



# Hyperion Exercise Guide: General Navigation



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## GENERAL NAVIGATION

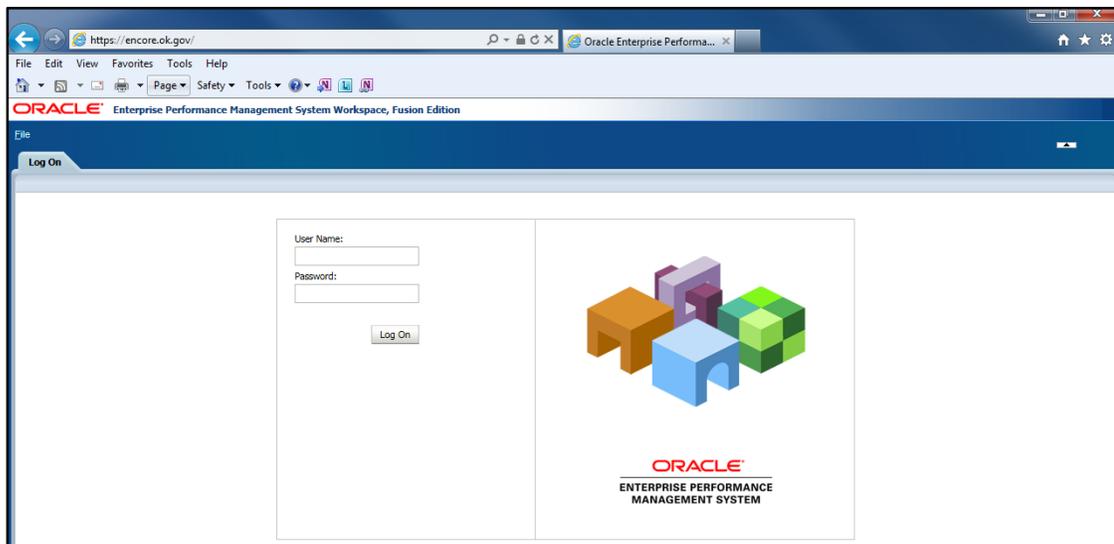
In the following sections you will learn to...

- Launch Hyperion Workspace
- Set General and Explore preferences
- Open Planning applications
- Add favorites
- Printing Reports

### Launching Hyperion Workspace

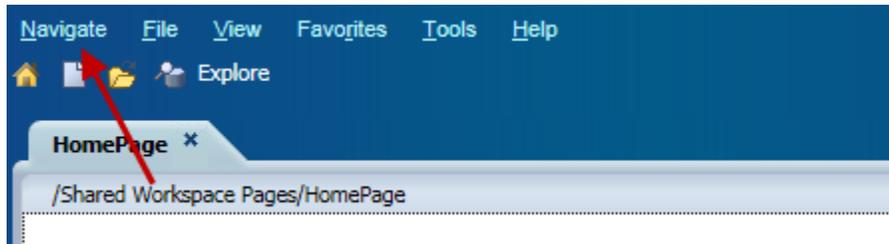
To start Planning, you log on to Hyperion Workspace with your user name and password.

1. Navigate to Hyperion Workspace: <https://encore.ok.gov>
2. Enter **User Name** and **Password**
3. Click “**Log On**”





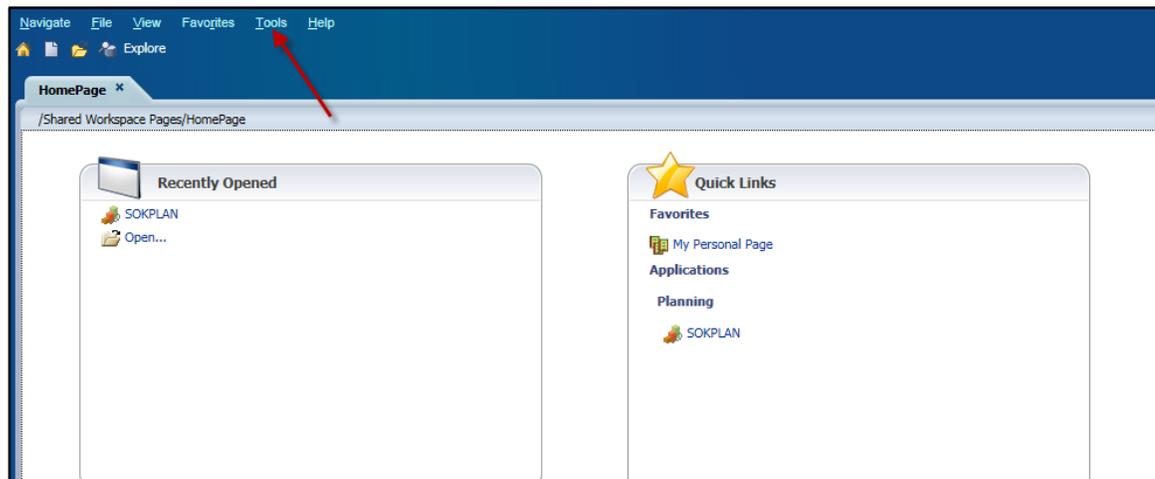
## Opening Hyperion SOK PLAN



1. Click the **Navigate** menu.
2. Click the **Applications** menu.
3. Click the **Planning** menu.
4. Select **SOKPLAN** application

## Changing Password

1. Click the Tools menu.



2. Click the **Change Password** menu.
3. Enter the desired information into the **Current Password**
4. Enter the desired information into the **New Password**
5. Enter the desired information into the **Confirm Password**
6. Click the **Save** button.

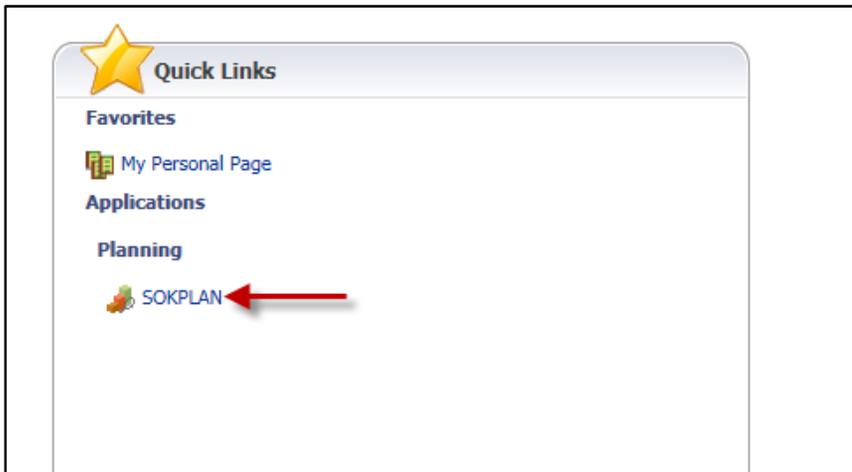


## Setting Preferences and Favorites

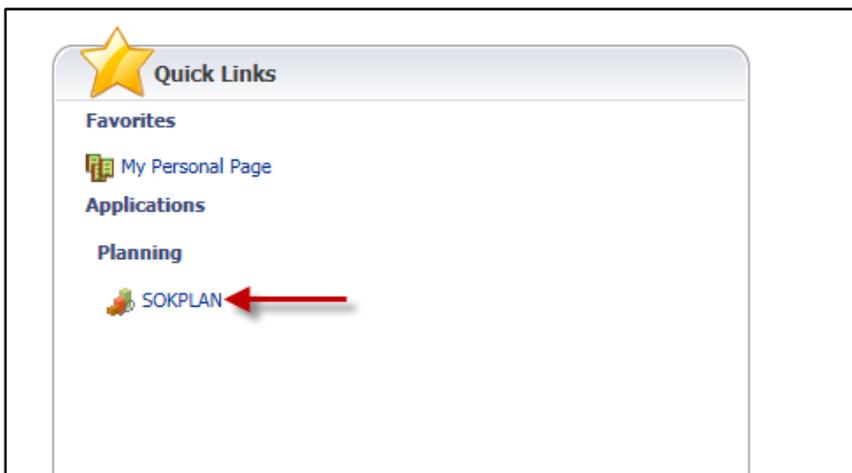
The first time you log into Hyperion you will need to set your preferences.

Setting Preferences

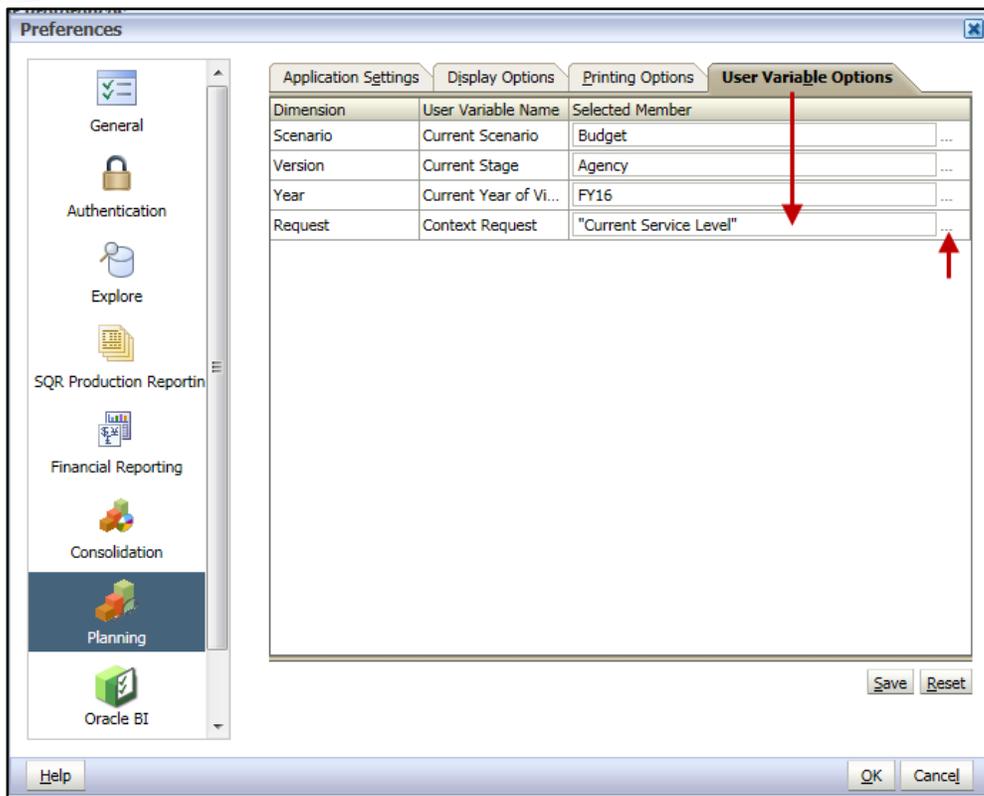
1. Open **SOK PLAN**



2. Click the **File** menu.

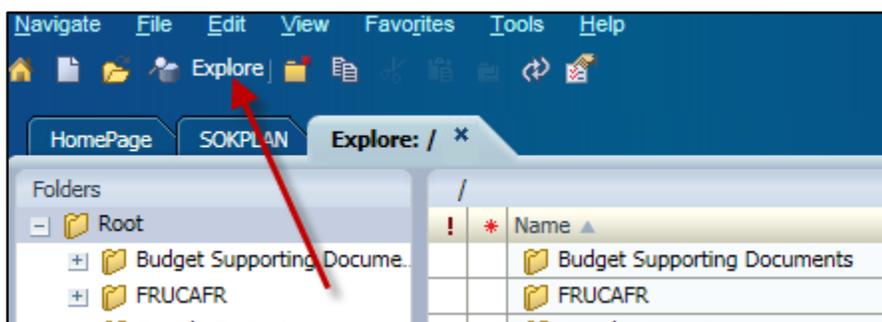


3. Click the **Preferences**
4. Click the **Planning** icon
5. Click on 4th tab called "**User Variable Options**"
6. Set the Dimensions according to year you will need choose the (...) icon, to make changes
7. Click the **Save** Button

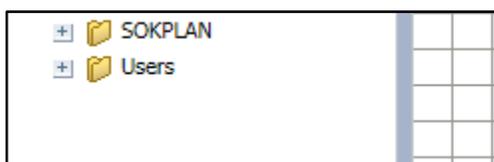


## Adding Favorites

Favorites enable you to quickly access frequently used items and documents.



