**Quick review of the Hyperion Query Pane:**

**Sections:** Where to access reports, results, queries, charts, etc.

**Criteria:** Where you select the fields (Request Line) you want your query to return and any parameters (Limit Line) you wish to set for your data sample.

**Views:** A data “table” with information from Banner based on a theme (e.g. STUDENT_BU, ADMISSIONS_DECISION, INSTRUCTOR_ASSIGNMENT)

**Joins:** How the tables (views) are linked together.

**Ways to Run Queries:**

**Canned Query:** Minimal user input. You will open the query with the left bqy and then click the “Process” button and respond to Parameter “Prompts.”

**Modifying Existing Query:** Moderate user input. Select the right bqy and use the existing canned query as a “head-start.” Add or Take Away Fields, Limits, or even Views to customize the query to your needs. You may also add Pivot Tables, Charts and Reports as needed.

**Query Shell:** Maximum user input. From the Query Shell folder, you will select a specific database (e.g. ODSatest, ODSprod), start with a blank query pane and create your query from scratch. You will provide all Sections, Criteria, Views and Joins.
What Canned Queries are Available, and Where do I Find Them?

University approved Canned Queries are located in the “*BU Canned Queries” folder in Hyperion.

They can be found in the Student sub-folder under the *BU Canned Queries folder. They are organized according to data category.

There are several folders to choose from. Currently, the categories are:

1. **Student**: (main folder) general student information
2. **Advisors**: advising information
3. **Class List**: several different ways to generate class lists
4. **Courses and Grades**: variety of course and grade information
5. **Graduates and Degree Candidates**: information on students who are candidates and/or graduates

Note: Go to [http://ods.binghamton.edu](http://ods.binghamton.edu) to view the canned query support documentation for detailed information on the various queries.
How do I modify a Canned Query?

1. Navigate to the Canned Query you would like to start with.

2. Open the Canned Query by clicking the right “bqy” icon under the Canned Query Name.

3. Go to the Query section and drag any additional fields that you want in your Results to the Request Line. (Hint: Right-click a Table in the Content Pane and choose Properties/Sort to sort the Field Names.)

4. Drag any additional fields that contain information that you want to limit your search by to the Limit Line or double-click it in the table.

Note: Some frequently used fields will already appear in the Request and Limit lines. You may want to process the Canned Query before adding any additional fields to familiarize yourself with the data and layout.
5. Before you enter your first limit criteria, you will be prompted to enter your login information for the database your data is in (your ODS userid and password) and click OK.

6. Each time you choose a field for the Limit Line, the Limit Box will appear. Set limits for that field, click Okay and continue to your next limit. **(Hint: If you know the value, type it in. This will return results faster. If you aren’t sure, you may use the Show Values button.)**

7. Click the Process icon in the toolbar to run your query.

8. Once you process the query, you will be able to sort the results by dragging the Field(s) to the Sort Line. **(Hint: If you would like to change the order of the columns, do this in Results View. If you change the order in Query View, the changes will not hold for Results View.)**
How do I Create Reports, Charts and Pivot Tables from my Results?

1. Go to Insert and select the option from the list.

2. Next, drag the fields to the appropriate boxes to organize the data.
   a. Example of a report

   ![Example of a report](image)

   b. Example of a chart

   ![Example of a chart](image)
c. Example of a pie chart

![Example of a pie chart](image1)

d. Example of pivot table

![Example of pivot table](image2)

e. Drilling down in a pivot table

![Example of drilling down in a pivot table](image3)
How do I Save and Publish my Query?

1. With the query open, choose File/Save As (Hint: save the Query to a folder you will remember.)

   ![Save File Dialog]

2. Close the Query and maximize the Hyperion page.

3. Navigate to the proper folder in Hyperion.

4. Click Publish File.

   ![Publish File Dialog]

5. Browse for the document, add a name, give it a meaningful description and click Next.

   ![Browse and Add Document]

6. Click Show and select Role, Group or User from the Drop Down Menu and click Go.

   ![Show and Access Control]

Hyperion/ODS – Modifying Canned Queries
7. Choose the people you want to have access to the Query and click Select.

8. Select the level of access for the user(s), and then click Next or choose another user.

<table>
<thead>
<tr>
<th>Access to File</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Access</td>
<td>Cannot access the document in any manner</td>
</tr>
<tr>
<td>View</td>
<td>Can only display the document</td>
</tr>
<tr>
<td>Modify</td>
<td>Can make changes, but not delete</td>
</tr>
<tr>
<td>Modify and Run</td>
<td>Can make changes and run jobs, but not delete</td>
</tr>
<tr>
<td>Full Control</td>
<td>Can display, change and delete</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Adaptive State</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Only</td>
<td>Can view the document, but may not modify it.</td>
</tr>
<tr>
<td>View and Process</td>
<td>Can view the document and refresh the data, but may not otherwise modify the document.</td>
</tr>
<tr>
<td>Analyze</td>
<td>Can create and modify charts, pivots, and reports in the document, but may not modify the queries or refresh the data.</td>
</tr>
<tr>
<td>Analyze and Process</td>
<td>Can create and modify charts, pivots and reports in the document, and may refresh the data. However, the user may not modify the query.</td>
</tr>
<tr>
<td>Query and Analyze</td>
<td>Can create and modify charts, pivots and reports in the document, and may refresh the data. Can build and limit queries before processing.</td>
</tr>
<tr>
<td>Datamodel and Analyze</td>
<td>Can create and modify charts, pivots and reports in the document, and may refresh the data. Can build and limit queries before processing. Can create and modify data models.</td>
</tr>
</tbody>
</table>

Note: A more in depth description is at...

9. Choose Database Connection and set Options to “Prompt for username/password” and hit Finish.

10. The Query is now available in the folder you chose and is available to selected users.
Appendix A – Advanced Hyperion Techniques

1. How to make changes to a published query:

A. Click Modify File Properties button.

B. Click in the appropriate area under the General tab to make your changes to General Properties, Access Control or Versions.

C. Click the BQY Properties tab and then change the database that the query points to.
2. How to add a sub-folder, delete folder item(s) or move items from one folder to another:

Note: When deleting items or moving items from one folder to another, select the item, click the arrow button, and in the case of moving, select the folder that you would like to move it to.

3. How to sort items within a folder:
4. How to Add Keywords

Go to Preferences and make sure both options are checked.

Then, when you are in the modifying file properties area for an existing query, or are publishing a new query, you may add key words under the Advanced Options tab. This will allow you to search for queries by Keyword as well as words in the title.

5. How to search for items: