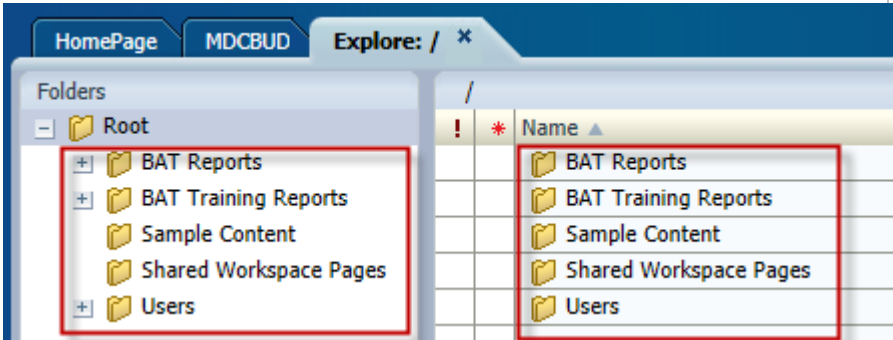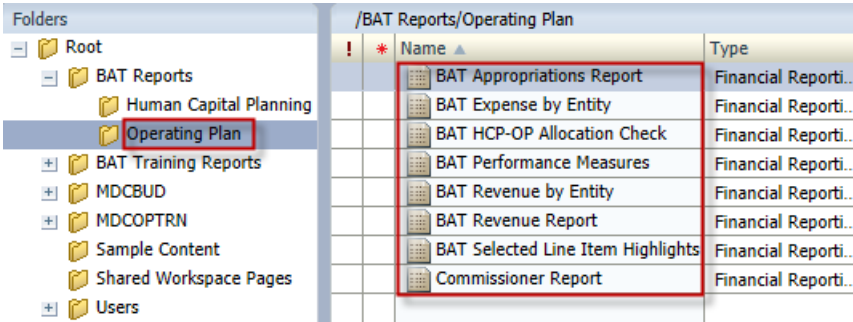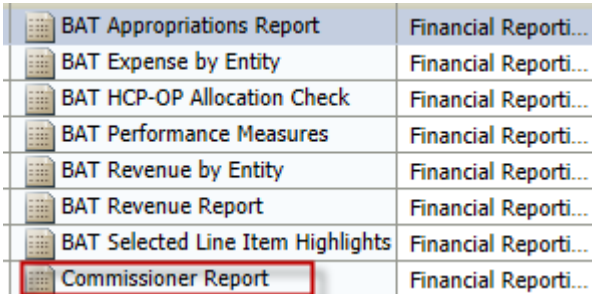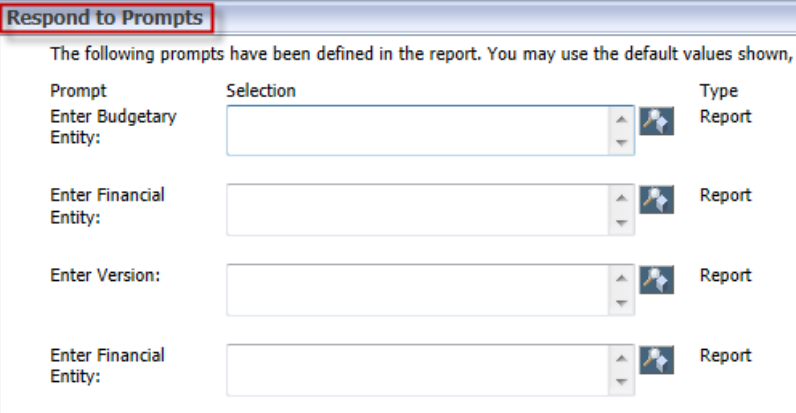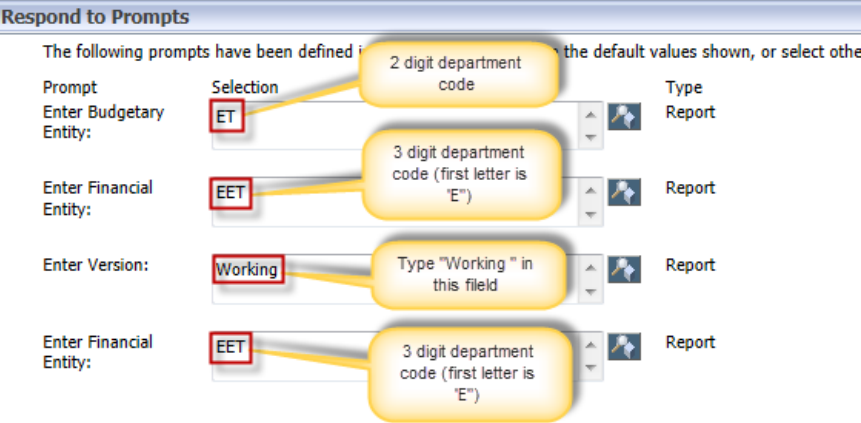# Job Aide: Running the BAT Commissioner Report

This job aide will guide you through the steps in running the Commissioner Report, exporting to Excel and emailing to departments.
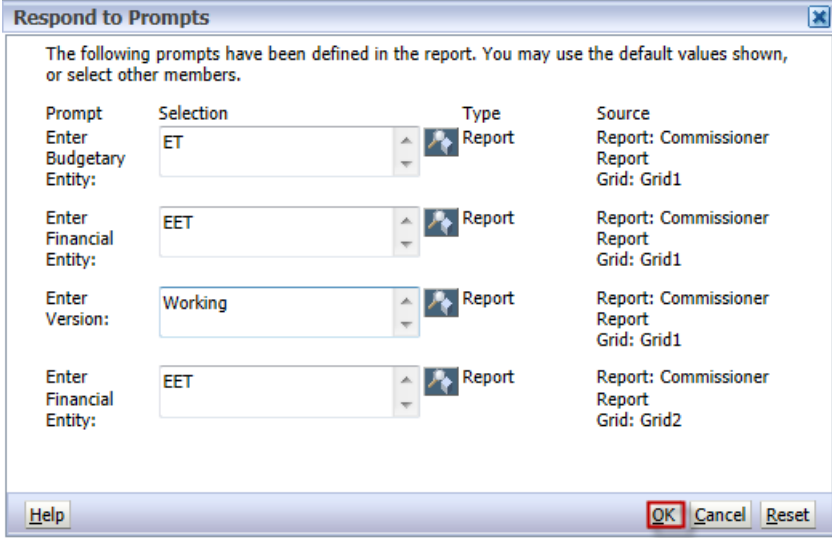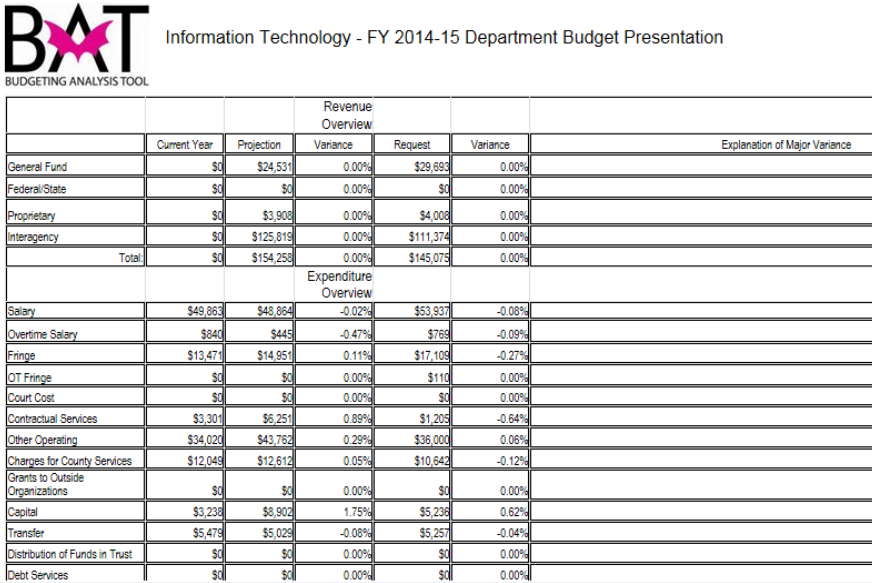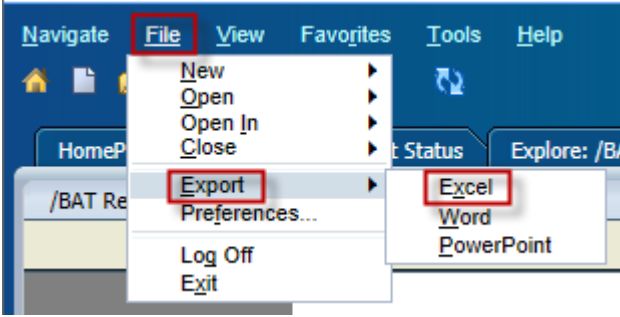
In the steps below, you will:
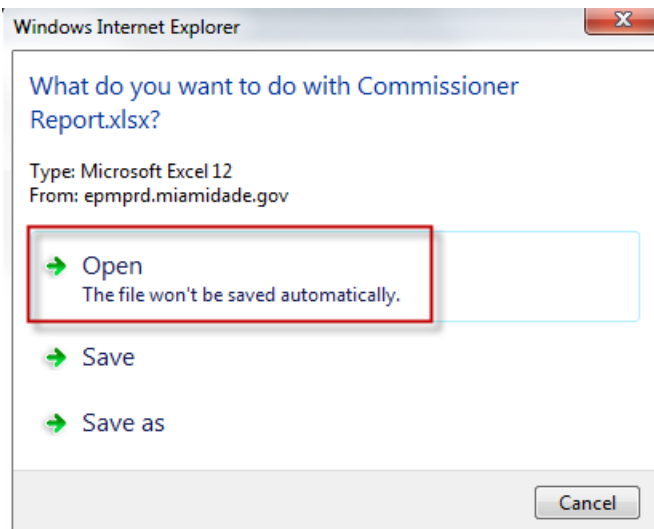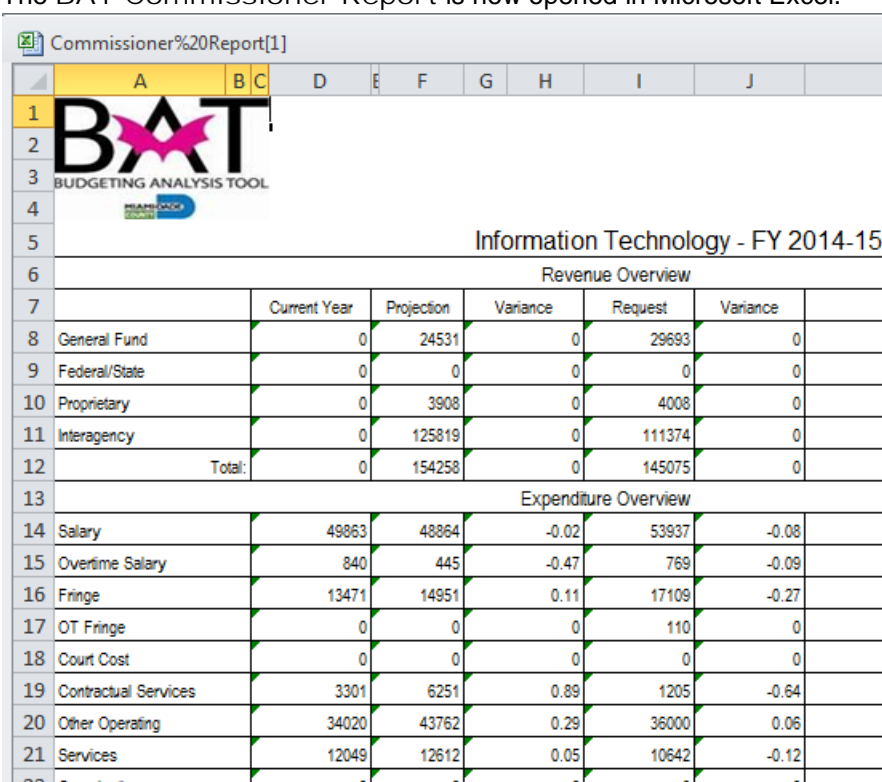
- Navigate the Hyperion Reports Structure
- Open the BAT Commissioner Report
- Respond to Prompts
- Export the Report from HTML to Excel
- Format BAT Committee Report in Excel
- Save final report in Budget Folder

