How to Run Business Intelligence Publisher Reports in Hyperion
By Department of Finance

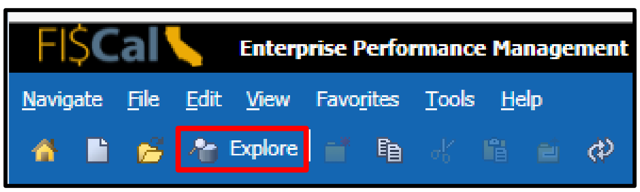
Target Audience: All department budget analysts with access to the Hyperion Planning Application.

Purpose: Provides instructions on how to run a Business Intelligence Publisher (BIP) report.

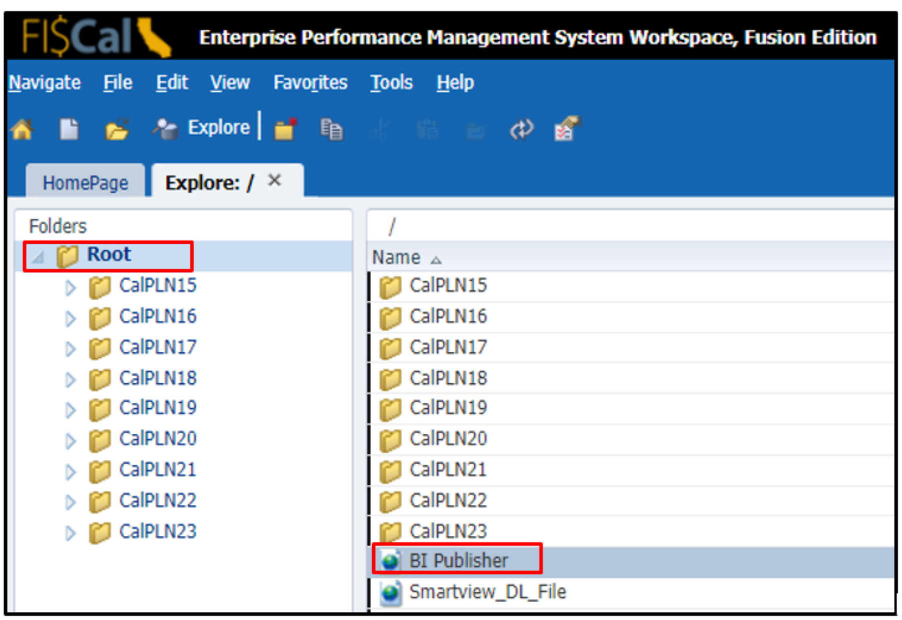
General Information: BIP reports pull data from a “datamart” instead of the Hyperion Planning Application. Data is usually available from the datamart within two minutes of a user manually entering data or uploading data into the Hyperion Planning Application. However actual process times may vary.

Steps to Run a Report: The following steps will help you understand the basic steps required to run BIP reports.

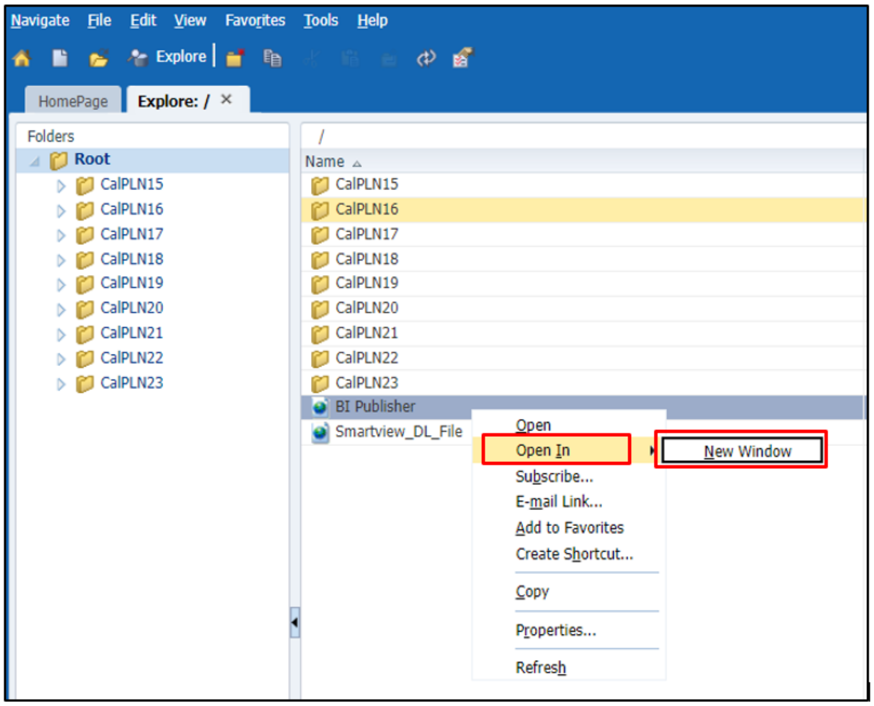
Step 1: Click on the **Explore** button.

