ORACLE HYPERION PLANNING

USER TRAINING

University of North Texas
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I. GETTING STARTED IN HYPERION PLANNING

A. ENTERING THE HYPERION BUDGET APPLICATION

1. Open Internet Explorer or Firefox. DO NOT USE CHROME.


3. The following screen will appear:

4. Enter your network ID and password and click “Log On.”

5. The HomePage will display.
6. From the HomePage tool bar, select Navigate > Applications > Planning > UNTSBud

The UNTSBud planning application will be automatically added to the “Recently Opened” documents area of your HomePage once you have accessed the application.

NOTE: The application timeout for inactivity is 60 minutes.

B. SETTING USER PREFERENCES

Users have the ability to define preferences or use the default application settings.

To view or change Planning display settings:

1. Open the UNTSBud application.

NOTE: You must be on the UNTSBud tab in order to define your preferences. Otherwise a blank page will appear that states: “Please open the Planning application to set application preferences.” If the UNTSBud tab option does not appear, then that means the UNTSBud application is not open. Refer to section “II.B. Access the Budget Application” within this training document for directions on accessing the budget application.
2. In the toolbar, select **File > Preferences**

3. A pop-up screen will appear. Select **Planning > Application Settings**. In the “Approvals Options” section, change both options to “YES.”
4. Click **Save**.

   **NOTE**: You must click **“Save”** for your preferences to save. If your preferences do not appear to be saving, make sure you’ve selected **“Save.”** If they still do not appear to be saving, log out of Hyperion Planning and then log back in.

5. A message will appear that says “User Preferences have been saved.”

6. Select **“OK”** to close the Preferences screen.

## II. BUDGET PROCESS

### A. STEP 1: ENTER REVENUE, EXPENSES, & TRANSFERS

#### 1. ACCESS THE ENTER, REVENUE, EXPENSES, & TRANSFERS SPREADSHEET

1. From the left-panel, click the **UNTSBud** tab. Expand the UNTS Budget Process Folder by clicking on the arrow next to the folder.

   ![UNTSBud tab](image)

   **NOTE**: The **UNTSBud** tab will change from **UNTSBud** to **UNTSBud – Task List Status** after you select the folder.

2. Expand the **Departmental Budget** folder by clicking on the arrow next to the folder.
3. Open the **Enter Revenue, Expenses & Transfers** bin by clicking on the bin icon.

4. The **Task – Enter Revenue, Expenses, & Transfers** screen will open on the right side of the screen. The **Task – Enter Revenue, Expenses, & Transfers** spreadsheet is where budget adjustments are entered.

The **Task – Enter Revenue, Expenses & Transfers** spreadsheet contains 8 sub-tabs.

   a. **INPUT: Tuition and Fees.** This is where budget adjustments to tuition and fees revenues are entered.
b. **INPUT: Goods, Services & Professional Fees.** This is where budget adjustments to Goods, Services, and Professional **revenues** are entered.

c. **INPUT: Grants, Contracts & Appropriations.** This is where budget adjustments to Grants, Contracts & Appropriations **revenues** are entered.

d. **INPUT: Gift, Investment & Other Revenue.** This is where budget adjustments to Gift, Investment & Other **revenues** are entered.

e. **INPUT: Internal Income.** This is where budget adjustments to Internal Income **revenues** are entered.

f. **INPUT: Expenditures.** This is where budget adjustments to **expenses** are entered.

g. **INPUT: Transfers.** This is where budget adjustments to **revenues and expenses for transfers** are entered.

h. **INPUT REVIEW: Overall Departmental Budget.** This is a review tab. No adjustments may be entered here.

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**NOTE:** Some users may find that only a few tabs display, or no that no tabs display. When this occurs, a double arrow icon ➔ will appear to the right and/or left of the input tabs. Click on the double arrow icon ➔ to view the drop-down selection box that lists all the tabs. Typically, adjusting the zoom settings will cause the tabs to appear.

