**Hyperion – Things To Know**

*The following is a list of helpful tips as you start entering data in Hyperion. This is not an exhaustive list, but rather a quick start guide. Please refer to the Hyperion training materials on our website for thorough instructions and utilize the UPK tool for assistance. You can access the training materials at* [*http://www.ok.gov/OSF/Project\_ENCORE/Training\_Materials/*](http://www.ok.gov/OSF/Project_ENCORE/Training_Materials/)*. In addition, you may contact your budget analyst with questions.*

* Make sure to first set up your  – User Variable Options tab: Scenario: Budget; Version: Agency; Year: FY16; Request: Current Service Level
* Data entry will be done in 
* You will only need to enter data for *Task 5 – Plan Agency Revenue* and *Task 6 – Plan Agency Expenditure*
* Use the following naming Convention for Fees Planning: Agency\_DeptID\_FeeName
* Under Task 6 – Ignore the first sub-task (Plan Statewide Program Expenses) and begin with the next sub-task (Plan Operational Expenses)
* Be sure to collapse side pane to view the Go arrow  under Plan Operational Expenses
* Make sure to check that you have the correct Point of View (POV) anytime you move from one task to another
* Remember to click the Go arrow  after selecting your POV, in order to activate your selection
* Be sure to use the lowest level of detail in your POV, which can be identified by the black lettering (avoid blue)
* If you are not budgeting by Operating Units, make sure to enter all data under the XXXXX\_NoOPR\_NoPRDs selection (with your business unit) on your POV
* Select HIGHER EDUCATION (INPUT) in your POV as the Statewide Program
* Use the 6-digit detail account codes, rather than the roll-up level, by using the expand buttons *Note:* If you want to budget at the roll-up level, you may select one detail account code as the roll-up.
* Yellow cells indicate data has not been saved. Click the save  button at the top left of your screen to save data.
* Aggregate your budget (Task 10) in order to view budget at roll-up level and to update reports
* If your variance column is red, this indicates significant difference from one year to the next
* To run Line Item reports go to  -> SOKPLAN/Line Item/EPM Reports
* The complete check box at the bottom of your screen, is not a submit button, it is only used to track your progress on the main Operation Planning screen