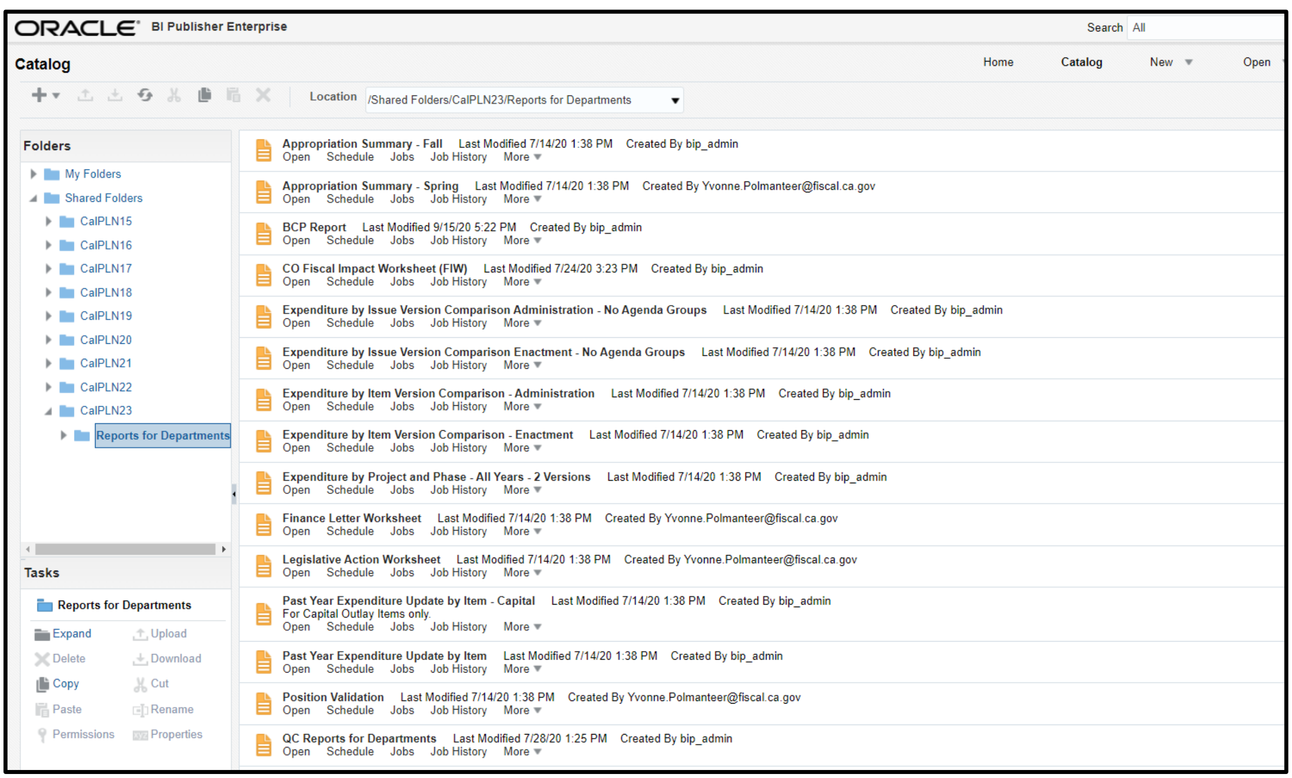


Step 2: Naviagate to the **“Root” folder** and right click on the **BI Publisher** link.



Step 3: Select the **Open In** option and then select the **New Window** option. A new window will open displaying the BI report catalog.





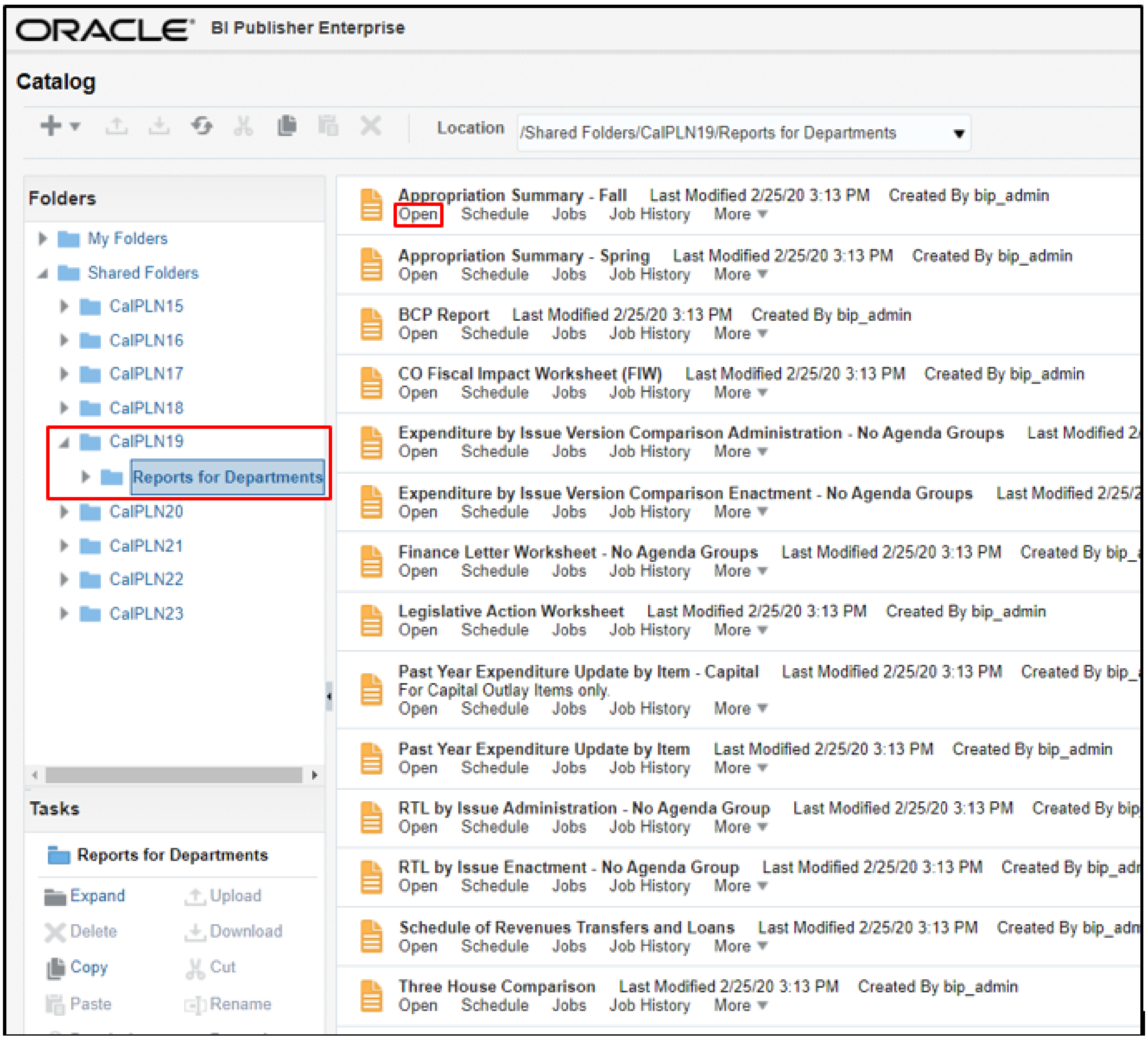
Step 4: Navigate to the reports through the folder structure in the left pane as follows:

Shared Folders → CalPLNXX → Reports for Departments

"XX" represents the first part of the fiscal year. In this example we are in the development of the 2019-20 budget cycle, therefore we will choose CalPLN19.