Example: Some tabs display

![Screenshot of tabs display]

Example: No tabs display

![Screenshot of no tabs display]

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### 2. INPUT BUDGET ADJUSTMENTS

1. The first step of the budget process is to select the Org Dept/Site/Fund Cat/Fund to which you will be making adjustments. **Budgeting will only occur in Fund Categories 105 Education General, 120 Auxiliary, and 200 Designated Operating.**
a. Select a Department and Site. Only the departments you have access to are listed.

   i. Click on the drop down arrow to view your available Department_Site options. The Department field is concatenated with the Site field. If a chartstring does not have a Site, then the Department will be concatenated with the place-holder “No_SITE.” For example, DP121200-No_SITE.

   ![Image 1](image1.png)

   ii. Select the Department and Site combination from the drop down box. To limit the Department_Site options to a particular Department, enter that Department ID into the Member search box.

   ![Image 2](image2.png)

b. Select a Fund Category – Fund combination from the Fund drop down arrow.

   ![Image 3](image3.png)

   **NOTE:** All possible Fund Category – Fund combinations will be listed whether or not they apply to your department. You should only budget on the Fund Categories and Funds applicable to your department. Refer to the “List of Budgetary Org Dept, Fund, Fund Cat combos” on the Budget Website for a list of budgetary chartstrings on which budgeting will occur. New budgets (those being established for the first time) will not appear on the “List of Budgetary Org Dept, Fund, Fund Cat combos.”

   **Budgeting will only occur within Fund Categories 105, 120, and 200.**
NOTE: It’s easier to find the correct Fund Category-Fund combination if you type in the Fund in the Member search field.

![Image of the Member search field](image)

c. Click the GO icon, , to apply your selection. The selection will apply to all the sub-tabs (revenues, expenses, transfers, and summary) not just to the sub-tab that you have open.

![Image of the Task List Status](image)

Upon selecting the Go icon, , you will automatically be directed to the INPUT: Tuition and Fees tab.

NOTE: After making a selection from the drop down box, if you click anywhere on the page you will receive a Change Page message. If you select the Go icon, you will not receive the message. If you receive this message select OK. By selecting OK the spreadsheet will populate with the new Fund Category-Fund selected.

![Image of the Change Page window](image)

Selecting OK or, alternatively, clicking the Go icon is a critical step. The form does not update to the Department_Site or Fund_Fund Category until either the GO icon is clicked, or until OK is selected in the Change Page window even if the Department_Site and Fund Category_Fund are reflected in the selection.
2. Once you have selected the Org Dept/Site/Fund Cat/Fund which you will be budgeting for, the next step is to enter adjustments for revenues, expenses and transfers within the Budget Adjustment column.

**NOTE:** Budgets that share the same department, site, fund category, and fund budgeted together. You will have to break out program and purpose within the subtabs.

a. **Select** the first tab, **INPUT: Tuition and Fees**. If you don’t have any budgeted Tuition and Fees revenues then no revenues will appear on this tab. (If you don’t have any budgeted Tuition and Fees and if you don’t need to add any, then simply click on the next input tab: **INPUT: Goods, Services & Professional Fees**.)

b. There are six value columns on each tab:

- The **FY18 Final Actual** column is pre-populated with revenues (or expenses) incurred during FY18. This is provided as a reference when planning your budget.

- The **FY19 Final Actual** column is pre-populated with revenues (or expenses) incurred fiscal year to date through the closing of February 2019 (Period 6). This is provided as a reference when planning your budget.

- The **FY19 Final Original Budget** column is pre-populated with the FY19 Original Budget.
- The FY19 Working Seed Budget column is pre-populated with the FY19 Original Budget plus permanent adjustments that have occurred during the year through 03/15/2019. This is your base budget.

- The FY20 Working Budget Adj column is where adjustments will be inputted.

- The FY20 Working Original Budget column reflects the Seed Budget (3rd column) plus the Budget Adjustments (4th column). This is what the FY20 Original Budget will reflect at the start of FY20.

c. Enter budget adjustments in the FY20 Working Budget Adj column. This is the only column in which data can be entered. If this column is entirely greyed out you will need to “Take Ownership” of the Dept ID to enter data. Refer to Appendix A for instructions. If this column shows some cells as white and some as grey, that is correct.

- Data can be entered only in cells highlighted in white. Cells highlighted in grey cannot be adjusted.

- The cell color will change from white to yellow once it has been adjusted, and prior to it being saved.

**NOTE:** Column FY20 Working Original Budget will not calculate the adjustments until the data is saved.

d. Once budget inputs are complete for INPUT: Tuition and Fees, click the Save icon, , in the toolbar to save the inputs.
Clicking the **Save** icon will change the yellow cells to white. Saving the inputs will also total the adjustments within the **FY20 Working Original Budget** column.

**NOTE**: You must “save” your inputs for the inputs to be totaled within the **FY19 Working Original Budget** column.

3. **ADDING COMMENTS**

After making an adjustment users are **highly encouraged** to add a comment describing why the change was made.

1. **Add Comments**: Click on the cell to which you want to attach a comment.
   a. Click the **ABC** icon, located in the toolbar:

   ![ABC icon](image)

   b. A comment box will appear. To add a note, click on the **plus** icon, 

   ![plus icon](image)
c. Another screen will display. Type your comment within this screen:

Optional: Check “Apply to all selected cells” if the comment applies to a group of cells that were initially highlighted.

d. Click Add to save the comment. This will close the current screen and bring the user back to the initial comment screen.
e. Click “Close” to exit out.

The cells containing comments will show a small triangle in the top right corner of that cell.

f. To remove a comment, click on the cell that has the comment, then click the ABC icon, in the toolbar. Within the Comments box that appears, click on the comment you want to delete and then click on the X icon, . Only the creator of the comment can delete the comment.
4. ADDING NEW ACCOUNTS TO BUDGET

If a new account is needed, such as a new travel line, then the account will have to be added to the INPUT form.

1. Within the input tabs, right click on any row to open the right-click menu. Click Department Manager> Add Account(s).

   An “Add Account” pop up will appear.

   ![Add Account](image)

   **NOTE:** In the Value column, the values will pre-populate depending on what cell was selected when you right-clicked to select the “Add Account” option. You will need to change these selections as appropriate.

2. Update the ProgramPurpose Value if appropriate. If the correct value is already listed then this step can be skipped. The Program and Purpose fields are concatenated.
   a. Click the Member Selector icon, ![Member Selector](image), to the right of the Value column to change the selection.
b. The **Member Selection** screen will appear. Change how each chartfield value displays on the **Member Selection** screen by clicking on the **XYZ** icon, , and selecting the display choice: **Member Name: Alias**.

c. Use the search bar to find the correct ProgramPurpose. Enter either the program or the purpose value in the search field and click on the **magnifying glass** icon to search.
d. Click the Arrow icon, ➔, to the left of the name. If the arrow icon disappears then you have reached the lowest level of data. The item selected must be at the lowest level of the tree structure or the account will not be added to the input tab.

e. Select the item you want to add and Click the Add icon, ➔, to move the selected member to the right pane.

f. Click OK. If you cannot see the OK icon then zoom out (using your internet settings zoom options) until the OK icon can be seen.
You will return to the **Add Account** screen

3. Repeat the **member selector** process as needed for the **Function** value.

4. Repeat the **member selector** process as needed for the **Account** values. You may add multiple accounts at once.

5. For Project, enter “**No_Project**” directly into the **Add Account** screen. Hyperion requires that a value be added for every chartfield even if that value is null.

6. Click **Launch**.
The selected account(s) are added to the form(s).

**NOTE:** The account will automatically be added to the INPUT tab to which it applies. For example, if you add an Expense account, it will be added to the tab “INPUT: Expenses” regardless of whether or not you were on the “INPUT: Expenses” tab when you added the account.

**NOTE:** If a specific Function, ProgramPurpose concatenation, or Account does not exist in Hyperion, contact the budget office and include “HYPERION” in the subject line.

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**B. STEP 2: AGGREGATE ORIGINAL BUDGET**

**NOTE:** The tab “INPUT REVIEW: Overall Departmental Budget” will not reflect budget adjustments until the data is aggregated. Aggregation must be run for each Org Dept_Site and Fund Category_Fund combination.