| Step | Action | Notes |
|------|--------|-------|
| 1. | From the Hyperion Planning Workspace page, click the Explore button on the toolbar.  | |
| 2. | A list of folders display. The Commissioner Report is contained in the **BAT Reports** folder. <br><br> **Note**: Only Budget Analysts have access to the Commissioner Report.  | |

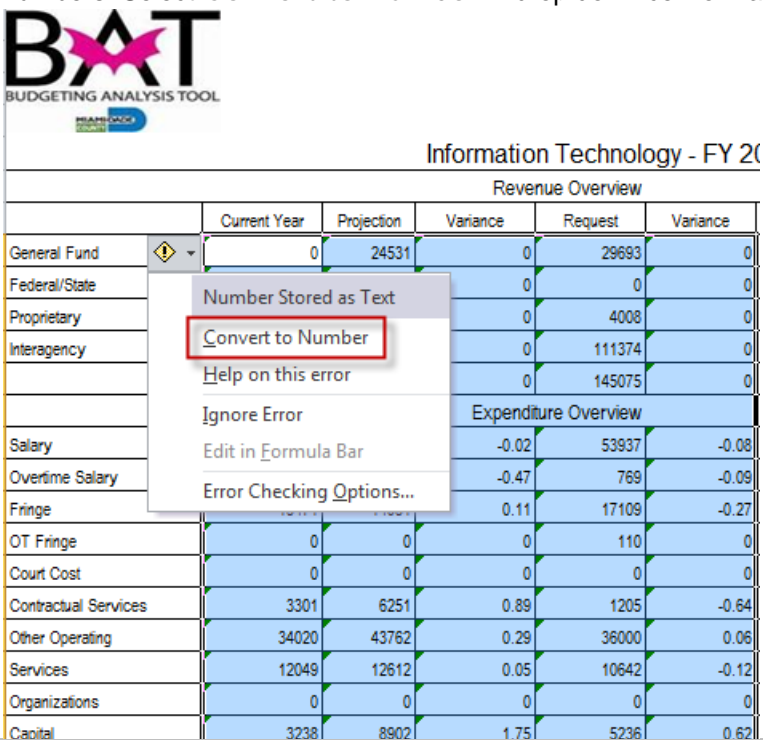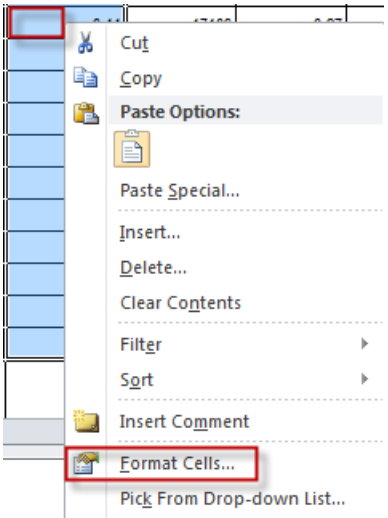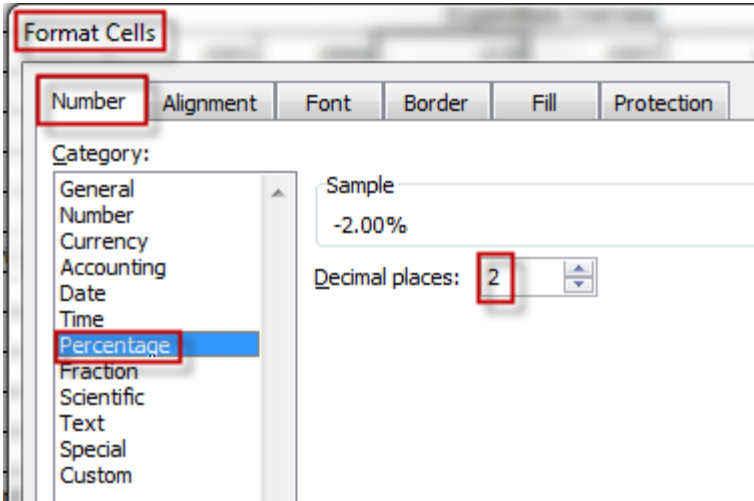| Step | Action | Notes |
|------|--------|-------|
| 3. | In the left pane, click the **+** next to the **BAT Reports** folder.<br><br>Folders<br>— Root<br>  — BAT Reports<br>    Human Capital Planning<br>    Operating Plan<br>  + BAT Training Reports | |
| 4. | Click the **Operating Plan** folder. The reports display in the content window.<br><br>Folders    /BAT Reports/Operating Plan<br>— Root    ! * Name ▲    Type<br>  — BAT Reports    BAT Appropriations Report  Financial Reporti…<br>    Human Capital Planning  BAT Expense by Entity  Financial Reporti…<br>    Operating Plan  BAT HCP-OP Allocation Check  Financial Reporti…<br>  + BAT Training Reports  BAT Performance Measures  Financial Reporti…<br>  + MDCBUD  BAT Revenue by Entity  Financial Reporti…<br>  + MDCOPTRN  BAT Revenue Report  Financial Reporti…<br>  Sample Content  BAT Selected Line Item Highlights  Financial Reporti…<br>  Shared Workspace Pages  Commissioner Report  Financial Reporti…<br>  + Users | |
| 5. | From the **Operating Plan** folder, double click the **Commissioner Report.**<br><br>BAT Appropriations Report  Financial Reporti…<br>BAT Expense by Entity  Financial Reporti…<br>BAT HCP-OP Allocation Check  Financial Reporti…<br>BAT Performance Measures  Financial Reporti…<br>BAT Revenue by Entity  Financial Reporti…<br>BAT Revenue Report  Financial Reporti…<br>BAT Selected Line Item Highlights  Financial Reporti…<br>Commissioner Report  Financial Reporti… | |