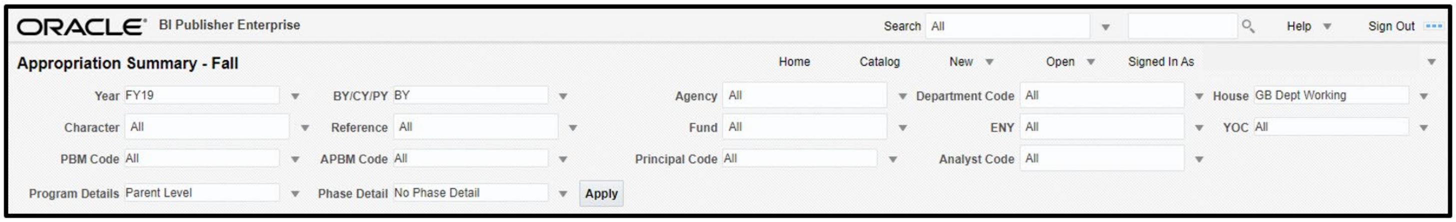
A list of available reports will appear in the right pane. Refer to the **Report Manual for Departments** for a full list of reports, key data elements included in the report, versions accessible by departments, and sample reports. This manual is provided by and can be requested from your Finance Budget Analyst.

Step 5: To open a BIP report, click the **Open** link under the report name.



Step 6: Select the **Point of View (POV)** for the report. The example below shows the POV selections for the Appropriation Summary - Fall report.

Select the required POV report parameters using the down arrow ( ) button. If you do not see your selection in the drop down menu, select **Search** at the bottom of the menu.



Step 7: For **Year**, "FY XX" refers to the first portion of a fiscal year. For example, for the 2019-20 budget cycle (July 2018 through June 2019), the Year should be set to "FY19".

Step 8: For **BY/CY/PY,** select either budget year (BY), current year (CY), or past year (PY).

Step 9: Select **Agency**, if applicable, otherwise leave at the default value of **All**. If an agency is chosen, the report will include a group of departments under the agency secretary or broad functional grouping.

Step 10: For **Department Code**, select a Business Unit (BU) code number.

Step 11: For **House**, select a **version** available to the department (e.g., GB Dept Working).

Step 12: Select **Character**, if applicable, otherwise leave at the default value of **All**. Character represents the character code associated with an item. If the default is chosen, the report will provide data for all items for the selected BU regardless of an item's character code.

Step 13: Select **Reference**, if applicable, otherwise leave at the default value of **All**. If the default is chosen, the report will provide data for all items for the selected BU regardless of an item's reference code.

Step 14: Select **Fund**, if applicable, otherwise leave at the default value of **All**. If the default is chosen, the report will provide data for all funds for the selected BU.

Step 15: Select **ENY**, if applicable, otherwise leave at the default value of **All**. ENY refers to the enactment year of an appropriation, which is the first fiscal year spending authority is available for encumbrance. If the default is chosen, the report will provide data for all items for the selected BU, regardless of an item's ENY.

Step 16: Select **YOC**, if applicable, otherwise leave at the default value of **All**. YOC refers to the year of completion of an appropriation, which is the last fiscal year an appropriation is available for encumbrance. If the default is chosen, the report will provide data for all items for the selected BU, regardless of an item's YOC.

Step 17: For **PBM, APBM, Principal,** and **Analyst Codes**, leave at the default value of **All**. These codes are for internal Department of Finance use.

Step 18: For **Program Details,** select **Parent Level** or **Child Level**, whichever is applicable to the selected BU. The selected program details level should typically match the program level in the Budget Bill.