1. Go to **Explore** Button
2. Click the + sign by **SOK PLAN**



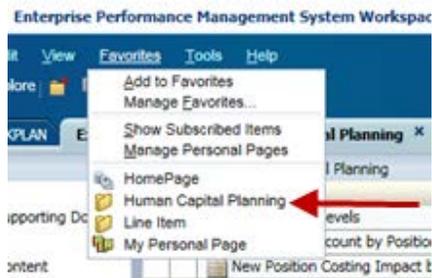


# OMES – Project Encore Training Manual

3. Select folder or form to be placed in favorites ie. Capital Planning, Human Capital Planning.

Shared workspace Pages	Form and Headcount by Position	Financial Reporti...	5/15/14 7:20 PM
50KPLAN	New Position Costing Impact by E...	Financial Reporti...	6/9/14 1:49 PM
folder	New Position Costing Impact by E...	Financial Reporti...	5/15/14 7:20 PM
Capital Planning	Position Adjustment	Financial Reporti...	6/9/14 1:49 PM
Human Capital Planning	Position Adjustment	Financial Reporti...	5/15/14 7:20 PM
Line Item			

4. Click the Favorites menu.
5. Click the Add to Favorites list item.

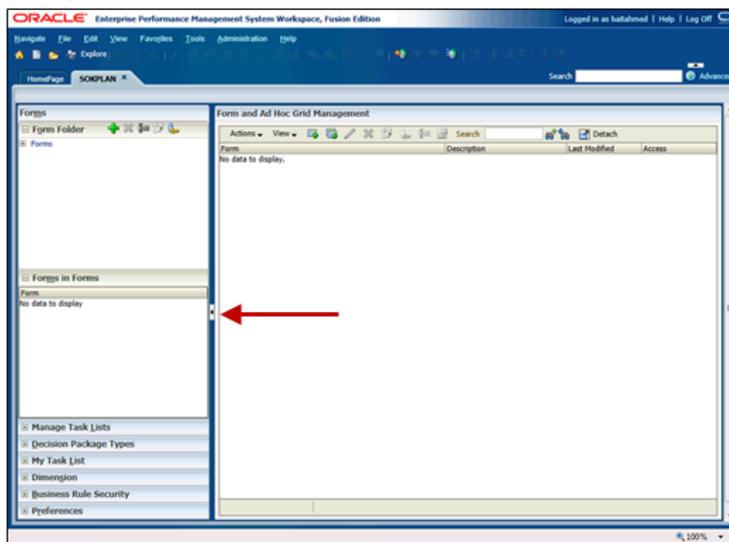


\*\*\*Notice that the folder is now listed as a favorite. \*\*\*You successfully added a folder to your favorites.

## Hide View Pane and Content Area

For a maximum view of content area user can hide view pane

1. Click the Collapse Pane button.



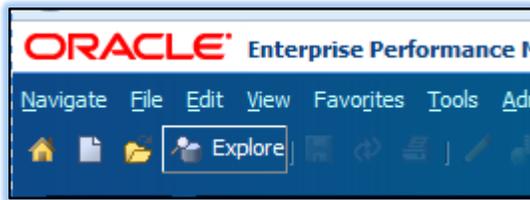
2. The View pane is hidden and the content area page is expanded.



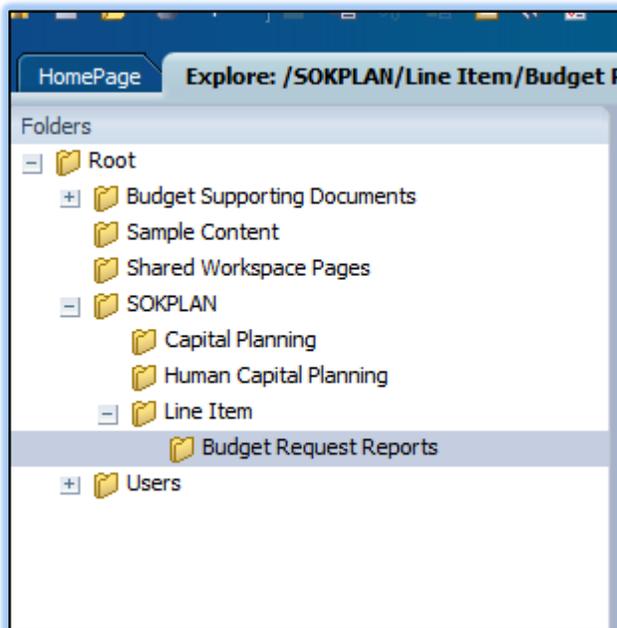
# REPORTS

## Navigation to Reports Folders

To run reports, you will first need to navigate to the Explore workspace at the top-left of the screen:



Once in the Explore workspace, go to the SOKPLAN folder, then the Line Item folder, and finally the Budget Request Reports folder:





## Operational Planning Reports

- [Operational Planning - Provide or verify Agency Information](#)
  - Report Name: Agency-Organizational Information
- [Operational Planning - Provide Agency Program Information](#)
  - Report Name: Program Information-Performance Measures
- [Operational Planning - Identify Legislation Needs](#)
  - Report Name: Legislation Needs
- [Operational Planning - Operational Decision Package](#)
  - Report Name: Decision Package Detail Report  
*This report is located in a different place than the other reports. Details are on Page 8*

## Strategic Planning Reports

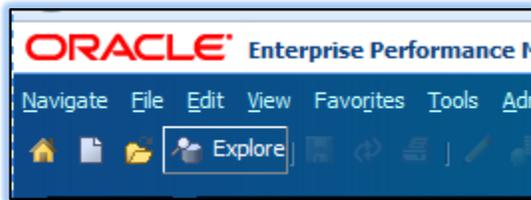
- [Strategic Planning - Provide Executive Summary](#)
  - Report Name: Strategic Plan Report
- [Strategic Planning – Goal Setting](#)
  - Report Name: Strategic Plan Report KPMs



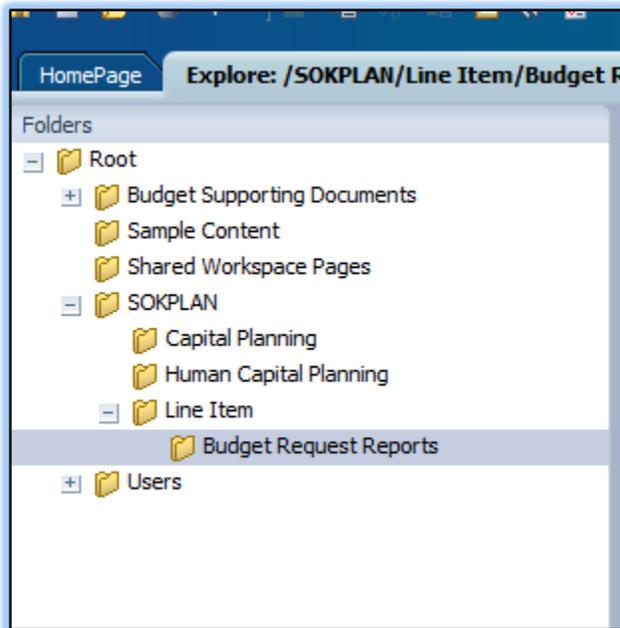
## Operational Planning – Provide or verify Agency Information

### Report Name: Agency-Organizational Information

To run this report, you will first need to navigate to the Explore workspace at the top-left of the screen:



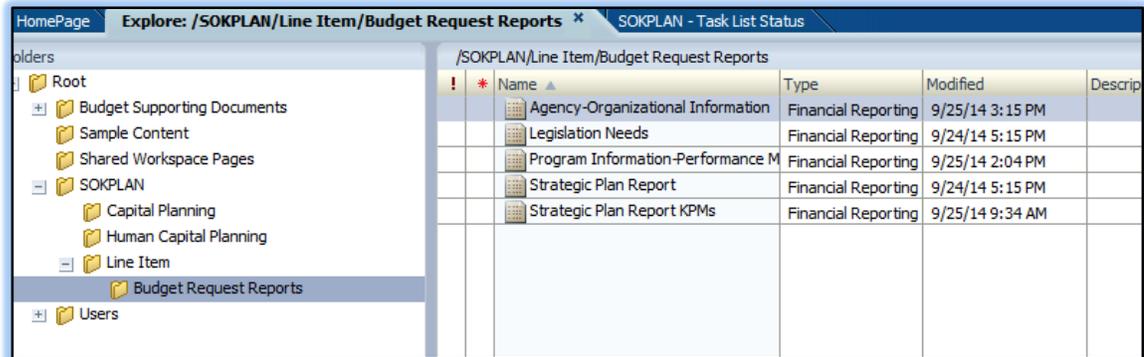
Once in the Explore workspace, go to the SOKPLAN folder, then the Line Item folder, and finally the Budget Request Reports folder:



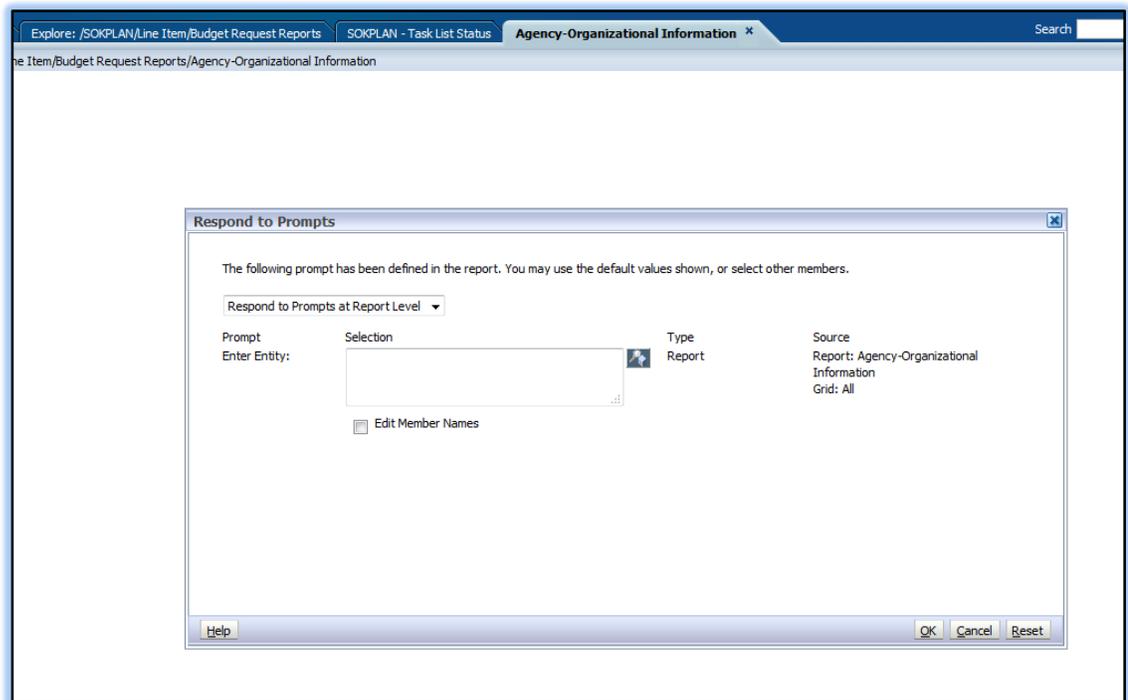
Then double-click on the Agency-Organizational Information report to start it:



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A new page will open with a prompt:



Make sure the 'Edit Member Names' checkbox is checked to allow for typing in the Selection field:



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Selection Type Report

Edit Member Names

Then type in your agency number (use the full 5 digits):

Selection Type Report

30900

Edit Member Names

Then hit the OK () button to run the report. Once run, the report should come up within Hyperion:

Page: 30900 - Civil Emergency Management

<b>Mailing Address</b>	P.O. BOX 53365 2401 N. Lincoln Boulevard Will-Rogers/Sequoyah Tunnel Oklahoma City, Oklahoma 73152
<b>Agency Head:</b>	Mr. Albert Ashwood
Title:	Director
Phone:	405-521-2481
Fax:	405-521-4053
Email:	albert.ashwood@oem.ok.gov
<b>Alternate Contact Person:</b>	Ms. Michelann Ooten
Title:	Deputy Director
Phone:	405-521-2481
Fax:	405-521-4053
Email:	michelann.ooten@omes.ok.gov
<b>Governing Body:</b>	-
<b>Description of Governing Body:</b>	
<b>Agency Mission Statement:</b>	The mission of the Department of Emergency Management is to minimize the effects of attack, technological and natural disasters upon the people of Oklahoma by preparing and exercising preparedness plans, assisting local government sub-divisions with training for and mitigation of disasters, and by coordinating actual disaster response and recovery operation.



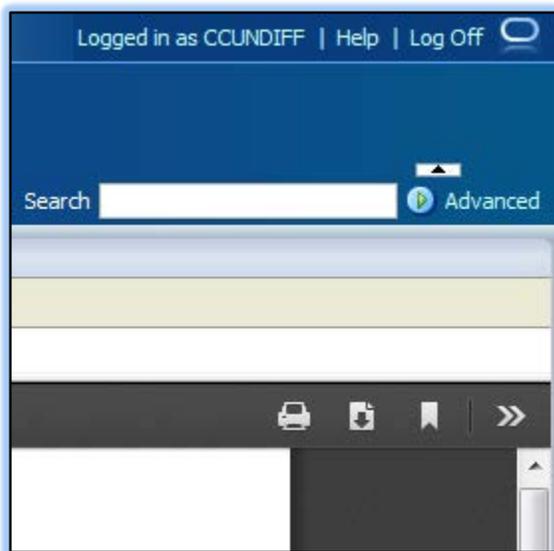
## OMES – Project Encore Training Manual

To turn that report into a PDF file, click on the PDF icon () at the top-left of the screen:



The PDF file will open within Hyperion. You can then print it using the Print icon (  ) at the top-right of the screen:

Or you can download it and save it using the Download button (  ), also at the top-right of the screen.

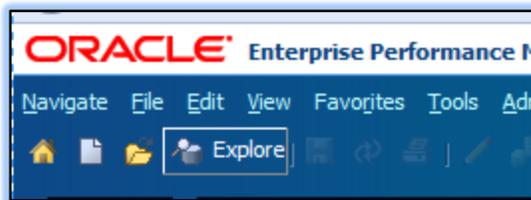




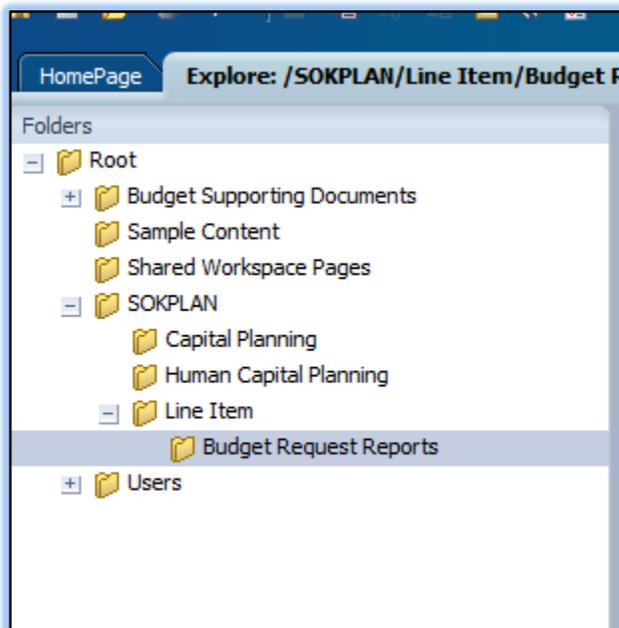
## Operational Planning – Provide Agency Program Information

### Report Name: Program Information-Performance Measures

To run this report, you will first need to navigate to the Explore workspace:



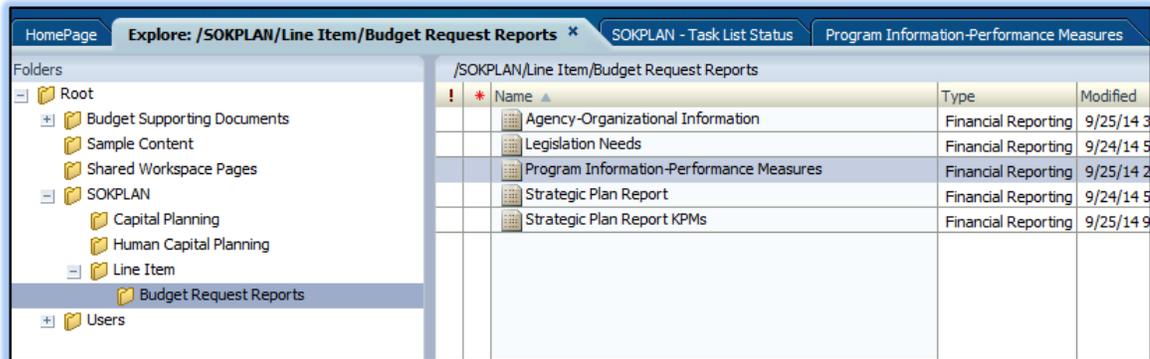
Once in the Explore workspace, go to the SOKPLAN folder, then the Line Item folder, and finally the Budget Request Reports folder:



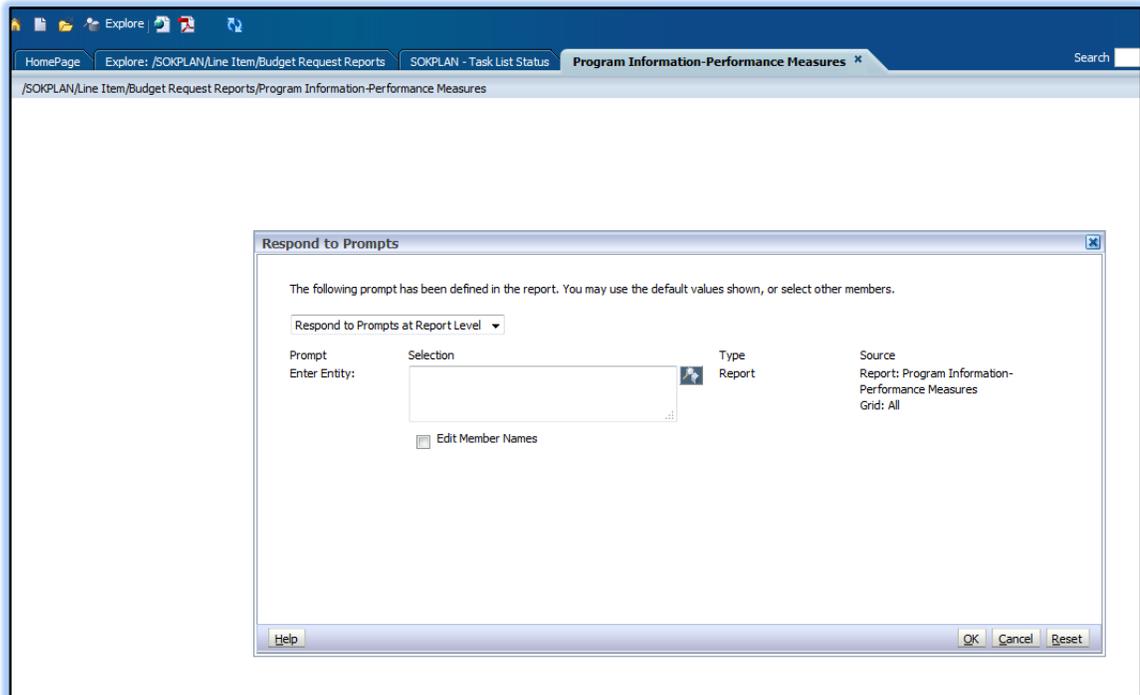
Then double-click on the Program Information-Performance Measures report to start it:



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A new page will open with a prompt:



Make sure the 'Edit Member Names' checkbox is checked to allow for typing in the Selection field:



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Selection

Type Report

Edit Member Names

Then type in your agency number (use the full 5 digits):

Selection

41500

Type Report

Edit Member Names

Then hit the OK () button to run the report. Once run, the report should come up within Hyperion:

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Logged in as CCLINDIFF

Navigate File View Favorites Tools Help

HomePage SOKPLAN Explore: /SOKPLAN/Line Item/Budget Request Reports Program Information-Performance Measures Search

/SOKPLAN/Line Item/Budget Request Reports/Program Information-Performance Measures

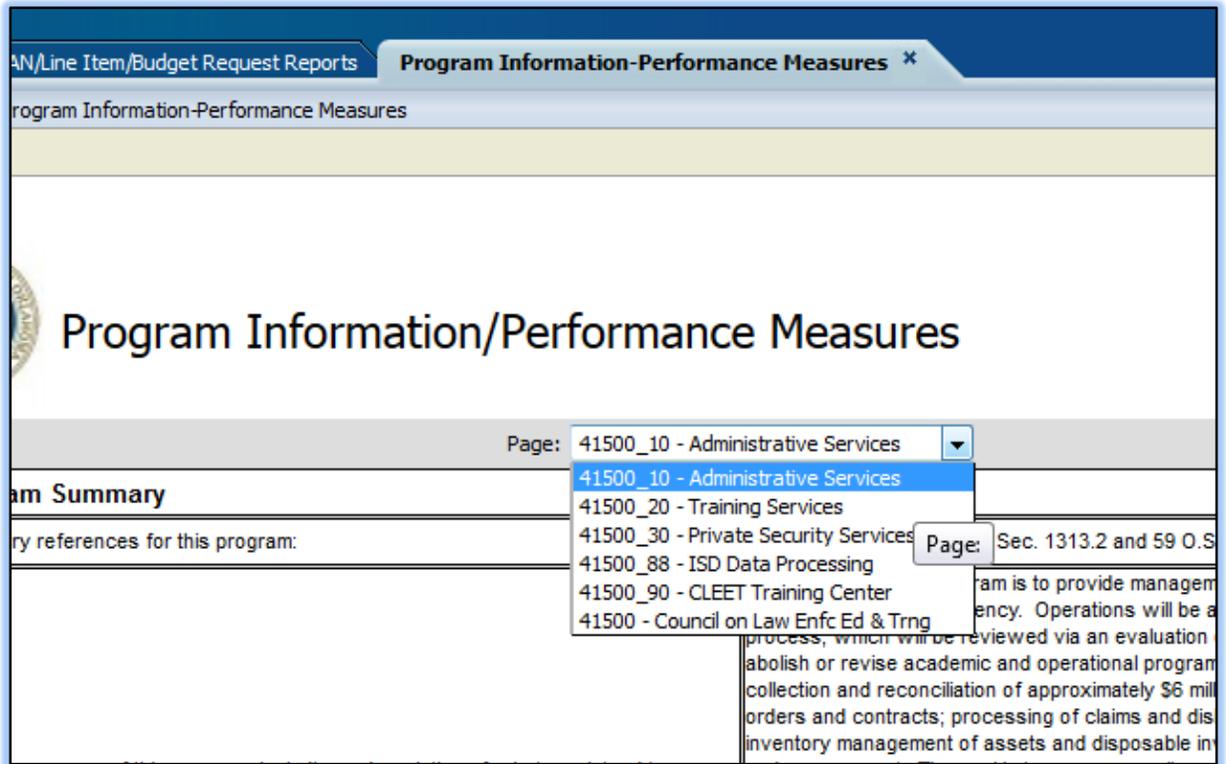
Page: 41500\_10 - Administrative Services

Agency Program Summary	70 O.S. Sec. 3311, 20 O.S. Sec. 1313.2 and 59 O.S. Sec. 1750.1-12
Provide the statutory references for this program:	
Please describe the purpose of this program, including a description of what you intend to accomplish:	The purpose of this program is to provide management and administrative operations necessary for the function of the agency. Operations will be accomplished through the internal budget process, which will be reviewed via an evaluation of performance measures designed to initiate, abolish or revise academic and operational programs. Activities within this program include the collection and reconciliation of approximately \$6 million annually in fees; preparation of purchase orders and contracts; processing of claims and disbursements of warrants for the same; inventory management of assets and disposable inventory items; budget preparation, revisions and management. The goal is to ensure compliance with state rules and laws governing fiscal activities and generally accepted accounting principles. CLEET serves as the central depository for Oklahoma Law Enforcement training and certification records. Resources will be used effectively and efficiently in creating and maintaining government records. Property management is included in the sub-activity of Facilities. This includes building and grounds maintenance, provides for daily operation, preventative maintenance, planned maintenance and future development of areas on campus to expand training opportunities. The goal is to comply with state and federal regulations regarding facilities, and to provide safe and operational facilities to conduct agency business.
What are the direct benefits of this program to society?	The public may contact one central location to verify the status of a peace officer or license holder. Society benefits from the development and enforcement of standards to which peace officers and license holders can be held.
	Other agencies benefit from the central records that CLEET maintains in that CLEET can track and provide circumscribed information on individuals throughout their career. Theoretically, such

If information was entered at multiple levels (i.e. at the Department, Division, or Agency level), then that data can be viewed by selecting the appropriate entity from the dropdown box located in the middle of the report:



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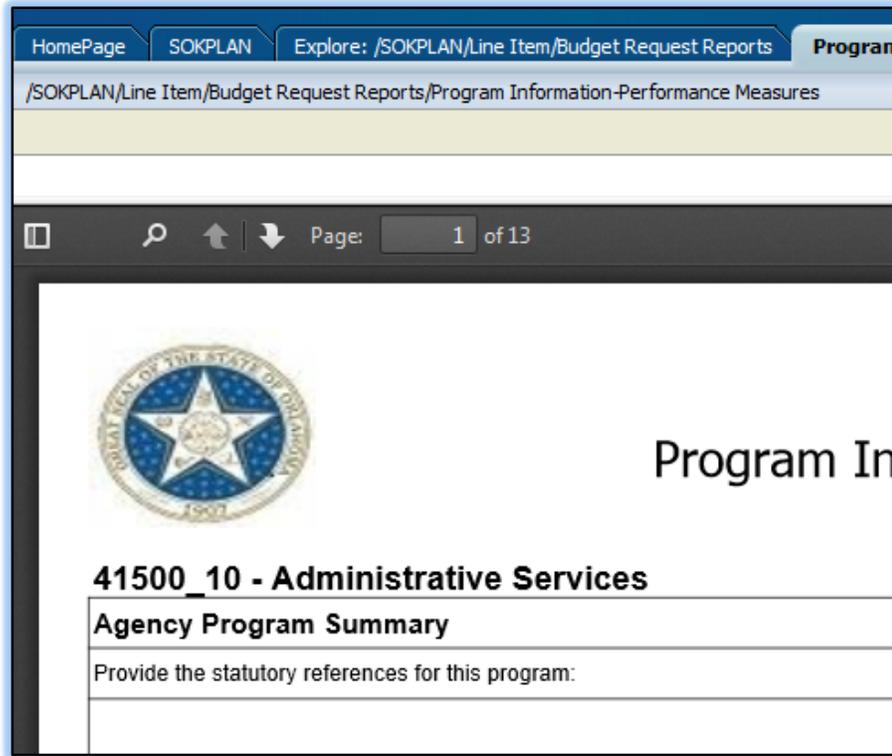
To turn that report into a PDF file, click on the PDF icon () at the top-left of the screen:



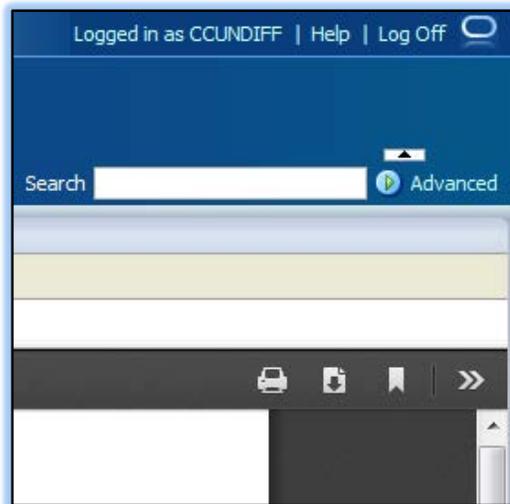
The PDF file will open within Hyperion. If information was entered at multiple levels, the PDF of the report should show all of them. The entity will be shown at the top left of the report. This example will be for the division level entity of 41500\_10:



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You can then print it using the Print icon () at the top-right of the screen:



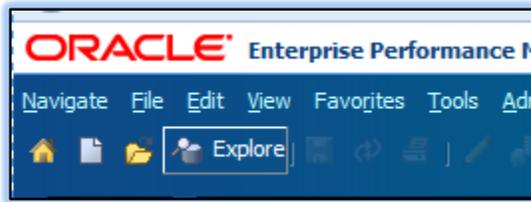
Or you can download it and save it using the Download button () , also at the top-right of the screen.



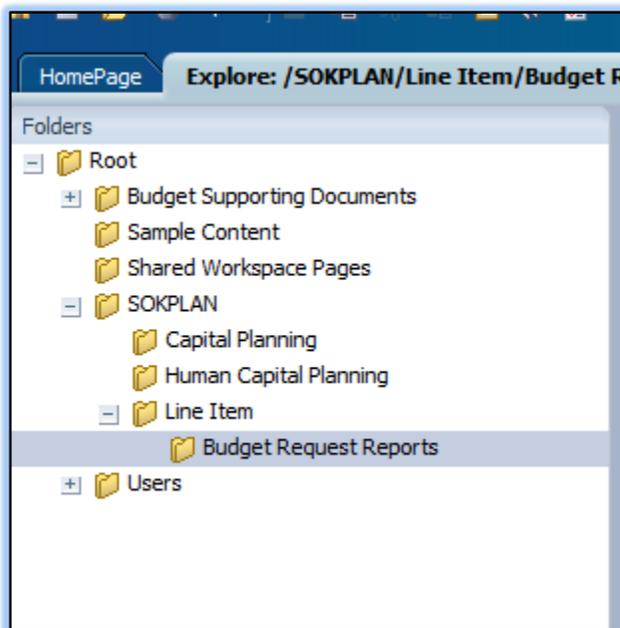
## Operational Planning – Identify Legislation Needs

### Report Name: Legislation Needs

To run this report, you will first need to navigate to the Explore workspace at the top-left of the screen:



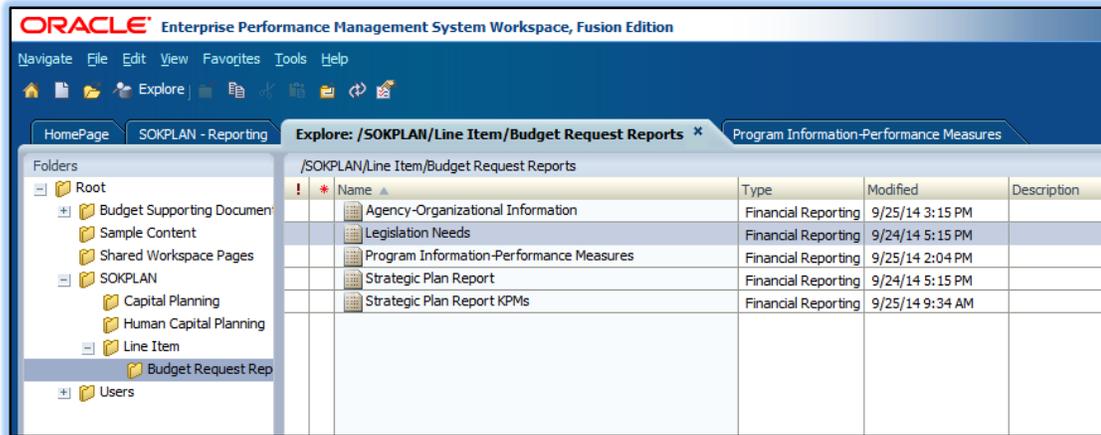
Once in the Explore workspace, go to the SOKPLAN folder, then the Line Item folder, and finally the Budget Request Reports folder:



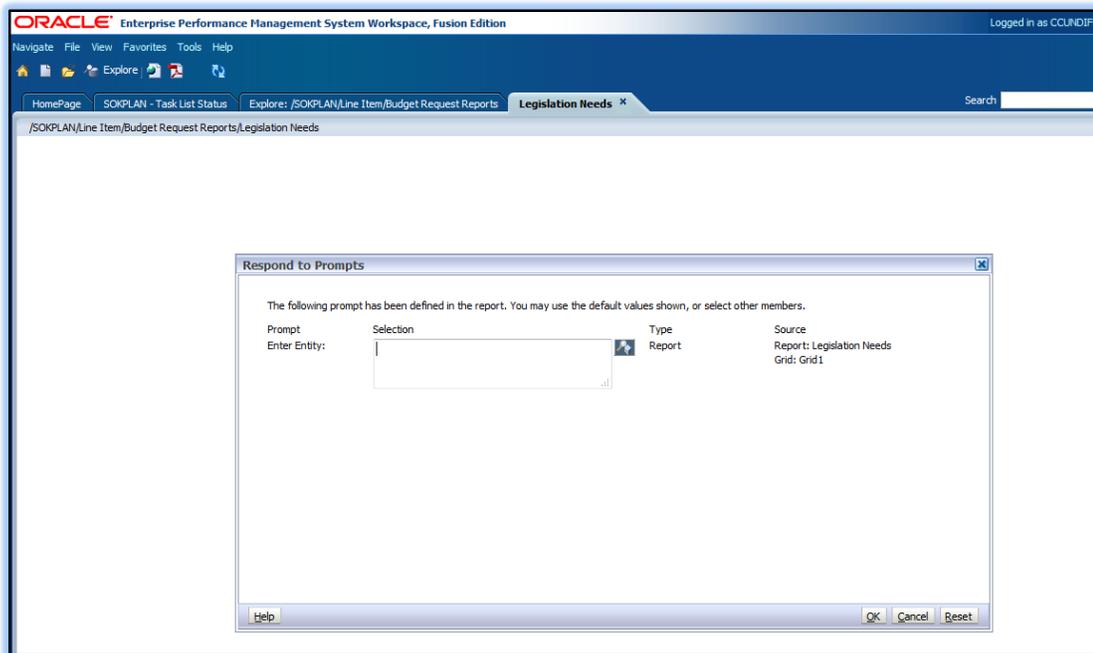
Then double-click on the Legislation Needs report to start it:



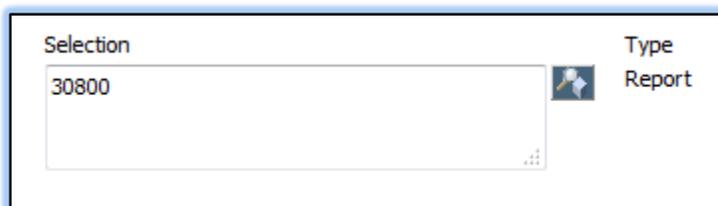
# OMES – Project Encore Training Manual



A new page will open with a prompt:



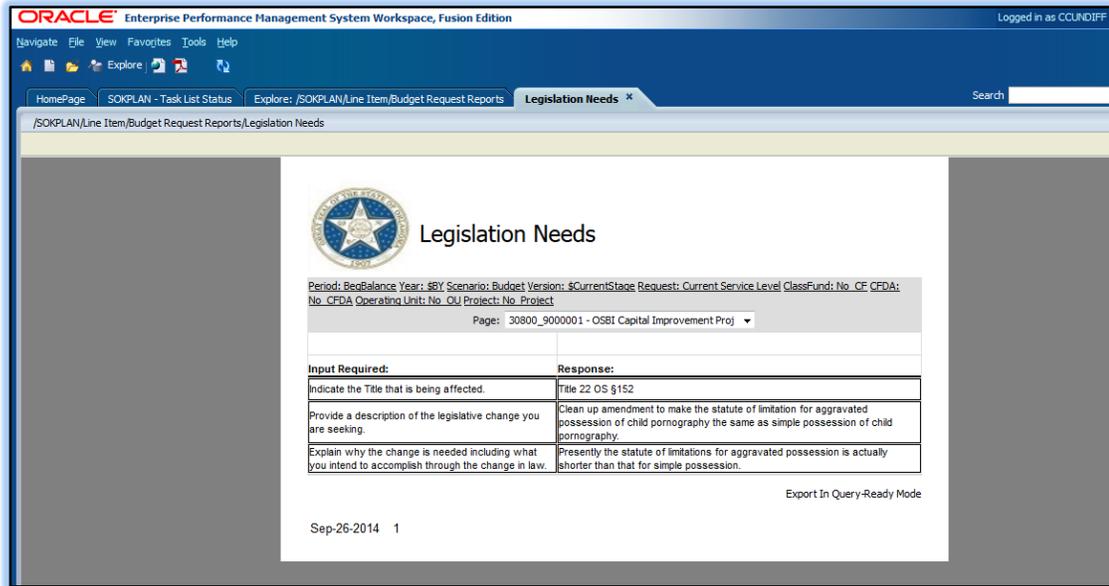
Then type in your agency number (use the full 5 digits):





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Then hit the OK () button to run the report. Once run, the report should come up within Hyperion:



If information was entered at multiple entities (i.e. at the Department 9000001, 9000002, etc.), then that data can be viewed by selecting the appropriate entity from the dropdown box located in the middle of the report:



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Period: BegBalance Year: \$BY Scenario: Budget Version: \$CurrentStage Request: Current Service Level ClassFund: No CF CFDA: No CFDA Operating Unit: No OU Project: No Project

Page: 30800\_9000001 - OSBI Capital Improvement Proj

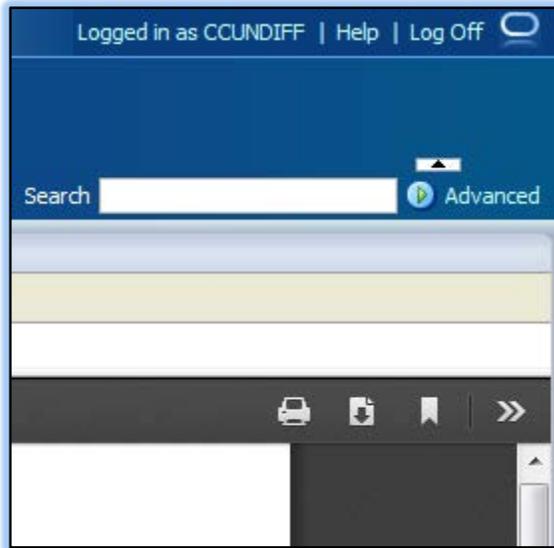
**Input Required:**

Indicate the Title that is being affected.	30800_9000001 - OSBI Capital Improvement Proj	Page:
Provide a description of the legislative change you are seeking.	30800_9000002 - AFIS Upgrade Project	
Explain why the change is needed including what you intend to accomplish through the change in law.	30800_9000040 - Capital Improv Projects-Grants	
	30800_9000088 - Capital Improve Projects - DP	
	30800_9000089 - Capital Improve Projects-AFIS	
	30800_9000176 - FSC/HSC Capital Equipment	
	limitation for aggravated possession of child pornography the same as simple possession of child pornography.	
	Presently the statute of limitations for aggravated possession is actually shorter than that for simple possession.	

Export In Query-Ready Mode

To turn that report into a PDF file, click on the PDF icon () at the top-left of the screen:

The PDF file will open within Hyperion. You can then print it using the Print icon () at the top-right of the screen:

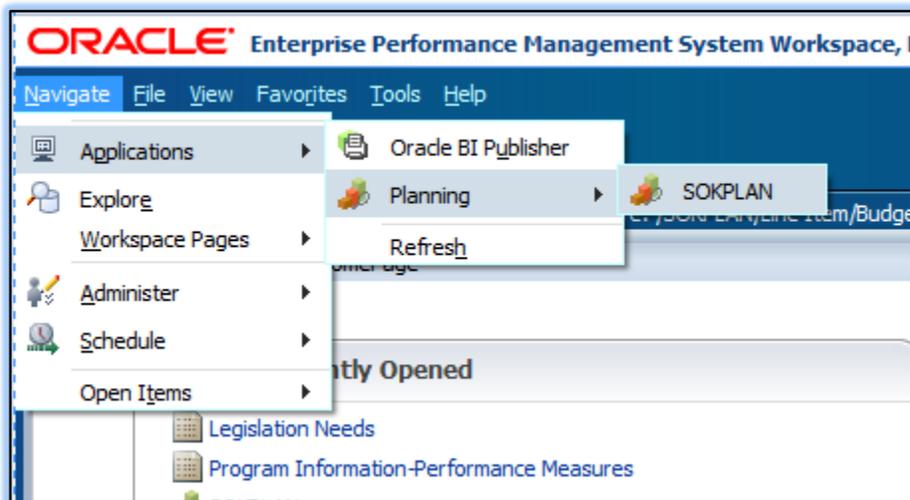


Or you can download it and save it using the Download button () , also at the top-right of the screen.

