

## How to Do...tips

**Annotations - Planning Unit:** Annotations is another replacement for “Pillar Notes” at the level of ORG, version, scenario, e.g. ORG 2783 Working Forecast.

Enter from Edit menu or while submitting new budget as a cover note. To add text in the form, click in a cell or select a range of contiguous cells. Select **Edit > Cell Text**. In the Cell Text window, type the text that you want to add. You can add up to 1,500 characters of cell text for each cell. If you select a range of cells, you can enter cell text in a separate text box for each cell. Click on **[Submit]**. A blue indicator is displayed in the upper-right corner of the cell to show that it contains cell text. Cell text is only an online reference, and will not print.

**Business Rules:** A tool for calculating data in Hyperion Essbase. You must have access to a business rule to see it listed on the view pane or the Launch Business Rules dialog box. Any calculation scripts, which you have access to, are shown by plan type. When you launch a business rule, the rule can prompt you to enter information. After you successfully launch a business rule, the relevant data entry form is updated with the new data.

**Copy Adjust:** Instead of entering data to adjust by x%, try this: Copy any year-version-scenario to any other year-version-scenario for any selected ORG, FUND, OBJ, PROG, CREF or their parents, e.g. copy Current Expense from the FY07 Spring Budget to the FY07 Working Forecast, then adjust all by a factor. Careful, there is no going back once it is saved!

**Data - Entry Areas:** In the forms, click in a yellow cell to add data then click on **[Enter]**. Green cells are ‘read only’. If you want to enter data on a form make sure that your user preferences are all set to actual member names.

**Dimensions - Adding New:** Schools and Centers should contact the Budget Office to request new combinations for budgeting purposes at the beginning of each planning cycle.

**Expand Viewing Screen:** To expand the data entry area and forms area, you can collapse the **View Pane** and the **Masthead** in the start page to give you more room to view the form. Select **View** and deselect **View Pane** (left-side table) and **View Masthead** (top table with Hyperion name, application, and user).

**Mode - Basic and Advanced:** Basic mode lets you focus on a task list that an administrator or interactive user sets up for you. Advanced mode gives you more flexibility in selecting and working with forms. In Advanced mode, if task lists are assigned to you, you can open them in a secondary window so that you still have access to the view pane to work with forms. If you are working in Basic mode, select **View > Advanced**

**User Preferences:** Select **File > Preferences**. Choose from **Application Settings, Display Options, Printing Options, and User Variable Options**. It is important to click on **[Save]** when done.

**View Pane:** If the view pane is hidden, show it by selecting **View > View Pane**. In the lower-right corner of the start page, type your **search** criteria in the text box. Click on **[Find Previous]** or **[Find Next]** to search up or down the hierarchy of forms. Any forms that match your search criteria appear in the content area.



## Gotcha...bugs and reminders

*Some known bugs and overlooked steps that will help you overcome problems.*



REMEMBER to click on these buttons to activate a change or search.

**Average Annual Growth over 5 Years Formula:** Shows 100% on many of the data entry forms if nothing is budgeted at all. Just ignore it.

**Scroll Bar - Disappears:** Sometimes saving in a Data Entry form repaints the form without the scroll bar on the bottom. To see the scroll bar again, this tip usually works: resize your browser window to force it to recognize that a scroll bar is necessary.

**User Variables:** Sometimes when you change your user variables within **File > Preferences**, the changes do not automatically appear when you open a form. This is a known bug that Hyperion has not corrected in this software version. Resolve this by opening another form, then closing it. When you reopen your intended form, your user variables should appear.

**Member Selection - CREF or PROG:** Don't select “No CREF” or “No PROG.” In forms, set your preferences for “CREF-xx” where xx is your center. Setting your preferences will return dimensions specific to your School/Center.



# PennPlan & Reports Quick Reference Guide

## Overview of Hyperion Planning

Hyperion Planning is a web-based application that includes **PennPlan** and **Reports**. **PennPlan** provides tools to create forecasts and budgets. **Reports** provides summarized financial information from PennPlan and the general ledger for budgets and actuals, and contains historical information.

The URL to launch Planning is:

<http://www.budget.upenn.edu/plantools/>

Announcements to the user's list:

[PlanningUsers-L@lists.upenn.edu](mailto:PlanningUsers-L@lists.upenn.edu)

Email for help and questions:

[PlanningHelp-L@lists.upenn.edu](mailto:PlanningHelp-L@lists.upenn.edu)

To log on:

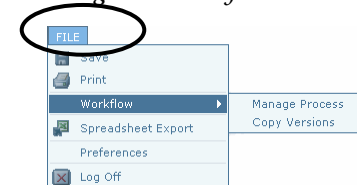
- 1 In the **UserName** text box, enter your user ID
- 2 In the **Password** text box, enter your password
- 3 In the **Application** drop-down list, select the appropriate Hyperion Planning application for your School or Center.
- 4 Click on **[Log On]**

