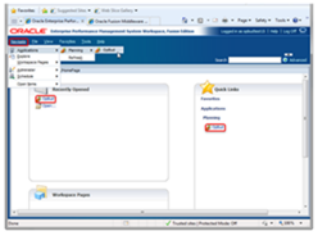
LAUNCHING WORKSPACE

1. Launch Internet Explorer.
2. Enter https://epm.irttest.drexel.edu/workspace/index.jsp .
3. Enter your user name and password.
4. Click **Log On**.

3 WAYS TO OPEN OPBUD FROM PLANNING HOME PAGE

1. Select **Navigate>Applications>Planning>OpBud**.
2. Select **OpBud** under Planning in **Quick Links** found on the right hand side of workspace.
3. Select **OpBud** under **Recently Opened** (This would appear after you had previously opened the form).



ACCESSING OPERATING BUDGET FORM

1. In the View Pane, expand **Forms** folder.
2. Click on **Planning Forms. Operating Budget** form appears in the Content Area.
3. Click the **Operating Budget** Form.

RECOGNIZING CELL COLOR CLUES

Grey	Data entry is prohibited
Yellow	Data has been changed but not saved
Teal	Cell has supporting detail attached
Brown	Cell is locked
Off White	Data entry available

WAYS TO SAVE DATA

1. Hit the **Save** toolbar.
2. Click **File > Save**.

ADJUSTING DATA

1. Select a cell or range of cells to adjust.
2. Click the **Adjust Data** icon .

3. Select **By Value** or **By Percentage**.
4. Click **Increase By** or **Decrease By** button.
5. Type in amount or percentage.
6. Click **Adjust Data**.
7. Click the **X** to close the Adjust Data window.
8. Click the **Save** icon to accept the adjustment or **Refresh** icon to reject it.

INSERTING COMMENT

1. Select the cell that you want to insert comment.
2. Right click and choose **Insert Comment.**
3. Enter the desired comment in the white box in the form (limit is 1500 characters).
4. After entering comment, click **Submit**.

ADDING SUPPORTING DETAIL

1. Select the cell that you want to add supporting detail.
2. Enter description on the first line, choose operator (+,-,*, /,~) and enter amount.
3. To add more detail to the parent level line, click **Add Child** in which Planning will add another row that is slightly indented.
4. The cell color changes from white to green indicating that the cell is no longer data enterable, but is now a calculated cell.
3. To add another line to the supporting detail that is on the same level as the first line, choose **Add Sibling**.
4. When done, hit **Save.**
5. The cell color on web form changed from white to teal indicating that cell contains supporting detail.

SAVING TO ROOT FOLDER

1. In order to add documents to cells you first have to save the desired documents in the appropriate place.
2. Click **Explore > Root Folder>New Budget Request Forms**.
3. Click **File>Import>File**.
4. Click **Browse**. Go to where document was saved. Select document by double clicking the file.
5. **Rename document** using recommended naming convention and then select **Next**. The recommended naming convention is **Entity_Fund_Orgn_Accout_Name of file** (e.g. D_110001_3302_3011_OfficeSuppliesBid).
6. Click **Next** again (you do not need to set Advanced settings).
7. Select the **Groups** > change the selection criteria to **contain**.

8. Type in the box next to **contain** the number located at the top of the window (ie. 2037_OB).
9. Click on the **Update > highlight the group >** click on the to move the group over to the **Selected Users, Groups and Roles:** section.
10. Under **access** hit and select **Full Control** from the choices.
11. Click **Finish**.

ADDING DOCUMENTS

1. Select the cell that you want to add supporting detail.
2. Right click and select **Add/Edit Document.**
3. Click the **Browse** icon on the Add/Edit Document window. This will show the **Root folder>New Budget Request Folder**>.
4. Expand the folder until you see the document that you want added to the cell.
5. Click **OK**. Hyperlink to the document will appear in the window.
6. Click **Submit**.
7. The cell on the web form now has a blue triangle on the upper right corner indicating that a document has been attached to the cell.

ADDING NEW ACCOUNT CODE

1. Click on any cell of the account code on the content area.
2. Right click> Choose **Budget a New Account**> Click **Select Members** icon.
3. On Member Selection window, expand **Total Expense** to select the account code to add.
4. Once selected, click arrow pointing to the right to select the account code to be added. Click arrow pointing to the left to deselect account code.
5. Click the **Launch** icon and message will appear on top of the form indicating "Budget New Account was successful".

TOOL BAR BUTTONS

HOME

This is Hyperion Planning's home page.

REFRESH

This command reverts any unsaved data back to the values stored since the last save took place. It will NOT save changes and provides a warning to that effect. NOTE: There is no "Undo" command. Save regularly and use Refresh to "Undo" to the last save. [Same as **View**>**Refresh**].

PRINT

This command allows print settings and a print preview. [Same as **File**>**Print**].

COMMENT

This command allows you to add notes to a given cell. A blue triangle appears marking a cell with text attached.

To see text, highlight the marked cell and re-click Cell Text. [Same as **Edit>Cell Text**].

LOCK/UNLOCK CELLS

This command will lock and unlock a given cell, with locked cells showing as brown. To unlock, position the cursor back on the brown cell and click the command again. Use Shift-click to select multiple cells to lock or unlock. [Same as **Edit**>**Lock/Unlock Cells**].

SUPPORTING DETAIL

This command allows you to add supporting details, in the form of calculations, to aggregated lines, such as travel. This provides a way for you to drill down into data and to understand the basis of that data. To see the detail, double-click on the cell or click Supporting Detail again while on the cell. Double-clicking on unlocked available cells also opens up the Supporting Detail box. [Same as **Edit**>**Supporting Detail**].

ADD/EDIT DOCUMENT

This command allows you to add/edit document to a given cell. The cell color is teal indicating that a document is attached to a cell. [Same as **Edit**>**Add/Edit Document**].

OPEN DOCUMENT

This command allows you to open a document attached to a cell.

CUT

This command allows you to cut cell contents. Shift-Click to select multiple cells to cut. [Same as **Edit**>**Cut**].

COPY

This command allows you to copy cell contents. Shift-Click to select multiple cells to copy. [Same as **Edit**>**Copy**].

PASTE

This command allows you to paste previously cut or copied data. Multiple cells will be pasted in the same order as they were cut or copied. [Same as **Edit** >**Paste**].

TASK LIST

Task lists may be used to track "to do" items during the planning process. This command displays current task list(s) in a separate window for reference. [Same as **View**>**Task Lists**].