## Operational Planning – Operational Decision Package

### Report Name: Decision Package Detail Report

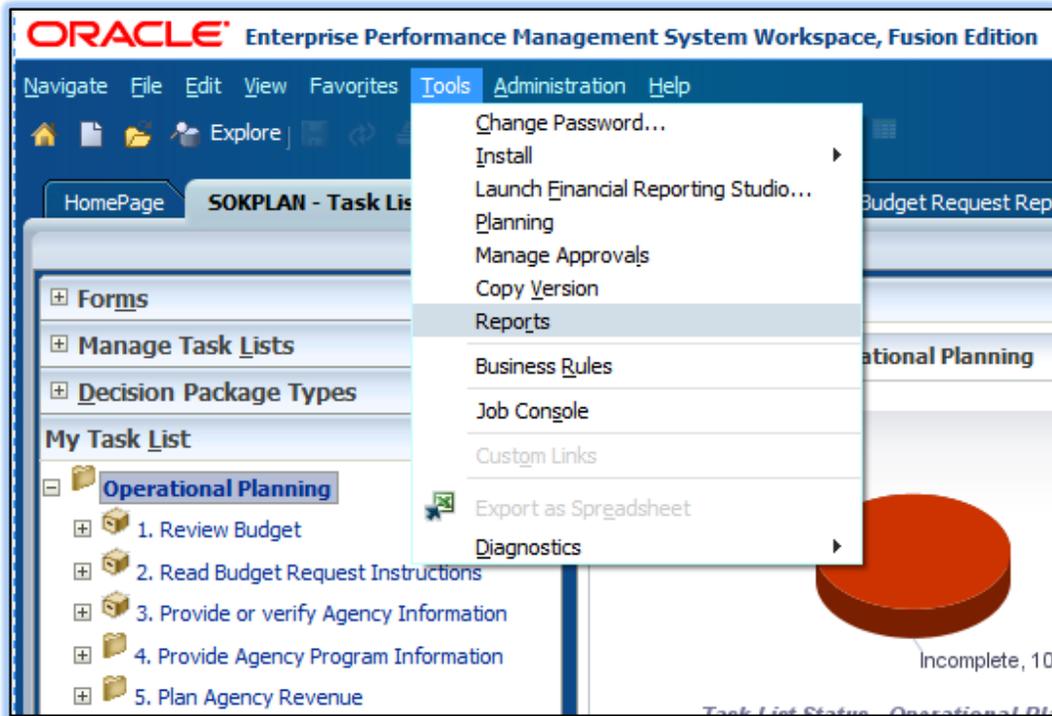
To run this report, you will first need to go to the SOKPLAN application. You can do this by going to the Navigate menu at the top-left of the screen:



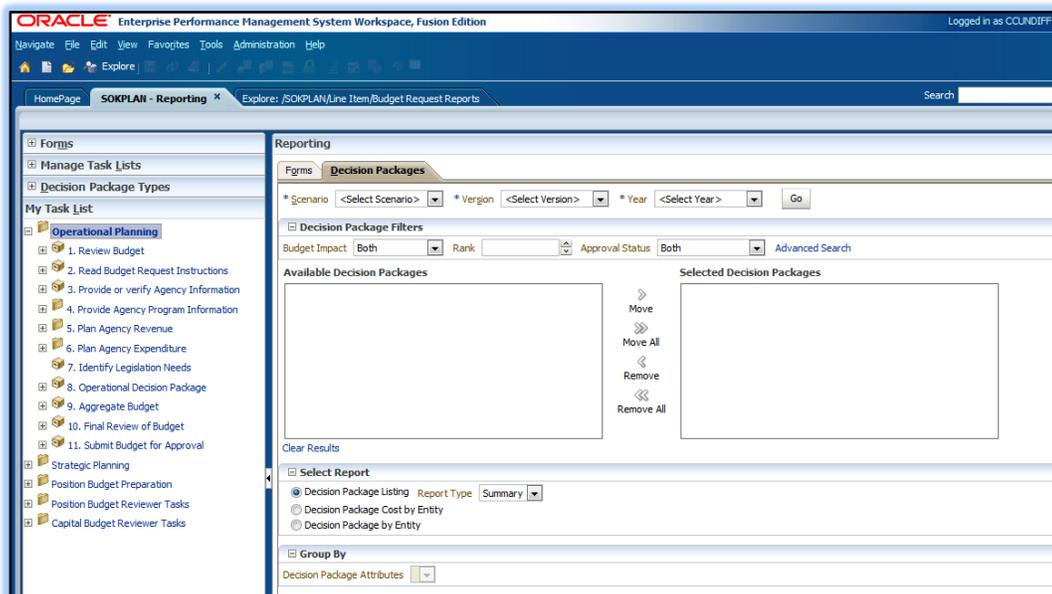


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Once in the SOKPLAN application, you will need to go to the Tools menu at the top-left of the screen, then select the Reports option.



Once the Reports option is selected, a new screen should appear in Hyperion with a Decision Package tab:





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In order to run the reports, you will first need to select the appropriate point-of-view (POV):

\* Scenario <Select Scenario> \* Version <Select Version> \* Year <Select Year> Go

For the FY16 Budget Requests, here are the selections you will need to make:

\* Scenario Budget \* Version Agency \* Year FY16 Go

Then load the POV by selecting the Go button (Go). Once loaded, the Available Decision Packages portion of the screen should populate with the decision packages your agency has created:

**Reporting**

Forms **Decision Packages**

\* Scenario Budget \* Version Agency \* Year FY16 Go

**Decision Package Filters**

Budget Impact Both Rank Approval Status Both [Advanced Search](#)

**Available Decision Packages**

<input type="checkbox"/>	03000_DP1
<input type="checkbox"/>	13100_DP2_ADD CARRYOVER TO THE FY2015 BWP
<input type="checkbox"/>	18500_DP1_CORPORATION COMMISSION
<input type="checkbox"/>	27000_DP1_Fund2016Elections
<input type="checkbox"/>	27000_DP2_SoftwareSupport
<input type="checkbox"/>	27000_DP3_CountySecretarySalary
<input type="checkbox"/>	27000_DP4_ReplaceInterest
<input type="checkbox"/>	32600_Reinstate_funds
<input type="checkbox"/>	32600_travel
<input type="checkbox"/>	35300 - Administrative Staff Assistant (1 FTE)

Clear Results

**Select Report**

Decision Package Listing Report Type Summary

Decision Package Cost by Entity

Decision Package by Entity

**Selected Decision Package**

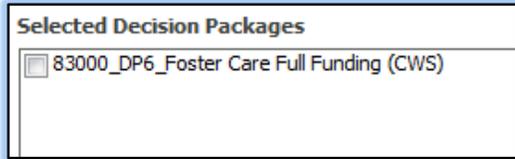
Select the package you wish to run the report for by checking the checkbox next to it:

83000\_DP6\_Foster Care Full Funding (CWS)



# OMES – Project Encore Training Manual

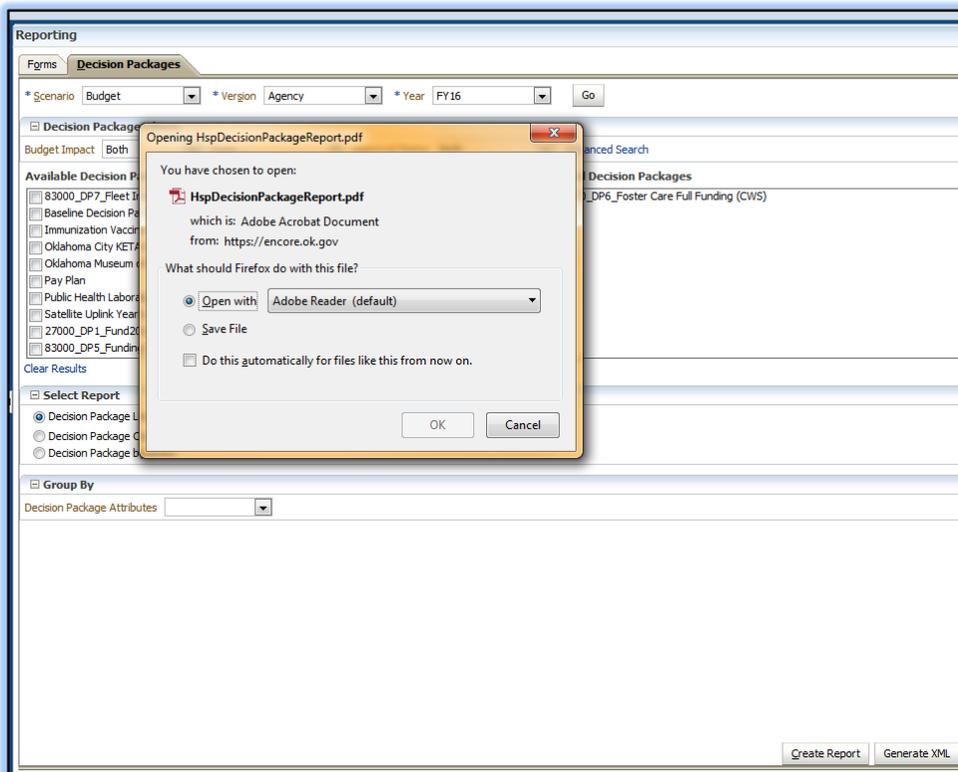
Then move it over to the Selected Decision Packages portion by hitting the Move button ():



Once it is selected, choose the Detail report option from the dropdown list on the Decision Package Listing:



Then proceed to click the Create Report () button listed at the bottom-right hand of the screen. Doing so will prompt you with a window asking if you would like to save the report, or open it as a PDF:

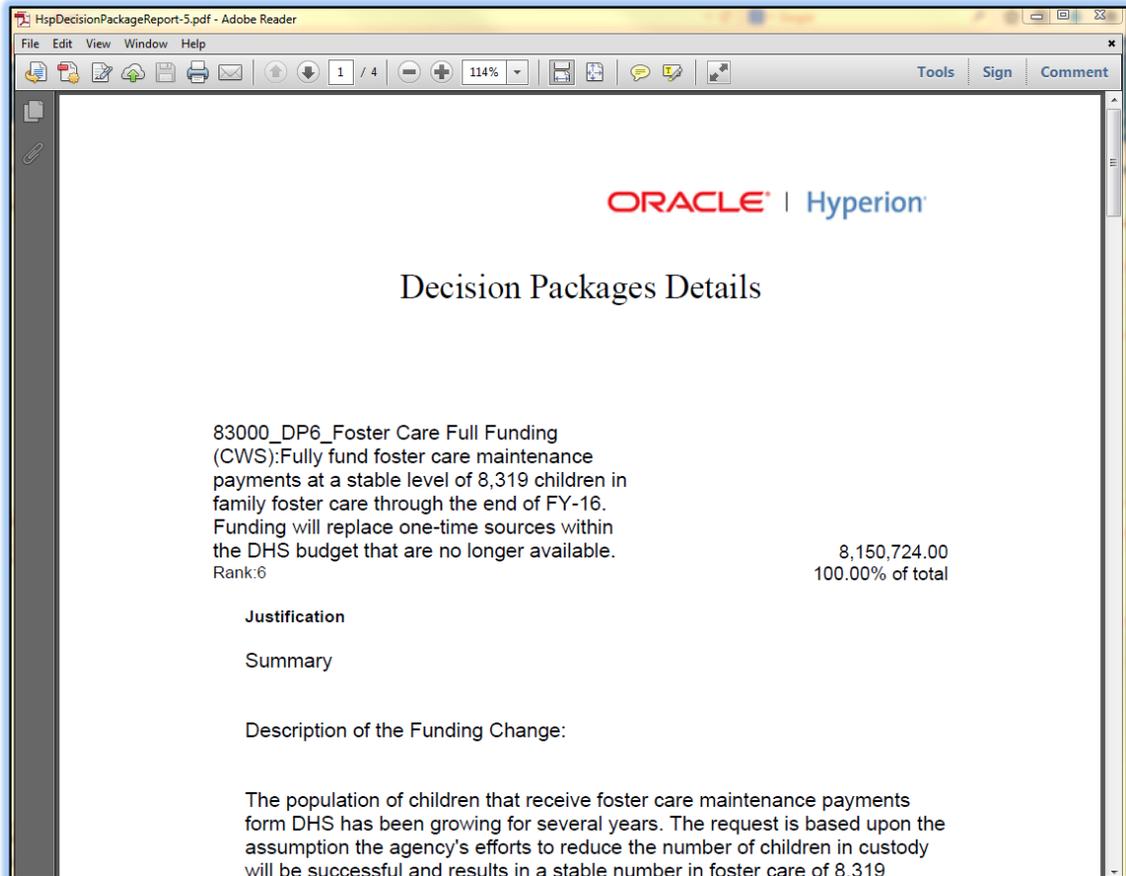




# OMES – Project Encore

## Training Manual

If you have Adobe Reader, it should then open a window with your Decision Package Detailed report:

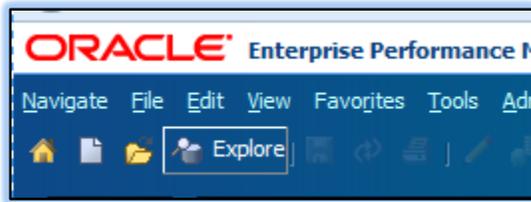




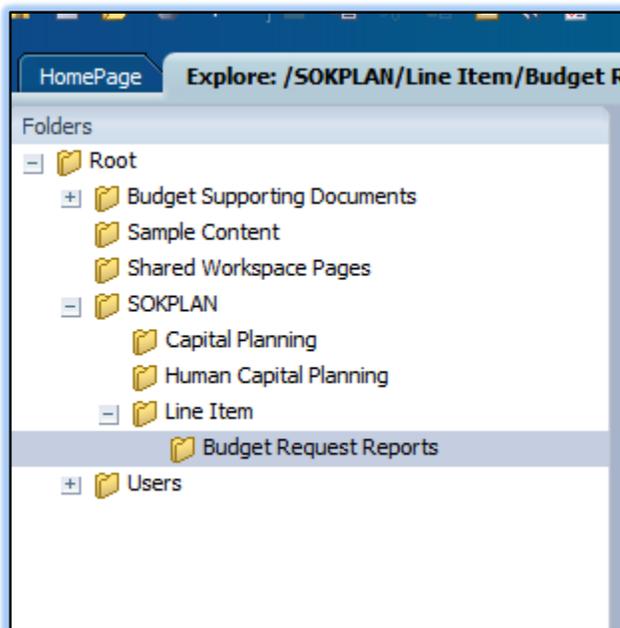
## Strategic Planning – Provide Executive Summary

### Report Name: Strategic Plan Report

To run this report, you will first need to navigate to the Explore workspace at the top-left of the screen:



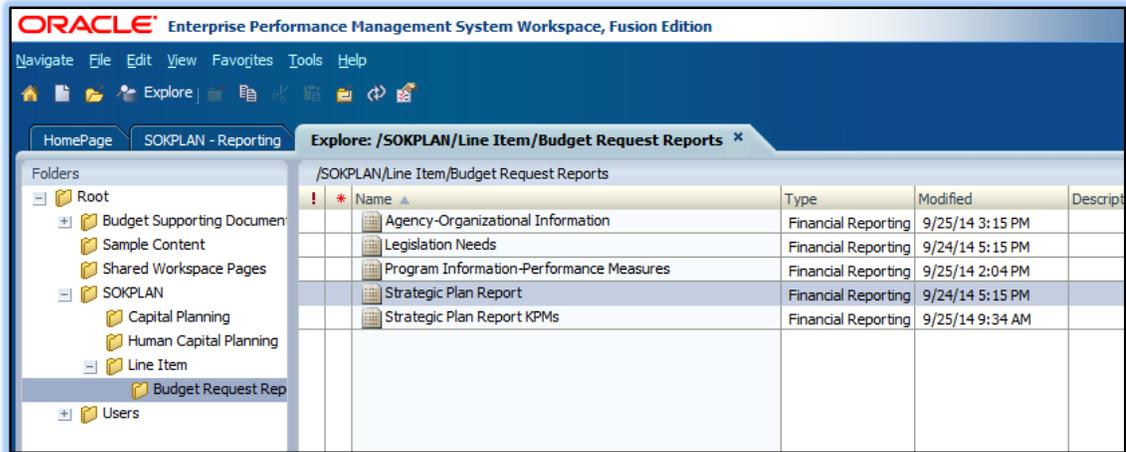
Once in the Explore workspace, go to the SOKPLAN folder, then the Line Item folder, and finally the Budget Request Reports folder:



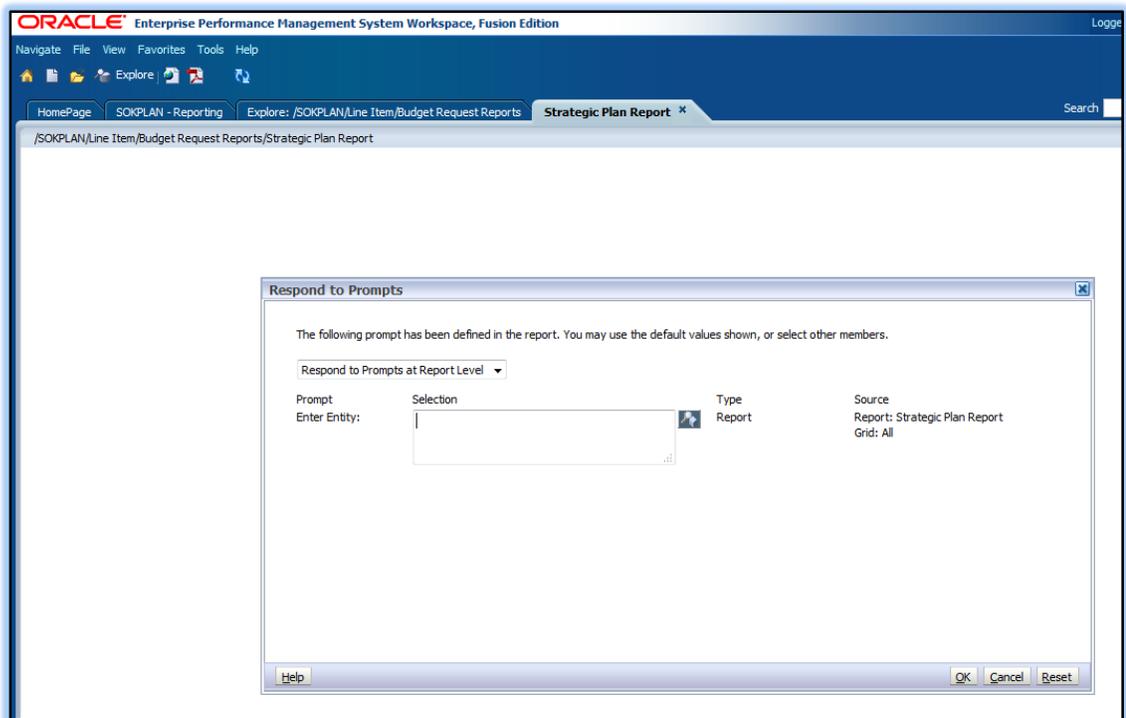
Then double-click on the Strategic Plan report to start it:



# OMES – Project Encore Training Manual



A new page will open with a prompt:



Then type in your agency number (use the full 5 digits):



# OMES – Project Encore Training Manual

Selection	Type
47700	Report

Then hit the OK () button to run the report. Once run, the report should come up within Hyperion:

**ORACLE** Enterprise Performance Management System Workspace, Fusion Edition

Navigate File View Favorites Tools Help

HomePage SOKPLAN - Reporting Explore: /SOKPLAN/Line Item/Budget Request Reports Strategic Plan Report x

/SOKPLAN/Line Item/Budget Request Reports/Strategic Plan Report



## FY16 - FY20 Strategic Plan For 47700 - Narc & Dangerous Drugs Control As of 26-September-2014

Period: ReqBalance Year: \$BY Version: Agency-Division Inputs Request: Current Service Level ClassFund: No CF  
CFDA: No CFDA Operating Unit: No OU Project: No Project

<b>47700 - Narc &amp; Dangerous Drugs Control</b>	
Mailing Address	419 NE 38th Terrace
	Oklahoma City, OK 73105
Agency Head:	R. Darrell Weaver
Title:	Director
Phone:	405-521-2885
Fax:	405-530-3797
Email:	dweaver@obn.state.ok.us
Alternate Contact Person:	Anita Smart
Title	Director of Fiscal Services
Phone:	405-530-3186



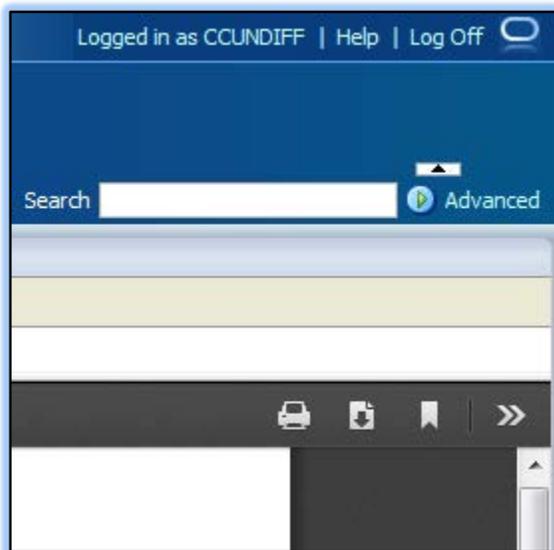
# OMES – Project Encore

## Training Manual

This report will pull data entered in other portions of Hyperion, including the Provide or verify Agency Information task. To turn that report into a PDF file, click on the PDF icon () at the top-left of the screen:



The PDF file will open within Hyperion. You can then print it using the Print icon () at the top-right of the screen:



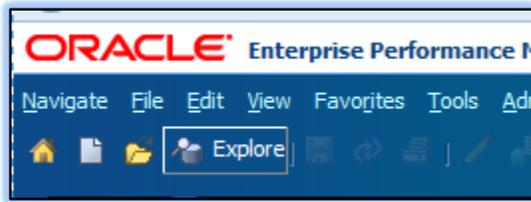
Or you can download it and save it using the Download button () , also at the top-right of the screen.



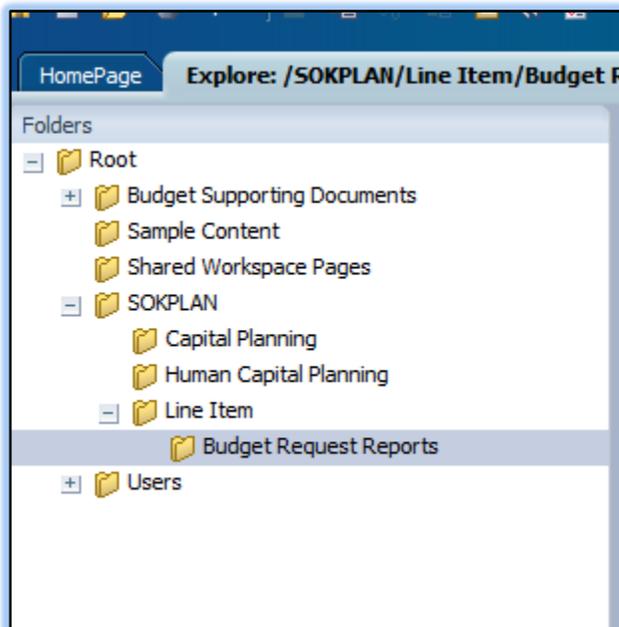
## Strategic Planning – Goal Setting

### Report Name: Strategic Plan Report KPMs

To run this report, you will first need to navigate to the Explore workspace at the top-left of the screen:



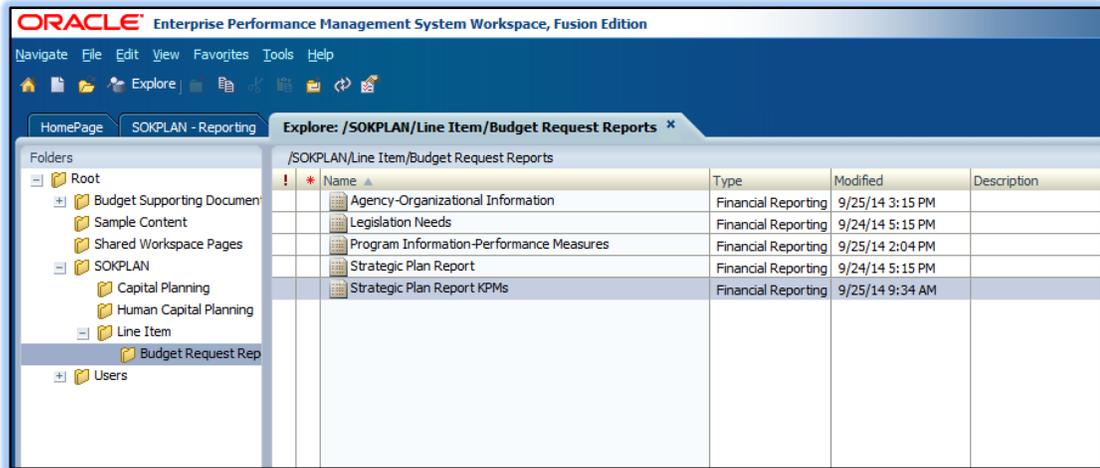
Once in the Explore workspace, go to the SOKPLAN folder, then the Line Item folder, and finally the Budget Request Reports folder:



