# DataWarehouse Reporting Portal Reference Guide

## How do I logon to Portal 9?

DataWarehouse Portal 9

1. From the **START** menu, select the Yale Administrative Menu System (**YAMS**)
2. Click on Reporting
3. Choose DataWarehouse Reporting Portal 9
4. Enter your NetId and "Reporting" password
5. Select **Logon**

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

**Use the Right-Click option for quick access to drop-down lists and more options.**

## What can I do with the Navigation Menu?


**Explore:**
View your Reports

**Manage Jobs:**
View Reports and the Schedules associated with them.

1. Click "**Navigate**" from the Menu options
2. Select "**Schedule**" from the drop-down list
3. Choose "**Manage Jobs**"

**View Job Status:**
View the status of processing Jobs and their Output files.

1. Click "**Navigate**" from the Menu options
2. Select "**Schedule**" from the drop-down list
3. Choose "**View Job Status**"

**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**"

**Parameter lists and schedules can be deleted.**

**Program Collections contain your parameters and Output Collections are where your output files are stored as PDF, BQY or XLS**

## How do I sort Report output?

You can sort Report Output by Name (default option), Type, or Modified Date or Description

- Click on the headings 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

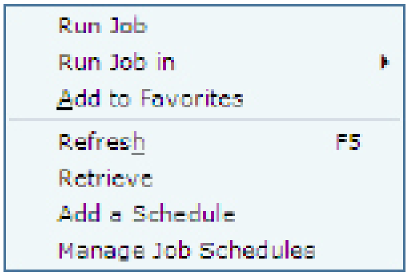
1. Click the "+" next to the Folder that contains the report you would like to work with
2. Click on the subfolder that contains the desired Report

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

1. Navigate to the desired Report
2. Right-click or double-click to execute the report
   - A security information box will appear, click "**yes**" to continue
   - The "Loading Parameter Collection Screen" will appear
3. Select the "**Job Parameters**" file or choose individual job parameters
4. Enter a Personal descriptive name for the "**Output File**"
5. To Save job parameters, click in the box next to "Save as my default"
   - Only be used for the set of parameters you want to see every time the job parameters are opened
6. Click in the box next to "**Save**"
7. Enter a personal "**Job Parameter Name**" to Save the current parameters
8. Click "**Run**"
9. Click "**OK**" to the background message window
10. Click the Hyperion Workspace "Refresh" icon or Right-click and choose "**Refresh**"
11. Select Report Output File (PDF, BQY, or XLS)
12. Click "**Open**" or double-click the report PDF, BQY, or XLS file line

## What options 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.

1. Right-click and select “Run Job”

**Run Job in:**

Options for Report processing:

1. Right-click and select “Run Job in”
2. Select either Foreground or Background
   - **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.
   - **Background** Reports process while you continue to perform other tasks in the Portal.

**Add to Favorites:**

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

1. Right-click and select “Add to Favorites”

**Refresh:**

Use the Portal “Refresh” not the browser “Refresh”

1. 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.

1. Right-click and select “Add a Schedule”

**Using descriptive names and suffixes will help you to use the portal better. Recommended suffixes include _SN (schedule name), _PL (parameter list), _SD (schedule description) and _JPN (job parameter name)**

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

## How do I schedule a Report?

Navigate to the desired Report.

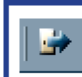
1. Right-click on the Report you want to add a schedule
   - From the drop-down list, choose “Add a Schedule”
2. Enter a name (required) and description (optional) for your Schedule
3. Click “Next”
4. You can either “Schedule this job using an existing job parameter” or “Define New Parameters”
5. Select the “Time Event” from the drop-down menu or select “Custom Time Event”
6. Click “Next”
7. Use the directory tool to lookup email addresses
   - Copy the email addresses from the directory and paste them into the “Email Addresses” line
   - Use commas between entries for multiple recipients

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

## How do I run a Report I have added to my Favorites?

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

## How do I log out of Portal 9?

 To log out of the portal, click on the exit icon located in the toolbar

## Where can I go for Help and Support?

For immediate assistance of any kind, call the ITS **HelpDesk at 785-3200**.

Functional support questions about Portal 9, 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**