
Support Unit Budget Requests

In Hyperion

University Budget Office
Office of the Vice President and Chief Financial Officer

October 2016



Table of Contents

HYPERION OVERVIEW	2
Overview.....	2
Support Unit Budget Cycle	2
Logging In.....	3
Setting Hyperion User Preferences	4
Changing Default Opening Page (This is an optional setting change).....	4
Changing Hyperion Display Settings.....	5
 WORKSPACE.....	 9
Hyperion Navigation.....	9
Toolbar Icons.....	9
Hyperion Processes	11
My Task List	11
 BUDGET PREPARATION OVERVIEW	 12
 RUNNING HYPERION REPORTS	 13
Navigation to all reports	13
Budgeted Lines + Benefits Report	15
Additional Earnings + Benefits	17
Benefit Selection	20
Support Unit Budget Request	22
 BUDGET PREPARATION PROCESSES	 24
Manage Position and Employee Data Forms	24
Maintain position data	24
Maintain filled positions	24
Maintain employees by position	24
Fill to-be-hired vacancies.....	24

Update Current Employees' Distributions & Data.....	24
Add an Additional Distribution for the same Employee	27
Delete a Distribution	31
Calculate and Allocate Compensation Budgets per Edit	33
Assigning an Existing Employee	36
Assigning a To-Be-Hired Employee.....	37
Employee Status Change	42
Removing an Assignment	44
Change FTE.....	44
To change the position FTE only.....	45
To change the FTE for an employee.	46
Promote a Position and employee including Fringe Benefit changes.....	48
Add Overtime Pay or Additional Earnings	53
Add a Vacant Position.....	56
Calculate and Allocate Compensation per Entity	58
Review Allocation Results.....	65
Correct Allocation Errors.....	66
Copy Working Flat to Working Cut and Working Optimal	67
Copy Working Flat to Working Optimal	67
Selecting Working Optimal for Editing	70
 SUPPORT UNIT BUDGET REQUEST	 72
Forms for Support Unit Budget Request.....	72
Accessing Forms	72
SU HCP Push Validation	73
SU Budget Worksheet.....	74
To input request dollars in for Working Flat and Working Optimal.....	75
SU Budget Worksheet-Level 0 Accounts Only	77
Populating Accounts.....	77
Comments and Supporting Details.....	81
Adding Comments	81
Deleting Comments	82
Supporting Details.....	84

Supporting Details	84
Editing/Deleting Supporting Details	89
 SMART VIEW	 90
Opening Smart View.....	90
Setting up Smart View Shared Connections URL.....	91
Smart View Option Settings	92
Connecting to Hyperion in Smart View.....	94
Input and Save Budget Data in Smart View	97
Copy, Paste and Cut.....	97
Populating Accounts.....	98
Adding Comments	101
Adding Supporting Details	103
 SECURITY	 109
 UBO_PSPB SU APPLICATION OVERVIEW	 110
Account.....	110
Entity	110
Commitment Source.....	110
Cost Pools	111
Fund.....	112
Program	112
Dept Flex.....	112
Scenario	112
Version.....	112
Year	112
Periods.....	112

Hyperion Overview

Overview

Hyperion is a centralized, Excel and Web-based planning, budgeting and forecasting solution that integrates financial and operational fiscal processes and improves business predictability. Support Units enter budget data through web forms using a web browser. Current year budget and two years of actual data are provided to facilitate the budgeting process. Support Units can also choose to open these same forms in Smart View which is integrated into Excel to input and submit the budget through Excel.

Support Unit Budget Cycle

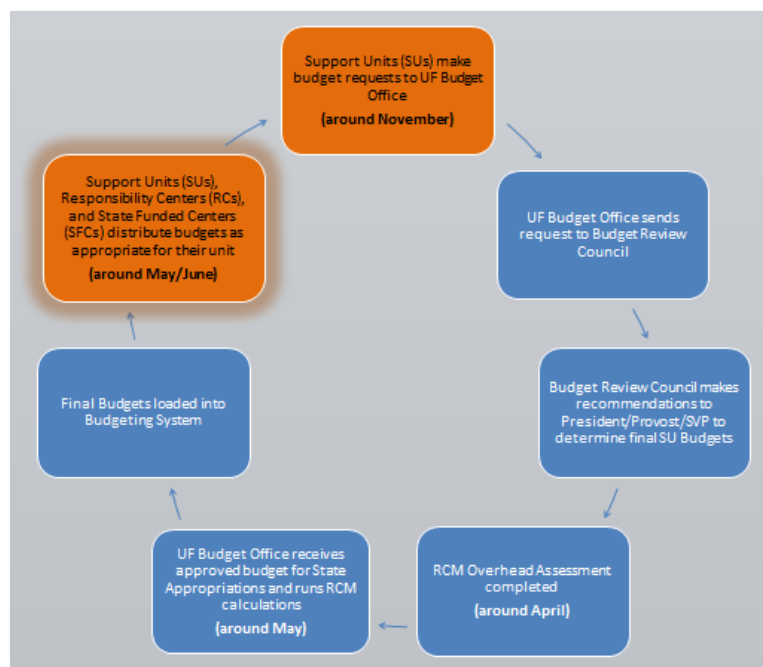
There are important milestones throughout the UF Budgeting process you should be aware of depending on whether you are budgeting for a Support Unit (SU), Responsibility Center (RC), Colleges, State Funded Center (SFC) or hybrid.

Starting in November of every year, Support Units make their budget requests for the upcoming fiscal year to the UF Budget Office. The requests are reviewed and approved by Senior Vice Presidents and the President.

[Click here for SU Budget Request Whole Cycle Document](#)

Starting in May/June, all budget personnel will receive their final budgets and can then manage and distribute the monies as appropriate across their Budget Preparation and All Funds Budget.

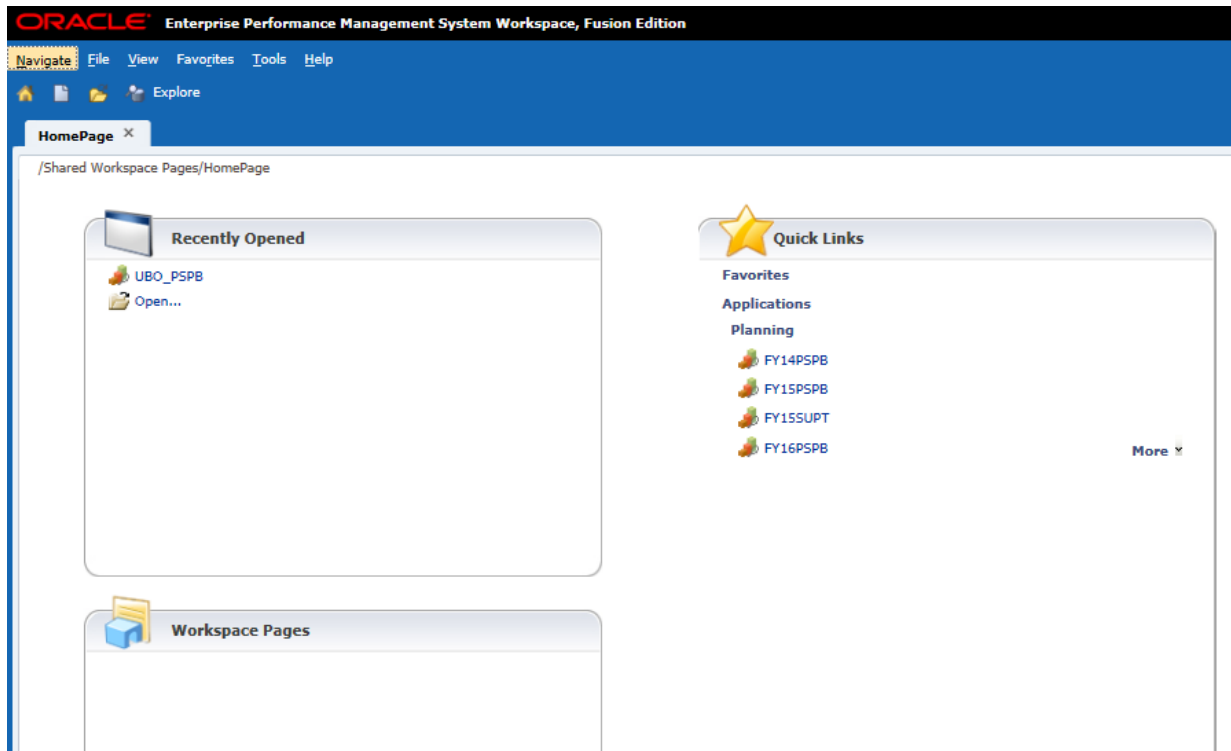
[Click here for All Funds Budget Whole Cycle Document](#)



Logging In

The Hyperion Support Unit budget submission application is incorporated to myUFL portal. After logging into myUFL, navigate through Nav Bar > Main Menu > Budgeting > UF Hyperion Budgeting.

Hyperion opens with the HomePage displayed by default.



NOTE:

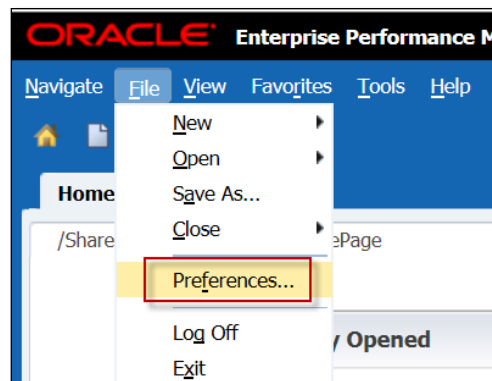
You may choose to display either the Home Page or the UBO_PSPB Application as the opening page by changing this setting in Hyperion User Preferences.

Setting Hyperion User Preferences

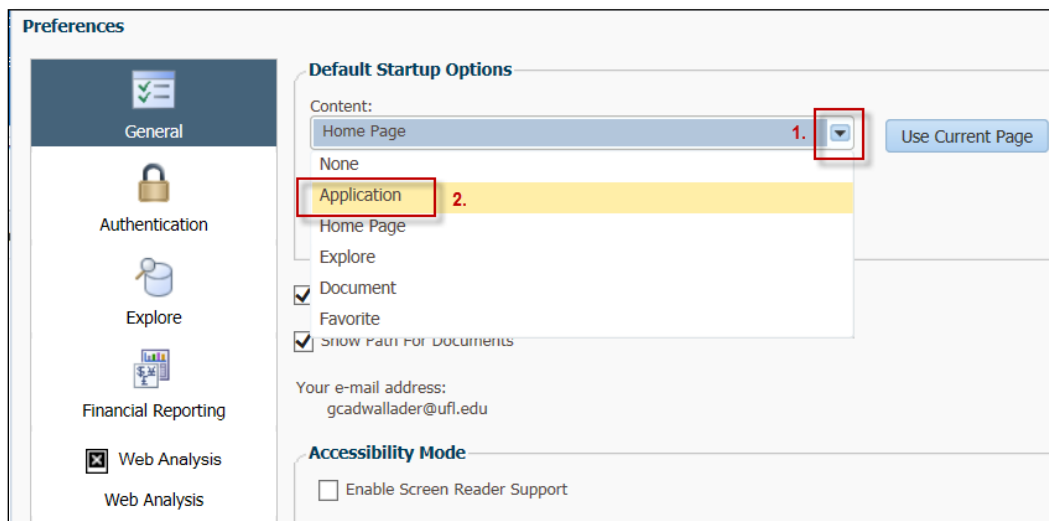
Let's look at how to setup user preferences before we begin using the application to prep and request UF budgets. Setting user preferences allows you to define the default content that will display when you login to Hyperion (mandatory). It also allows you to define formatting, page options and additional options (optional).

Changing Default Opening Page (This is an optional setting change)

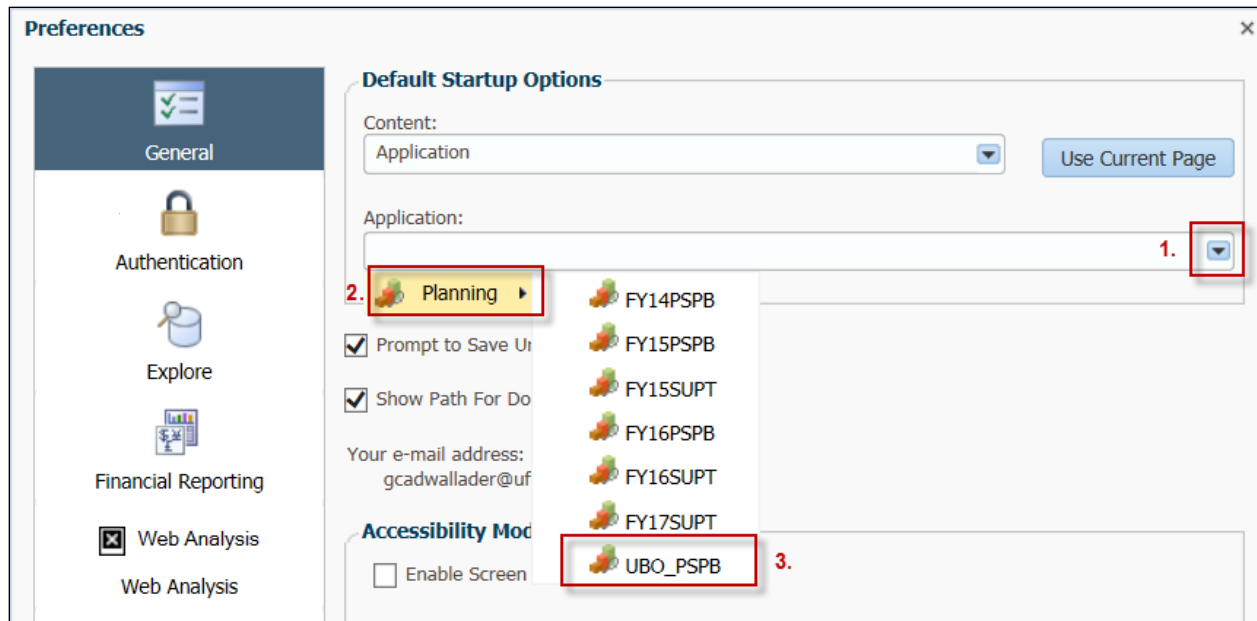
1. From the Hyperion application window, go to **File > Preferences**.



2. From the **General** preference option, click the **Home Page** drop down menu and choose **Application** from the list.



3. Select the **Application** drop down menu and select **UBO_PSPB** from the Planning list.

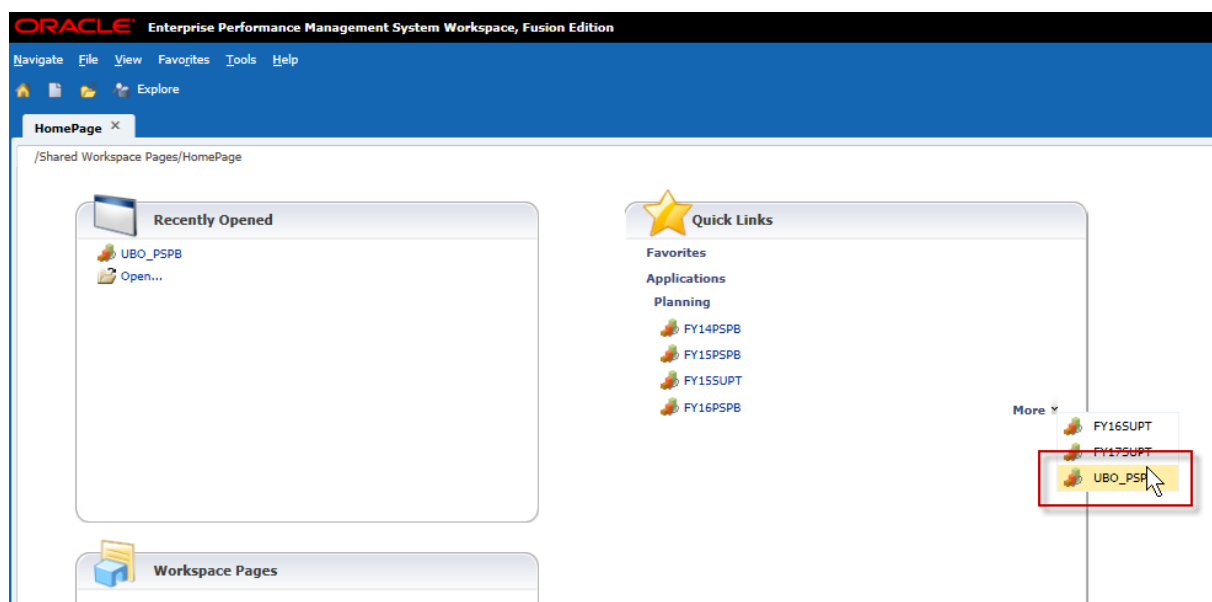


4. Click **OK**.

Changing Hyperion Display Settings

To change the display settings, you must first open the UBO_PSPB application. The display options must be established prior to using the Hyperion application for requesting UF budgets.

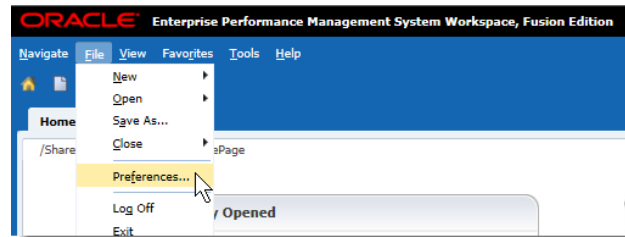
1. Open **UBO_PSPB** from the **Quick Links** section of the Home Page. (If you've already changed the preferences to display UBO_PSPB immediately upon login, you would skip this step).



NOTE:

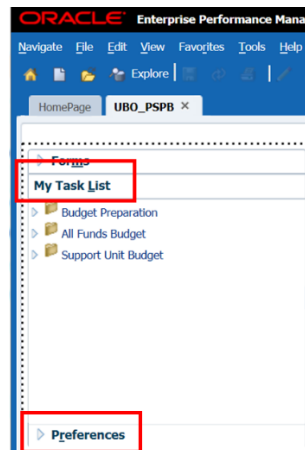
If you have previously opened the UBO_PSPB application, you can open it again from the Recently Opened section on the HomePage, if displayed.

2. Choose **File > Preferences** from the Menu bar.

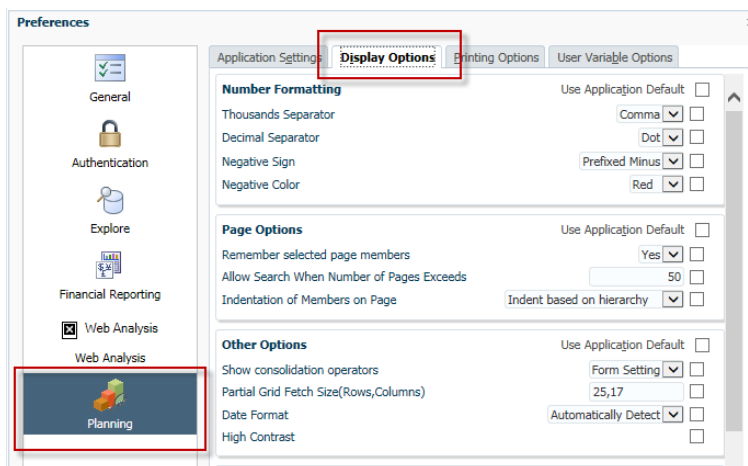


NOTE: You can also click the Preferences section under the My Task List panel.

3. Choose File > Preferences from Menu bar and click the Planning option or click the Preferences option at the bottom of the left panel.



4. Move to the Display Options. Click on Display Options.



5. Select your desired options.

You are welcome to customize your desired Display Options settings as you see fit. Some suggested default settings include:

Number Formatting

- Thousands Separator – choose Comma
- Decimal Separator – choose Dot
- Negative Sign – choose Prefixed Minus
- Negative Color – choose Black

Page Options

- Indentation of Members on Page – choose Indent Level 0 members only
- This option dictates the look and feel of data categories on web forms.

Other Options

Using the default settings is highly recommended

Number Formatting

Thousands Separator
Decimal Separator
Negative Sign
Negative Color

Page Options

Remember selected page members
Allow Search When Number of Pages Exceeds
Indentation of Members on Page

Other Options

Show consolidation operators
Partial Grid Fetch Size(Rows,Columns)
Date Format
High Contrast

User Image

Choose File

Please note that the maximum file size limit is 500 KB

Changing Hyperion User Variable Settings

You are typically required to submit two budgets as part of your overall Budget Request Submission process annually. The two budgets are referred to as:

- Working Flat – the budget you had last year
- Working Optimal – the optimal budget you'd like to have to run your unit.

Under budget constraints, you may be asked to submit a Working Cut budget.

- Working Cut – the flat budget cut by a certain percentage. The UBO will inform you of a percentage each year and if this submission is required.

As part of the Hyperion preference setup, you will indicate three User Variable settings. These settings will need to be changed when you shift your budgeting from Working Flat to Working Optimal or vice versa.

- Scenario: SU_Budget (Stays the same for all versions)
- Version: Working Flat and Working Optimal (Will change depending on version working on)
- Year: FYXX (this is the fiscal year you are budgeting for and it stays the same for all versions)

It is recommended you initially set “Working Flat” as your default budget version. After you finish all the personnel changes and operating expenses for Working Flat, you will need to change this preference to Working Optimal to update the budget on this version.

Although you can choose to return to this Preferences window to make the changes to the additional budget versions, there is a more quick and direct method of changing budget versions in Budget Preparation that will be covered later in this handbook.

Dimension	User Variable Name	Selected Member
Scenario	Current Scenario	SU_Budget
Version	Current Stage	Working Flat
Year	Current Year of Vi...	FY17

NOTE: The above screen displays when one choosing File > Preferences from Menu bar. If you choose the Preferences option under My Task List, the window would look as below:

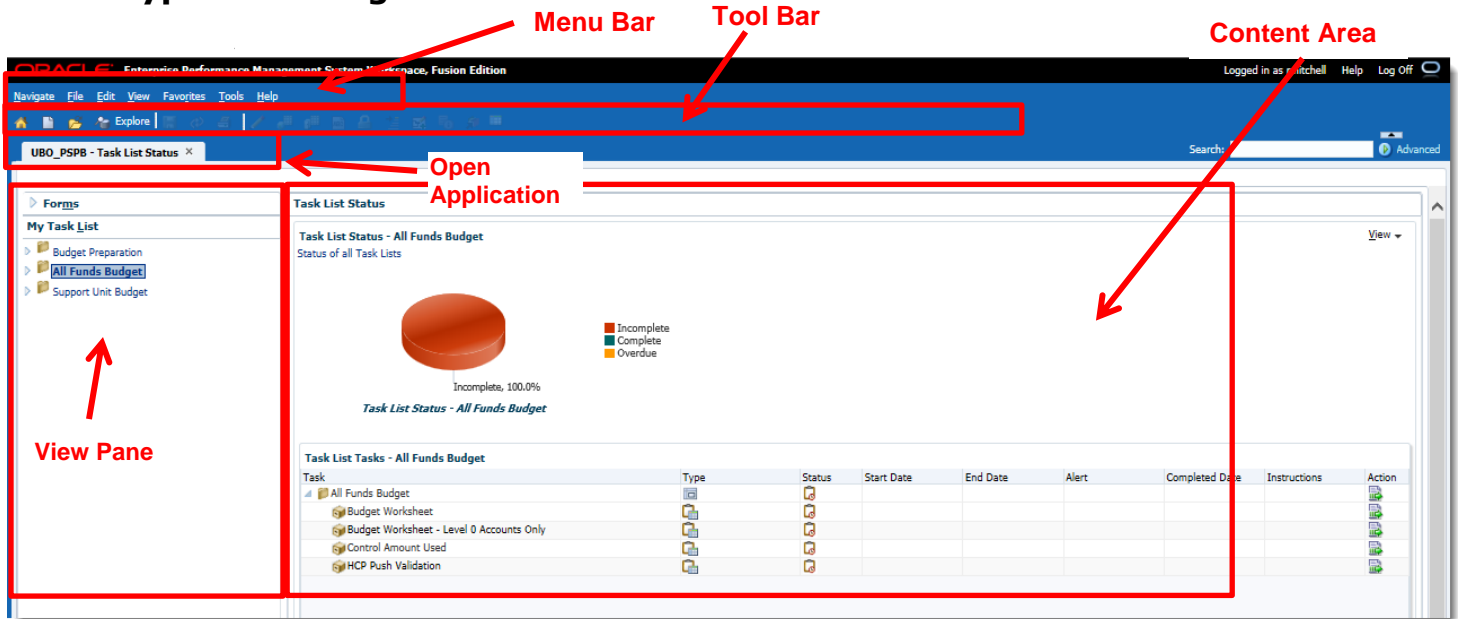
Dimension	User Variable Name	Selected Member
Scenario	Current Scenario	SU_Budget
Version	Current Stage	Working Flat
Year	Current Year of Vi...	FY17

6. Click **OK** or **Save** depending on which way you accessed Preferences.







You are now ready to navigate through the application.




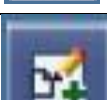
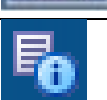

Workspace

Hyperion Navigation

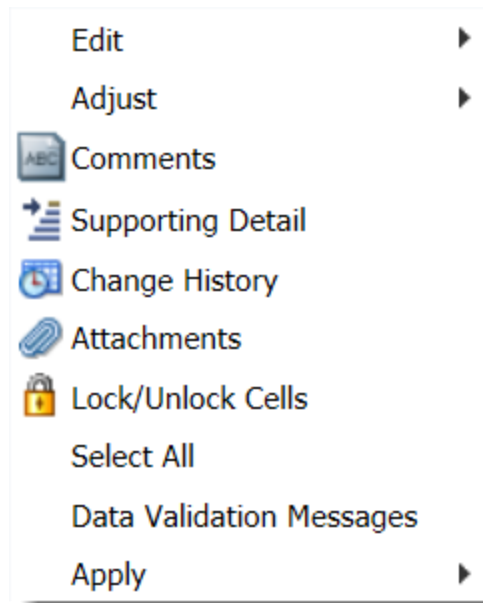


Toolbar Icons

	Save	Save the input data
	Refresh	Refresh the form
	Print	Print the current screen
	Adjust	Adjust the selected cell value by a percentage or by a value
	Grid Spread	Spread value
	Mass Allocate	Run a mass allocation

	Comment	Add or edit comment to the selected cell.
	Lock/Unlock Cells	Lock or unlock cells when spreading data.
	Supporting Detail	Add or edit supporting details to selected cell.
	Add/Edit Document	Add or edit attached documents for the selected cell.
	Instructions	Show the instruction details for the open data form.
	Open in Smart View	Open data from in Smart View. <i>(This button does not work and will not be used.)</i>

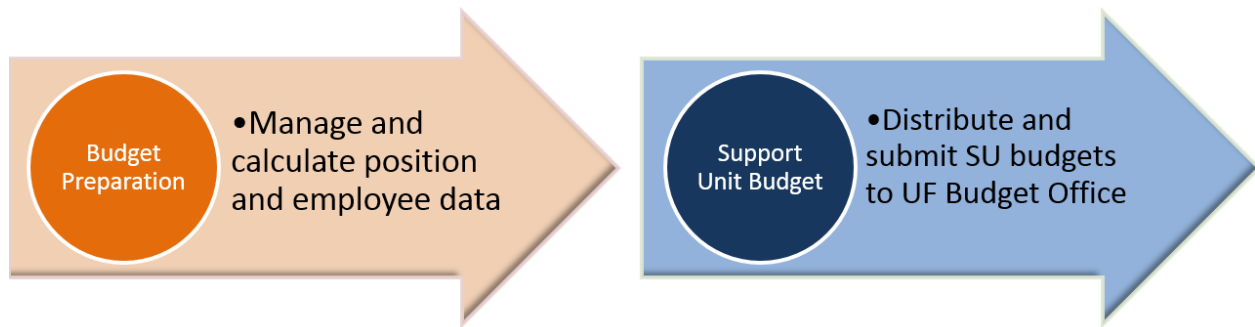
Some tools can be accessed by right-clicking on the desired area of the form and displaying the shortcut menu.



Hyperion Processes

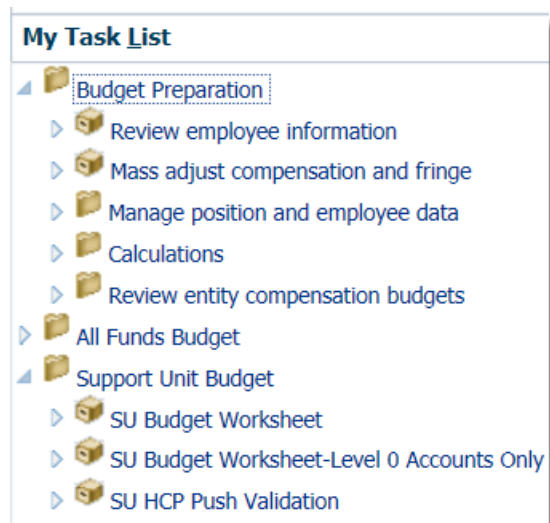
As a Support Unit, there are two specific and individual processes you will complete using Hyperion to successfully request your budget each fiscal year. Those processes include multiple procedural steps and are titled:

- Budget Preparation
- Support Unit Budget Request Submission



My Task List

You will use the My Task List to access all needed forms and functions for Budget Preparation and Support Unit Budget Requests.



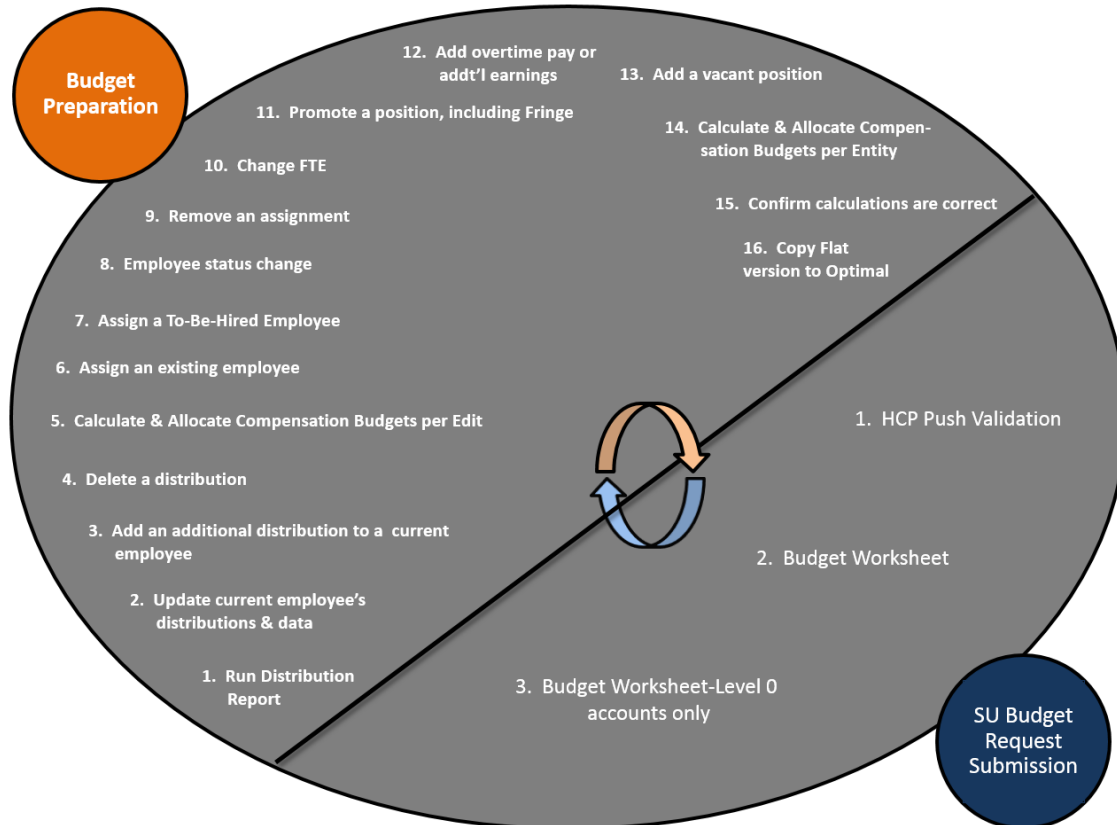
Budget Preparation Overview

NOTE: Choose **Budget Preparation** from the My Task List Pane.

The annual Budget Request Submission process includes completing relevant procedures within both Budget Preparation and Support Unit Budget Request Submission before submitting to the University Budget Office (UBO).

In this section, we will cover the available procedures in Budget Preparation in the order the University Budget Office recommends as best practice. Required Budget Preparation procedures are recommended to be completed first, prior to completing Support Unit Budget Request Submission procedures.

There are a total of 16 budget prep procedures displayed in the image below from which you may choose to successfully prepare your budget.



There is no specific order you need to follow to finish your budget request. We recommend you run the Budget Line & Benefits report first. Review the employee and positions currently in Hyperion. Make all necessary changes on the personnel side. Once the salary and fringe expenditures are up to date, review your OPS and operating expenditures.

Running Hyperion Reports

Please keep in mind that the reports will not be updated until after the push has occurred in Hyperion. The push runs every two hours starting at 7am and ending at 7pm Monday thru Friday. On Saturday and Sunday the push will run every two hours starting at 11am and ending at 7pm.

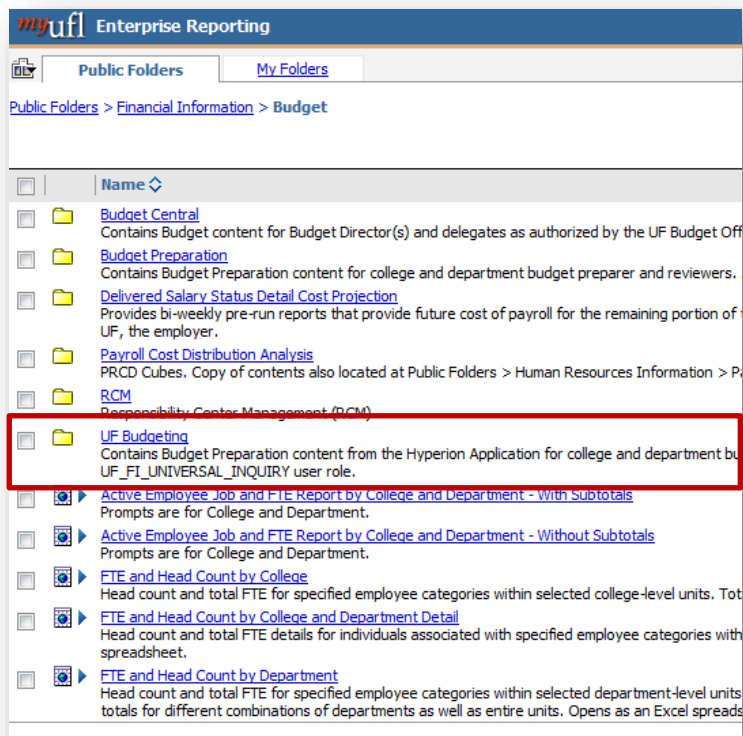
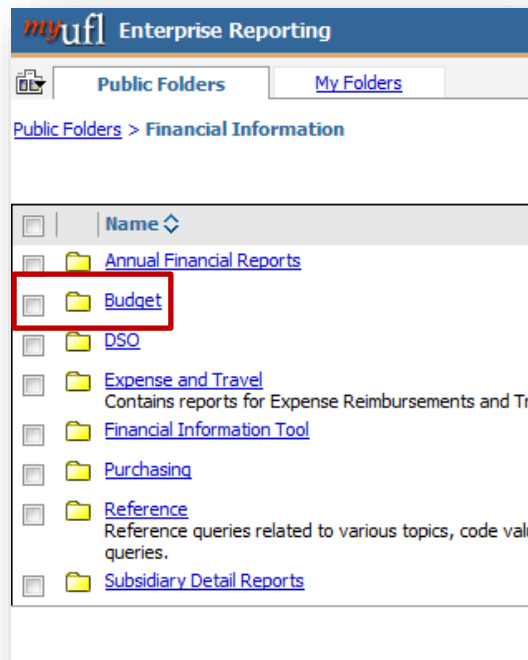
We have found that the push typically takes about ½ hr to run. We recommend you run the reports an hour after the push times (7:30 am, 9:30 am, et al.) to see any changes that were made before the push occurred.

Navigation to all reports

1. Log into myUFL and navigate through **Main Menu > Enterprise Reporting > Access Reporting**.



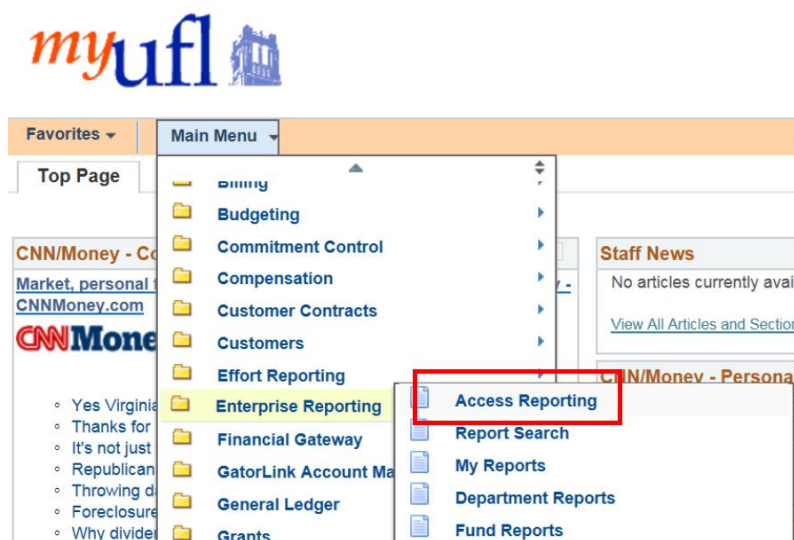
2. From the **Public Folders** tab, select **Financial Information > Budget > UF Budgeting**. Once inside you will choose the report you want to run from the list provided.



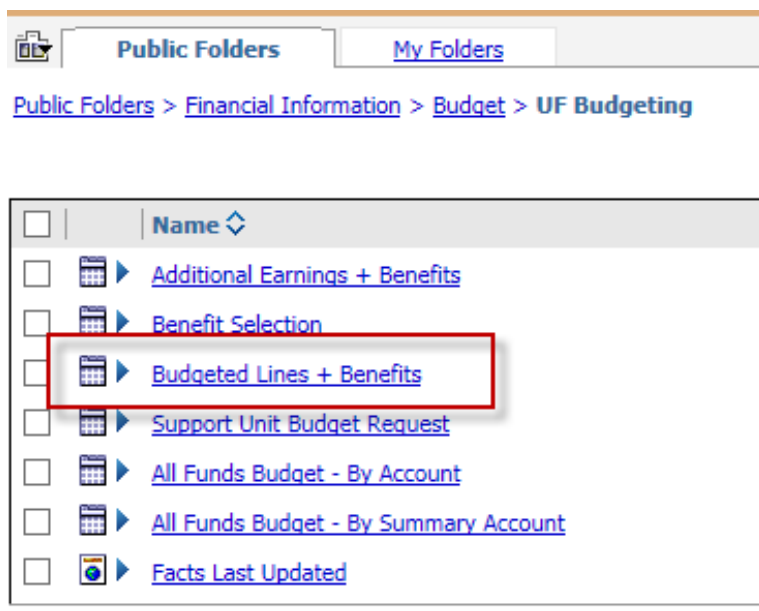
Budgeted Lines + Benefits Report

The Budgeted Lines + Benefits Report gives you a list of where all employees are currently budgeted and their benefits within Hyperion. This report can be run by the following additional search criteria Employee, Entity (Home Department), Comp Entity (Earnings Department), and Filled or Vacant. Please note Comp Fund (Earnings Fund), Comp Program (Earnings Fund), Comp Dept Flex (Earnings Dept Flex) are available search criteria, however for the SU Budget Request cycle no data will pull if these values are selected since we do not use these values at this time.

1. Login to my.ufl.edu. Click on **Main Menu > Enterprise Reporting > Access Reporting**.



2. Go to **Public Folders > Financial Information > Budget > UF Budgeting**. Select **Budgeted Lines + Benefits**



3. Choose your required search criteria. In this example, we are running the budge line for Support Unit Flat Budget for FY17. The parameters are selected as below.

Budgeted Lines + Benefits

Year: * FY17 AND Scenario: * SU_Budget AND Version: * Working Flat Finish

4. Choose your additional search criteria. In this example, we will use HR_6201 data.

Budgeted Lines + Benefits

Year: * FY17 AND Scenario: * SU_Budget AND Version: * Working Flat Finish

Keywords:
Type one or more keywords separated by spaces.
Search

Options

Results:

Employee:
(ex: UFID_00000000)

Insert
Remove

Choice:

Select all Deselect all

Keywords:
Type one or more keywords separated by spaces.
HR_6201 Search

Options

Results:

Entity:
(ex: HR_0101)

Insert
Remove

Choice:

Select all Deselect all

Keywords:
Type one or more keywords separated by spaces.
Search

Options

Results:

Comp Entity:
(ex: D_01010000)

Insert
Remove

Choice:

NOTE: Please note that there are two types of Entities.

One is the employee's home department which is referred to as "Entity" on the search criteria page. The home department starts with "HR_".

The other one is the employee's earnings department which is referred to as "Comp Entity" on the search criteria page. The earnings department starts with "D_".

If you search by home department, the report will return all the positions/employees who are administrated in that department. If you search by the earnings department, the report will return all the positions/employees who are paid by that department.

5. Scroll to the bottom of form or top of the form. Click **Finish** and wait for the report to run.
6. **Review** your report.

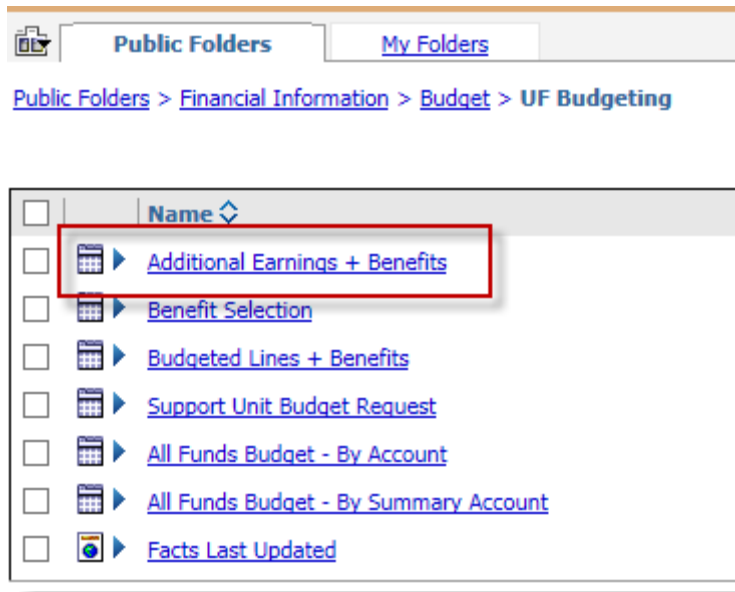
my ufl							
Entity	UFID and Name	HCP Employee	HCP Position	Job Title	Job Code	Union LD	
HR 3305	UFID 99995429	P 00000647	PROGRAM AST - 000908	PROGRAM AST - 000908	JC 000908 Out of Unit - 00	TU2N	
HR 3305	UFID 99995429	P 00000647	PROGRAM AST - 000908	PROGRAM AST - 000908	JC 000908 Out of Unit - 00	Fringe TI	
HR 3305	UFID 99995429	P 00000647	PROGRAM AST - 000908	PROGRAM AST - 000908	JC 000908 Out of Unit - 00	TU2N	
HR 3305	UFID 99995429	P 00000647	PROGRAM AST - 000908	PROGRAM AST - 000908	JC 000908 Out of Unit - 00	Fringe TI	
HR 1002	UFID 99994750	P 00029168	INFO/PUBLICATIONS SVCS; CRD 3 - 001403	INFO/PUBLICATIONS SVCS; CRD 3 - 001403	JC 001403 Out of Unit - 00	TA12	
HR 1002	UFID 99994750	P 00029168	INFO/PUBLICATIONS SVCS; CRD 3 - 001403	INFO/PUBLICATIONS SVCS; CRD 3 - 001403	JC 001403 Out of Unit - 00	Fringe TI	
HR 6045	UFID 99985009	P 00000205	EXTENSION PROGRAM AST - 000816	EXTENSION PROGRAM AST - 000816	JC 000816 Out of Unit - 00	Fringe TI	
HR 6045	UFID 99985009	P 00000205	EXTENSION PROGRAM AST - 000816	EXTENSION PROGRAM AST - 000816	JC 000816 Out of Unit - 00	TU2N	
HR 1180	UFID 99981198	P 00018987	LABORATORY ANIMAL TECH - 001088	LABORATORY ANIMAL TECH - 001088	JC 001088 Operation Services - 32	Fringe TI	
HR 1180	UFID 99981198	P 00018987	LABORATORY ANIMAL TECH - 001088	LABORATORY ANIMAL TECH - 001088	JC 001088 Operation Services - 32	TU2N	
HR 290801	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	CLINICAL SERVICE REP 2 - 001700	JC 001700 Out of Unit - 00	TU2N	
HR 290801	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	CLINICAL SERVICE REP 2 - 001700	JC 001700 Out of Unit - 00	Fringe TI	
HR 290801	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	CLINICAL SERVICE REP 2 - 001700	JC 001700 Out of Unit - 00	TU2N	
HR 290801	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	CLINICAL SERVICE REP 2 - 001700	JC 001700 Out of Unit - 00	Fringe TI	

NOTE: At this time each person has at least two rows of data. The one row of data is the salary expense data line and the one row is the benefit data line.

Additional Earnings + Benefits

The Additional Earnings + Benefits Report gives you a list of any employee where that employee has had additional earnings and their benefits input into Hyperion. For example, some units budget up life insurance and other misc. benefits as additional earnings. This report can be run by the following additional search criteria Employee, Entity (Home Department), Comp Entity (Earnings Department), and Filled or Vacant. Please note Comp Fund (Earnings Fund), Comp Program (Earnings Fund), Comp Dept Flex (Earnings Dept Flex) are available search criteria, however for the SU Budget Request cycle no data will pull if these values are selected since we do not use these values at this time.

1. Select **Additional Earnings + Benefits**



2. Choose your required search criteria.

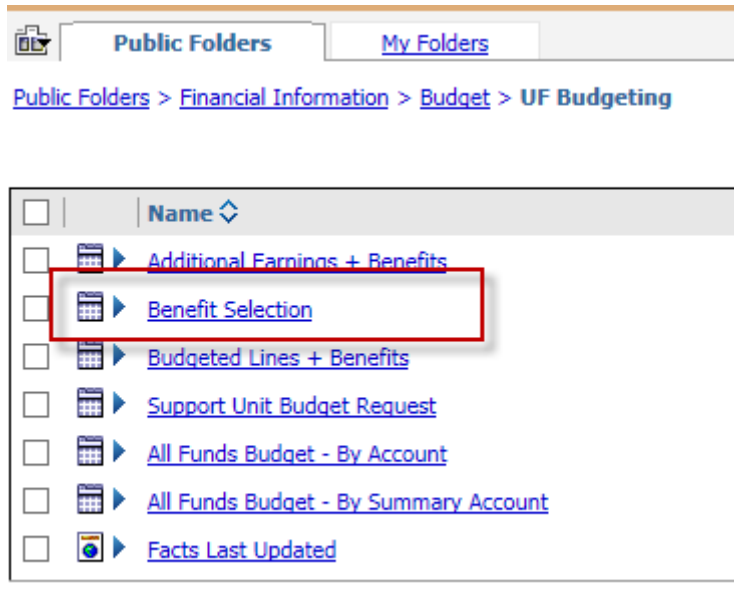
A screenshot of a search form titled 'Additional Earnings + Benefits'. The form contains three main input fields: 'Year' with a dropdown menu showing 'FY17', 'Scenario' with a dropdown menu showing 'SU_Budget', and 'Version' with a dropdown menu showing 'Working Flat'. These fields are separated by 'AND' operators. To the right of the 'Version' field is a 'Finish' button.

3. Choose your additional search criteria. In this example, we will use HR_6201 data. After entering scroll to bottom of form or top of the form.

Benefit Selection

The Benefit Selection Report gives you a list of all employees benefit selections that have been input into Hyperion. This report can be run by the following additional search criteria Employee, Entity (Home Department), Comp Entity (Earnings Department), and Filled or Vacant. Please note Comp Fund (Earnings Fund), Comp Program (Earnings Fund), Comp Dept Flex (Earnings Dept Flex) are available search criteria, however for the SU Budget Request cycle no data will pull if these values are selected since we do not use these values at this time.

1. Select **Benefit Selection**



2. Choose your required search criteria.

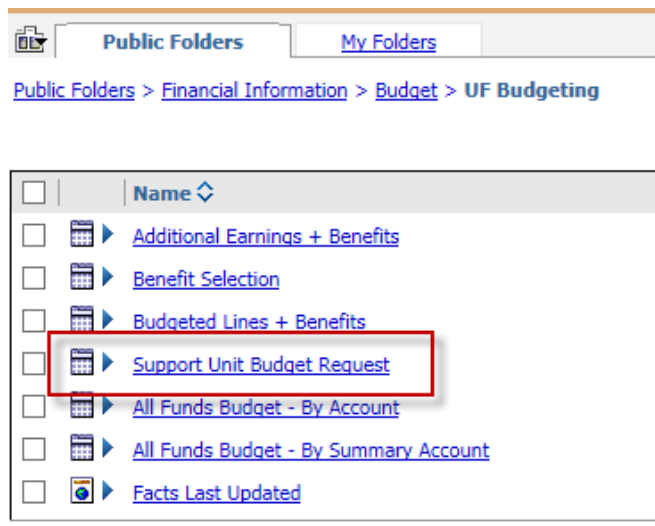
A screenshot of the 'Benefit Selection' report form. The title 'Benefit Selection' is centered at the top. Below the title, there are three dropdown menus for search criteria: 'Year' with 'FY17' selected, 'Scenario' with 'SU_Budget' selected, and 'Version' with 'Working Flat' selected. These are separated by 'AND' labels. To the right of the dropdowns is a 'Finish' button.

3. Choose your additional search criteria. In this example, we will use HR_6201 data. After entering scroll to bottom of form or top of the form.

Support Unit Budget Request

The Support Unit Budget Request Report gives you the support unit budget requested by Fiscal Year, Version, Scenario, Entity, Account, Cost Pool, and Commitment Source in total and spread monthly.

1. Select **Support Unit Budget Request**



2. Choose your required search criteria.

Support Unit Budget Request

Year: * FY17 **AND** **Scenario:** * SU_Budget **AND** **Version:** * Working Flat **Finish**

3. Choose your additional search criteria. In this example, we will use D_62 data. After entering scroll to bottom of form or top of the form.

Support Unit Budget Request

Year: * FY17 **AND** **Scenario:** * SU_Budget **AND** **Version:** * Working Flat **Finish**

OR

Keywords:
Type one or more keywords separated by spaces.
D_62

Options ▾

Entity:
(ex: D_01 or D_01010000)

Results:

D_62010101	<input type="button" value="Insert"/> <input type="button" value="Remove"/>	D_62030000
D_62040100		D_62010100
D_62040000		D_62060100
D_62010000		D_62060300
D_62060000		D_62040200
D_62060200		D_62010101
D_62060500		D_62040100
D_62060400		D_62040000
D_62050100	D_62010000	

Select all Deselect all

4. Click **Finish** and wait for the report to run.

Select all Deselect all		Select all Deselect all	
Cancel	< Back	Next >	Finish

5. Review your report.

Support Unit Budget Request																											
Fiscal Year	Version	Scenario	Entity	Account	Cost Pool	Commitment Source	Beginning Balance	July Allocation	August Allocation	September Allocation	October Allocation	November Allocation	December Allocation	January Allocation	February Allocation	March Allocation	April Allocation	May Allocation	June Allocation								
FY15	Working Plan	SL_Budget_D_62030000	D_621000	D_62060000	No Cost Pool	No Commitment Source	1,722.00	51.75	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95	131.95
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	250,624.66	22,095.70	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	28,919.84	2,548.52	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	361,386.25	33,608.75	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	693,393.20	61,104.15	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	25,426.00	2,240.61	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	1,670,364.00	147,196.83	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	5,171.00	455.68	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25	396.25
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	584,766.00	49,768.65	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	752,628.60	66,323.42	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	2,533,636.31	230,238.89	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61	217,539.61
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	1,292,025.69	113,866.67	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80	99,005.80
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	13,565.53	1,153.56	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	256,963.00	22,844.78	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11	19,691.11
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	5,239.10	460.71	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62	400.62
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	165,565.00	14,530.02	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	315,492.09	27,801.98	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	49,966.00	4,332.64	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	701,666.00	61,832.64	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	556,231.00	49,098.52	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	16,700.00	1,363.52	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	319,255.00	28,133.85	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	363,878.00	32,065.68	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37	27,863.37
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	1,671,939.00	164,894.05	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13
FY15	Working Plan	SL_Budget_D_62020000	D_621000	D_62020000	No Cost Pool	No Commitment Source	623,306.00	54,509.72	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	100,304.58	8,839.10	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	6,687.00	589.28	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41	512.41
FY15	Working Plan	SL_Budget_D_62060000	D_621000	D_62060000	No Cost Pool	No Commitment Source	147,645.00	13,070.85	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79	11,313.79
Summary							\$14,071,281.45	\$1,235,244.72	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54	\$1,074,126.54
1																											
2																											
3																											
4																											
5																											
6																											
7																											
8																											
9																											

Budget Preparation Processes

Manage Position and Employee Data Forms

Maintain position data

This form should only be used to make changes to positions. Updating employee distributions and data is performed within a different form.

Maintain filled positions

This form should only be used to make changes to existing and to-be-hired employees. This is where you would make any changes to distributions, salary, benefits, etc.

Maintain employees by position

Maintain employees by position was originally designed to display positions and employees together in one form, but due to the level of complexity and resulting confusion, the UBO does not recommend using this form.

Fill to-be-hired vacancies

This form was originally designed to replace to-be-hired employees with named employees if they are hired. Because we don't add new hired employees to Hyperion after the snap shot, you will never need to use the Fill to-be-hired vacancies functionality. In this training, we still show you the steps on how to fill a to-be-hired vacancy. However, keep in mind you will not need to do that in Hyperion. This form is currently used by the departments to review all the to-be-hired employees.

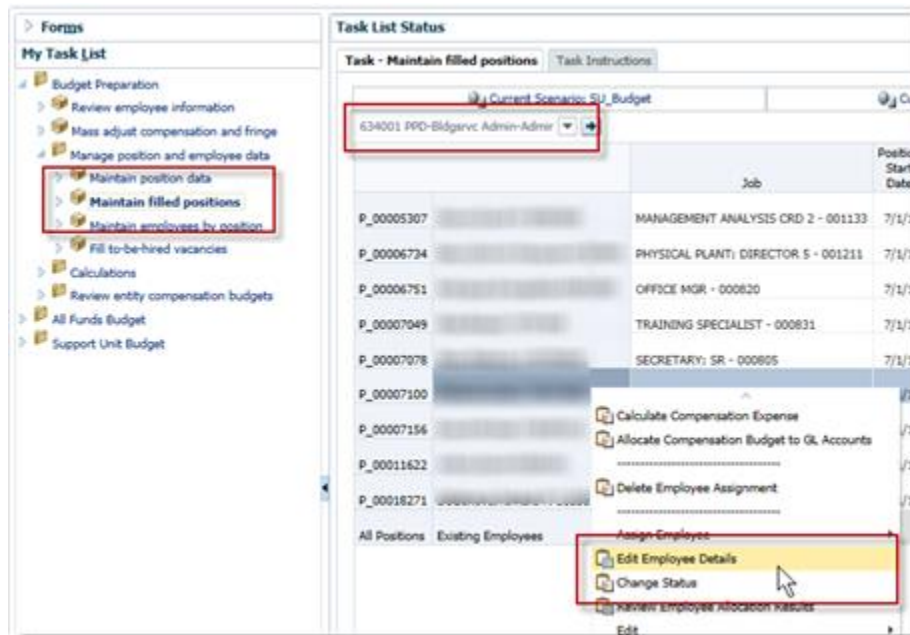


Update Current Employees' Distributions & Data

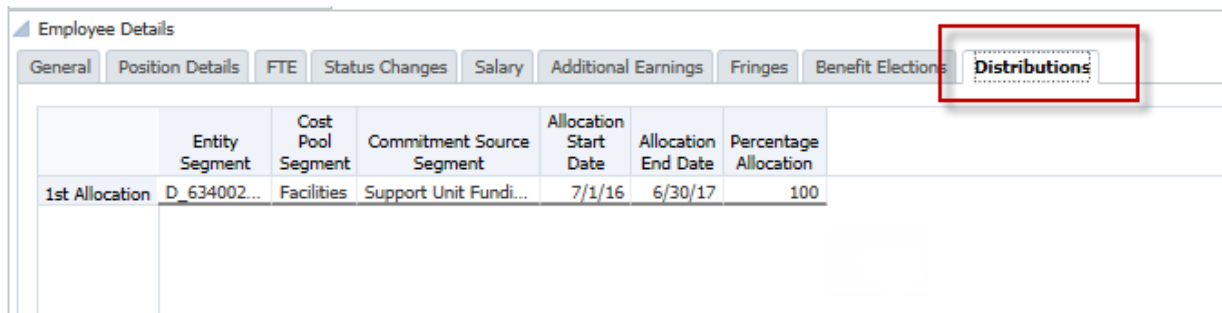
This procedure is used to make changes to particular parameters of an employee's distribution, such as changing an employee's Entity.

1. From the **Maintain filled positions form**, choose your desired **Entity** from the Entity drop down field.

2. **Right-click** on the name of the employee for which you wish to change the distribution and select **Edit Employee Details**.



3. Click the **Distributions** tab.
NOTE: You may have to scroll to the right to view the Distributions tab.

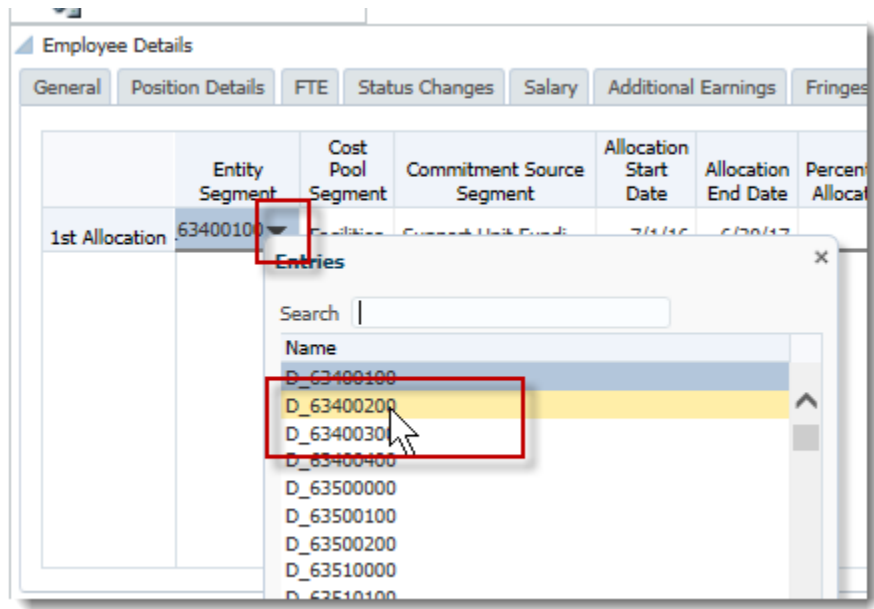


In this example, we will be changing the employee's Entity and assigning the appropriate Cost Pool Segment and Commitment Source Segment.

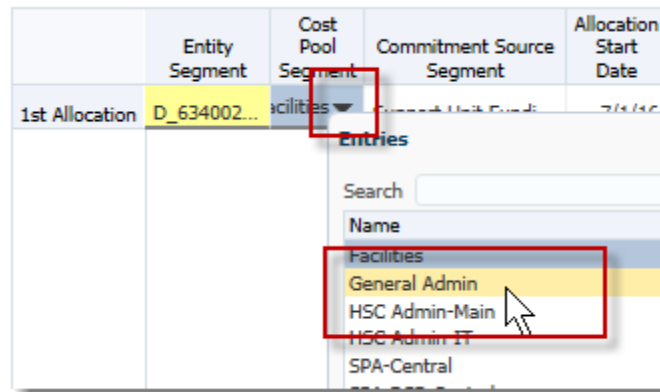
4. Select the **Entity Segment** drop down field and click on the down pointing arrow.
5. Enter the desired Entity number into the **Search** field (e.g., "6340"). Or choose it from the list.

NOTE: When searching, you do not have to type D_ in the Entity field. You can just type in 6201 and the list should automatically move to the correct options. You may also choose to scroll to the appropriate list item.

6. Click the new desired **Entity**.



7. Select the **Cost Pool Segment** field and click the down pointing arrow.
8. Click the desired **Cost Pool Segment** option (e.g., **General Admin**).



9. Select the **Commitment Source Segment** field and click the down point arrow.
10. Click the desired **Commitment Source** option (e.g., **Support Unit Funding**).

The screenshot shows a dropdown menu for the 'Commitment Source' field. The menu is open, displaying a list of options. A red box highlights the 'Support Unit Funding' option, which is currently selected. Other visible options include 'Direct Bill Funding' and 'No Commitment Source'.

11. Make any changes to the **Allocation Start** and **End Dates** if needed.
12. If any changes are needed to the **Percentage Allocation** field, make those here.
NOTE: You must have a number in the percentage cell and all lines must be 100% in total. Do not leave any 0% distribution lines. If you do not need that line please delete the allocation not being used.

The screenshot shows a table with the following data:

Allocation Start Date	Allocation End Date	Percentage Allocation
7/1/16	6/30/17	100

13. Click the **Save** button, then click **OK**.
 Notice that any red or yellow fields no longer appear once you save your changes.

The screenshot shows the 'Distributions' tab in a software interface. It contains a table with the following data:

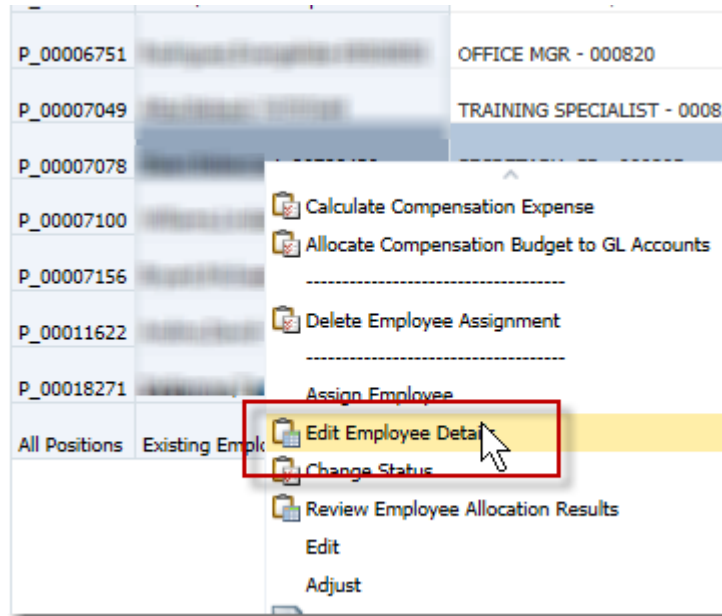
	Entity Segment	Cost Pool Segment	Commitment Source Segment	Allocation Start Date	Allocation End Date	Percentage Allocation
1st Allocation	D_634002...	General Ad...	Support Unit Fundi...	7/1/16	6/30/17	100

Add an Additional Distribution for the same Employee

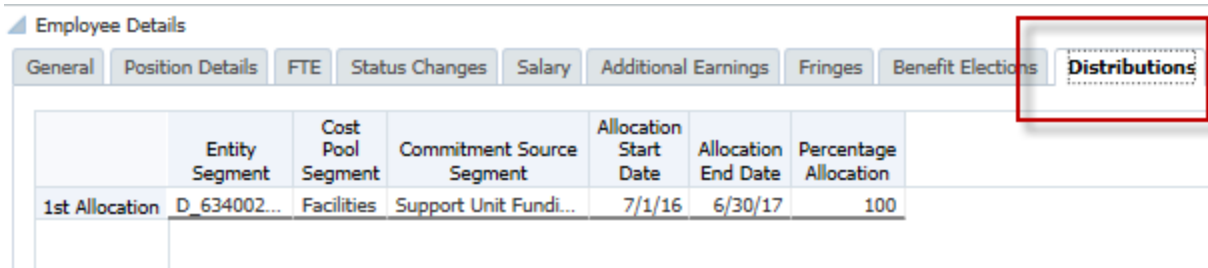
It's not uncommon for an employee to hold multiple positions or have multiple distribution sources at UF. This procedure covers how to add an additional distribution for the same employee.

1. From the **Maintain filled positions** form, choose your desired **Entity** from the Entity drop down field, if needed.

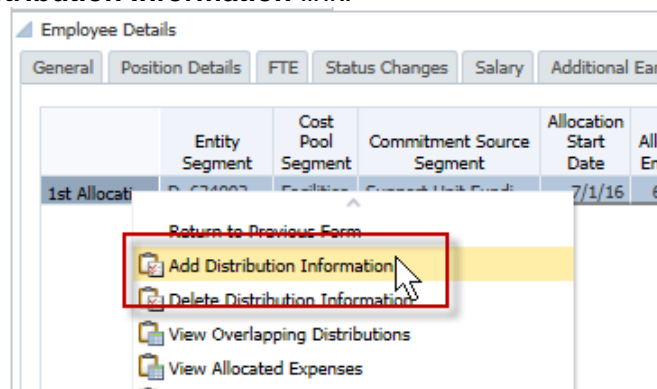
- Right-click on the name of the employee for which you wish to change the distribution and select **Edit Employee Details**.



- Click the **Distributions** tab.
NOTE: You may have to scroll to the right to view the Distributions tab.



- Right-click the **1st Allocation** label.
- Click the **Add Distribution Information** link.



6. Enter the **Effective Start or End Date** if it's different.

Prompt Text	Value
* Enter Effective Start Date	7/1/2016
Enter Effective End Date	06-30-2017

NOTE: It's very rare to budget a person in the middle of a fiscal year.

7. Click the **Add** button on the bottom, right of the screen.
8. Click **OK** to the pop up window.

Information

EP_SC_AddDistribution was successful.

OK

9. Once the additional allocation appears, select an entity from the **Entity** drop down list and select the appropriate department from the list.

NOTE: You may need to search for the desired entity.

NOTE: Red cells indicate required data that is currently missing.

Employee Details

General Position Details FTE Status Changes Salary Addition

	Entity Segment	Cost Pool Segment	Commitment Source Segment
1st Allocation	D_634002	Facilities	Support Unit Funding
2nd Allocation	D_63400100		

Entities

Search |

Name

D_63400100

D_63400200

D_63400300

D_63400400

D_63500000

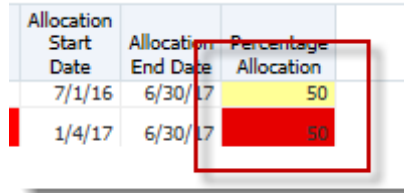
D_63500100

D_63500200

10. Click the **Cost Pool Segment**, **Commitment Source Segment** field, and **Allocation Start and End Dates** and enter the appropriate data.

11. Make changes in the **Percentage Allocation** fields of both allocation lines.

NOTE: Keep in mind, the combination of all distribution lines must equal 100% allocation. Please do not leave any 0% distribution lines. If it is not needed delete the distribution allocation.



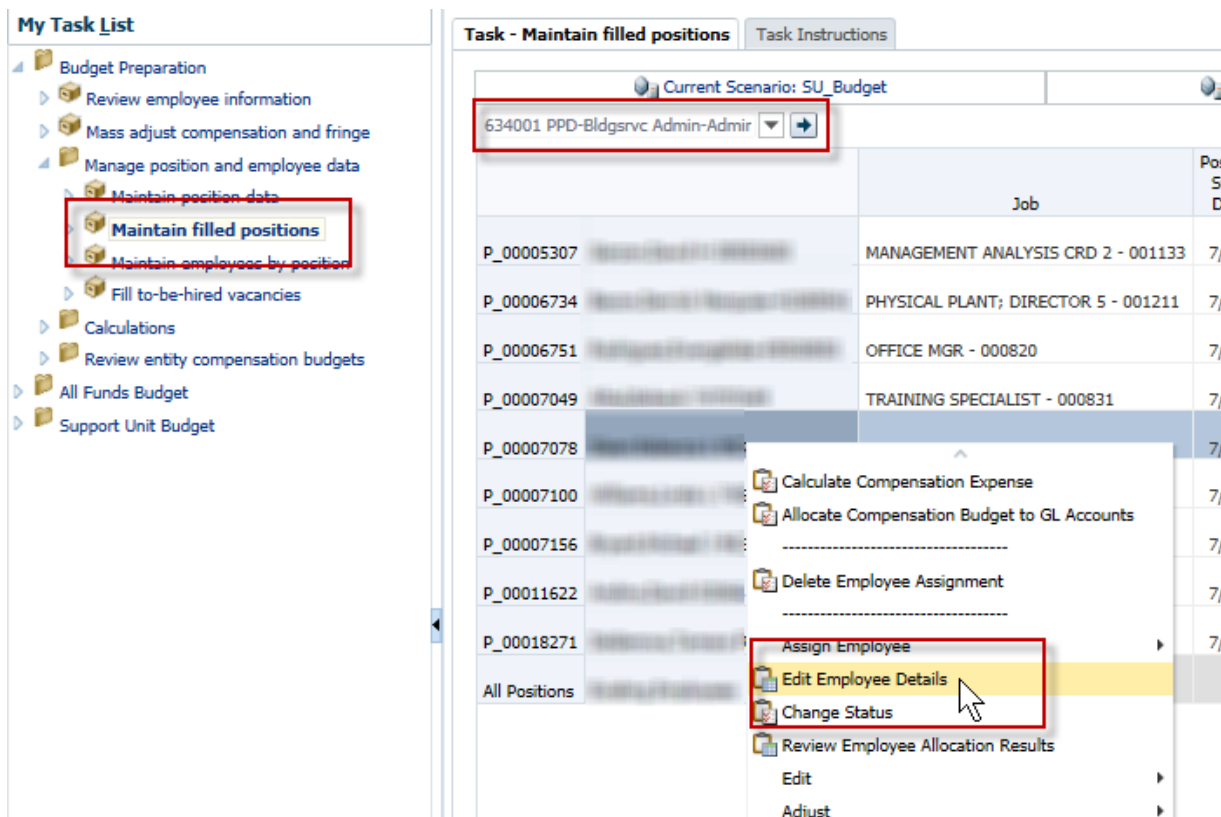
Allocation Start Date	Allocation End Date	Percentage Allocation
7/1/16	6/30/17	50
1/4/17	6/30/17	50

12. Click the **Save** button.

NOTE: Remember any red or yellow cells should clear after saving.

Delete a Distribution

1. From the **Maintain filled positions** form, choose your desired **entity** from the Entity drop down field, if needed.
2. Right-click on the name of the employee for which you wish to change the distribution and select **Edit Employee Details**.



3. Click the **Distributions** tab.
NOTE: You may have to scroll to the right to view the Distributions tab.
4. Right-click the **Allocation** label you wish to delete.
5. Select **Delete Distribution Information**.
6. Click **OK** to the pop up window.

Employee Details

General Position Details FTE Status Changes Salary Additional Earnings Fringes Benefit Elections **Distributions**

	Entity Segment	Cost Pool Segment	Commitment Source Segment	Allocation Start Date	Allocation End Date	Percentage Allocation
1st Allocation	D_634002...	Facilities	Support Unit Fundi...	7/1/16	6/30/17	50
2nd Allocation	D_634001	General Ad	Support Unit Fundi...	1/4/17	6/30/17	50

Return to Previous Form

- Add Distribution Information
- Delete Distribution Information
- View Overlapping Distributions
- View Allocated Expenses
- Calculate Compensation Expense

6. Click in the **Percentage Allocation** field of the remaining allocation.

7. Enter "100".

NOTE: Remember, the lines must add up to 100.

	Entity Segment	Cost Pool Segment	Commitment Source Segment	Allocation Start Date	Allocation End Date	Percentage Allocation
1st Allocation	D_634002...	Facilities	Support Unit Fundi...	7/1/16	6/30/17	100

8. Click the **Save** button.

Calculate and Allocate Compensation Budgets per Edit

After each edit you make, you may choose to calculate and allocate. These procedures will process all needed calculations and allocate the updated data to the Support Unit Budgets forms within Hyperion.

These procedures can take a long time depending on your area and number of employees. As such the University Budget Office recommends you run these procedures from the Budget Prep panel once all edits/updates are done.

If you choose to calculate and allocate after each edit, it's very important that you note where you are before running these procedures as they are very sensitive to location to run accurately.

For example, if you are on the main Maintain position data or Maintain filled positions forms, you must right-click on the exact position row you just edited for the calculate and allocate procedures to run successfully. Otherwise, the edited data may not calculate and allocate correctly.

If you are in Edit Employee Details, you can right click on any input cell on any tab (except for the General tab) to run the calculate and allocate procedures for this position.

1. Right click anywhere in the main portion of the edited position.

Employee Details

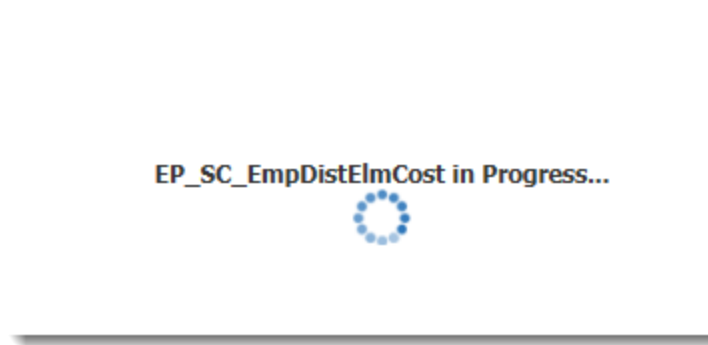
General	Position Details	FTE	Status Changes	Salary	Additional Earnings	Fringes	Benefit Elections	Distributions
	Entity Segment	Fund Segment	Program Segment	Dept Flex Segment	Allocation Start Date	Allocation End Date	Percentage Allocation	
1st Allocation	D_634002...	101-CRRNT-NO_SOF	PRG_05...	No Dept Flex	7/1/16	6/30/17	100	

2. Click **Calculate Compensation Expense**.

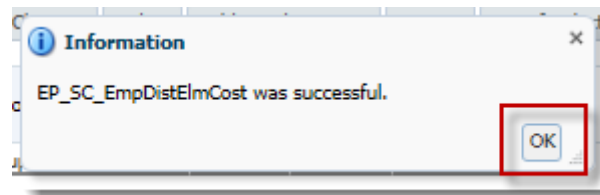
FTE	Status Changes	Salary	Additional Earnings	Fringes	Benefit
Cost Pool Segment	Commitment Source Segment	Allocation Start Date	Allocation End Date	Percentage Allocation	
Facilities	Su...				

- Return to Previous Form
- Add Distribution Information
- View Overlapping Distributions
- View Allocated Expenses
- Calculate Compensation Expense**
- Allocate Compensation Budget to GL accounts
- Edit
- Adjust

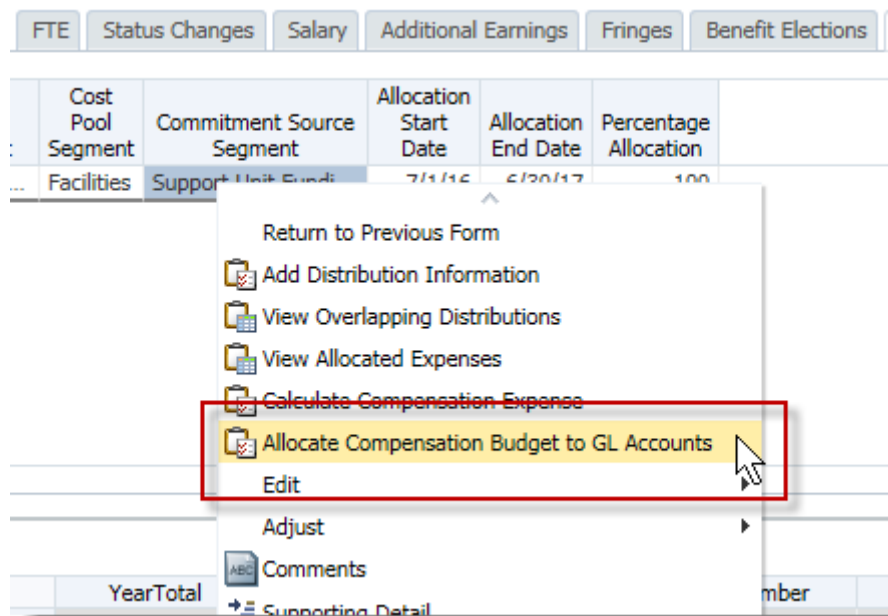
NOTE: You will see an animated blue circle within the Launch Business Rules window while the process is running. See image below.



3. Confirm the calculation procedure was successful by noting the message that appears in a pop up window. Click **OK**.

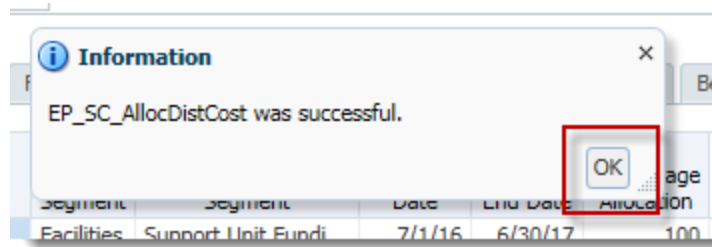


4. After the Launch Business Rules window closes, **right click** within the same cell on the form again.
5. Choose **Allocate Compensation Budget to GL Accounts**.



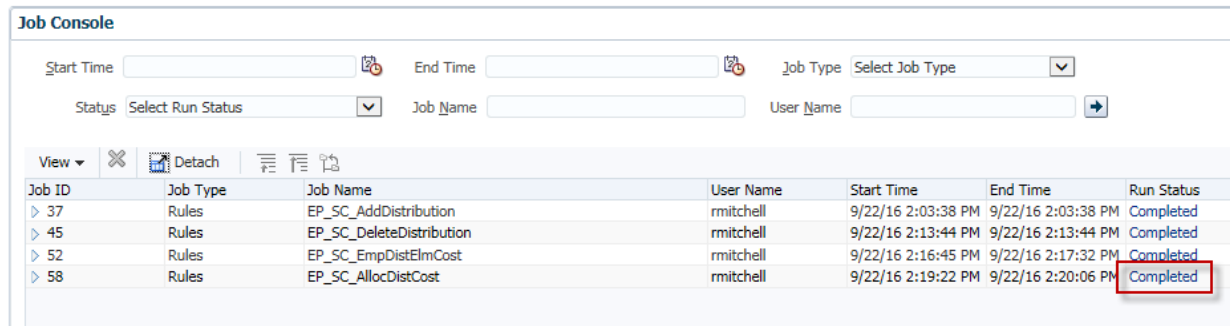
NOTE: The Launch Business Rules window will display again until the procedure completes.

- Confirm the procedures have completed successfully by noting the message that appears in the pop up window.



NOTE: Sometimes the Launch Business Rules window gets stuck. If you notice the calculation or allocation has been running for long time, you can check to make sure the rule has finished running by clicking Tools>Job Console from the Menu bar.

If the last column says “Completed”, the procedure has run successfully. If not completed, click Tools > Job Console again to refresh the screen until the job reads Completed.



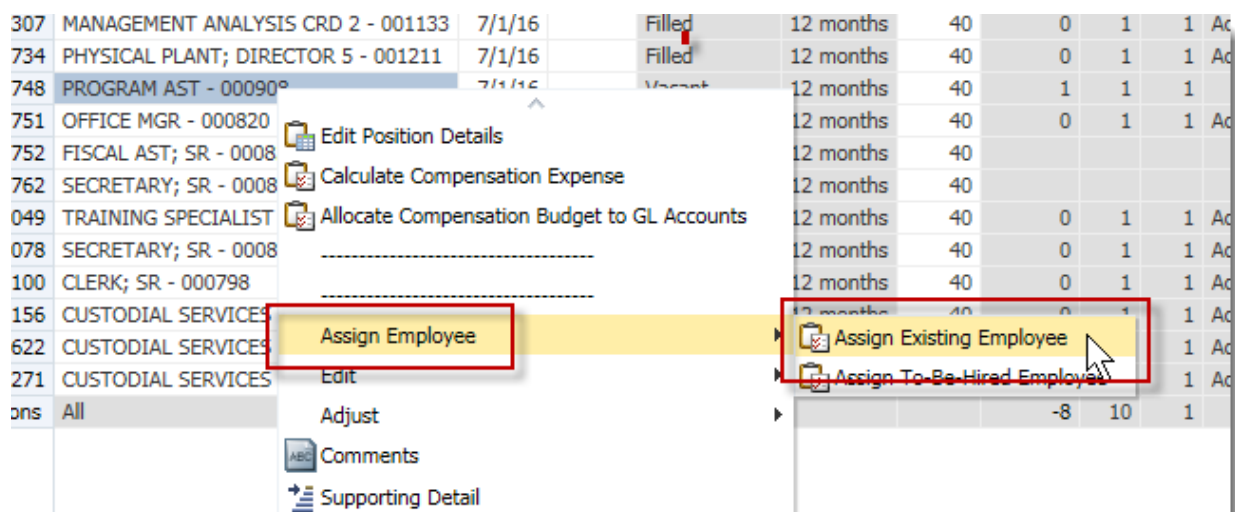
Assigning an Existing Employee

If you know you will be hiring a new current full time UF employee from another department before the snap shot was taken you will need to add them into Hyperion so that you can account for their salaries. This process must be started by using the Maintain position data form and finished using the Maintain filled positions form.

NOTE: The snap shot is the status of the data in PeopleSoft on a particular date that is then loaded into Hyperion as the base data.

1. From the **Maintain position data** form, right click the line of the position for which you want to assign an existing UF employee. **Make sure the position status is Vacant.**
NOTE: If the position is listed as Not Budgeted, complete the following steps to assing FTE to the position first.
 - a. Right click on position and choose Edit Position Details
 - b. Click the FTE tab
 - c. Right click on assignment label and choose Update FTE
 - d. Enter FTE value and the Start and End Dates
NOTE: Leave the End Date blank to make this an ongoing change.
 - e. Click Add, then OK.

2. Click the **Assign Employee** option and then click the **Assign Existing Employee**.



3. Click in the **Select Employee** field, delete any default text and enter the **UFID** of the appropriate employee.
NOTE: the UFID must start with UFID_.

Runtime Prompts - Assign Existing Employee

Prompt Text	Value
* Select Employee	UFID_41839908
* Enter FTE	1
* Enter Effective Date	7/1/13
Enter Union Code	None
Enter Full/Part Time	Full-time

4. Enter the correct **FTE**, **Effective Date**, **Union Code** and **Full/Part Time** status, if different from position defaults.
5. Click the **Assign** button at bottom right of window. Click **OK**.
6. To confirm the change, click the **Maintain filled positions** form and verify the assigned employee data appears associated with the proper position.

P_000067-8	Mitchell,Ronda Clemons-41839908	PROGRAM AST - 000908	7/1/16	UFID_418 Mitchell,R	None	Full-ti...	9/15/08
				UFID_69: Rodrique			

7. **Right click** on name of newly assigned existing employee and choose **Edit Employee Detail** to make any needed distribution and salary changes.
8. Click **Save** button.
NOTE: Remember to run the calculations for changes to become active.

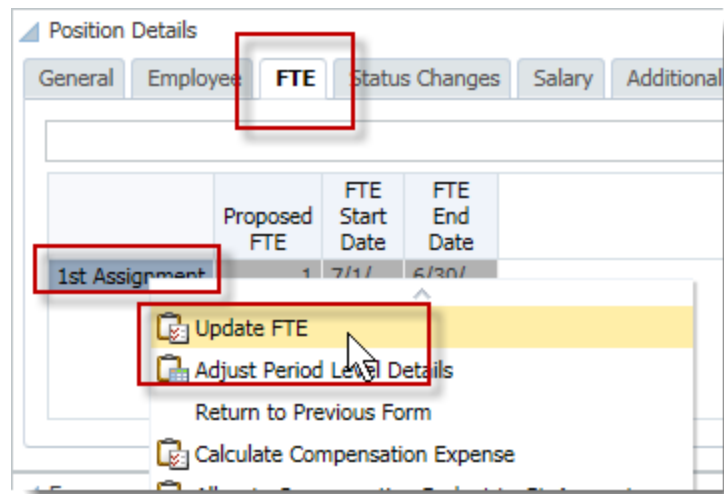
Assigning a To-Be-Hired Employee

You would assign a To-Be-Hired employee for those positions not yet budgeted, but will be in the future or for new employees hired after the snap shot was taken. To include the budget information for the future employee in your budget preparation procedure, you would assign a To-Be-Hired employee as a place holder.

1. From the Maintain position data form, locate the position for which you wish to assign a To-Be-Hired employee. **Make sure the position status is Vacant.**
NOTE: If the position is listed as Not Budgeted, complete the following steps to assign FTE to the position first.
 - a. Right click on position and choose Edit Position Details
 - b. Click the FTE tab
 - c. Right click on assignment label and choose Update FTE

- d. Enter FTE value and the Start and End Dates
NOTE: Leave the End Date blank to make this an ongoing change.
- e. Click Add, then OK.

2. Right click on the vacant position and choose Edit Position Details.
3. Click the **FTE** tab.
4. Right-click anywhere on the assignment label.
5. Choose **Update FTE**.



6. Input the FTE for this position.
7. Remove the **Effective End Date**.
If you do not remove the end date it adds an unnecessary FTE line for the next available date sequence.

Prompt Text	Value
* Enter FTE	1
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	

8. Click **Add**, then click **OK**.
9. Confirm the assignment appears under the FTE tab.

Position Details

General Employee **FTE** Status Changes

	Proposed FTE	FTE Start Date	FTE End Date
1st Assignment	1	7/1/...	

10. **Right click** anywhere on the form and click **Return to Previous Form** and notice your position should now read Vacant in the Occupancy Status field.

P_00006751	OFFICE MGR - 000820	7/1/16	Filled	12 month
P_00006752	FISCAL AST; SR - 000834	7/1/16	Not Budgeted	12 month
P_00006762	SECRETARY; SR - 000805	7/1/16	Vacant	12 month
P_00007049	TRAINING SPECIALIST - 000831	7/1/16	Filled	12 month
P_00007078	SECRETARY; SR - 000805	7/1/16	Filled	12 month
P_00007100	CLERK; SR - 000798	7/1/16	Filled	12 month

- 11.
12. **Right-click** the Position number.
12. Click the **Assign Employee** on the pop-up menu.
14. Click the **Assign To-Be-Hired Employee** option.

751	OFFICE MGR - 000820	7/1/16	Filled	12 months	40	0	1	1	Acti...
752	FISCAL AST; SR - 000834	7/1/16	Not Budgeted	12 months	40				
762	SECRETARY; SR - 000805	7/1/16	Vacant	12 months	40	1	1	1	
049	TRAINING SPECIALIST - 000831			12 months	40	0	1	1	Acti...
078	SECRETARY; SR - 000805			12 months	40	0	1	1	Acti...
100	CLERK; SR - 000798			12 months	40	0	1	1	Acti...
156	CUSTODIAL SERVICES SUPT			12 months	40	0	1	1	Acti...
622	CUSTODIAL SERVICES SUPT			12 months	40	0	1	1	Acti...
271	CUSTODIAL SERVICES SUPT			12 months	40	0	1	1	Acti...
ons	All					-8	11	2	

Edit Position Details

Calculate Compensation Expense

Allocate Compensation Budget to GL Accounts

Assign Employee

Edit

Adjust

Comments

Supporting Detail

Change History

Attachments

Assign Existing Employee

Assign To-Be-Hired Employee

15. Enter the name of the new employee or a placeholder name or description if unknown.

NOTE: If you know the UFID and want to input it best practice is to input it as UFID_XXXXXXX otherwise if you input a number only the system will treat it as a dollar figure and add a decimal and cents.

16. Be sure to indicate the correct Full/Part Time status, Union Code, FTE and Effective Date, if different from default.

Prompt Text	Value
Enter Employee Number	UFID_90798430
* Enter Employee Name	Alberta Gator
* Select FT/PT	Full-time
* Select Union Code	None
* Enter FTE	1
* Enter Hire Date	7-1-2016

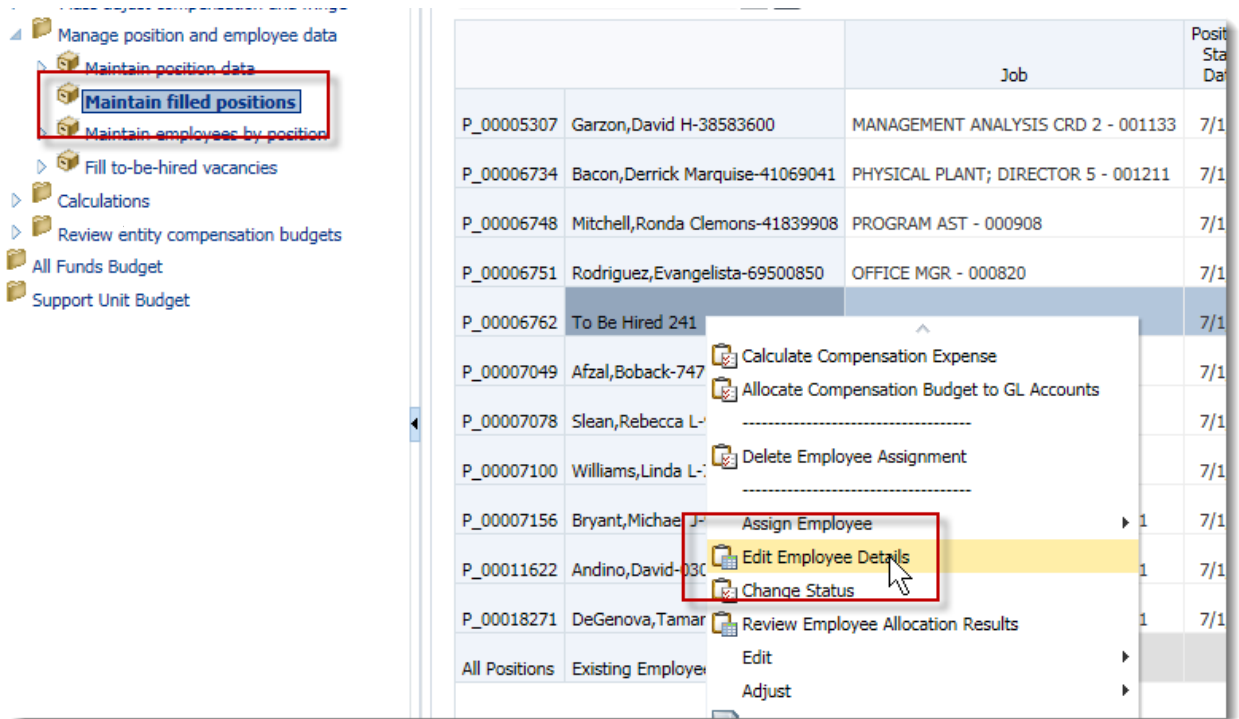
17. Click the **Assign** button, then click **OK**.

18. Note the Occupancy Status of the position is now "Filled."

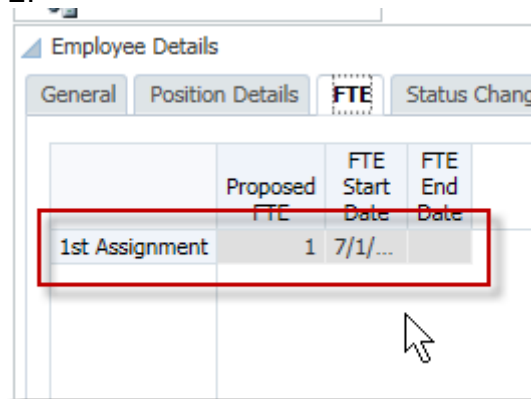
P_00006751	OFFICE MGR - 000820	7/1/16	Filled	12
P_00006752	FISCAL AST; SR - 000834	7/1/16	Not Budgeted	12
P_00006762	SECRETARY; SR - 000805	7/1/16	Filled	12
P_00007049	TRAINING SPECIALIST - 000831	7/1/16	Filled	12
P_00007078	SECRETARY; SR - 000805	7/1/16	Filled	12
P_00007100	CLERK; SR - 000798	7/1/16	Filled	12
P_00007156	CUSTODIAL SERVICES SUPT - 001071	7/1/16	Filled	12
P_00011622	CUSTODIAL SERVICES SUPT - 001071	7/1/16	Filled	12

19. Click on the **Maintain filled positions** form and find the To-Be-Hired employee just assigned.

20. **Right-click** on the To-Be-Hired employee and choose **Edit Employee Details**.



21. If you changed the default FTE value in step 16 above, choose the **FTE** tab to ensure you have a valid FTE.



22. Choose the **Salary** tab and ensure you have a valid salary. If not, input the new salary dollar amount. If changes are made, be sure to save.

23. Choose the **Benefits Elections** tab and ensure you have valid benefits and save.

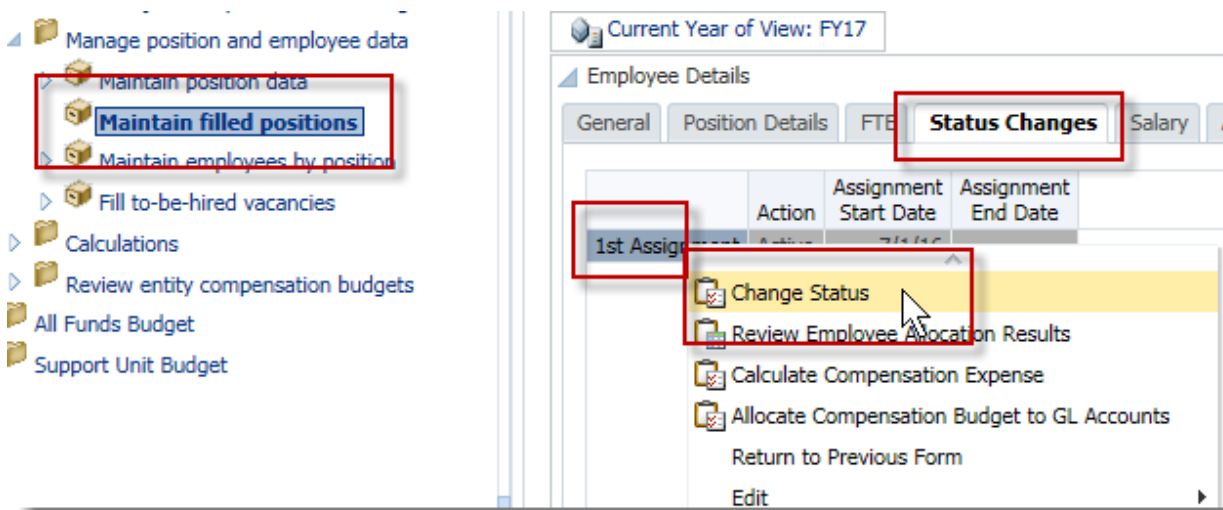
24. Choose the **Distribution** tab and input your distribution information and save.

25. Run both the Calculate and Allocate procedures.

Employee Status Change

Common status changes are inactive (due to maternity leave, military leave, retirement part way through the fiscal year, etc.)

1. From Maintain filled positions form, **right-click** the relevant employee for which you are changing status.
2. Click the **Edit Employee Details**.
3. Click the **Status Change** tab.
4. **Right-click** the **blue assignment label** of the assignment you wish to change.
5. Click the **Change Status** option.



6. **Double-click** the **Select Status** drop down field arrow.

Runtime Prompts - Change Status

Prompt Text	Value
* Select Status	Active
* Enter Effective Start Date	
Enter Effective End Date	

A red box highlights the dropdown arrow for the 'Select Status' field.

- Click the appropriate status (e.g., **Maternity**, **Inactive**, **On Sabbatical**, etc.).

Runtime Prompts - Change Status

Prompt Text	Value
* Select Status	Active
* Enter Effective Start Date	Maternity
Enter Effective End Date	Inactive
	On Sabbatical
	Leave of Absence
	Disability

Example: 11/29/98

- Enter the desired information into the **Enter Effective Start Date** field (e.g., "12/1/14") and **Enter Effective End Date** as appropriate.

Runtime Prompts - Change Status

Prompt Text	Value
* Select Status	Inactive
* Enter Effective Start Date	12/1/16
Enter Effective End Date	

- Click the **Change** button, then click **OK**.
- Confirm** the additional allocation displays with the appropriate Action.

Employee Details

General Position Details FTE **Status Changes**

	Action	Assignment Start Date	Assignment End Date
1st Assignment	Active	7/1/16	11/30/16
2nd Assignment	Inactive	12/1/16	

- Run the Calculate Compensation Expense and Allocate Compensation Budget to GL Accounts.

NOTE: The Calculate and Allocate process may take a few minutes.

- Go to **General** tab and change the appropriate **Assignment End Date**.

Employee Number	Employee Name	Hire Date	Employee Type	Annual Salary Spread	FT/PT	Union Code	Termination Date	Default Weekly Hours	Assignment End Date	Status
UFID_741	Williams, I	4/2/...	Team/USPS Non-Exem...	12 months	Full-ti...	Out of Unit -...		40	11/30/2016	Inactive

15. Click the **Save** button, then the **OK** button.

16. Right click and click the **Return to Previous Data Form** option.

Removing an Assignment

1. From the Maintain filled positions form.
2. Right-click the **Name of the individual** of which you want to delete.
3. Select **Delete Employee Assignment**.

P_00005307	...	MANAGEMENT ANALYSIS
P_00006734	...	PHYSICAL PLANT; DIRECT
P_00006748	Mitchell Bonds Clements 41830008	PROGRAM ACT 000008
P_00006751	...	
P_00006762	...	
P_00007049	...	
P_00007078	...	
P_00007100	...	

4. Once the process has run you will now notice that the employee is no longer listed in the Maintain filled positions form.

Change FTE

Occasionally the Full Time Equivalency (FTE) of a position or person may change. Examples are full-time positions changing to part-time, part-time positions changing to full time or a different part-time status.

NOTE: Prior to completing the Change FTE procedure, please check the Default Weekly Hours cell to ensure you are adjusting your FTE correctly. Default Weekly Hours listed as 40 is equivalent to 1.0 FTE. Be aware that some employees have default weekly hours of 20 (not 40). The equivalent FTE for this would still be 1.0, not 0.5. If you inputted 0.5, that would be equivalent to 10 hours, not 20.

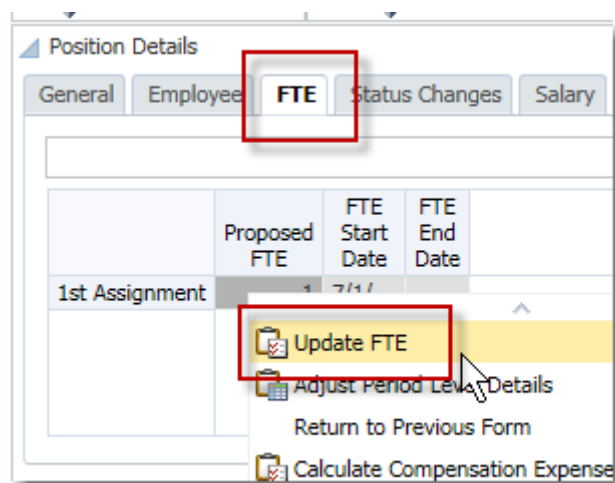
	Job	Position Start Date	Position End Date	Occupancy Status	Annual Salary Spread	Default Weekly Hours	Availa FTE
P_00020441	HUMAN RESOURCES; DIRECTOR 6 - 001201	7/1/14		Filled	12 months	40	
P_00020560	HUMAN RESOURCES; VICE PRES 7 - 001536	7/1/14		Not Budgeted	12 months	40	
P_00020709	HUMAN RESOURCES REP - 000829	7/1/14		Filled	12 months	24.8	
P_00020937	HUMAN RESOURCES; CRD 2 - 001298	7/1/14		Not Budgeted	12 months	40	

FTE may be changed either per position or per employee.

To change the position FTE only

When you budget salary to a vacant position directly and need to update the position to part-time, you change the FTE only.

1. From the Maintain position data, right click on the position to which you wish to change the FTE.
2. Click the **Edit Position Details** option.
3. Click the **FTE** tab.
4. Right-click in the **Proposed FTE** field.
5. Select **Update FTE** from the pop-up menu.



In this example, we are changing the position from a 1.0 FTE to a 0.5 FTE.

6. Replace the 1 in the Enter FTE field with .5.
7. Select the default data in the **Effective End Date** field.
8. Press **[Delete]** key on keyboard to remove the Effective End Date to make this an ongoing change.

Prompt Text	Value
* Enter FTE	.5
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	

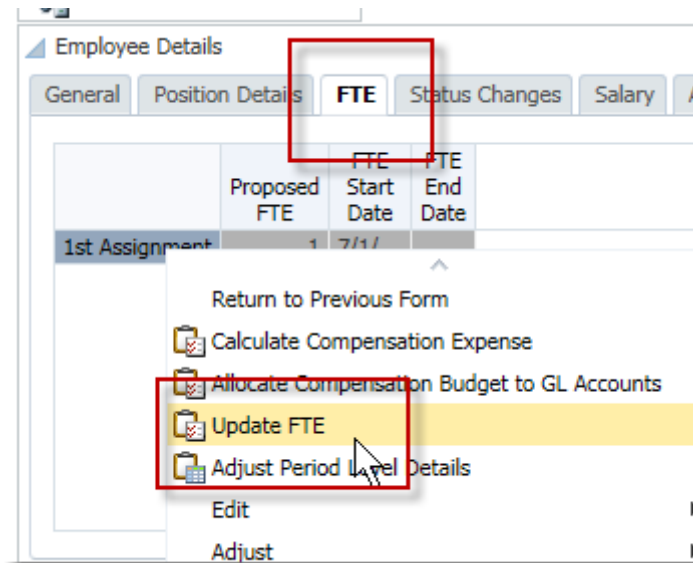
9. Click the **Add** button, then click **OK**.
10. Confirm the assignment updates correctly.

Position Details			
General Employee FTE Status Changes			
	Proposed FTE	FTE Start Date	FTE End Date
1st Assignment	0.5	7/1/...	

To change the FTE for an employee.

When you budget salary to an employee and need to change the employee to part-time, you change the FTE for the employee.

1. From the **Maintain filled positions**, right click on the name of the individual you wish to change the FTE.
2. Click the **Edit Employee Details** option.
3. Click the **FTE** tab.
4. Right-click in the **Proposed FTE** field.
5. Select **Update FTE** from the pop-up menu.



In this example, we are changing the position from a 1.0 FTE to a 0.5 FTE.

6. Replace the 1 in the Enter FTE field with .5.
7. Select the default data in the **Effective End Date** field.
8. Press [**Delete**] key on keyboard to remove the Effective End Date to make this an ongoing change.

Runtime Prompts - Update FTE

Prompt Text	Value
* Enter FTE	.5
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	

9. Click the **Add** button, then click **OK**.
10. Confirm the assignment updates correctly.

Employee Details

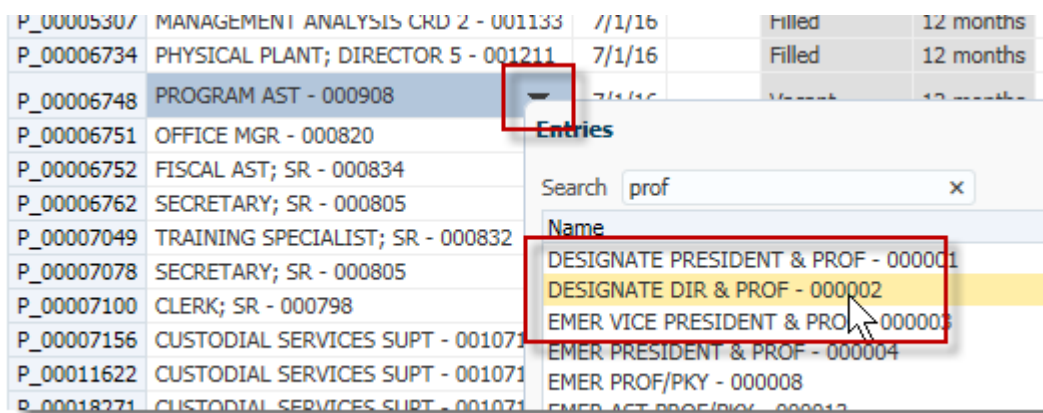
General Position Details **FTE** Status Cha

	Proposed FTE	FTE Start Date	FTE End Date
1st Assignment	0.5	7/1/...	

Promote a Position and employee including Fringe Benefit changes

This procedure would be used when you are hiring a new employee and do not have an appropriate vacant line for that position. You can use any one of the vacant lines you have and change the Job title and, if needed, change the Salary Admin plan which adjusts the Fringes.

1. From the **Maintain position data** form, select the vacant position for which a promotion will be provided.
2. Click on the job name cell once.
3. Click the job drop down arrow.
4. Use the Search field to search for a position name or job number and select or choose the position from the list if it already appears.



NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.

5. Click the **Save** button.
6. If no additional changes are needed to this position, skip to step 21.

In this example, we need to change the benefits from a USPS Non-Exempt rate to a Faculty Exempt rate.

Change the Salary Admin Plan

7. **Right-click** on the newly changed position.
8. Choose **Edit Position Details**.
9. Click the **Salary** tab. Notice the Salary Admin Plan still says TU2N which is a TEAMS USPS Non-Exempt salary plan.

Position Details

General Employee FTE Status Changes **Salary** Additional Ea

		Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value
TU2N	1st Element Change	0	7/1/...		Yes	0

10. Click the **Fringes** tab and notice the fringes are TEAMS USPS fringe rates.

Position Details

General Employee FTE Status Changes Salary Additional Earnings **Fringes** Benefit Election

Employee:Vacancy

		Option Value	Override Option Value	Option Start Date	Option End Date	Value T
Fringe_TEAMS_USPS_Non-Exempt	1st Element Change	42.9	42.9	7/1/...		Percentage of
Fringe_Non-Benefit_Earnings	1st Element Change	5.4	5.4	7/1/...		Percentage of

11. Go back to the Salary tab and **right click** on any of the cells in the Position Details section.

12. Click **Delete Salary** Information, then click **OK**.

Position Details

General Employee FTE Status Changes **Salary** Additional Earnings Fringes Benef

Employee:Vacancy

		Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value
TU2N	1st Element Change	0	7/1/...		Yes	0

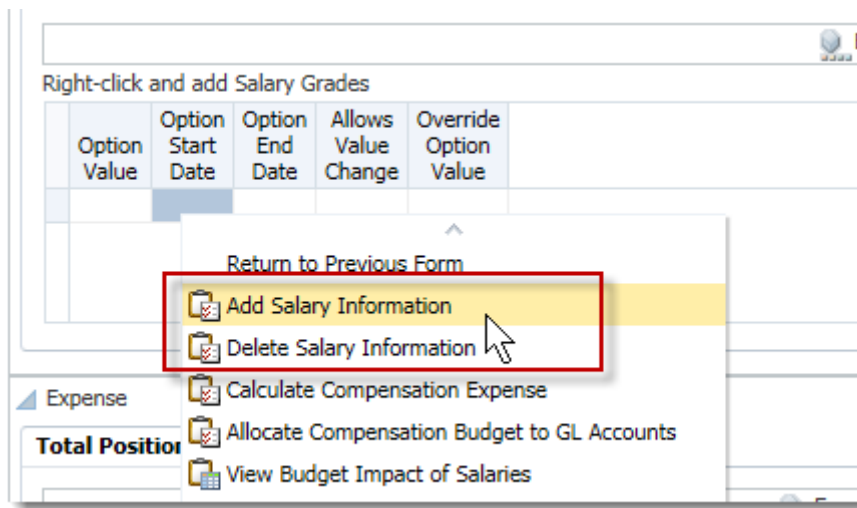
Return to Previous Form

- Add Salary Information
- Delete Salary Information**
- Calculate Compensation Expense
- Allocate Compensation Budget to GL Accounts

Expense

Total Position Edit

13. **Right-click** on any cell in the Position Details section and choose **Add Salary Information** to add a new salary admin plan.

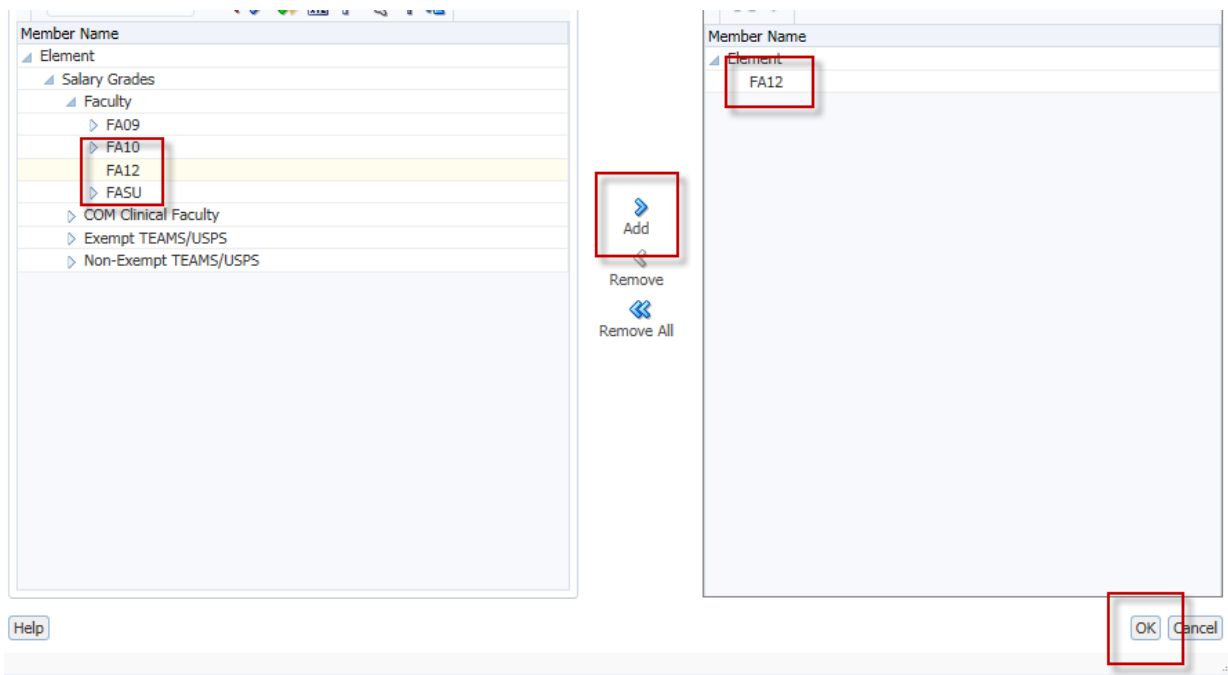


14. Click the **Salary Grade Select Members** icons to search for and locate the appropriate salary grade for this position.

In this example, we will choose FA12, which is a Faculty 12 month Salary Admin Plan.

15. Expand the Salary Grades and Faculty categories, and then click FA12.

16. Once FA12 is chosen click the right arrow to send it over to the Element area on the right hand side and then click OK.

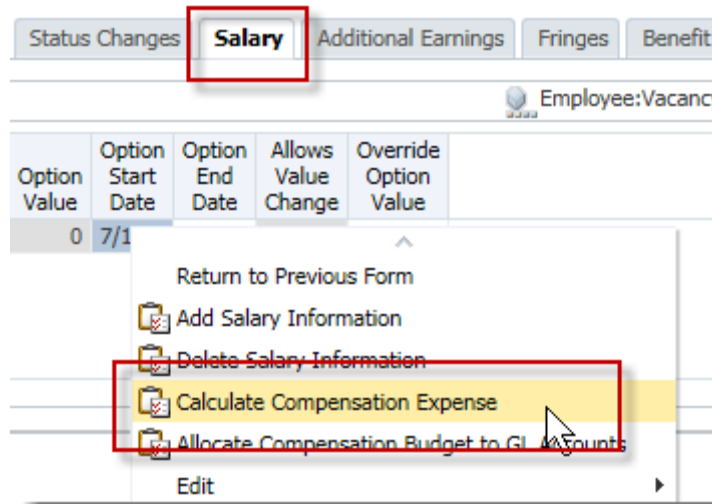


17. From the Add Salary Information window, adjust your Effective Start Date if needed. In this example, we will leave it at 7/1/2016.

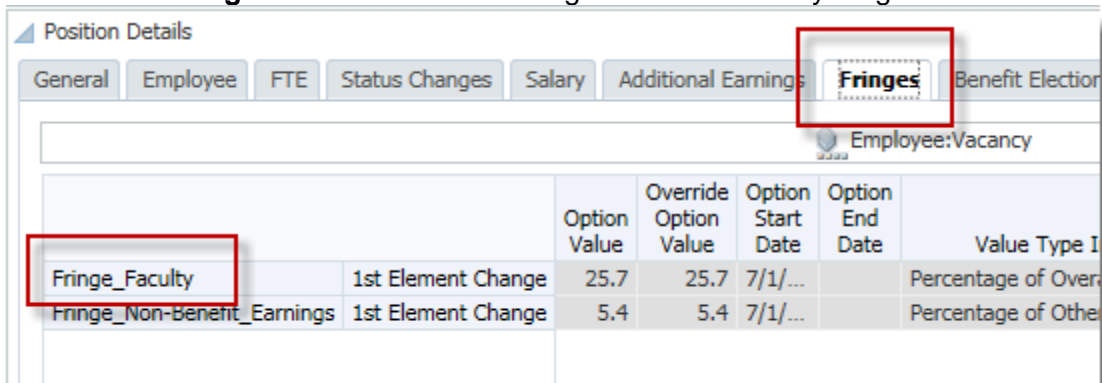
18. Click the **Add** button, then click **OK**.

After adding the new salary, you must run the Calculate Compensation Expense for the new Fringe Benefit to be reflected.

19. **Right-click** on any cell in the **Position Details** section and choose **Calculate Compensation Expense**. And then run the **Allocate Compensation Budget to GL Accounts** calculation.



20. Go to the **Fringes** tab and notice the fringes are now Faculty fringes.



Promote an Individual

Use this procedure if you have employees who have changed to new job titles after the dataload (or after Hyperion is open)

21. Click **Maintain filled positions** from the Budget Prep panel.

22. Click on the job name on the position and select the drop down arrow.

23. Use the Search field to search for a position name or job number and select or choose the position from the list if it already appears.

P_00006751	OFFICE MGR - 000820	7/1/16	Filled	12 months
P_00006752	FISCAL AST; SR - 000834	7/1/16	Not Budgeted	12 months
P_00006762	SECRETARY; SR - 000805	7/1/16	Over Filled	12 months
P_00007049	TRAINING SPECIALIST - 000831	7/1/16	Filled	12 months
P_00007078	SECRETARY; SR - 000805			
P_00007100	CLERK; SR - 000798			
P_00007156	CUSTODIAL SERVICES SUPT - 001071			
P_00011622	CUSTODIAL SERVICES SUPT - 001071			
P_00018271	CUSTODIAL SERVICES SUPT - 001071			
All Positions	All			

Entries

Search

Name

TRAINING SPECIALIST - 000831

TRAINING SPECIALIST; SR - 000832

FISCAL AST - 000833

FISCAL AST; SR - 000834

FISCAL OPERATIONS SPV - 000835

ACCOUNTANT - 000836

ACCOUNTANT; SR - 000837

COLLECTIONS/LOAN MGR - 000838

NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.

24. Click the **Save** button, then click **OK**.

25. If the Salary Admin Plan is changed, you need to update the Salary Admin Plan on the position.

You will update the Salary and Fringe benefit, if needed.

26. **Right-click** on the name of the employee holding newly changed position.

27. Choose **Edit Employee Details**.

28. Repeat steps 9 – 20 above as needed.

NOTE: Make sure you do that on the employees.

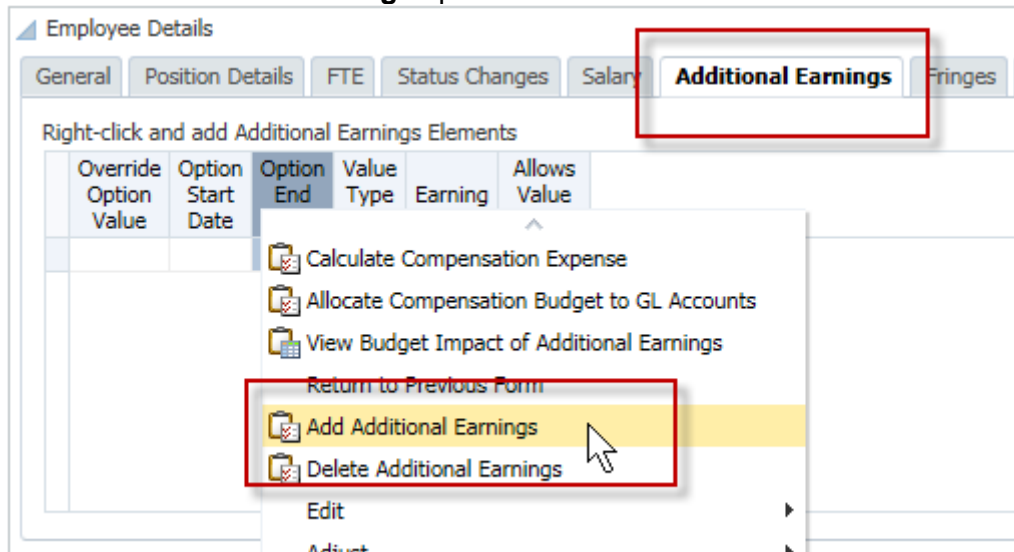
29. Click the **Save** button.

30. **Run** Calculate compensation budgets and **Allocate compensation to general ledger accounts** as needed.

Add Overtime Pay or Additional Earnings

This procedure allows you to apply overtime or additional earnings to an employee's salary information. Examples of when overtime or additional earnings would be if you have a person that will need to work overtime, SPI, or is a Sr. Level manager and has additional earnings they receive.

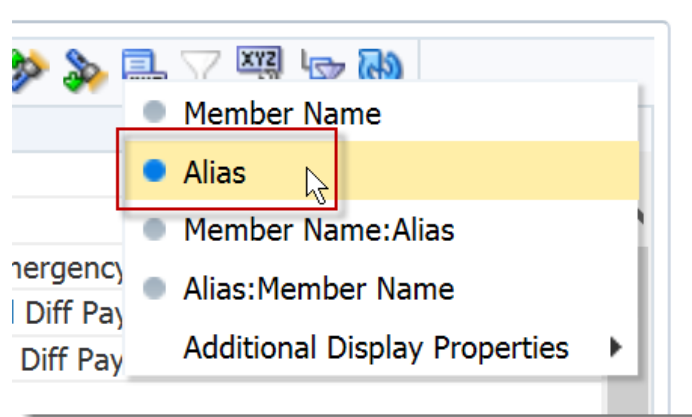
1. From **Maintain filled positions**, **right click** on the name of the person to whom you want to add overtime.
2. Click the **Edit Employee Details** option.
3. Click the **Additional Earnings** tab.
4. **Right-click** on the blue section that states "Right-click and add Additional Earnings Elements portion of the screen."
5. Click the **Add Additional Earnings** option.



6. Click the **Enter Additional Earning Select Members** drop down icon.
7. Click the **Display Properties** icon.



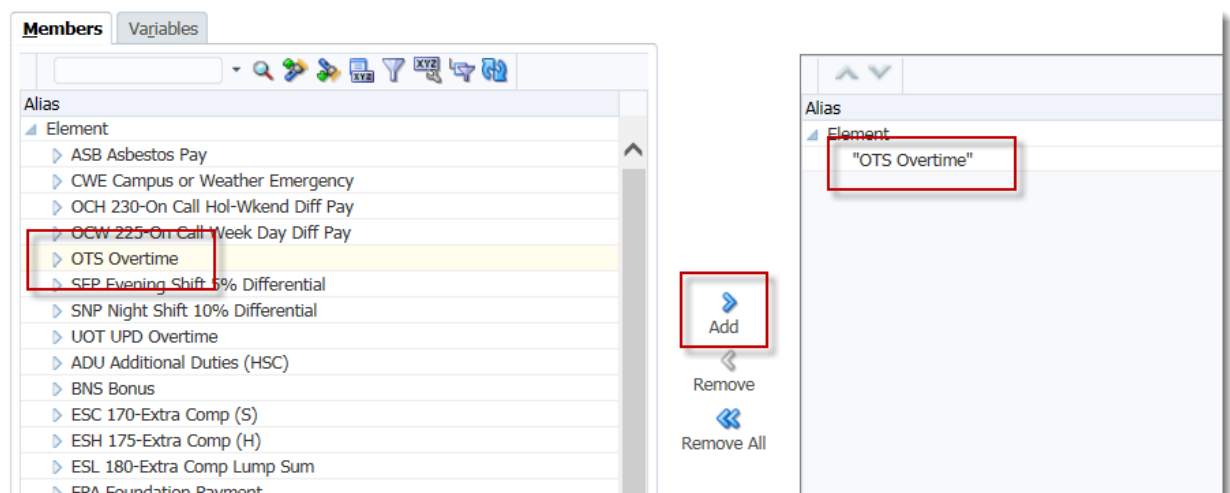
8. Click the **Alias** menu.



9. Select **OTS Overtime**.

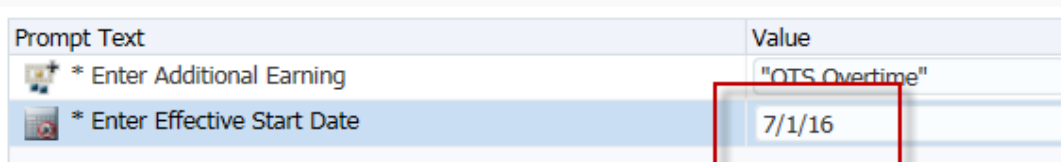
NOTE: In this example we are selecting an overtime payment. You would choose the correct additional earnings for our purpose.

10. Click the **right arrow** to move the item to the right side.



11. Click the **OK** button.

12. If you want to make this effective as of July 1, 2016, click inside the **Effective Start Date** field. For example, change the date to "7-1-2016".



13. Click the **Add** button, then click **OK**.

14. Click in the **Override Option Value** field and enter the Amount of the additional earnings. For example, enter "500.00".

Employee Details		General	Position Details	FTE	Status Changes	Salary	Additional Earnings	Fringes
		Override Option Value	Option Start Date	Option End Date	Value Type Input			
OTS Overtime	1st Element Change	500	7/1/...		Amount - Spread with Sala...			

15. Click the **Option End Date** field and enter the date this option amount will end. For example, enter "7-30-17".

		Override Option Value	Option Start Date	Option End Date	Value Type Input
OTS Overtime	1st Element Change	500	7/1/17	7/30/2017	Amount - Sp

16. Click the **Value Type Input** field and a drop down list will appear. Select **Amount – July** which will budget the additional pay amount all in July.

Employee Details		General	Position Details	FTE	Status Changes	Salary	Additional Earnings	Fringes	Benefit B
		Override Option Value	Option Start Date	Option End Date	Value Type Input				
change		500	7/1/17	7/30/2017	Amount - Spread with Salary				

Entries

Search

Name

- Amount - Spread with Salary
- Percentage of Salary
- Percentage of Overall Earnings
- Percentage of Other Earnings
- Amount - July**
- Amount - August
- Amount - September
- Amount - October
- Amount - November
- Amount - December
- Amount - January

17. Click the **Save** button, then click **OK**.

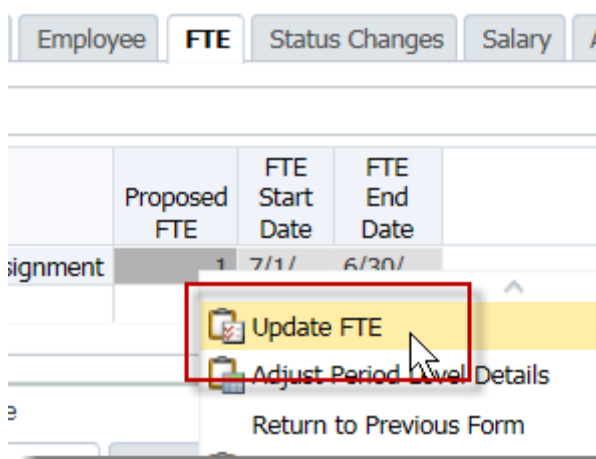
Add a Vacant Position

If you want to hold a specific dollar amount, but do not plan to hire someone in the near future for a specific position you can add a truly vacant line to hold dollar amounts.

1. From the **Maintain position data** form, find a **Not Budgeted** or **Vacant** position.
2. **Right-click** on the position and choose **Edit Position Details**.
3. Click the **FTE** tab and verify the correct FTE is listed.

NOTE: If you do not have a FTE or an inaccurate FTE is currently listed you will need to input the correct FTE by completing the following steps:

- a. **Right-click** anywhere on the assignment line.
- b. Choose **Update FTE**.



- c. Enter the appropriate FTE.
- d. Click the **Add** button, then click **OK**.

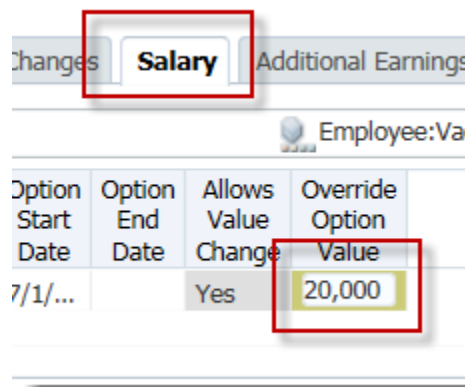
Runtime Prompts - Update FTE

Prompt Text	Value
* Enter FTE	.5
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	

NOTE: If you permanently wanted to change the FTE of this position, you would delete the Effective End Date. Otherwise, the updated FTE will return to the previous value after that end date passes.

4. Click the **Salary** Tab.

5. Input a Salary amount to hold in the Override Option Value cell. Please keep in mind that the fringes will automatically calculate so if you have an exact amount you need to hold adjust the number you input for fringe benefits.



The screenshot shows a software interface with a tabbed menu at the top containing 'Changes', 'Salary', and 'Additional Earnings'. The 'Salary' tab is selected and highlighted with a red rectangle. Below the tabs is a label 'Employee: Val' with a person icon. A table is displayed with the following columns: 'Option Start Date', 'Option End Date', 'Allows Value Change', and 'Override Option Value'. The first row of data shows '7/1/...' in the first column, an empty cell in the second, 'Yes' in the third, and '20,000' in the fourth. The '20,000' value is highlighted with a yellow background and enclosed in a red rectangle.

Option Start Date	Option End Date	Allows Value Change	Override Option Value
7/1/...		Yes	20,000

6. Click the **Save** button, then click **OK**,
7. Go to the **Distribution** tab and input your distribution information and save.
8. Run both the Calculate and Allocate procedures.

Calculate and Allocate Compensation 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.

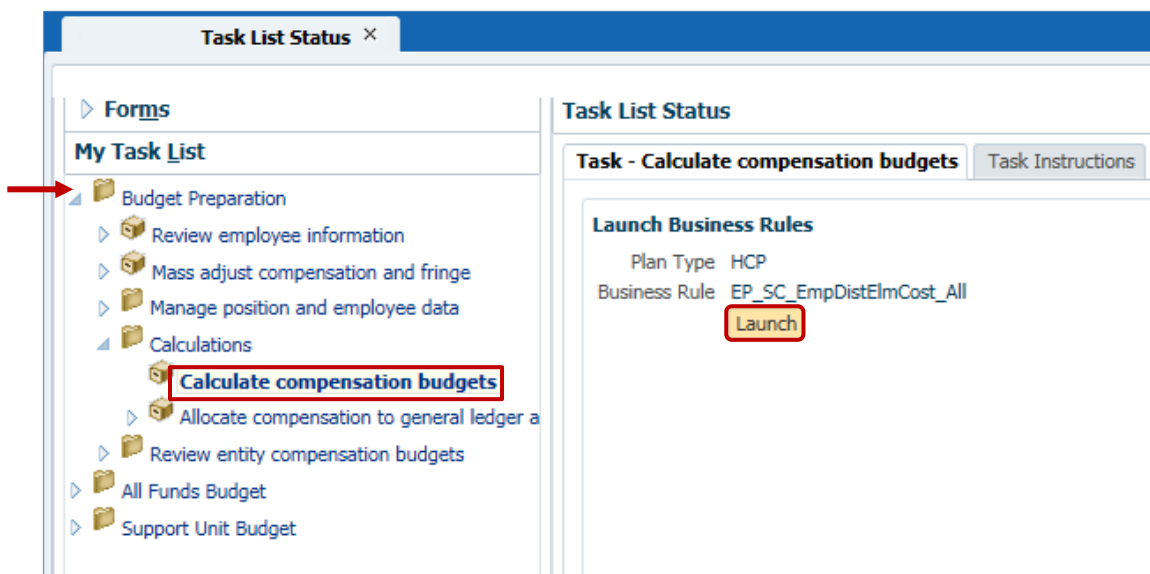
Complete these tasks to run the calculation and allocations after all of your transactions for the day.

BEST PRACTICE

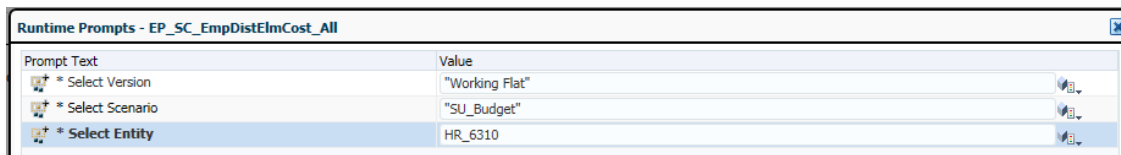
Because of the amount of time it takes for the system to complete the running of these options, the Budget Office recommends running this at the end of all your transactions, rather than after each transaction.

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.

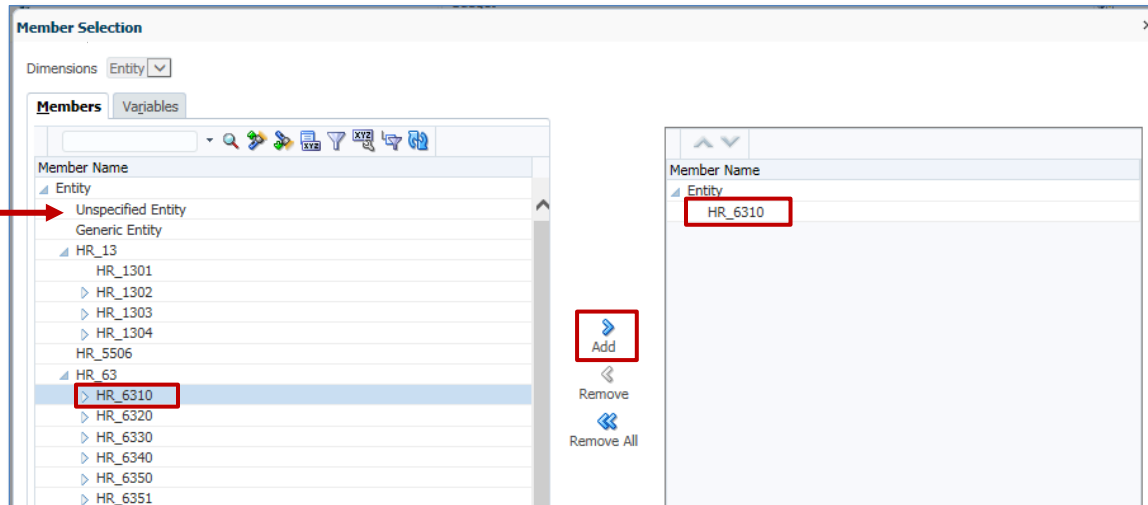
1. Navigate to: **My Task List > Budget Preparation > Calculations > Calculate compensation budgets.**
2. Click the **Launch** button.



3. To change the entity, make sure the **Version** is **Working Flat (or Working Optimal)** and the **Scenario** is **SU_Budget**.
4. Select the appropriate **Entity**.

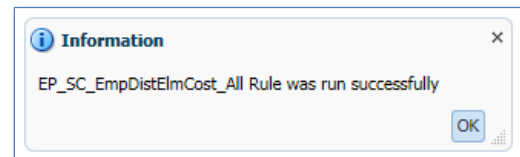


5. Click your **Department** to select it.
6. Click the **right arrow** to move it to the right side of the screen.
7. Click the **OK** button.

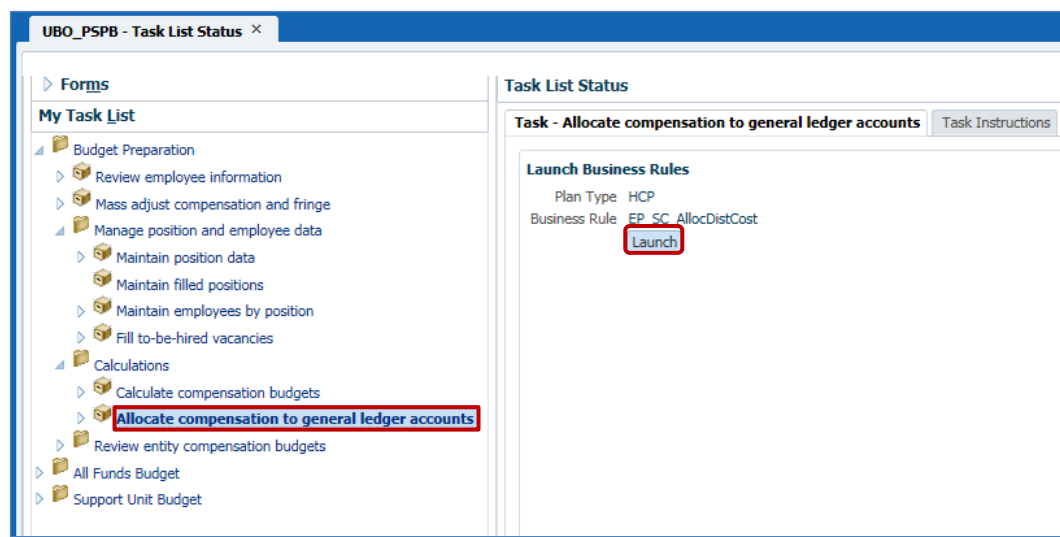


8. Click the **Launch** button.

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_6310
* Select Entity	HR_6310
* Select Position	POS_6310
* Select Scenario	SU_Budget
* Select Version	Working Flat

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 "SU_Budget" and the **Version** should always be "Working Flat" (or Working Optimal) when you work in the SU Budget Request cycle.

Instance 2: To-be-Hired employees on existing positions

Prompt Text	Value
* Select Employee	"New Employees"
* Select Entity	HR_6310
* Select Position	POS_6310
* Select Scenario	SU_Budget
* Select Version	Working Flat

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 "**SU_Budget**" and the **Version** should always be "**Working Flat**" (or **Working Optimal**) when you work in the SU Budget Request cycle.

Instance 3: To-Be-Hired employees on new positions

Prompt Text	Value
* Select Employee	"New Employees"
* Select Entity	HR_6310
* Select Position	"Total New Positions"
* Select Scenario	SU_Budget
* Select Version	Working Flat

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 "**SU_Budget**" and the **Version** should always be "**Working Flat**" (or **Working Optimal**) when you work in the SU Budget Request 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.

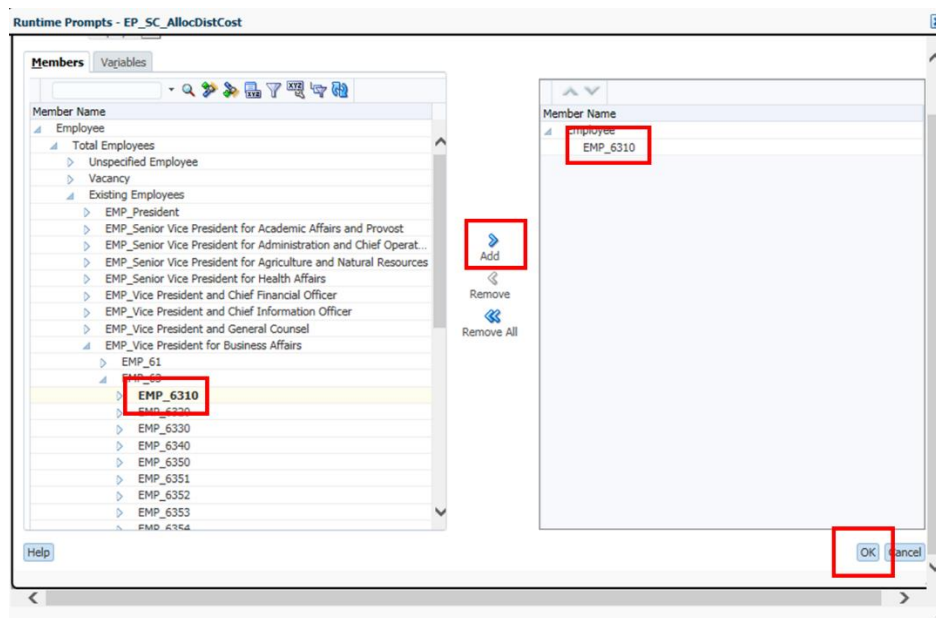
11. To change employee selection, click the **Search** button next to the Select Employee box.

Prompt Text	Value
* Select Employee	UFID_123456789
* Select Entity	HR_1302
* Select Position	"All Positions"
* Select Scenario	"Budget"
* Select Version	"Stage 1"

Launch Cancel Create runtime prompt values file

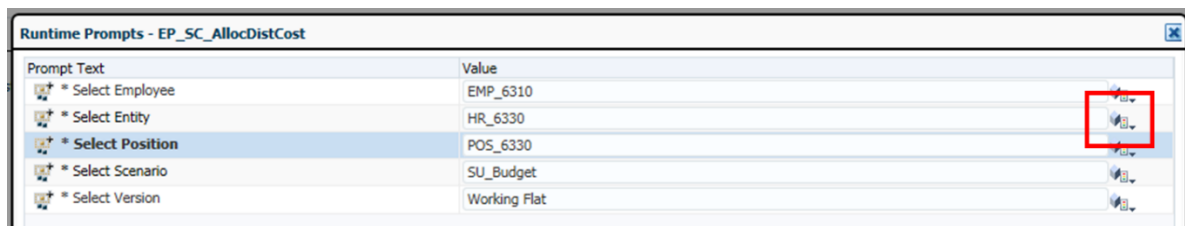
12. Navigate along the branches to select employee branch for your organization.
13. Click the **right arrow** to move it into the right side of the window.

14. Click the **OK** button.



Next, you will select **Department** as the Entity you want.

15. Click the **Search** button next to the Select Entity box.

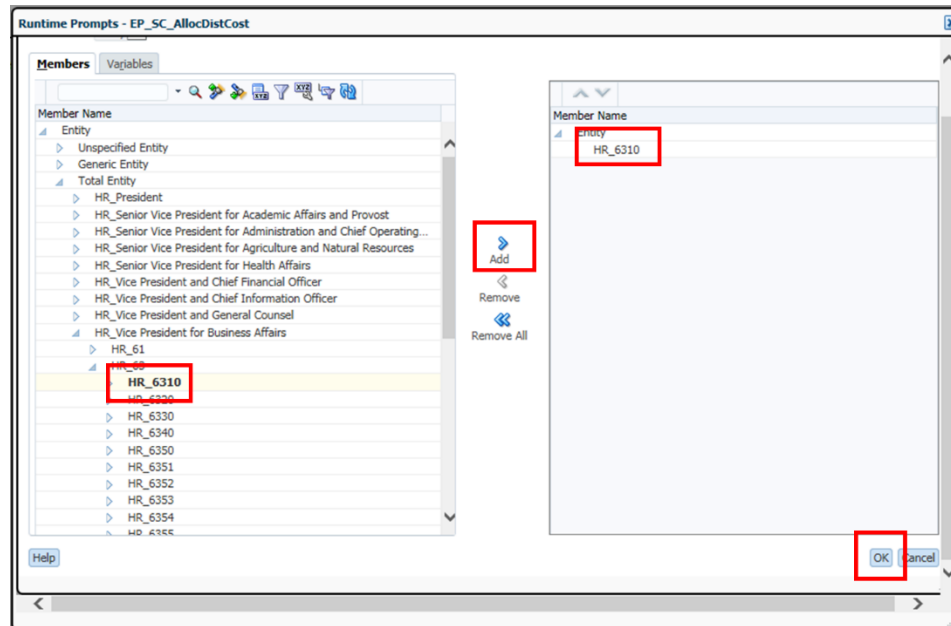


16. Click the **arrow** button next to your **Department**.

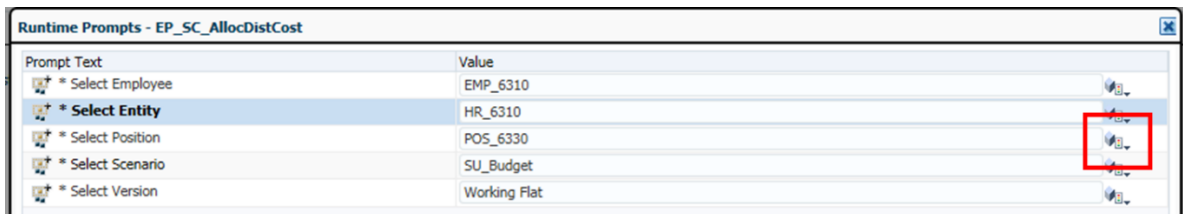
17. Select the **Department**.

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

19. Click the **OK** button.



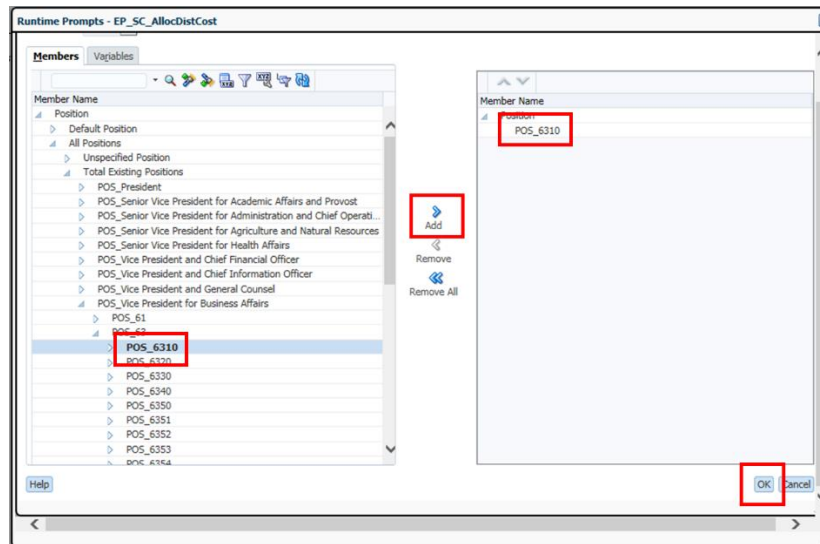
To change the position selection, click the **Search** button next to the Select Position box.



20. Navigate the branches to select the positions for your organization.

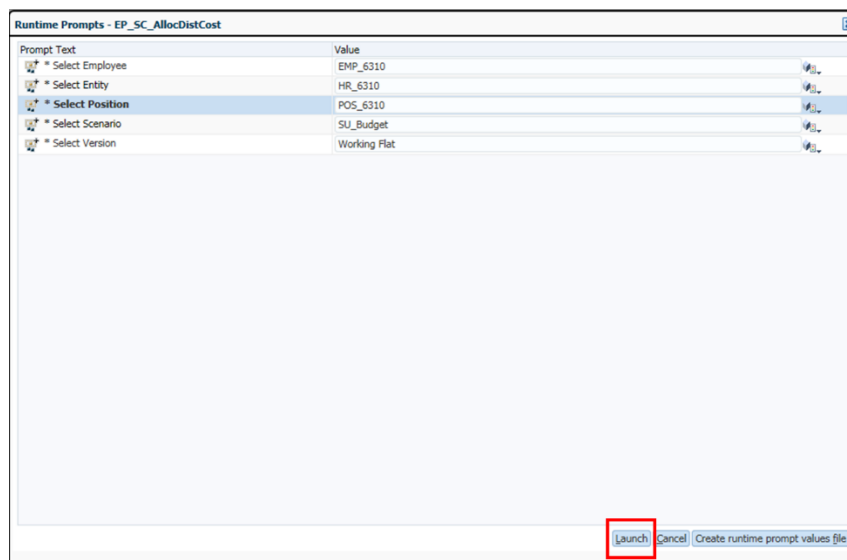
21. Click the **right arrow** to move it to the right side of the screen.

22. Click the **OK** button.



23. Confirm **Scenario** and **Version** fields display **SU_Budget** and **"Working Flat" or "Working Optimal"**.

24. 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_6330, POS_6330 and HR_6330) directly to the search boxes.

NOTE: If you are at the All Fundsd Budget cycle, please make sure to select **"Budget"** for **Scenario** and either **"Working"** for **Version**.

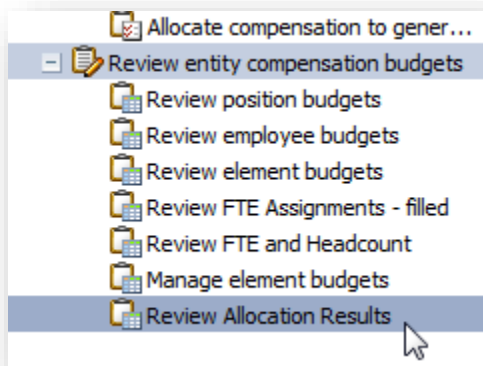
Remember the BEST PRACTICE

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 all your transactions, rather than after each transaction.

Review Allocation Results

To confirm the data has been processed successfully, you'll review a report to show you what was processed.

1. Click the **expand arrow** next to **Review entity compensation budgets** to view the reports available.
2. Click the **Review Allocation Results** option.



3. View the results to make sure the Allocation process was run.

A screenshot of a budget report window titled 'UBO_PSPB'. The window shows a table with columns for 'Total Compensation Expense', 'Allocated Expense', and 'Difference'. The table lists various positions and their associated expenses. A red box highlights the row for position P_00005478, which shows a difference of -1,311.

		Total Compensation Expense	Allocated Expense	Difference
P_00004700	Penrod, Gloria J-54782460	52,080,900.48	52,081	0
P_00005009	To be Hired 1	70,700	70,700	0
P_00005132	Fussell, Paula V-91509010	297,598	297,598	0
P_00005259	Johnson, Melba-87298149	38,382	38,382	0
P_00005273	To be Hired 3	129,700	129,700	0
P_00005274	To be Hired 5	147,840	147,840	0
P_00005374	Cook, Patricia A-79057540	49,842	49,842	0
P_00005478	Adkinson, Janice L-92344280	68,615	69,925	-1,311
P_00005479	To be Hired 4	0	0	0
P_00005480	Czaplewski, Kimberly M-07027900	155,143	155,143	0
P_00005481	Moon, Courtney-79747570	73,475	73,475	-0
P_00005484	Wease, Amanda S-80397890	70,803	70,803	0
P_00005486	Stevenson, Donald W-32273710	61,310	61,310	-0
P_00005487	Kiesel, Heather N-03094340	71,594	71,594	0

In this example, you can see that position P_00005478 is displaying an error.

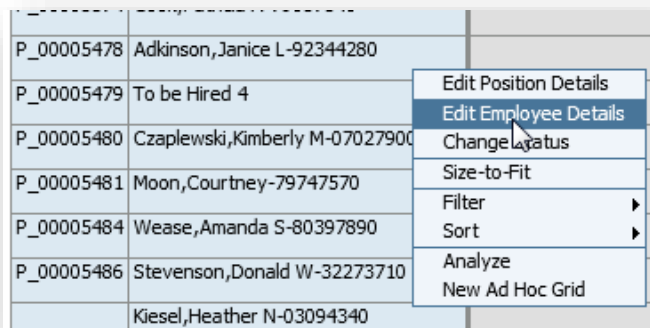
Correct Allocation Errors

Whenever you see red cells in the Review Allocation Results report, that means you have an error somewhere with this person/position.

Common errors are:

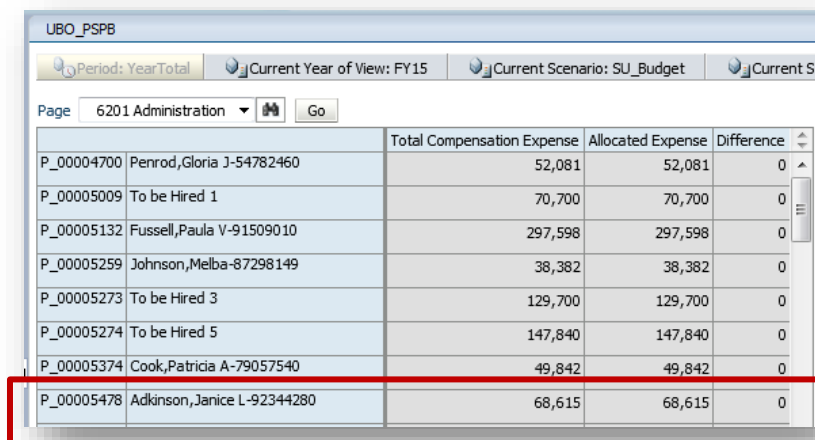
- Allocate compensation to general ledger accounts procedure was not run
- FTE not assigned
- No distribution assigned
- Distribution does not equal 100%

1. From the **Review Allocations Results** report, **right click** on employee name.
2. Choose **Edit Employee Details**.



P_00005478	Adkinson,Janice L-92344280
P_00005479	To be Hired 4
P_00005480	Czaplewski,Kimberly M-07027900
P_00005481	Moon,Courtney-79747570
P_00005484	Wease,Amanda S-80397890
P_00005486	Stevenson,Donald W-32273710
	Kiesel,Heather N-03094340

3. Check the **FTE** and **Distribution** tabs to check if above issues are found.
4. If nothing appears within the FTE and Distributions tabs, **calculate and allocate** again.
5. Confirm the error has been fixed.



		Total Compensation Expense	Allocated Expense	Difference
P_00004700	Penrod,Gloria J-54782460	52,081	52,081	0
P_00005009	To be Hired 1	70,700	70,700	0
P_00005132	Fussell,Paula V-91509010	297,598	297,598	0
P_00005259	Johnson,Melba-87298149	38,382	38,382	0
P_00005273	To be Hired 3	129,700	129,700	0
P_00005274	To be Hired 5	147,840	147,840	0
P_00005374	Cook,Patricia A-79057540	49,842	49,842	0
P_00005478	Adkinson,Janice L-92344280	68,615	68,615	0

NOTE: Position number P_00005478 no longer displays the red cell.

Copy Working Flat to Working Cut and Working Optimal

As mentioned earlier, you are typically required to submit two separate budgets to the University Budget Office each year. Those budgets are:

- Working Flat
- Working Optimal

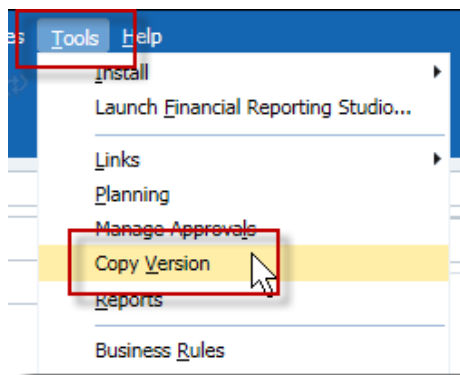
NOTE: Occasionally, an additional budgets may be required. For example, depending on state budget expectations, Working Cut may be required. You will receive notice from the UBO each year on which budgets are required.

If you followed the UBO recommendations, you set up Working Flat as your Current Stage budget in Hyperion Preferences and have been working on the Working Flat version to this point. Now you will copy the Working Flat data to the Working Optimal version.

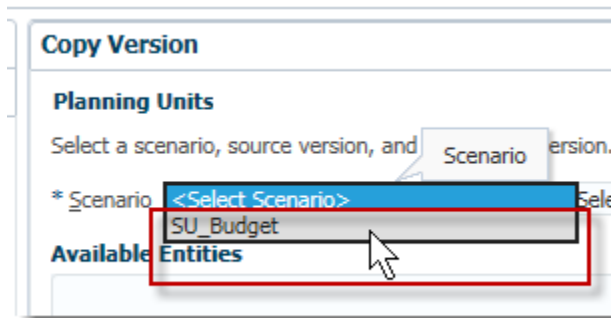
After copying the data over to the other budget version, you can then make the needed edits to that budget version as necessary.

Copy Working Flat to Working Optimal

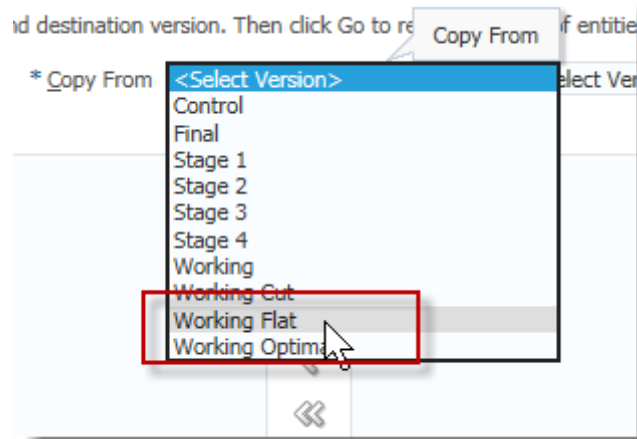
1. Click **Tools > Copy Version** from menu bar.



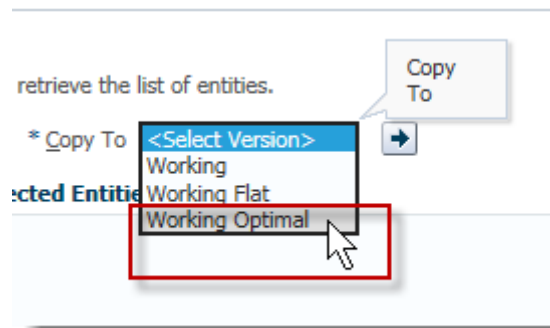
2. Choose **SU_Budget** from Scenario drop down field.



3. Choose **Working Flat** from Copy From drop down field.

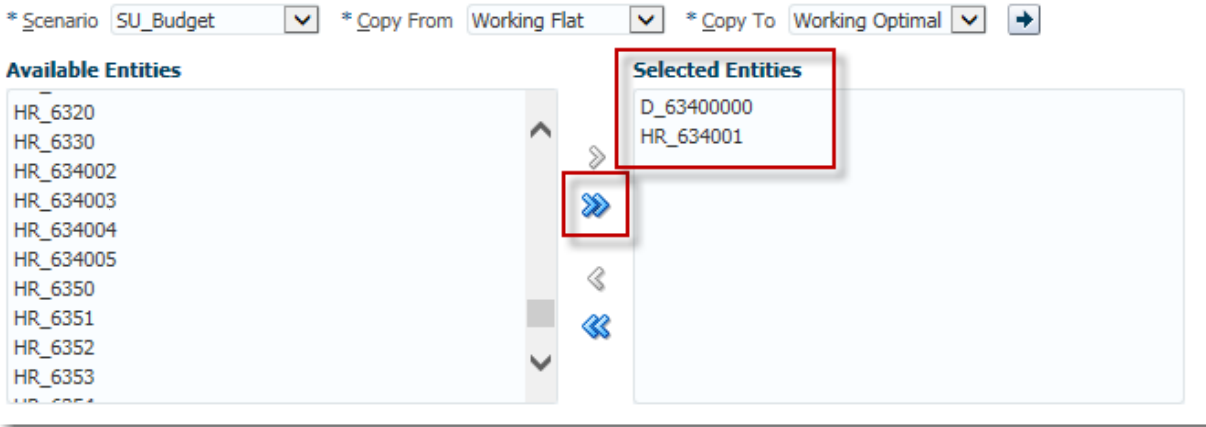


4. Choose **Working Cut** from **Copy To** Drop down field.



5. Click **Go** button.

6. Scroll down and choose your appropriate **Budget Prep Entities** (always starts with HR_ and D_) from the Available Entities list. Be sure to choose both or the financial data will not be copied over.
7. Click the **right-pointing Select arrow**.
8. Confirm Entity appears in the Selected Entities list.