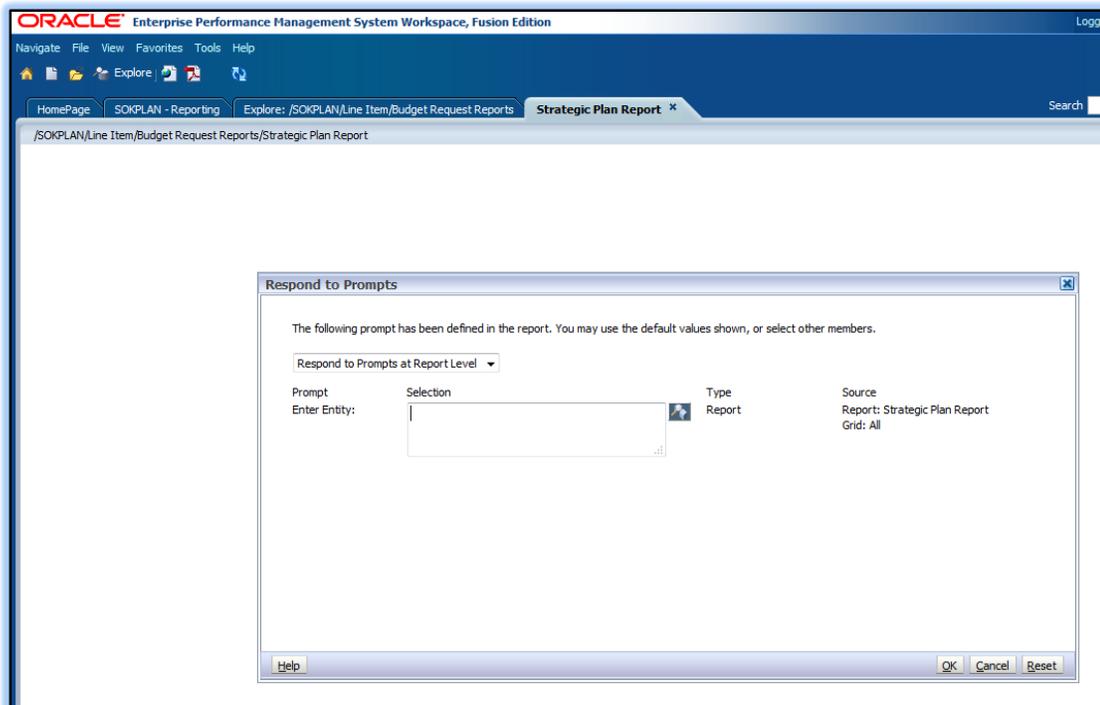
Then double-click on the Strategic Plan Report KPMs to start it:



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A new page will open with a prompt:



Then type in your agency number (use the full 5 digits):



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Selection	Type
47700	Report

Then hit the OK () button to run the report. Once run, the report should come up within Hyperion:

**LONG - TERM GOALS and AGENCY KEY PERFORMANCE MEASURES**

Summary of long-term goals and measures:\*

OBNDCC is known for its forward thinking and proactive approach to not only drug education, but also enforcement and intelligence education. The wide variety of information they disseminate through both public and internal education [e.g. identification, prevention, and enforcement related to illegal drug activities, human-trafficking, and money-laundering] is essential for preventing threats, a key component of their mission.

Goal#: Enhancing public and internal educational opportunities

G1-KPM#: Increase participation 10% by reducing conflicts in the training schedule

Key Performance Measure - Description:  
Providing an all-inclusive training calendar will help prioritize, coordinate and communicate training. All personnel training opportunities can be filtered, coordinated and identified as mandatory. Participation will increase in unit-specific CLEET certified training and training conflicts will be reduced.

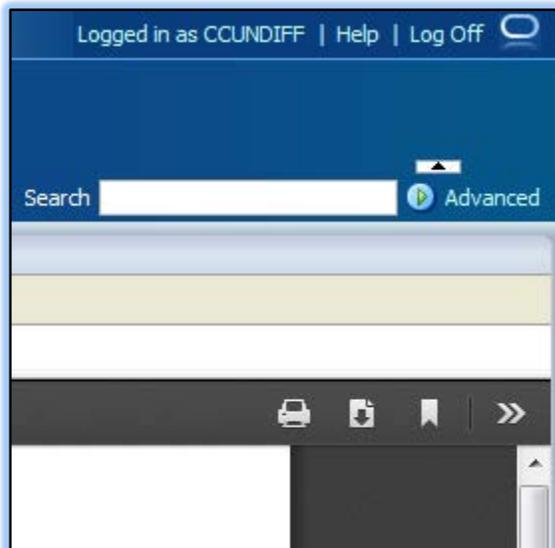
	Actual		Budgeted	Estimated			
	FY13	FY14	FY15	FY16	FY17	FY18	FY19
	-	-	480	528	580	638	701

To turn that report into a PDF file, click on the PDF icon () at the top-left of the screen:

The PDF file will open within Hyperion. You can then print it using the Print icon () at the top-right of the screen:



## OMES – Project Encore Training Manual



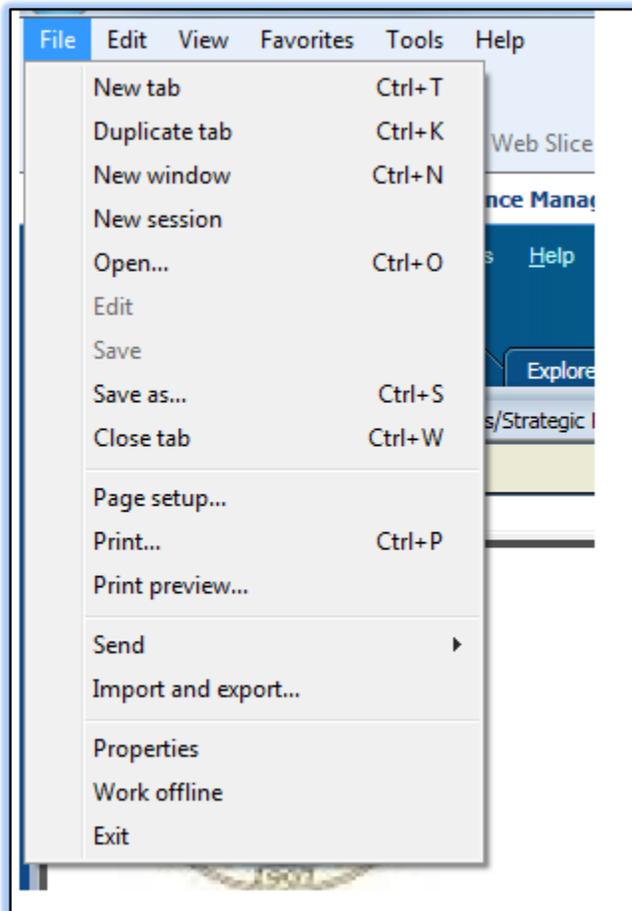
Or you can download it and save it using the Download button () , also at the top-right of the screen.



## ADDITIONAL NAVIGATION TOOLS

### Printing and Saving Reports with Internet Explorer

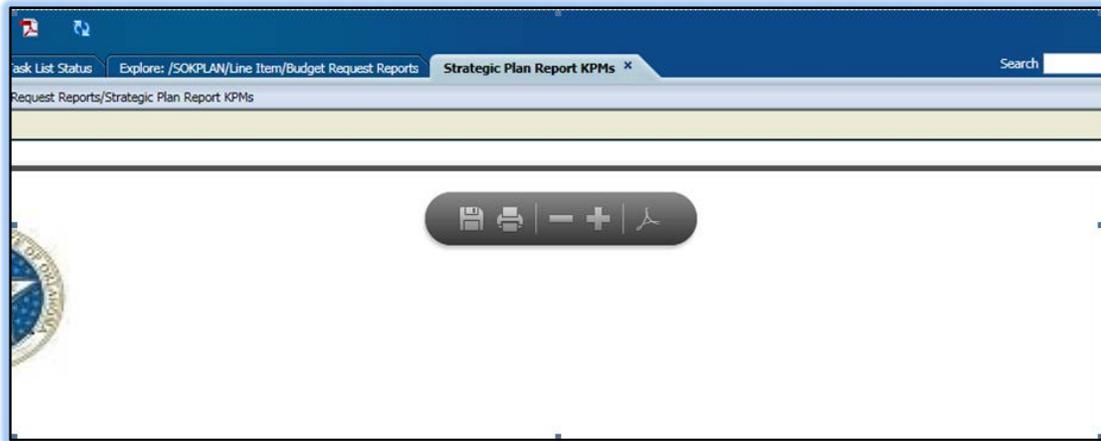
There are some slight discrepancies when using Mozilla Firefox and Internet Explorer. When trying to save a PDF in Internet Explorer, you can simply go to the Internet Explorer File menu and select Save as...:



However, in order to directly print a PDF straight from Hyperion, you will need to hover your mouse cursor over the PDF so that the following menu appears on the PDF:



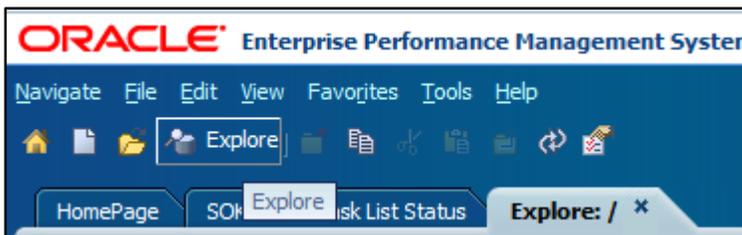
# OMES – Project Encore Training Manual



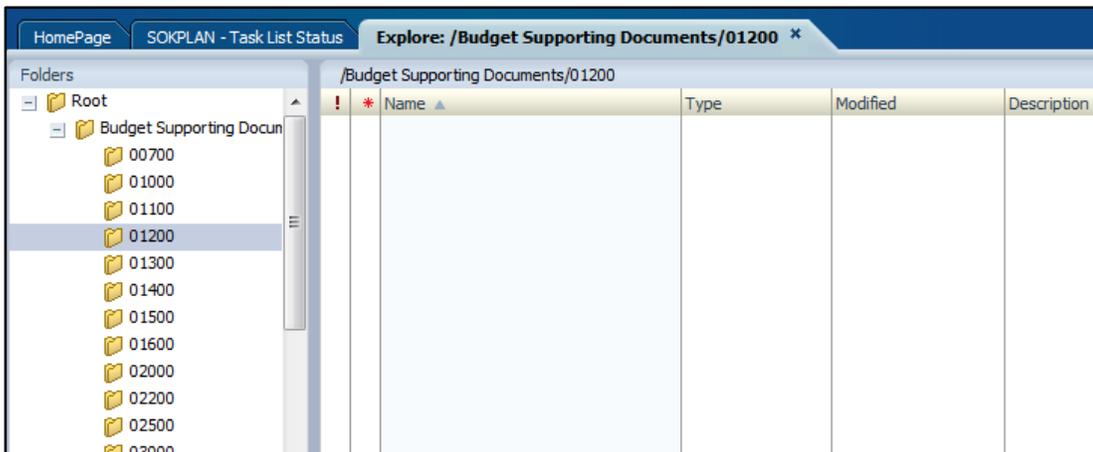
The Save button () will also allow for the saving of the reports, and the Print button () will let you print the report directly from Hyperion.

## Importing Documents

To Import a file, you will first need to navigate to the Explore workspace by clicking on the Explore button at the top-left of the screen:



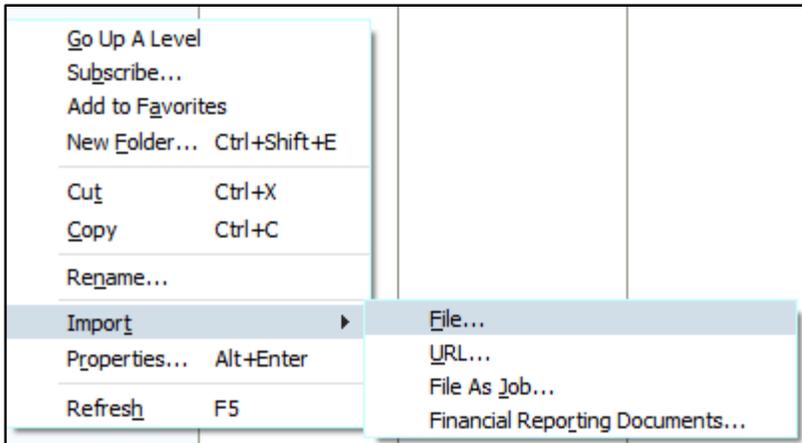
Navigate to your agency's Budget Supporting Documents folder and double click.