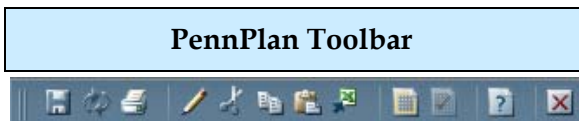
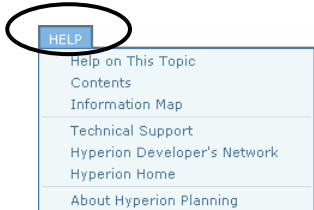
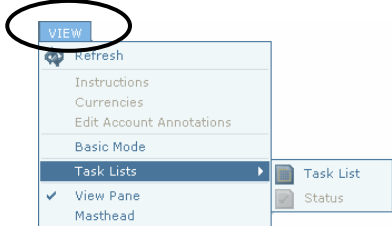
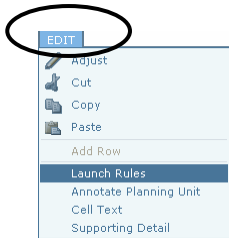
## PennPlan

### Menu Tool Icons

FILE EDIT VIEW TOOLS HELP

*Use the Menu options or select a Toolbar icon to navigate in the system.*





Not all the icons in the toolbar can navigate. For those that aren't active, you will need to navigate through the Menu Tool icons.

**Adjust:** In the form, put the cursor in a data cell to adjust the value. Select **Edit > Adjust**. To increase or decrease the cell's value, select **Increase By** or **Decrease By**. In the **Percent** text box, enter the percentage by which you want to increase or decrease the cell's value. Click on **[Adjust Data]**. Click on **[Save]**.

**Copy:** In the form, select the cell or group of cells that contain the data you want to copy. Click on **[Copy]** to copy the values in the selected cells to the Clipboard. Select the cell or group of cells to which you want to paste the data, then click on **[Paste]**. Paste inserts the contents of the Clipboard at the insertion point, and replaces any selection.

Hyperion Planning does not paste data into read-only cells.

**Help:** You can get help while you are working in Planning. Select **Help**, and then select an option: **Contents** or **Index** or **Search**. You can find documentation on procedures and navigating, **Frequently Asked Questions**, and a **Glossary**.

**Refresh:** After cells in a form are saved to the database, click on **[Refresh]** to get the latest values from the Essbase database.

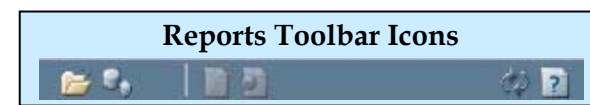
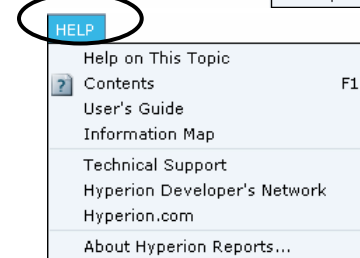
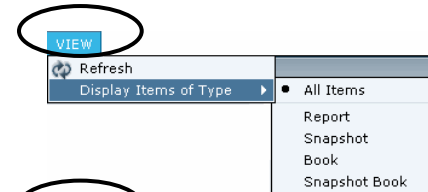
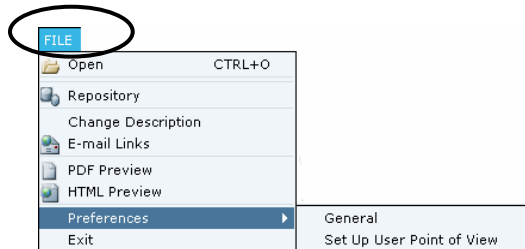
**Status:** To change the status of a planning unit: Select **File > Workflow > Manage Process**. The **Manage Process** page appears. From the **Scenario** drop-down list, select a scenario: **Budget** or **Forecast**. From the **Version** drop-down list, select a version: e.g. **Working**. Click on **[Go]**. Click on **[Change Status]**. From the **Select Action** drop-down list, select one of the following actions: **Promote**, **Sign Off**, **Reject**, or **Approve**. From the **Select Next Owner** drop-down list, select the next owner of the planning unit. Click on **[Submit]**.

**Task List:** If your administrator or an interactive user sets up task lists, you can view them in **Basic** or **Advanced** mode.

## Reports



Use either the Menu options or select an active Toolbar icon to navigate in the system.



**Repository:** Has three RCM folders: **Account Details**, **Analytical Tools**, and **Green Books**. **Account Details** includes **RevExp** and **Salary** reports and shows the 26 digit level. **Analytic tools** is in a single page format; each report has different columns according to where you are in the budget cycle. **Green Books** combines several reports to generate one contiguous report in a book format. **GAAP** is a coming attraction.

**PDF Preview:** Use **Preview** to display the report in **Adobe Acrobat Reader** inside the **Web browser**. **PDF Preview** ensures that **Reports** are properly formatted when printing or saving.

**HTML Preview:** Use **Preview** to preview the report in **dynamic mode**. The user **POV** is displayed above the report, and can be changed to regenerate the report to display current data for the selection. **Drilldown** is often available in **HTML mode**.