	**100%**

Data Layout ☒

Row Labels: ⇕Coll Code 1 ◆ Coll Desc ◆ ⇕Levl Code
◆ ⇕Reg Time Status ◆ Majr Code 1

Column Labels: Term Code

Facts: Term HC ◆ Percent

Getting assistance with reports

Consult the Hyperion FAQ section on the AIS website at http://www.drexel.edu/provost/ais/faq/.

If you still have questions, create a ticket in the appropriate queue as described at http://www.drexel.edu/provost/ais/faq/#tickets.