| Step | Action | Notes |
|------|--------|-------|
| 6. | The **Responds to Prompts** screen appears.<br><br>**Respond to Prompts**<br>The following prompts have been defined in the report. You may use the default values shown,<br><br>Prompt / Selection / Type<br>Enter Budgetary Entity: — Report<br>Enter Financial Entity: — Report<br>Enter Version: — Report<br>Enter Financial Entity: — Report | |
| 7. | On the **Respond to Prompts** screen you will see that there are 3 fields related to the **Entity Dimension** and 1 field for the **Version Dimension.**<br><br>This report is designed to run at the **Department Level**. Complete the fields as follows:<br><br>**Respond to Prompts**<br>The following prompts have been defined i... the default values shown, or select othe...<br><br>Prompt / Selection / Type<br>Enter Budgetary Entity: — ET — *2 digit department code* — Report<br>Enter Financial Entity: — EET — *3 digit department code (first letter is "E")* — Report<br>Enter Version: — Working — *Type "Working " in this field* — Report<br>Enter Financial Entity: — EET — *3 digit department code (first letter is "E")* — Report | **Note:** You may use the **Search Icon** to locate your department code in the Entity hierarchy. |

| Step | Action | Notes |
|---|---|---|
| 8. | Click **OK**. | |
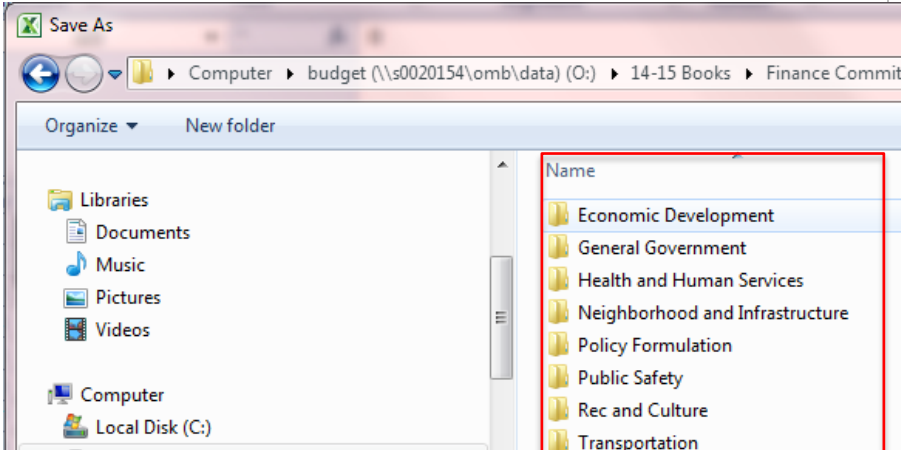
**Respond to Prompts**

