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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 Quarterly Projections application by selecting Navigate → Applications → Planning → LRProj (Long Range Projection).
Data Entry Form
There is one form used for the Quarterly Projection data entry. Navigate to the Planner folder under forms and click "Projection: Data Entry".

For the purposes of this instruction manual, we will assume it is the first week of October, 2013, and we are entering FY14 Q1 projections.

Projection columns default to FY14 Budget for Q1. Will default to latest projection in current fiscal year for other quarters.

Variance column is automatically calculated after the projection is saved.

Open 255 character text fields for commentary on projection.

Divisonal Level Ops Statement Categories

YTD Actuals downloaded daily during the Quarterly Projection cycle.

Full Year Annual Budget divided by 4, multiplied by periods elapsed. Flat spread.

Last quarterly projection. In this case, column is blank because system was not in place.
Grey cells indicate read-only. Data may only be entered in white cells.

Enter new projection and comments. "Dirty cells" appear yellow, indicating that the data in them have not been saved to the server, yet. Variance column will not calculate until data is saved.
Saved data returns cell to white, variance is automatically calculated and displayed.
Provide Account

For the sake of efficiency, each form only shows accounts where there has been budget or actual activity. Frequently, a user may need to project on an account that has not been budgeted to, yet, or that has no activity. In this case, click the form "Provide Account".
Right click in the line that is missing and select "Add Account to Projection":

A business rule will be run, and once completed you will see a message indicating that the account has been added to your forms:

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