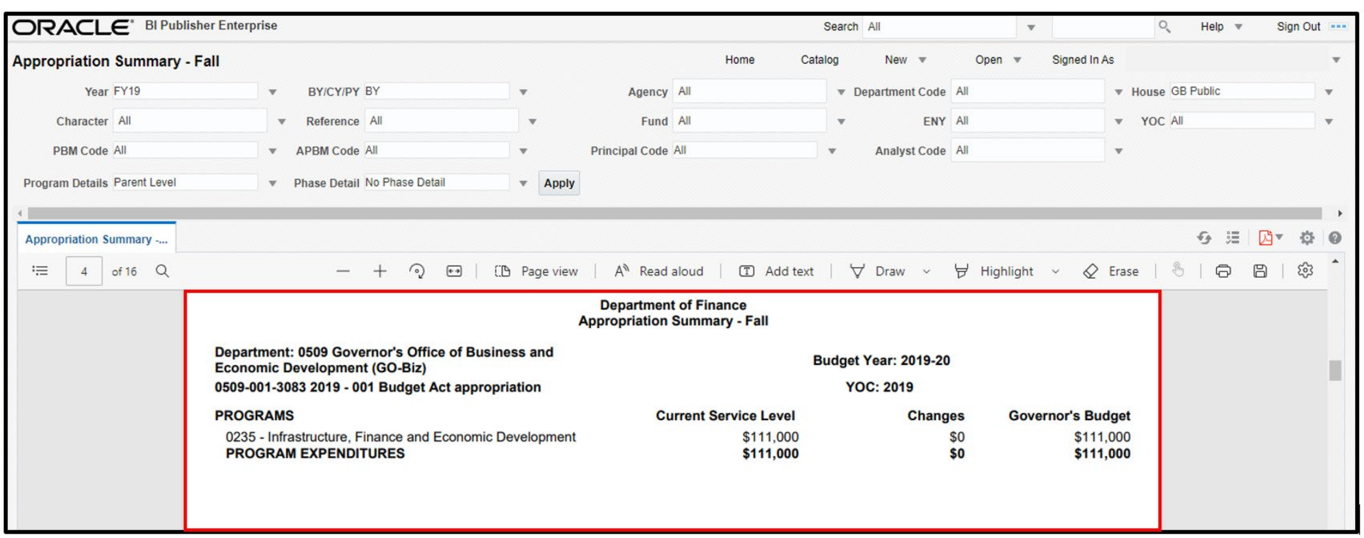
- If **Parent Level** is chosen, the report will provide data for the selected BU at the 4-digit program number(s).
- If **Child Level** is chosen, the report will provide data for the selected BU at the 7-digit subprogram number(s).

Step 19: For **Phase Detail**, select **No Phase Detail**, **Parent Level**, or **Child Level**, if applicable. **Phase details are only applicable to capital outlay projects.**

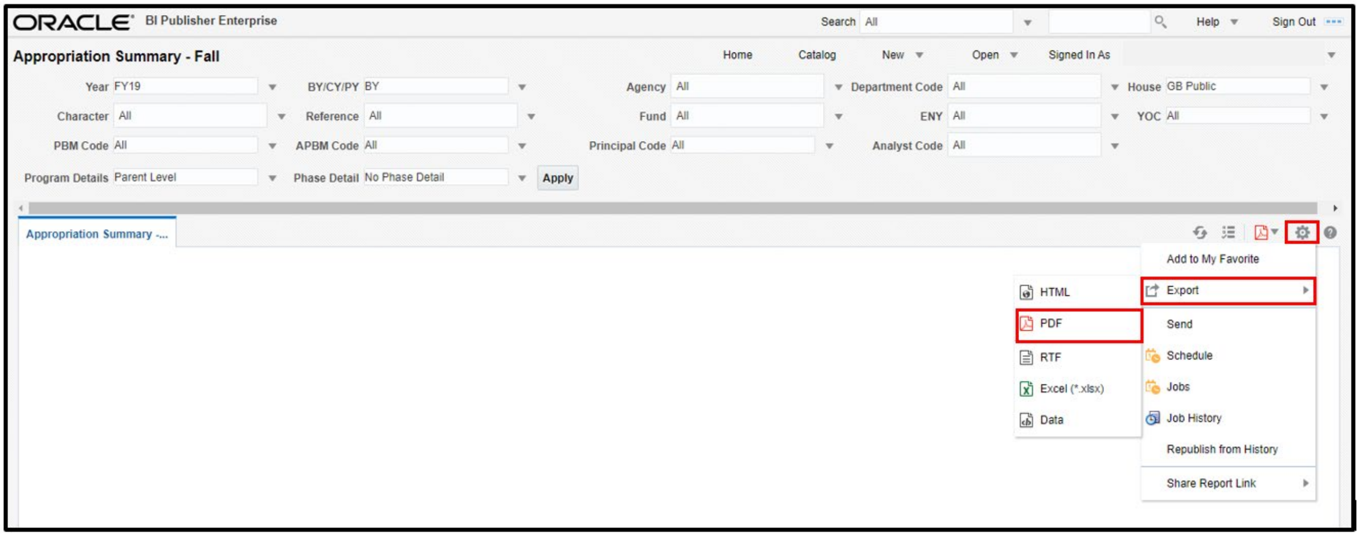
- Select **No Phase Detail** for non-capital outlay items.
- If **Parent Level** is chosen, the report will provide capital outlay project data for the selected BU at the parent phase level. (Parent Level phase details are displayed in the Budget Bill.)
- If **Child Level** is chosen, the report will provide capital outlay project data for the selected BU at the sub-phase level.

Step 20: After all the POV report parameters have been selected, click **Apply**.

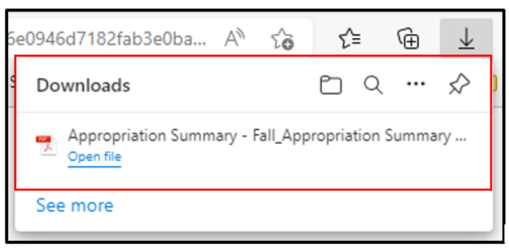
Step 21: The report will run and display.

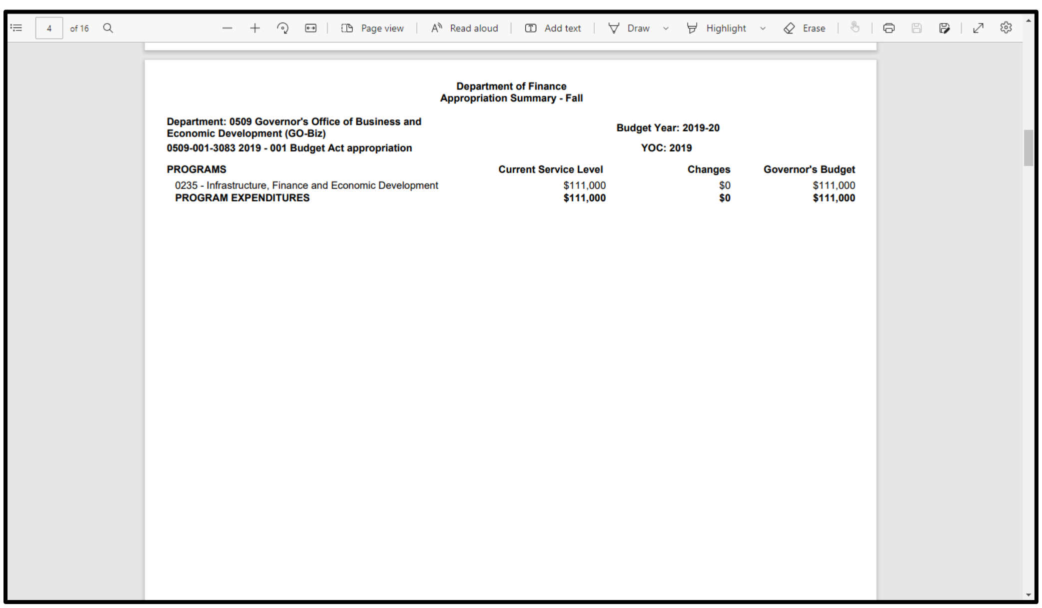


Step 22: To export the report, navigate to the **Actions** button ( ) → **Export** → **PDF**.



Step 23: A new tab will open in Hyperion and depending on the web browser utilized, the report will either open automatically or a "Downloads" pop-up prompt will appear. Select the report to open the file from the pop-up.





Congratulations. You have successfully run and exported a BIP report from Hyperion.

Who to Contact for Questions/Problems:

Hyperion Log-in Access/Password Issues:

Contact the **FI$Cal Service Center (FSC)**

- Phone: 1-855-FISCAL0 (1-855-347-2250) (Toll Free)
- https://fiscal.ca.gov/user-support/fiscal-service-center/

Business/Process Questions:

Contact your Finance Budget Analyst