Running Calculate and Allocate Compensation Budgets Rules per Entity

In Hyperion you have the option of calculating and allocating after each transaction or all at one at the end of all of your transactions.

Complete these tasks to run the calculation and allocations after all of your transactions for the day.

BEST PRACTICE
Because of the amount of time it takes for the system to complete the running of these options, the Budget Office recommends running this at the end of your transactions, rather than after each transaction.

For large units, please run these rules at the four digit department level instead of the whole unit. If these rules are run at the whole unit level, the calculations may cause the system to freeze.

1. Navigate to: **My Task List > Budget Preparation > Calculations** > **Calculate compensation budgets**.

2. Click the **Launch** button.
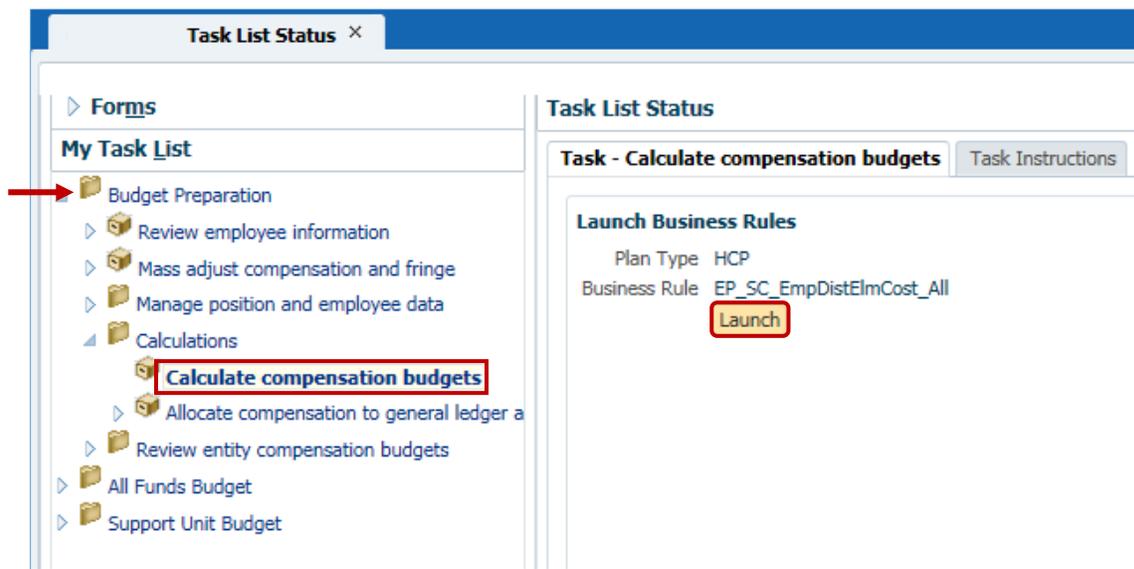
3. To change the entity, make sure the **Version** is **Working** and the **Scenario** is **Budget**.

4. Select the appropriate **Entity**.
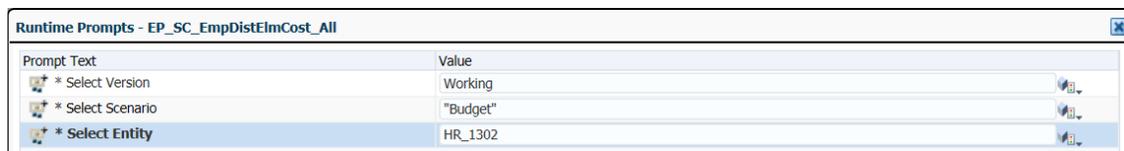
5. Click your **Department or College** (if you are small size college) to select it.