The following prompts have been defined in the report. You may use the default values shown, or select other members.

| Prompt | Selection | | Type | Source |
|---|---|---|---|---|
| Enter Budgetary Entity: | ET | | Report | Report: Commissioner Report Grid: Grid1 |
| Enter Financial Entity: | EET | | Report | Report: Commissioner Report Grid: Grid1 |
| Enter Version: | Working | | Report | Report: Commissioner Report Grid: Grid1 |
| Enter Financial Entity: | EET | | Report | Report: Commissioner Report Grid: Grid2 |

Help                                                                 OK  Cancel  Reset

| Step | Action | Notes |
|---|---|---|
| 9. | The **BAT Commissioner Report** displays with the data for the Entities you selected. | |

**BAT** BUDGETING ANALYSIS TOOL   Information Technology - FY 2014-15 Department Budget Presentation

|  | Current Year | Projection | Revenue Overview Variance | Request | Variance | Explanation of Major Variance |
|---|---|---|---|---|---|---|
| General Fund | $0 | $24,531 | 0.00% | $29,693 | 0.00% | |
| Federal/State | $0 | $0 | 0.00% | $0 | 0.00% | |
| Proprietary | $0 | $3,908 | 0.00% | $4,008 | 0.00% | |
| Interagency | $0 | $125,819 | 0.00% | $111,374 | 0.00% | |
| Total: | $0 | $154,258 | 0.00% | $145,075 | 0.00% | |

|  | | | Expenditure Overview | | | |
|---|---|---|---|---|---|---|
| Salary | $49,863 | $48,864 | -0.02% | $53,937 | -0.08% | |
| Overtime Salary | $840 | $445 | -0.47% | $769 | -0.09% | |
| Fringe | $13,471 | $14,951 | 0.11% | $17,109 | -0.27% | |
| OT Fringe | $0 | $0 | 0.00% | $110 | 0.00% | |
| Court Cost | $0 | $0 | 0.00% | $0 | 0.00% | |
| Contractual Services | $3,301 | $6,251 | 0.89% | $1,205 | -0.64% | |
| Other Operating | $34,020 | $43,762 | 0.29% | $36,000 | 0.06% | |
| Charges for County Services | $12,049 | $12,612 | 0.05% | $10,642 | -0.12% | |
| Grants to Outside Organizations | $0 | $0 | 0.00% | $0 | 0.00% | |
| Capital | $3,238 | $8,902 | 1.75% | $5,236 | 0.62% | |
| Transfer | $5,479 | $5,029 | -0.08% | $5,257 | -0.04% | |
| Distribution of Funds in Trust | $0 | $0 | 0.00% | $0 | 0.00% | |
| Debt Services | $0 | $0 | 0.00% | $0 | 0.00% | |

| Step | Action | Notes |
|---|---|---|
| 10. | To open the report in MS Excel, click **File > Export > Excel**. | |

Navigate  File  View  Favorites  Tools  Help

New
Open
Open In
Close
**Export**  ▶  **Excel**
Preferences...        Word
                      PowerPoint
Log Off
Exit

| Step | Action | Notes |
|---|---|---|
| 11. | On the message screen, click the **Open** option. | |



| Step | Action | Notes |
|---|---|---|
| 12. | The **BAT Commissioner Report** is now opened in Microsoft Excel. | |

| Step | Action | Notes |
|------|--------|-------|
| 13. | Left click and drag mouse over cells with **Green Tabs** to convert cells to numbers. Select **Convert to Number** in drop down cell format menu.<br><br> | |
| 14. | Highlight the cells in the **Variance** Columns. Right-click and Format **Cell**.<br><br> | |

| Step | Action | Notes |
|------|--------|-------|
| 15. | From the **Format Cells** screen, choose the **Number** tab and select **Percentage**.  | Leave the **Decimal Places** set to **2**. |
| 16. | Click **OK**.  | |
| 17. | Under **Explanation of Major Variance**, type all required explanations for each line.  | |

| Step | Action | Notes |
|------|--------|-------|
| 18. | Once all information has been completed select **File > Save As.** | |
| 19. | From the **Save As** click **Budget(\\s0020154\omb\data) (o:) > 14-15 Books > Finance Committee Budget Presentation**, find your department's strategic file folder save file in folder. | |

**--END--**