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**1. AGGREGATE SPECIFIC DEPT_SITE AND FUND CATEGORY-FUND COMBINATION**

Once the given Department_Site and Fund Category-Fund combination is complete for revenues, expenses and transfers, the data must be aggregated.

**Use the Right-Click Menu to Aggregate.** On any of the INPUT tabs (except for the INPUT REVIEW tab), right-click anywhere on the spreadsheet and select Department Manager > Aggregate Current Department and Fund. You can right click anywhere on the screen within one of the first seven tabs.
A popup will appear with the selected Department_Site and Fund Category-Fund combination already pre-populated. Click **Launch**. This will aggregate the inputs for the given form.

### C. STEP 3: REVIEW DEPARTMENTAL BUDGET

#### 1. REVIEW OVERALL DEPARTMENT BUDGET SUMMARY FOR A SPECIFIC DEPARTMENT_SITE & FUND CATEGORY-FUND COMBINATION

After running the Aggregation rule for the specific Department_Site and Fund Category-Fund combination, the tab **INPUT REVIEW: Overall Departmental Budget** will update. Click the tab to view a summary of all the adjustments.
NOTE: If a change is needed, the change must be entered on one of the first seven INPUT tabs, the data must be saved, and then it must be re-aggregated.

If no changes are needed, then you can move on to the next Fund combination for the Department, repeat the input process, and aggregate the specific Dept_Site and Fund Category-Fund combination.

D. STEP 4: SUBMIT BUDGET FOR APPROVAL

1. ACCESS THE SUBMIT BUDGET FOR APPROVAL PAGE

1. From the left-panel, open the Submit Budget for Approval bin by clicking on the bin icon.

2. The Task – Submit Budget for Approval screen will open on the right side of the screen. At the bottom of the screen only those Departments you have access to will display. If additional access is needed, contact the Budget...
2. MANAGE APPROVALS

Once a department is ready for review the department should be submitted to the next level approver in the approver chain. A department is ready for review once 1. All the chartstrings for that department have been updated, aggregated, and reviewed, and 2. No further changes are needed.

Refer to Appendix A. Managing Approvals for detail on all manage approval statuses.

1. Select the base department (or B-Level or C-Level department as appropriate) from the Planning Unit section by clicking on the department name.

2. Click on Actions to open the list of available actions, then click Change Status. A Change Status pop-up window will appear.

NOTE: Actions can be applied to a group of departments at a time by either:
   a. Selecting the C-level or B-level department. All actions performed here will apply to all departments that roll-up to those levels.
   b. Selecting multiple departments at a time using your keyboard “CTRL” or “SHIFT” keys.
3. Click on the **drop-down arrow** icon next to the **Select Action** box to view the list of available actions. Select the **Promote** action. A comment may be added in the **Annotation** comment area if desired. Click **OK**.

Promoting the department is the method for approving a department and sending it to the next approver in the approver chain.

### 3. ADD ANNOTATIONS

In section II.A.3. Adding Comments, users are shown how to add comments to specific cells within the budgeting spreadsheets. Users may find it helpful to add comments to a department overall. This is possible through Annotations.

1. **Within the Task – Submit Budget for Approval** screen, select the **details** icon.
2. The pane at the bottom of the screen will now show two tabs: **History** and **Annotations**. Select the **Annotations** tab.

![Annotations tab](image)

3. Click the **Add Annotation** icon 📝.

4. The **Add Annotation** pop-up window will appear. Edit the title and add text as needed then select **OK**. Once an Annotation is added, it cannot be deleted.

![Add Annotation pop-up](image)

5. The new comment will now appear on the **Annotations** tab. Select **Done** to return to the department list.

![Annotations tab with new comment](image)
III. APPENDIX

A. MANAGING APPROVALS

Users have the ability to manage approval statuses for a department. Select the department and then select the Actions drop down box.

Within the Change Status box there are 9 options. The list of available options will vary depending on the status of the user or of the department.

1. **Take Ownership**: Become the owner of a department. Only one user (user group) can be the owner of a department at a time. Only the current owner (or user group) has access to enter budget adjustments. If the FY20 Working Budget Adjs column is greyed out, you will need to Take Ownership to be able to enter data.
The Take Ownership option is not available once a department has been Promoted.

Note: If the only option (i.e. “Action”) available is “Take Ownership” then the user will need to first perform that action, and then return to the change status screen to view all available options.

2. **Promote**: Passes ownership to the next approver in the approver chain. Promote causes an implicit signoff by the current owner. Once a department is ready for review the department should be submitted to the next level approver in the approver chain. A department is ready for review once 1. All the chartstrings for that department have been updated, aggregated, and reviewed, and 2. No further changes are needed.

Note: If the only option (i.e. “Action”) available is “Take Ownership” then the user will need to first perform that action, and then return to the change status screen and select the “Promote” action.

3. **Originate**: Changes the ownership of a department back to the first approver in the approver chain. This action cannot be taken after a planning unit has been Promoted. This action is useful when a single user has taken ownership of a unit and wishes to return ownership back to the original owner group.

In the example below, Dept 200100 has a specific user listed as the owner whereas the remaining departments have user groups listed as owners.

4. **Delegate**: Passes ownership to a person not in the approver chain. Select a person from the Select Next Owner drop-down list to pass ownership to that person.

The delegated user should:
- Select **Originate** when done to return the budget to the first approver in the approver chain, or
- Select **Delegate** to pass ownership to the original delegator or to another user, or
- Select **Promote** to pass ownership to the next approver in the chain. NOTE: The “next approver” will vary depending on who the original delegator was, in some instances it is possible to bypass an
approver. Select the **Path** icon to the right of the department to determine where in the approver chain the department currently is and to where it will promote.

Upon selecting the **Path** icon, a new window will appear. The current owner is the user identified by “Current Location.” In this example, if the “Current Location Owner” promotes the department, the next approval would be the “UNT_BUDGET OFFICE.”

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5. **Freeze**: This action makes the data read-only.

6. **Unfreeze**: Changes a department from read-only to editable. Only the current owner can ‘unfreeze’ a department. Or, users above the current approval level can execute the **Take Ownership** action to transfer ownership and unfreeze the department.

7. **Reject**: Returns ownership back to the previous owner or to an owner selected from the “Select Next Owner” list.

8. **Return**: Returns ownership back to the previous owner or to an owner selected from the “Select Next Owner” list. This action is only available after a user has taken ownership of a department.

9. **Sign off**: Signs off on a department. Sign Off does not transfer ownership of the department, but changes its state to Signed Off.
B. DATA FORM TOOLBAR

Users can utilize the toolbar to save, refresh, adjust, etc. data. Toolbar screenshot below:

1. Common toolbar actions include:

   - Save data
   - Refresh data
   - Print form
   - Adjust data
   - Add comments
   - Add supporting detail
   - View instructions

These actions are commonly used for data inputs, as discussed in the next section, “Data Input Methods”.

**NOTE:** These actions can also be found on the “Right-Click” menu.

2. **Lock/Unlock cells**: Lock/unlock cells allows users to lock a cell to prevent data entry. To lock/unlock a cell, click on the cell you want to lock, and then click on the lock icon, , located on the toolbar.
C. CHARTFIELDS

Each chartfield within the chart of accounts is set up in a tree structure such that each Department, Fund, Account, etc. rolls up to a “level.”

Any data inputted in Hyperion must be inputted at the lowest level of input (called “level-0”), with few exceptions. Refer to the tables below for examples of the tree structures for each chartfield as well as examples of the level-0 fields.

DEPARTMENT & SITE

In Hyperion, Department and Site have been concatenated. If a chartstring does not have a site, then the department will be concatenated with the place-holder “No_Site.”

The Department tree contains levels A, B, C, D, and E, with A being the highest level. Below is an example of the department-site hierarchy structure:

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Department</td>
<td>Total Department</td>
</tr>
<tr>
<td>A10000</td>
<td>President UNT (A10000)</td>
</tr>
<tr>
<td>B16000</td>
<td>Student Affairs (B16000)</td>
</tr>
<tr>
<td>C16150</td>
<td>Career &amp; Leadership (C16150)</td>
</tr>
<tr>
<td>D16150</td>
<td>Career &amp; Leadership (D16150)</td>
</tr>
<tr>
<td>E16150</td>
<td>Career &amp; Leadership-Gen (E16150)</td>
</tr>
<tr>
<td>DP161500-No_Site</td>
<td>Career &amp; Leadership-Gen-No_Site (161500)</td>
</tr>
</tbody>
</table>

FUND CATEGORY & FUND

In Hyperion, Fund Category and Fund have been concatenated. Below is an example of the Fund Category – Fund hierarchy structure.

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allfunds</td>
<td>Allfunds</td>
</tr>
<tr>
<td>Current Funds</td>
<td>Current Funds</td>
</tr>
<tr>
<td>Education &amp; General</td>
<td>Education &amp; General</td>
</tr>
<tr>
<td>FC105</td>
<td>Education &amp; General (105)</td>
</tr>
<tr>
<td>FC105-FD800001</td>
<td>EDU GEN (105) – GRD-General (800001)</td>
</tr>
<tr>
<td>FC105-FD800003</td>
<td>EDU GEN (105) – GRD-Lab Fees (800003)</td>
</tr>
<tr>
<td>FC105-FD800005</td>
<td>EDU GEN (105) – GRD-Organized Activities (800007)</td>
</tr>
</tbody>
</table>

**NOTE:** Budgeting will only occur in Fund Categories 105 Education General, 120 Auxiliary, and 200 Designated Operating.

FUNCTION

Below is an example of the function hierarchy structure.

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Alias</th>
</tr>
</thead>
</table>
### PROGRAM & PURPOSE

In Hyperion, Program and Purpose have been concatenated. Below is an example of the ProgramPurpose hierarchy structure:

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total ProgramPurpose</td>
<td>Total ProgramPurpose</td>
</tr>
<tr>
<td>Total No_Program</td>
<td>Total No_Program</td>
</tr>
<tr>
<td>No_Program</td>
<td>No_Program</td>
</tr>
<tr>
<td>No_Program-No_Purpose</td>
<td>No_Program-No_Purpose</td>
</tr>
<tr>
<td>No_Program-PP10003</td>
<td>No_Program-Recruiting-Faculty-Gen (10003)</td>
</tr>
<tr>
<td>No_Program-PP10011</td>
<td>No_Program-Recruit-Executive Search 1 (10011)</td>
</tr>
<tr>
<td>No_Program-PP10012</td>
<td>No_Program-Recruit-Executive Search 2 (10012)</td>
</tr>
</tbody>
</table>

### PROJECT

Projects are not budgeted within Hyperion.

### ACCOUNT

The Account field contains the GL revenue and expense accounts. The Account tree contains levels A, B, C, and D, with A being the highest level. Below is an example of the account hierarchy structure.

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Account</td>
<td>Total Account</td>
</tr>
<tr>
<td>Operating &amp; Non-Operating</td>
<td>Operating &amp; Non-Operating Revenues</td>
</tr>
<tr>
<td>A4000</td>
<td>Operating Revenues</td>
</tr>
<tr>
<td>B4000</td>
<td>Tuition and Fees (B4000)</td>
</tr>
<tr>
<td>C4000</td>
<td>Tuition (C4000)</td>
</tr>
<tr>
<td>D4000</td>
<td>Tuition-Undergraduate (D4000)</td>
</tr>
<tr>
<td>40000</td>
<td>Tuition and Waiver [CONV ONLY] (40000)</td>
</tr>
<tr>
<td>40001</td>
<td>Tuit-U/G-Res (40001)</td>
</tr>
<tr>
<td>40005</td>
<td>Tuit-U/G-Non-Res (40005)</td>
</tr>
</tbody>
</table>

**Note:** Revenues will be budgeted at the level-0 account level (i.e. the lowest level account). Expenses will be budgeted at the level-D account level. The only exception is transfer expenses which will be budgeted at level-0. Budget checking for expenses occurs at level-C.