6. Click the **right arrow** to move it to the right side of the screen.

7. Click the **OK** button.
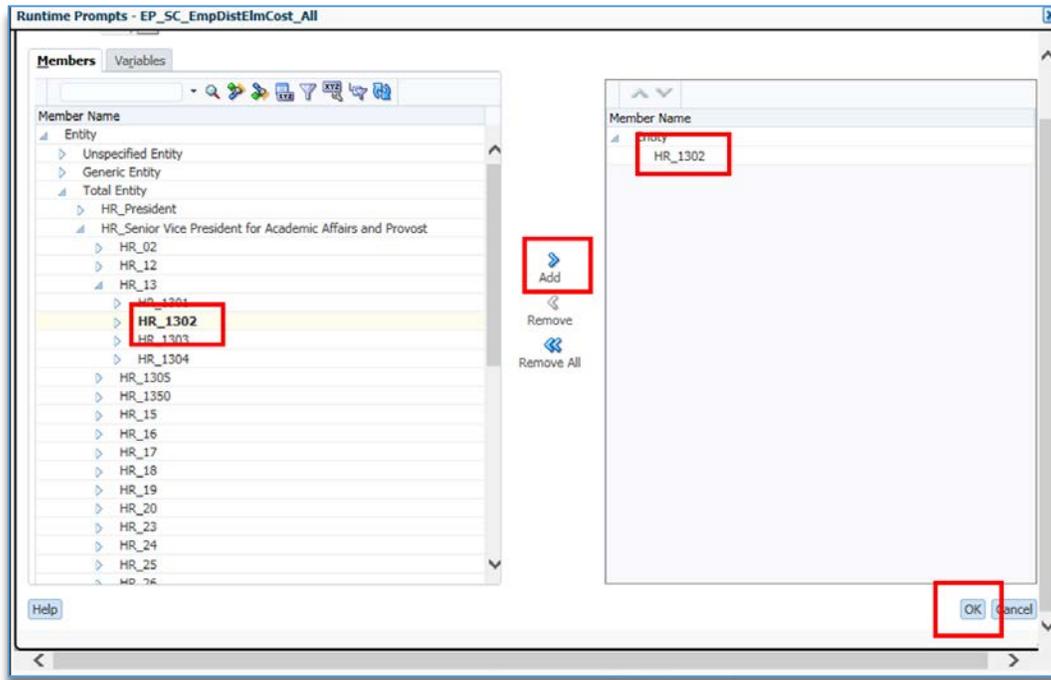
8. Click the **Launch** button.

    The system will create a popup let you know it was successfully run.

9. Once you see the rule was run successfully, click the **Allocate compensation to general ledger accounts** option.

10. Click the **Launch** button.
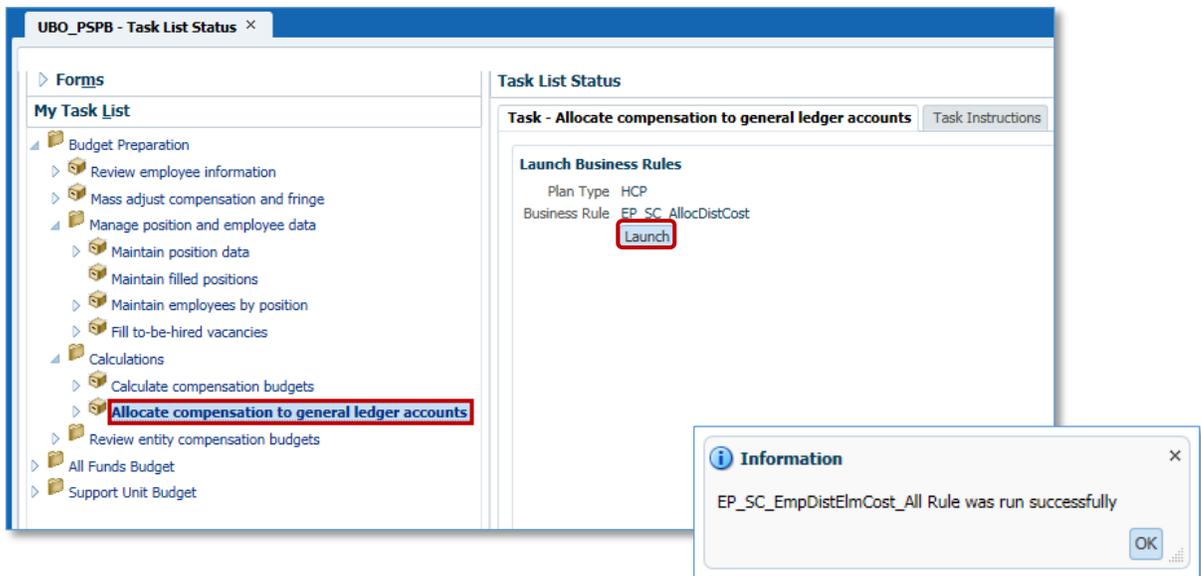
Before going into details on how to select the calculation criteria, let's define some concepts.

- **Existing Employees** are all of the pre-loaded employees. Existing Employees have a valid 8-digit UFID.

- **Existing Positions** are all of the pre-loaded positions. Any position that starts with "**P_**," "**P_A**," "**SA_**," or "**SB_**" is an existing position.

- **To-Be Hired Employees** start with "To_Be_Hired" followed by a digit. An example is: "**To Be Hired 1**."

- **New Positions** are all added to Hyperion by the Budget Office per requests from a unit. They start with "**New Position**." An example is: "New Position 100."

Here are the three major instances when you may run the allocate compensation rule.

Parameters	Position	Employee	Employee/Position Relationship
Instance 1	P_xxxxxxxx	Name_UFID	Existing Employee on Existing Position
Instance 1	P_xxxxxxxx	Name_UFID	Existing Employee on Existing Position
Instance 2	P_xxxxxxxx	To be Hired 1	To Be Hired on Existing Position
Instance 2	P_xxxxxxxx	To be Hired 2	To Be Hired on Existing Position
Instance 3	New Position	To be Hired 3	To be Hired on New Position

Each of these calculations correspond with different parameters, which are shown below. Review the list of employees/positions in your department. In most cases, you will have existing employees on existing positions. When you run the allocate compensation calculations for these instances, make sure you use the following parameters:

Instance 1: Existing employees on existing positions
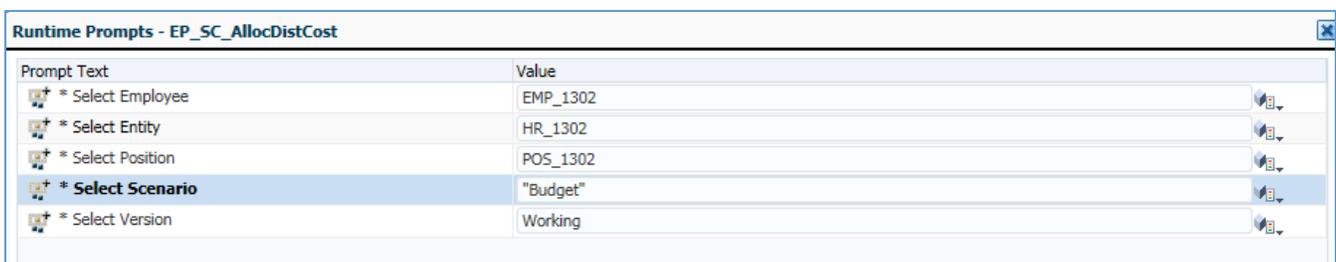
Runtime Prompts - EP_SC_AllocDistCost	
Prompt Text	**Value**
* Select Employee	EMP_1302
* Select Entity	HR_1302
* Select Position	POS_1302
* Select Scenario	"Budget"
* Select Version	Working

If you have existing employees on existing positions, you need to set these parameters: Make sure you select **EMP_XXXX** for *Employee* criteria and **POS_XXXX** for *Position* criteria. You can also type those values directly into the boxes. The *Scenario* should always be "**Budget**" and the *Version* should always be "**Working**" when you work in the All Funds Budget cycle.

Instance 2: To-be-Hired employees on existing positions
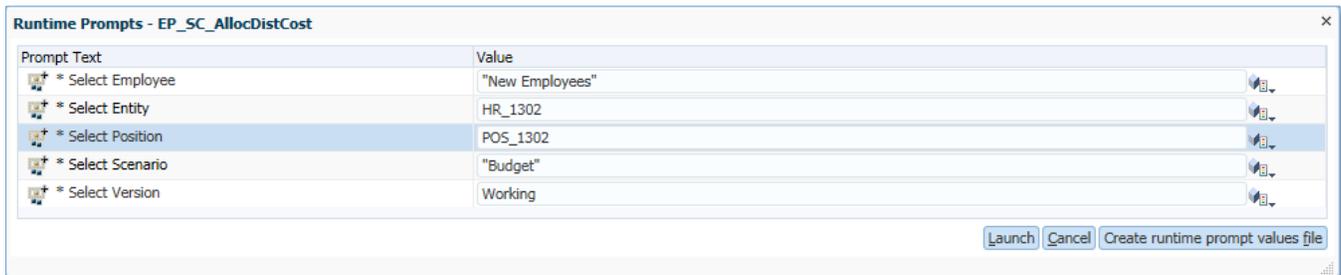
If you have To-be-Hired employees on existing positions, you need to set these parameters: Select **New Employees** (which represents all the To-be-Hired) for *Employee* criteria, and **POS_XXXX** for *Position* criteria. You can also type those values directly into the boxes. The *Scenario* should always be "**Budget**" and the *Version* should always be "**Working**" when you work in the All Funds Budget cycle.

Instance 3: To-Be-Hired employees on new positions
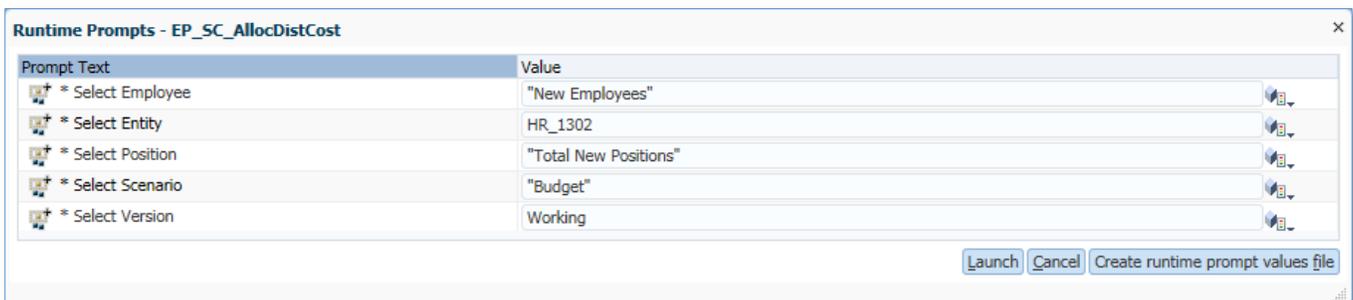
If you have To-be-Hired employees on new positions, you need to set these parameters: Select **New Employees** (which represents all the To-be-Hired) for *Employee* criteria, and **Total New Positions** for *Position* criteria. You can also type those values directly into the boxes. The *Scenario* should always be "**Budget**" and the *Version* should always be "**Working**" when you work in the All Funds Budget cycle.

The following steps show you how to make selections for Instance 1. You can follow these steps to make selections for instances 2 and 3 as well.

11. To change employee selection, click the **Search** button next to the Select Employee box.
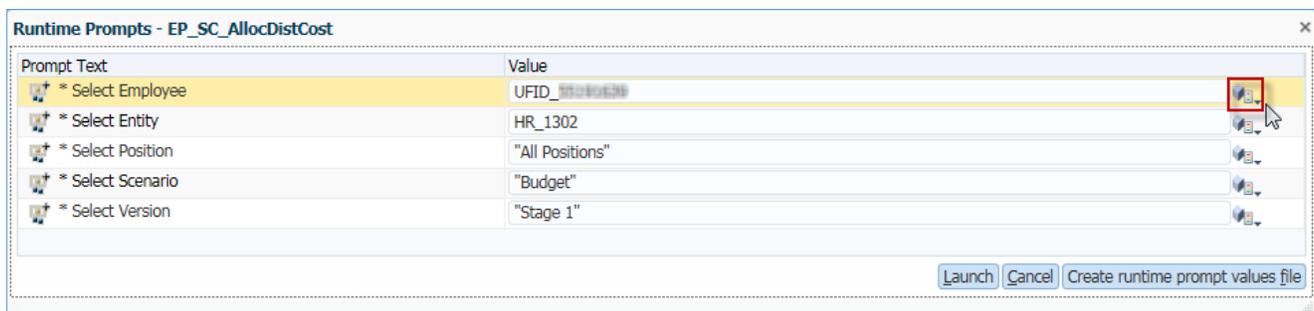
12. Navigate along the branches to select employee branch for your organization.
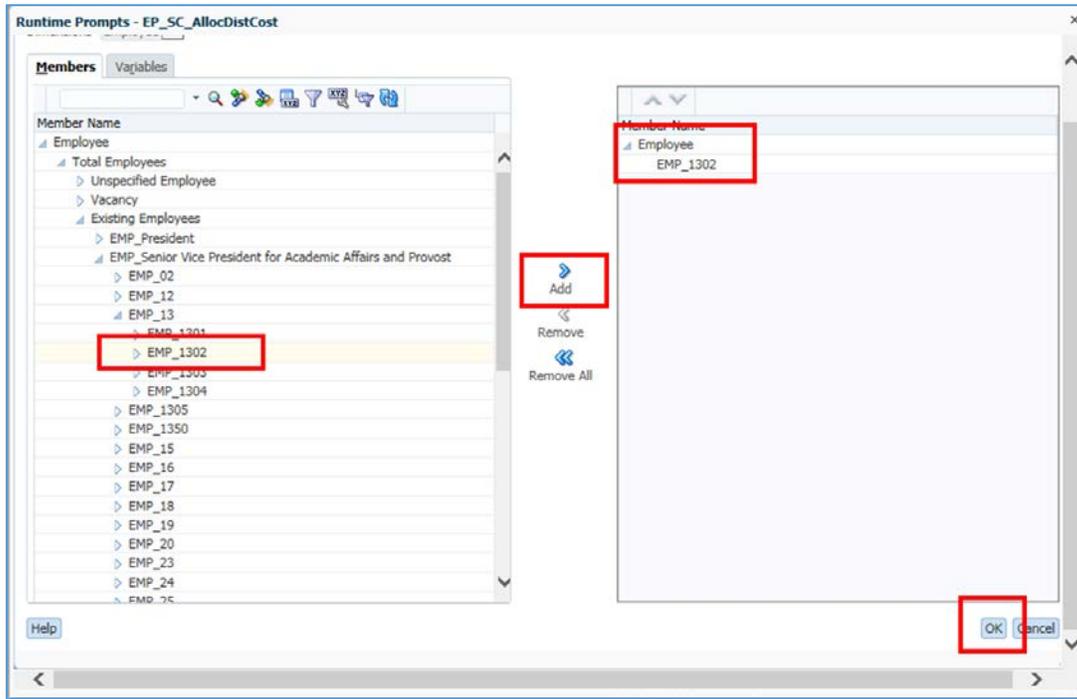
13. Click the **right arrow** to move it into the right side of the window.

14. Click the **OK** button.

Next, you will select **Department or College** as the Entity you want.
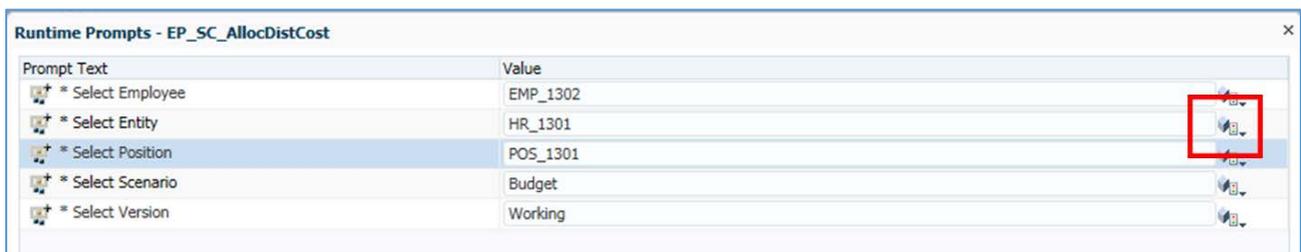
15. Click the **Search** button next to the Select Entity box.

16. Click the **+** button next to your **Department**.

17. Select the **Department**.

18. Click the **right arrow** to put it in the right side of the window.

19. Click the **OK** button.
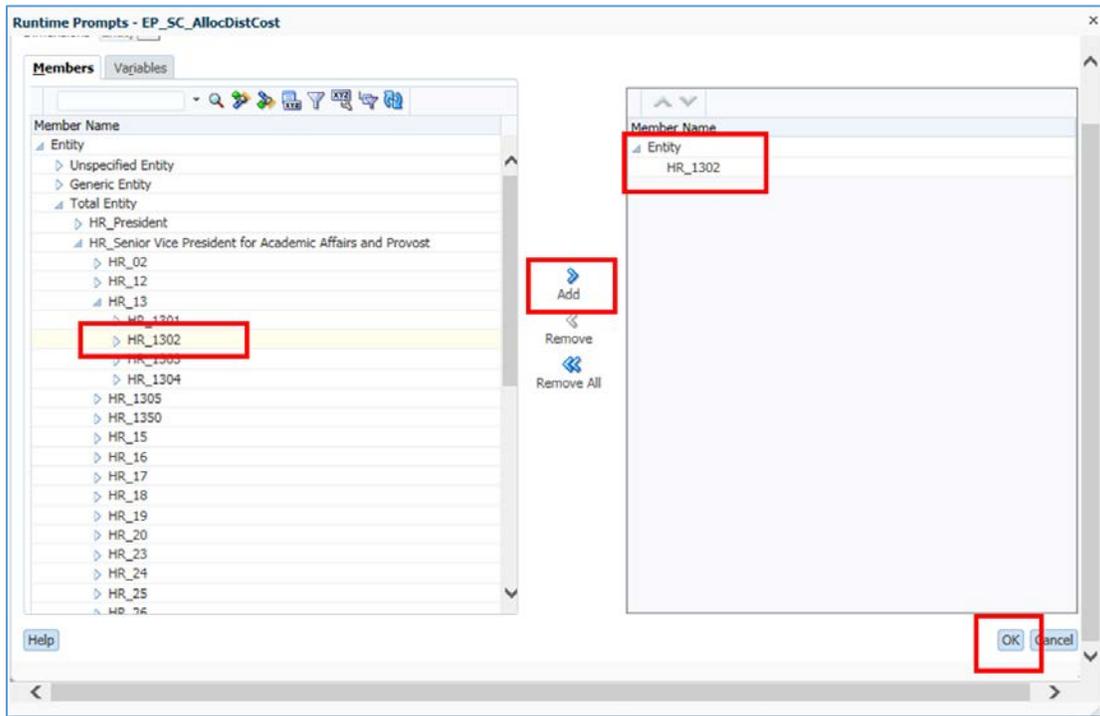
20. To change the position selection, click the **Search** button next to the Select Position box.
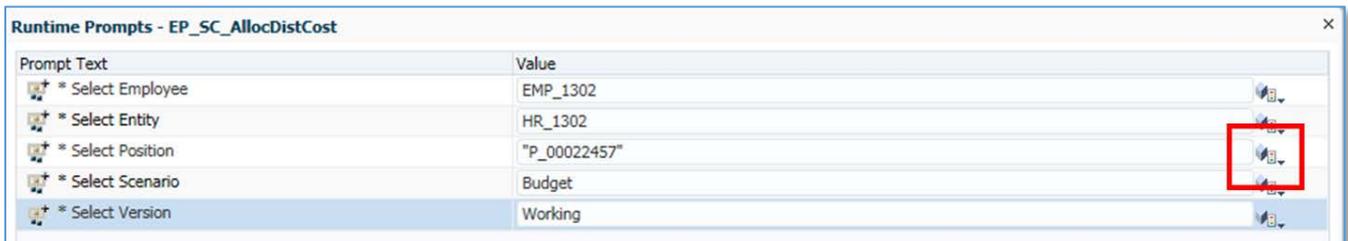
21. Navigate the branches to select the positions for your organization.

22. Click the **right arrow** to move it to the right side of the screen.

23. Click the **OK** button.
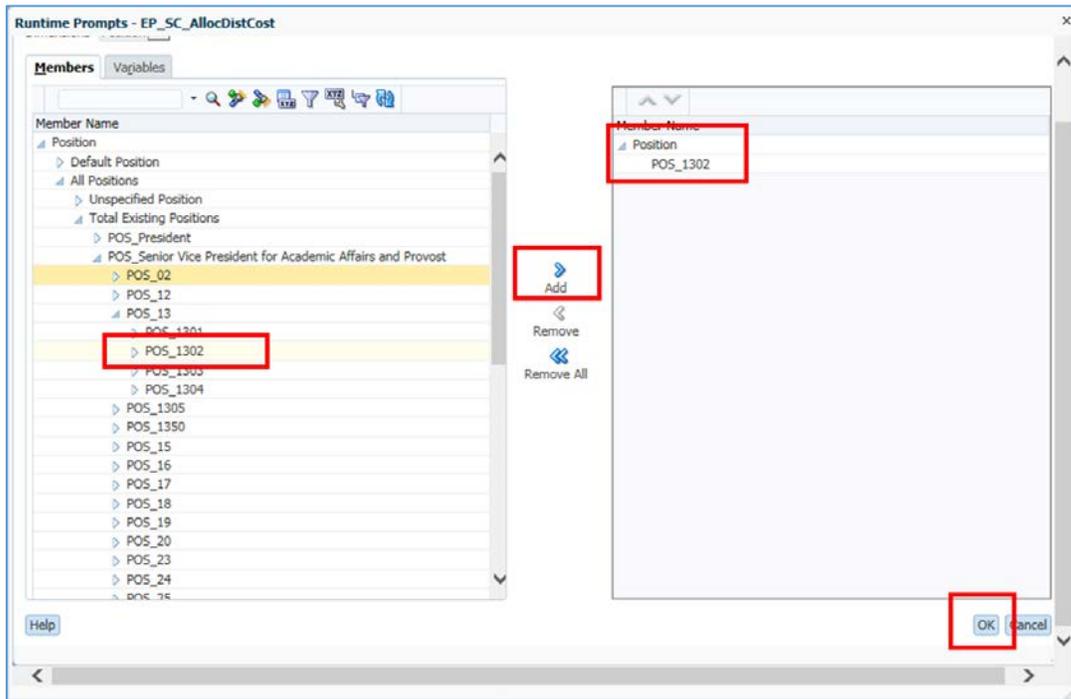
24. Confirm *Scenario* and *Version* fields display **Budget** and **Working**.

25. Click the **Launch** button.
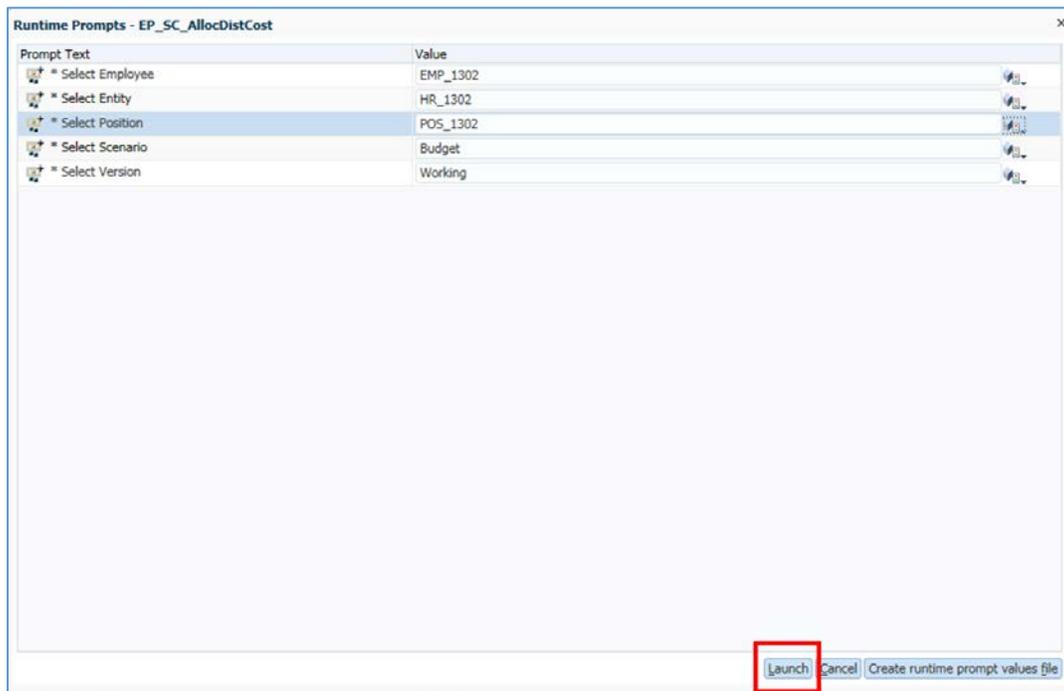
Repeat these steps to make selections for *Instances 2 and 3* if needed.

Note: Besides searching to change your selection values, you can type in all the values (such EMP_1302, POS_1302 and HR_1302) directly to the search boxes.

Note: If you are at the Support Unit Budget Request cycle, please make sure to select "**SU_Budget**" for *Scenario* and either "**Working Flat**" or "**Working Optimal**" for *Version*.

Remember the BEST PRACTICE
Because of the amount of time it takes for the system to complete the running of these options, the Budget Office recommends running this at the end of your transactions, rather than after each transaction.

If you need help with…

- Technical issues, contact the UF Help Desk:
    o 392-HELP(4357)
    o helpdesk@ufl.edu

- Policies and Directives, contact the UF Budget Office:
    o 392-2402
    o http://cfo.ufl.edu/administrative-units/budget/