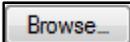


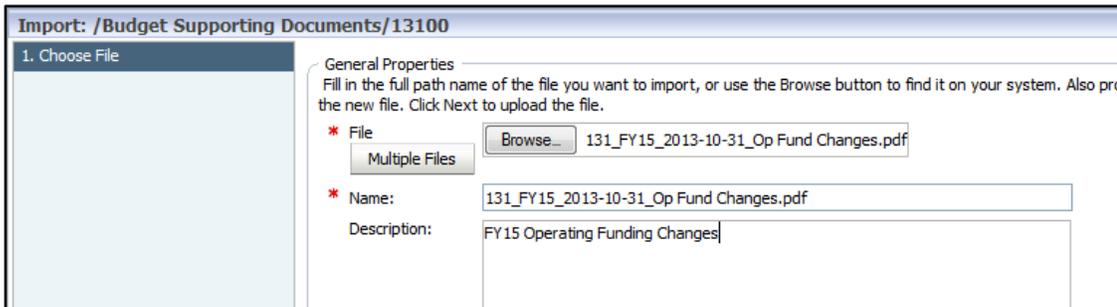


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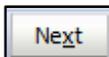
Right click on your agency's folder or in the white-space on the right side of the screen, and Import a File:



Choose the file you wish to import by Browsing () to the location of the file on your computer:



Be sure to hit the Next button and not the Finish button:



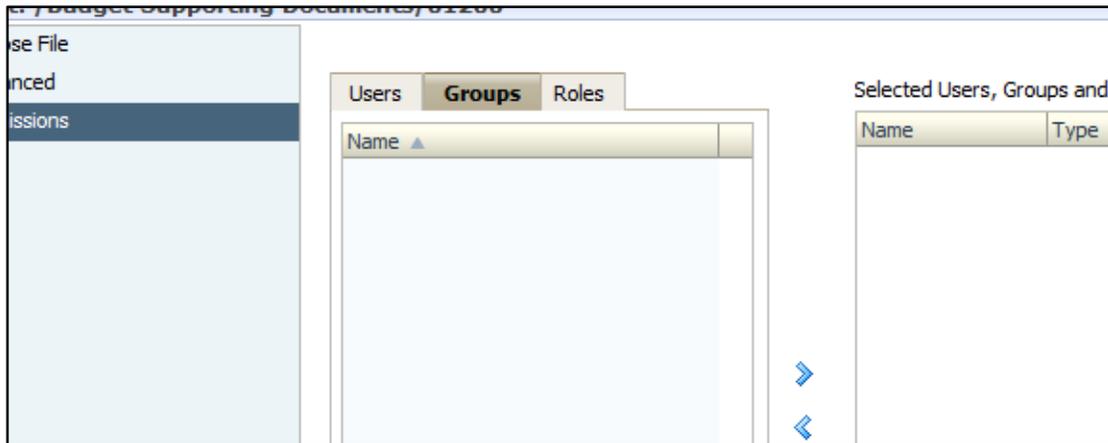
You don't have to adjust any of the Advanced option if you don't want to, so hit the Next button again.

On the Permissions screen, you will choose who can access, view, or modify the attachment. This is done by assigning access to individual users, user groups, or user roles to the document. The easiest might be to assign access to groups.

You will first need to search for the groups by clicking on the Groups tab:



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Then go to the bottom and change the search feature from “begin with” to “contain”:



Then type in your agency number to find your agency’s groups, or “all” to find the All Agency groups. For example:



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The left screenshot shows the 'Groups' tab with a list of groups: Capital\_Grp\_13100, HCP\_Grp\_13100, and LI\_Grp\_13100. Below the list is a dropdown menu set to 'contain' and a text input field containing '13100'. An 'Update List' button is at the bottom.

The right screenshot shows the 'Groups' tab with a list of groups: Capital\_Grp\_All\_Agencies, HCP\_Grp\_All\_Agencies, and LI\_Grp\_All\_Agencies. Below the list is a dropdown menu set to 'contain' and a text input field containing 'all'. An 'Update List' button is at the bottom.

LI is for the Operational Planning & Strategic Planning modules, HCP is for the Position Budget module, and Capital is for the Capital Budget module.

All Agencies groups are your OMES Budget and Capital analysts. Agencies also have their own module groups.

Then select the group and add them to the allowed groups:

The screenshot shows the 'Groups' tab with a list of groups: Capital\_Grp\_All\_Agencies, HCP\_Grp\_All\_Agencies, and LI\_Grp\_All\_Agencies. Below the list is a dropdown menu set to 'contain' and a text input field containing 'all'. An 'Update List' button is at the bottom.

The 'Selected Users, Groups and Roles' table is shown on the right:

Name	Type	Access
LI_Grp_All_Agencies Group		



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In order for users of those groups to view or access the attachment, they will need to be given access to it. To assign that access, you will need to click in the Access column on the screen:

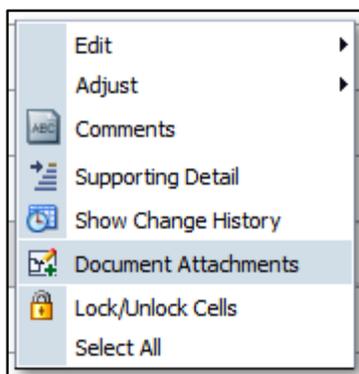
Selected Users, Groups and Roles:			
Name	Type	Access	
LI_Grp_13100	Group	Full Control	
Capital_Grp_13100	Group	Full Control	
HCP_Grp_13100	Group	Full Control	
LI_Grp_All_Agencies	Group	View	
HCP_Grp_All_Agenc	Group	View	
Capital_Grp_All_Age	Group	No Access	▼

- No Access
- View
- Modify
- Full Control

Once that is done, then you can apply these default permissions to any file you import, if you want to:

Make these the default permissions for all files I import.

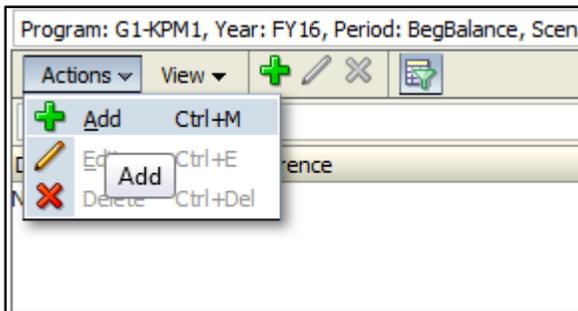
Once Imported into Hyperion, and then right click on the cell you wish to attach the file to and choose the Document Attachments option:



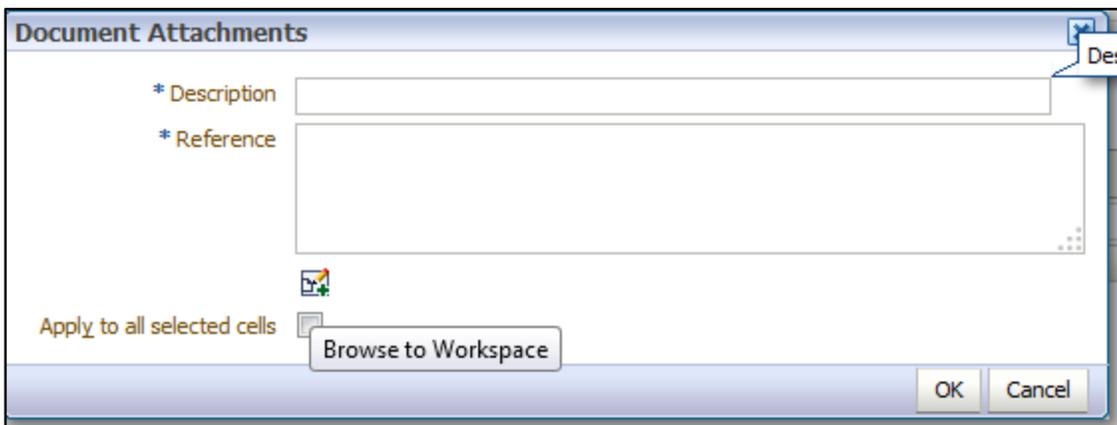
Hit the Plus sign to add a new attachment, either by using the shortcut or by selecting that option from the Action menu:



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Type in a description for the attachment, and then select the Browse to Workspace button underneath the Reference box:



Search for your agency's Budget Supporting Documents folder, and select the imported file you wish to attach. Then hit the OK button.

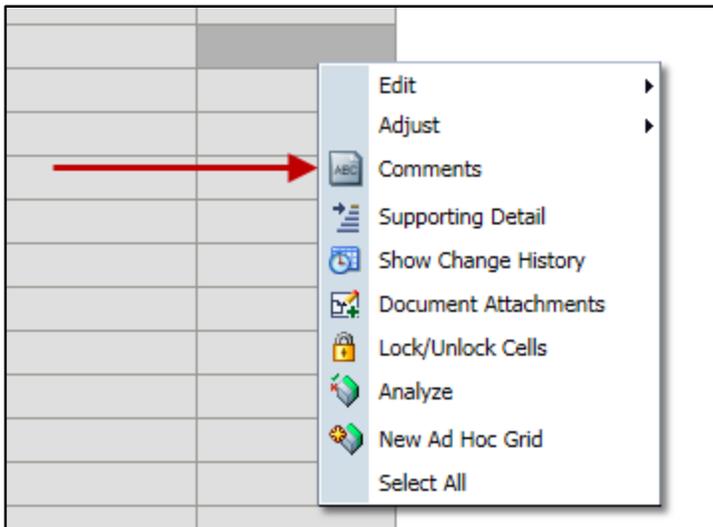
After that, the file has been attached to that particular cell and should be noted by a green tab type object in the upper right-hand side of the cell (similar to Excel signifying a comment with a red tab type object on a cell). However, it might still be wise to make a note in the cell that there is an attached document, just in case the reviewer's eyes miss the little green tab type object.



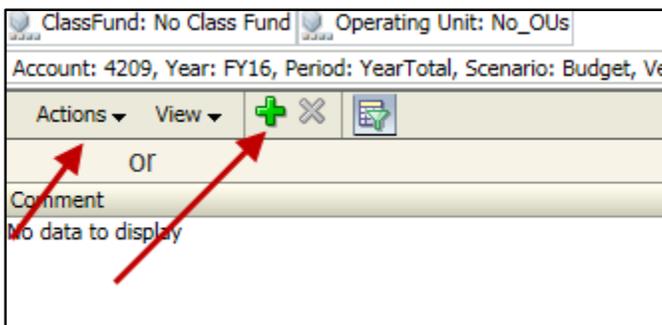
## Adding Comments

Comments are a useful feature for identity data that is entered in fields.

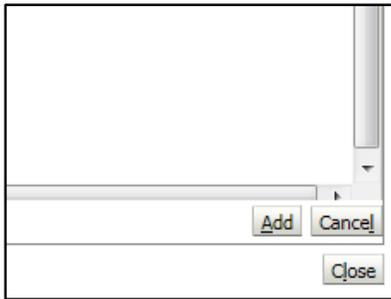
1. Click the **Navigate** menu.
2. Click the **Applications** menu.
3. Click the **Planning** menu.
4. Click the **SOKPLAN** menu.
5. Go to **My Task List**.
6. Click any task list form ie. **Operational Planning-Plan Agency Revenue** to add comments.
7. Right-click the any cell where the comment is to be inserted.
8. Choose **“Comments”**



9. Click Action drop down button, then Add button OR click +



10. Enter the desired information into the Comment field.
11. Click the Add button.



- 12. Click the Close button.
- 13. Green Indicator in top right corner of cell lets user know there is a comment for that cell.

## Copy/ Paste Option

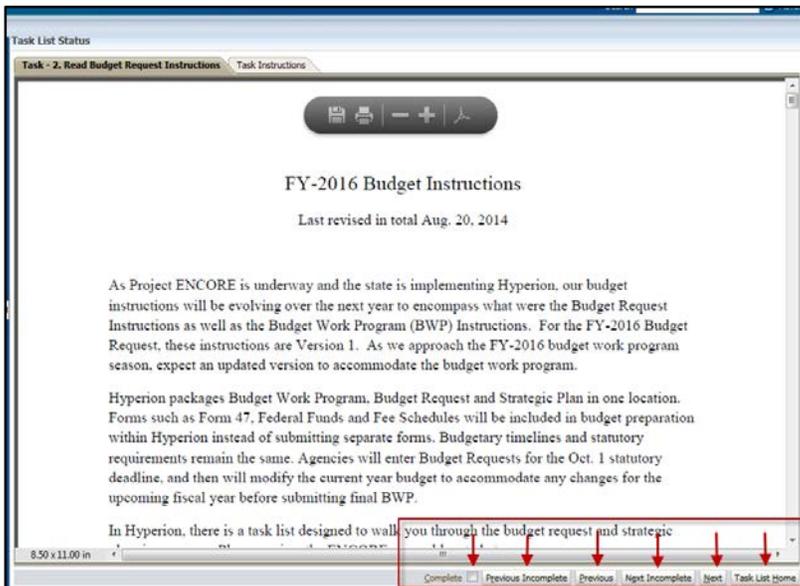
To copy from an external document. ie. Word and paste into cells in Hyperion.

Select Ctrl + C: this copies the selected range of cells to the clipboard then Select Ctrl + V: Pastes content from Clipboard into cells in Hyperion.

## Complete Button

For each listed task in the side menu users have the ability to keep track of their progress as they move through each budget process. These buttons also help users to advance to the next task, go to previous task, go to previous or next incomplete tasks and navigate back to the Task List Home page.

*\*\*This complete box is NOT a required option. It is intended for the user to keep track of their progress.*





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On the task list home page, once a user checks the complete button Hyperion will keep track which tasks have been complete with a pie chart, indicating Incomplete, Complete and for items that have dues dates and Overdue status color.

**Task List Status**

**Task List Status - Operational Planning** View ▾

Status of all Task Lists

Incomplete, 100.0%  
Task List Status - Operational Planning

**Task List Tasks - Operational Planning**

Task	Type	Status	Due Date	Alert	Completed Date	Instructions	Action
Operational Planning		Incomplete					
1. Review Budget		Incomplete				bd	
2. Read Budget Request Instructions		Incomplete				bd	
3. Provide or verify Agency Information		Incomplete				bd	
4. Provide Agency Program Information		Incomplete				bd	
Provide Agency Program Summary		Incomplete				bd	
Define Agency Program Performance Me...		Incomplete				bd	
5. Plan Agency Revenue		Incomplete				bd	
Identify anticipated Fee based revenues		Incomplete				bd	
Identify Other Revenue Streams		Incomplete				bd	