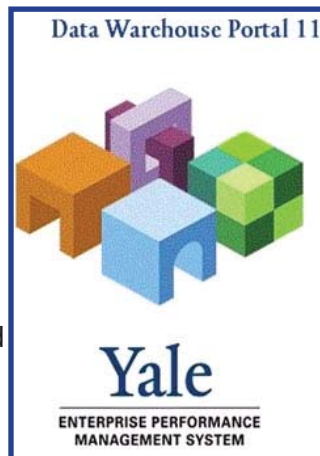


How do I logon to Portal 11?

1. From the **START** menu, select the Yale Administrative Menu System (**YAMS**)
2. Click on **Reporting**
3. Choose **Data Warehouse Portal**
4. Enter your **NetId** and **password**
5. Select **Log On**



I Use the **right-[click]** option for quick access to drop-down lists and more options.

What can I do with the “Navigate” Menu?

Navigate File View Favorites Tools Help

Explore:

View your Reports within Folders

Schedule - *Manage Events*:

This is a **View only** option that allows you to see fixed time periods available for Report processing.

1. [Click] **Navigate** from the Menu options
2. Select **Schedule** from the drop-down list
3. Choose **Manage Events**

How do I save Report Job Parameters?

1. Navigate to the desired Report
2. Right-[click] then select **Run Job** or double-[click] to execute the Report
 - The **Loading Parameter Collection** screen will appear
3. Select the **Job Parameters** file you would like or **Set Values** for individual job parameters
 - If you want to use the same set of parameters every time you open job parameters, [click] the box next to **Save as my default**
 - Or to add a new **Job Parameter** to your list of drop-down choices, [click] the box next to **Save** and then create a unique **Job Parameter** Name to save the selections you have made

I Look for this symbol, throughout the guide for helpful information

How do I sort Report output?


To sort Report Output, [click] on any column heading to change the way you view your output

How do I find my saved reports?

On the left hand side of the screen you will see University Standard Reports located under SMART Space

1. Click the “+” next to the Folder that contains the report you would like to work with
2. Click on the sub folder that contains the desired Report

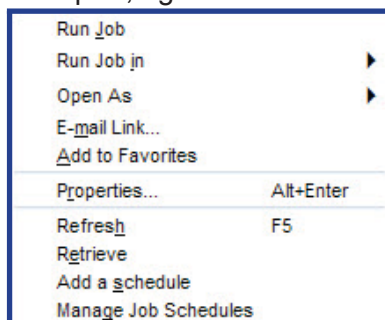
How do I Run, View, or Print a Report?

1. Navigate to the desired Report
2. Right-[click] and then select **Run Job** or double-[click] to execute the report
 - The **Loading Parameter Collection Screen** will appear
3. Select the **Job Parameters** you would like or **Set Values** for individual job parameters
4. Enter a descriptive name for the **Output File**
5. [Click] **Run**
6. [Click] **OK** to the informational box explaining that the report will run in the background
7. Click the Hyperion Workspace Refresh icon or right-[click] and choose **Refresh**

 - You can also use the **F5** key
9. Double-[click] the folder that contains your **Report Output**, or right-[click] and then select **Open**
10. Double-[click] again to view the output
 - Report Output will be presented in PDF, BQY, or XLS format
 - The **Loading Parameter Collection Screen** or a window requesting you to Open the file will appear

I Report **output** is available for 30 days after the report has been processed. It is then automatically deleted.

What selections do I have using the right-click option with Reports?

Navigate to the desired Report; right-click to see this menu.



Run Job:

Process your report.

- Right-[click] and select **Run Job**

Run Job in:

Options for Report processing:

- Select either Foreground or Background
 - **Background** Reports process while you continue to perform other tasks in the Portal.
 - * **Preferred method to run Jobs**
 - **Foreground** allows you to see Report processing and output. Don't use this option for large jobs because it will prevent you from running any other reports until the output is returned.


Add to Favorites:

The Reports you use frequently may be saved for faster on demand reporting.

- Right-[click] and select **Add to Favorites**

Refresh:

Use the Portal **Refresh** not the browser **Refresh**

- Right-[click] and select **Refresh**
 - You can also press F5 to Refresh your screen
 - Or [click] on the **Refresh** icon 

Add a Schedule:

Configure the parameters and recipients associated with your Report.

- Right-[click] and select **Add a Schedule**

Manage Parameters and Job Schedules:

1. Right-click on a job and select **Manage Job Schedules**
2. [Click] on the **Event Name** column header to filter and view only your **Schedules**
3. Modify the **Schedule, Job Parameters, Timing** or **Notification** email address
4. [Click] **OK**



TABS along the top of the screen can be used for easy navigation.

How do I schedule a Report?

To schedule a Report:

1. Navigate to the desired Report
2. Right-[click] on the Report where you want to add a schedule
3. From the drop-down list, choose **Add a Schedule**

Then follow these steps:

1. Enter a name (required) and description (optional) for your Schedule; [Click] **Next**
2. You can either "Schedule this job using an existing job parameter" or **Define New Parameters**
3. After making your selections, [click] **Next**
4. Select the **Time Event** from the drop-down menu or select **Custom Time Event**; then [click] **Next**
5. Enter a valid email address(s)
 - Use commas between entries for multiple recipients; and [click] **Next**
6. Update Report Permissions, then [click] **Finish**

How do I manage my Favorites?

How do I run a Report from my Favorites:

1. Select "Favorites" from the Hyperion Menu bar
2. Click on the Report you would like to Run

How do I Add a Report to my Favorites list:

1. Right-[click] on any Report
2. Choose Add to Favorites

How do I remove a Report from my Favorites list:

1. [Click] **Favorites** from the Hyperion Menu bar
2. Select **Manage Favorites**
3. [Click] in the **Remove** box next to the Report you would like to **Remove** from your list
4. Then [click] **OK**

Where can I go for Help and Support?

For immediate assistance of any kind, call the ITS **Help Desk at 432-9000**.

Functional support questions about Portal 11, the Brio Users Group (BUG) Report Library, and BrioQuery Reports can be directed to General Accounting User Support by sending email to ga.usersupport@yale.edu or dw.usersupport@yale.edu