Hyperion Planning

Budget Application

Instruction Manual

Version 1

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X63038
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System Access:

The Hyperion Planning application is web based and accessible by the following link:

https://bi.dartmouth.edu/workspace/index.jsp

At the screen below, enter your NetID and Password to gain access to the application.

Access the Budget application by selecting Navigate → Applications → Planning → Budget.
Data Entry Forms:
There are three different ways to approach the Budget forms. Which way you choose depends on how you prefer to work and the complexity of your budget. The three options are

- plan by activity
- plan by funding
- plan by natclass
Plan By Activity
Start in Common Forms, click "01. 1 Plan By Activity". This will give you an overall total for each activity that has budget or actuals for the years provided. This form is not a data entry form, it if for purposes of viewing budget totals by activity only.

Note: If an activity is not listed that needs to be budgeted to, send the missing activity:subactivity code to Amy Schaeffler for manual input.
In order to input budget data for a given activity, select the activity you would like to budget to, right click and select "Pivot Activity to Page".

The user will be taken to the 01.0.1. Plan By Activity Detail form, shown below.

Entity, Org and Activity is now selected. Note that the activity selected from the calling form is automatically populated here. User may choose to change activity directly through the drop down on this detail form, skipping the common form all together.

White cells are read/write.
Grey cells are read only.
Once users enter new data, the "dirty cells" (those that have been changed, but not yet saved to the database) will appear yellow:

Once you click the "Save" icon, your data will be saved to the database, and the yellow cell returned to white. All subtotals and totals will reflect your changes.

Once completed, user may choose to select a new activity via the activity drop down, and remain on this form. Or, the user may choose to go back to the calling (Common) form by right clicking within the form and selecting "Go Back To Plan By Activity".

And user will return to the common form and repeat for the next activity.
Plan By Funding

Start in Common Forms, click "01. 1 Plan By Funding". This will give you an overall total for each Funding that has budget or actuals for the years provided. This form is not a data entry form, it is for purposes of viewing budget totals by Funding only.

**Note:** If a funding is not listed that needs to be budgeted to, send the missing funding code to Amy Schaeffler for manual input.
In order to input budget data for a given funding, select the funding you would like to budget to, right click and select "Pivot Funding to Page".

The user will be taken to the 01.0.1. Plan By Funding Detail form, shown below.
Once users enter new data, the "dirty cells" (those that have been changed, but not yet saved to the database) will appear yellow:

Entity, Org and Funding is now selected. Note that the funding selected from the calling form is automatically populated here. User may choose to change funding directly through the drop down on this detail form, skipping the common form all together.

White cells are read/write. Grey cells are read only.

Save Icon
Once you click the "Save" icon, your data will be saved to the database, and the yellow cell returned to white. All subtotals and totals will reflect your changes.

Once completed, user may choose to select a new funding via the funding drop down, and remain on this form. Or, the user may choose to go back to the calling (Common) form by right clicking within the form and selecting "Go Back To Plan By Funding".

And user will return to the common form and repeat for the next funding.
Plan By Natclass

Start in Common Forms, click "01. 1 Plan By Natclass". This will give you an overall total for each Natclass that has budget or actuals for the years provided. This form is not a data entry form, it if for purposes of viewing budget totals by Natclass only.

Select Entity and Org you are viewing

Notice that the Natclass code is not a straight 4 digit number, as we would expect. The first 3 digits represent the SeqNo for the Divisional Category this Natclass belongs to on our Ops Statement. For example: Tuition Fall (Natclass 4012) is in both SeqNo 100 (Tuition-Undergraduate) and SeqNo 108 (Tuition-Graduate).
In order to input budget data for a given natclass, select the natclass you would like to budget to, right-click and select "Pivot Natclass to Page".

The user will be taken to the 01.0.1. Plan By Funding Detail form, shown below.

Entity, Org and Natclass is now selected. Note that the natclass selected from the calling form is automatically populated here. User may choose to change natclass directly through the drop down on this detail form, skipping the common form all together.

Once users enter new data, the "dirty cells" (those that have been changed, but not yet saved to the database) will appear yellow:
Once you click the "Save" icon, your data will be saved to the database, and the yellow cell returned to white. All subtotals and totals will reflect your changes.

Once completed, user may choose to select a new natclass via the natclass drop down, and remain on this form. Or, the user may choose to go back to the calling (Common) form by right clicking within the form and selecting "Go Back To Plan By Natclass".

And user will return to the common form and repeat for the next Natclass.
Add Existing Accounts to Sheets

For the sake of efficiency, each form only shows natclasses where there has been budget or actual activity. Frequently, a user may need to budget to a natclass that has not had any activity in the time period displayed. In this case, the user should select the form "01. 1 Add Existing Account to Sheets". The user selects the Org, Funding, Activity and Entity where this natclass is missing.

Select the Org, Funding, Activity and Entity.

Right click in the line that is missing and select "Add Natclass to Forms":

![Image of Oracle interface showing budgeting process](image-url)
A business rule will be run, and once completed you will see a message indicating that the natclass has been added to your forms:

Message box looks like an error – but it is a success!!!