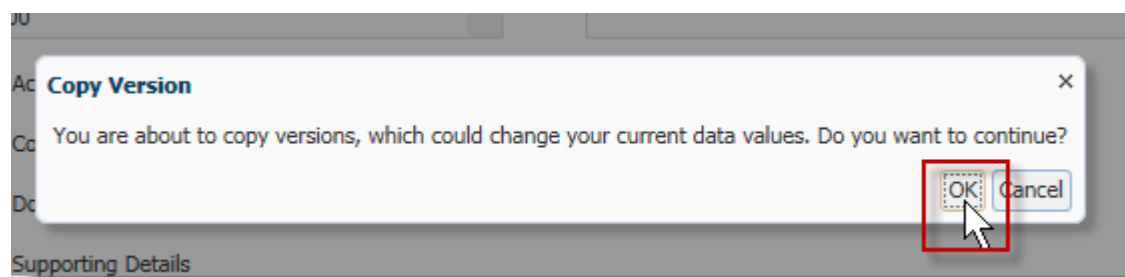


9. If you have annotations, comments, or supporting details you wish to display in this version, select the appropriate checkbox. Otherwise leave blank.

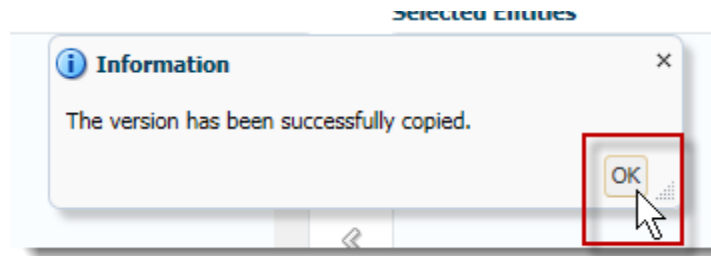
10. Click **Copy Data** button.



11. Click **OK**.

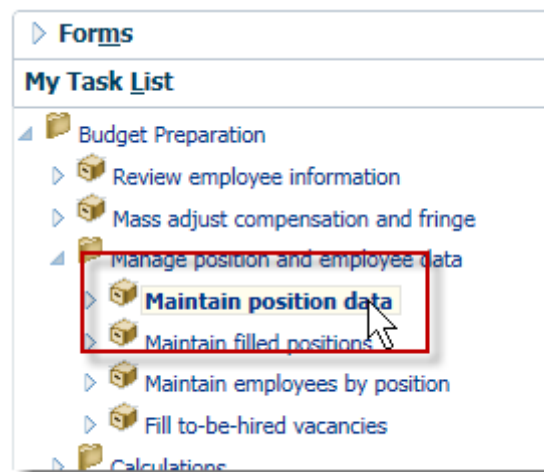


12. Confirm the budget version was copied successfully by noticing the confirmation message popup window.

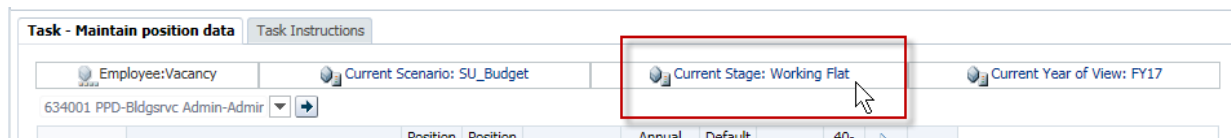


Selecting Working Optimal for Editing

1. Select **appropriate form** from Budget Preparation in the My Task List.

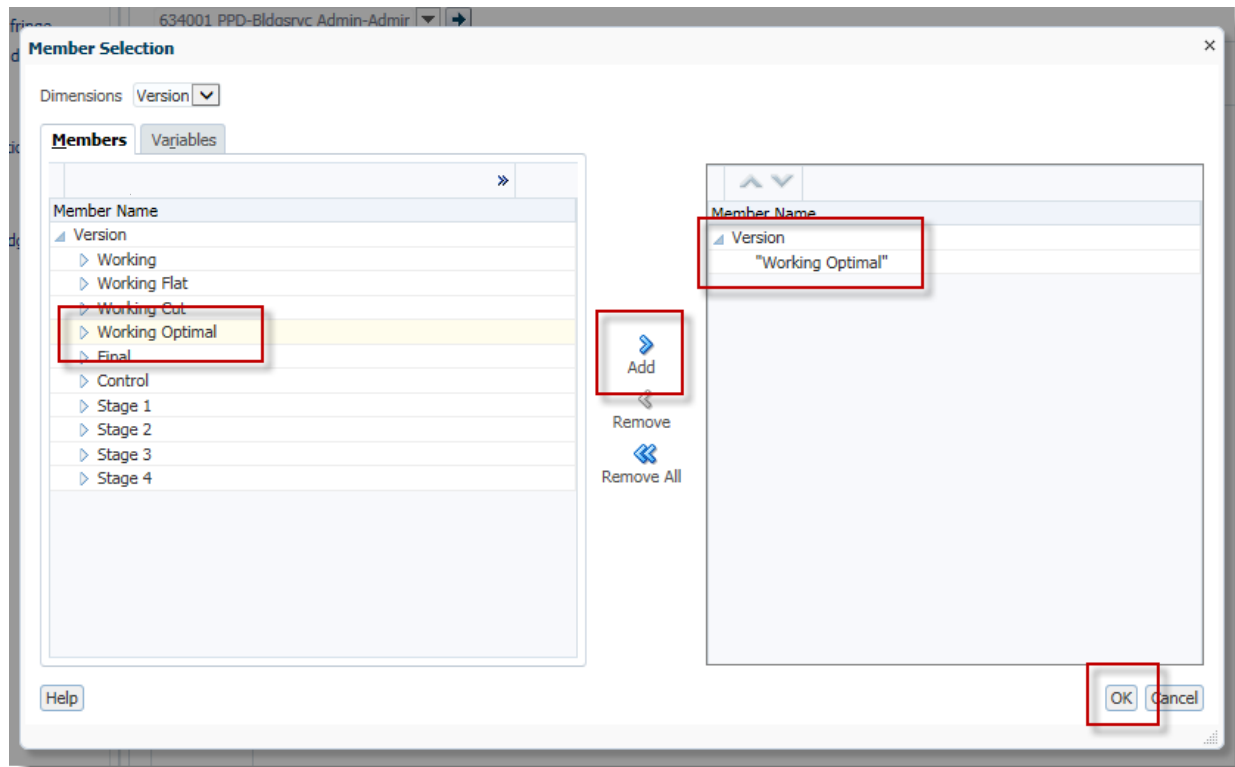


2. Click **Current Stage** link at top of the form.

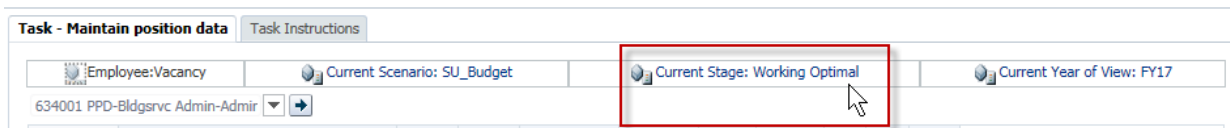


NOTE: When you log out of Hyperion, the budget version you have displayed in the Current Stage will remain open when you log back in. Be sure to confirm the correct budget version displays in the Current Stage tab at the top of the form prior to making edits.

3. Within the Member Selection window, select **Working Optimal** from the Version list on left side.
4. Click **right-pointing Select arrow**.
5. Confirm **Working Optimal** appears in the Version list on right side.
6. Click **OK**.



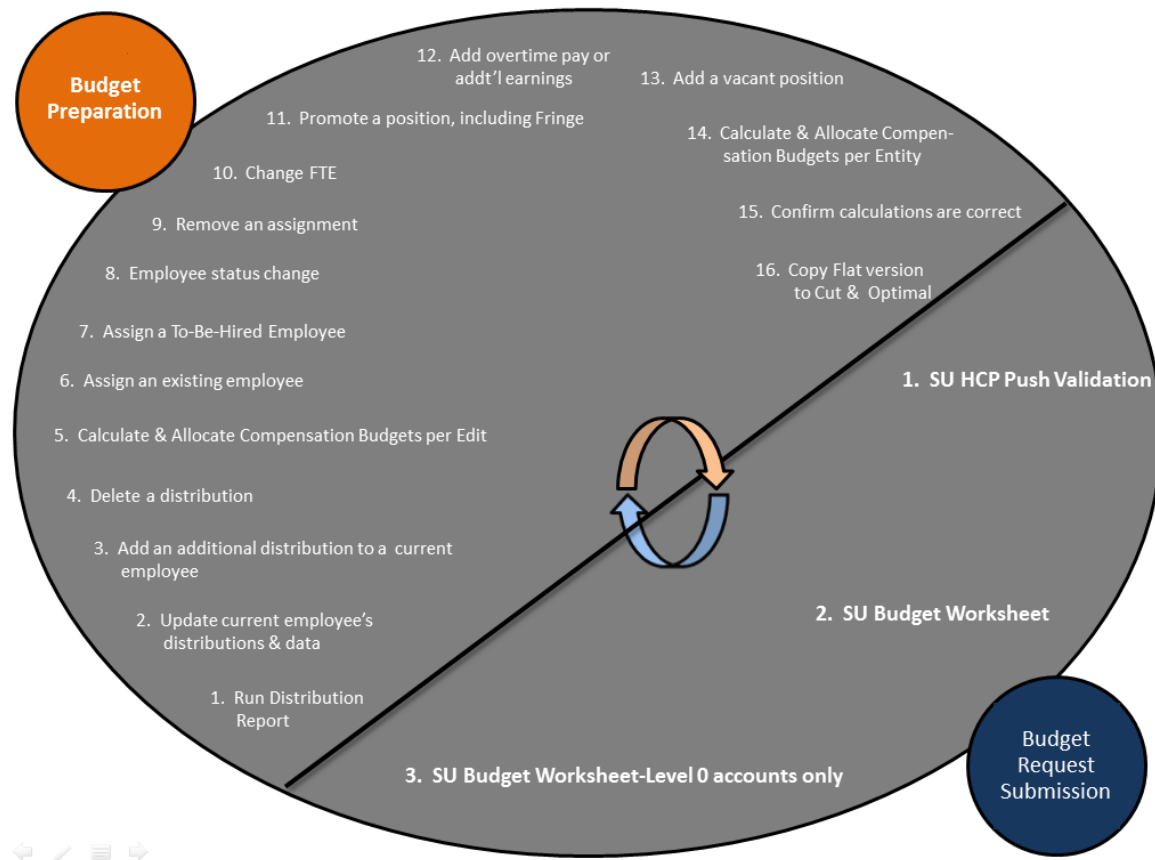
7. Confirm **Current Stage** icon displays Working Cut.



8. Make any desired adjustments as needed for your “optimal” budget.
 - a. Reference Working Flat processes above as needed.

NOTE: Follow the same procedures to copy Working Flat to Working Cut if a Working Cut version is required.

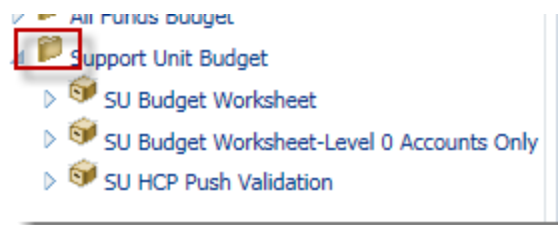
Support Unit Budget Request



Forms for Support Unit Budget Request

Accessing Forms

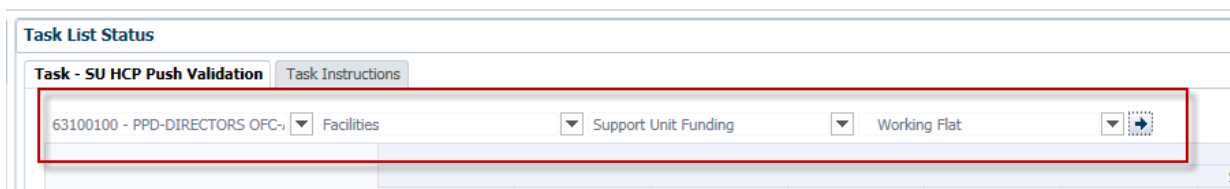
1. Expand the **Support Unit Budget** folder in **My Task List**.
2. You should see three forms.
 - SU Budget Worksheet
 - SU Budget Worksheet-Level 0 Accounts Only
 - SU HCP Push Validation



SU HCP Push Validation

This form allows you to verify that “the push” has successfully completed and will display the salary dollars entered via Budget Prep. You should verify this information prior to using the other two forms.

1. Select **SU HCP Push Validation** form.
2. Choose your **Entity** from the Entity dropdown field.
NOTE: You may need to search for the appropriate Entity.
3. Choose your **Cost Pool** from the Cost Pool drop down field.
4. Choose your **Commitment Source** from the Commitment Source drop down field.
5. Choose the **appropriate budget version** from the Version drop down field.
6. Click the **Go** button.



The screenshot shows a web form titled "Task List Status". Below the title are two tabs: "Task - SU HCP Push Validation" (which is active) and "Task Instructions". The form contains four dropdown menus and a "Go" button, all enclosed in a red rectangular box. The dropdowns are labeled: "63100100 - PPD-DIRECTORS OFC", "Facilities", "Support Unit Funding", and "Working Flat". The "Go" button is represented by a blue arrow icon.

Verify the displayed data is what you expected to see pushed from Budget Prep. If the data is unexpected or in error, return to Budget Prep and make any needed corrections.

SU Budget Worksheet

Salary data and fringe will automatically be populated from the Budget Prep push.

This form displays account categories and accounts that expand and roll up along with totals at the bottom of the columns. Please note either this form or the SU Budget Worksheet- Level 0 Accounts only form can be used to input salary/fringe budget. Both forms do the same thing they just have a different view.

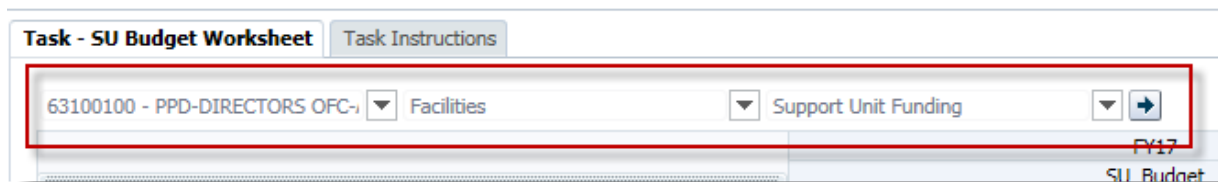
This form provides two years of actual expenditures and current year final approved budget related to your support unit(s). The actual data includes your support unit expenditure only. It doesn't include other expenditures such as auxiliary, endowment, etc. The final approved current year budget data is based on the preparation of your budget in Budget Preparation (salary portion) and Budget Request Submission (all other expenditures).

NOTE: It is not required to budget at the 8 digit DeptID level or GL account level. It is your unit's decision what level to budget. However, all data must be input at Level 0 members.

If you plan to budget at a higher level, you also need to select one 8 digit DeptID. For example Enrollment Management, if you plan to budget at Office of Admission, Office of Registrar's Office and VP of Enrollment Management areas, you can select DeptID 03020000 for Office of Admission, DeptID 03030000 for Office of Registrar and 03010000 for VP of Enrollment Management. You don't have to go down to 03020100 or 03020300 deptID level.

Similarly, if you plan to budget at GL account level, select the GL accounts you need to budget to and input your value. If plan to budget at higher level, for example, if you want to budget at Contractual Services level, pick one GL account under Contractual Services and input your value. You can either pick the GL account where you spend most of the Contractual Services or pick the GL account "71000 - Contractual Services".

1. Select your **Department** from the Entity drop down field (if needed).
2. Select the **Cost Pool** for your department from the Cost Pool drop down field (if needed).
3. Select the **Commitment Source** from the Commitment Source drop down field (if needed).
4. Click the **Go** button.



The screenshot shows the top portion of the 'SU Budget Worksheet' form. It has two tabs: 'Task - SU Budget Worksheet' (active) and 'Task Instructions'. Below the tabs is a red-bordered box containing three dropdown menus and a button. The first dropdown is labeled '63100100 - PPD-DIRECTORS OFC-' and has a small triangle icon next to it. The second dropdown is labeled 'Facilities' and also has a small triangle icon. The third dropdown is labeled 'Support Unit Funding' and has a small triangle icon. To the right of these dropdowns is a blue button with a right-pointing arrow. Below the red box, the text 'FY17' is visible in red, and 'SU Budget' is visible in blue at the bottom right.

To input request dollars in for Working Flat and Working Optimal

1. Go to **SU Budget Worksheet** form. Select the department, cost pool and commitment source to budget. Click on the arrow to refresh the page.

Task List Status

Task - SU Budget Worksheet Task Instructions

63100100 - PPD-DIRECTORS OFI Facilities Support Unit Funding

FTE	FY17 SU_Budget			
	Working Cut	Working Optimal	Working Flat	Final
621110 - EXEMPT TEAMS/USPS-EARNINGS		151,783	151,783	151,783
SU_TEAMS/USPS-Exempt Salaries		151,783	151,783	151,783
621120 - EX TEAMS/USPS-EARN FRNG POOL		50,544	50,544	50,544
SU_TEAMS/USPS-Exempt Fringe Benefit Pool Expense		50,544	50,544	50,544

2. Find the GL account to budget. Type in the value amount. And click **Save** button.

Task List Status

Task - SU Budget Worksheet Task Instructions

63100100 - PPD-DIRECTORS OFI Facilities Support Unit Funding

	FY17 SU_Budget			
	Working Cut	Working Optimal	Working Flat	Final
734100 - COMPUTER SUPPLIES			500	500
734200 - COMPUTER SOFTWARE				
734800 - ATTRACT-COMP EQUIP (NOT CAP)				
734900 - ATTRACT - COMP PERIPHERAL		3,000	3,000	
738000 - MISC OTHER SUPPLIES				
739300 - BOOKS and PUBLICATN				

You can also input the value by copy from one cell to another cell. Following steps show you how to copy from a cell to another cell.

3. Find the GL account to copy from. Right click and choose **Edit >Copy** data (or Cntrl+C).

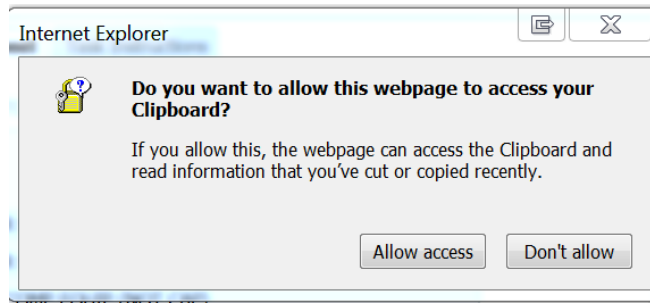
Support Unit Funding

FY17 SU_Budget				FY16 SU_B	FY15 Seed Final Version...
Working Cut	Working Optimal	Working Flat	Final		
	270,919	270,919			
	270,919	270,919			

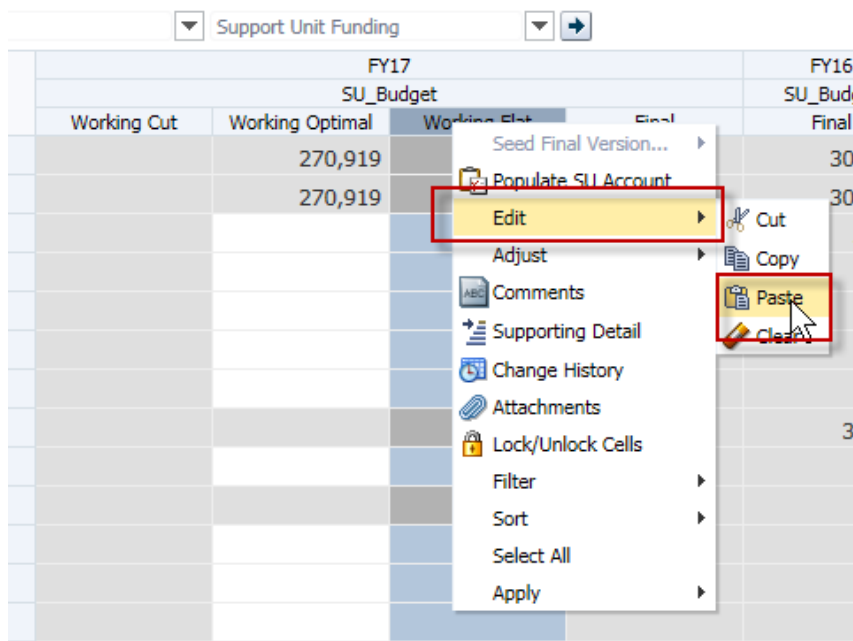
Right-click context menu options:

- Cut
- Copy
- Paste
- Clear
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History
- Attachments
- Lock/Unlock Cells
- Filter
- Sort
- Select All
- Apply

4. A window will pop up with below message. Click Allow access.



5. Right click on the cell you want to copy to. Choose **Edit >Paste** data (or Cntrl+V).



6. Click **Save** button.

SU Budget Worksheet-Level 0 Accounts Only

Salary data and fringe will be automatically be populated from the Budget Prep push.

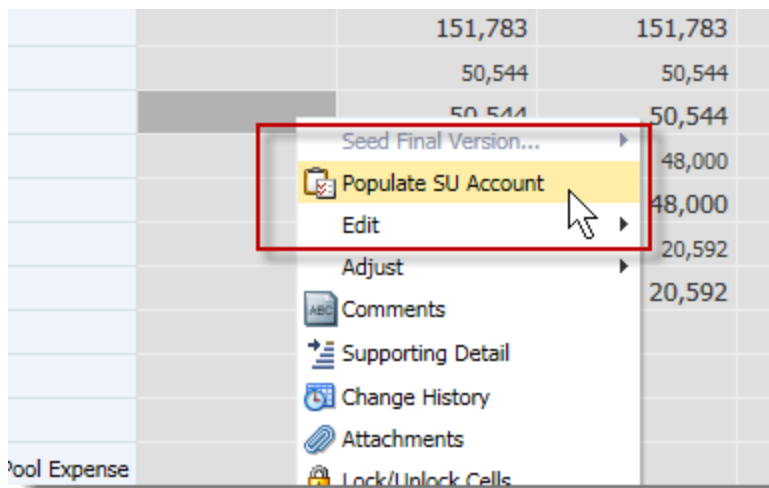
This form only displays accounts and the accounts don't expand (roll up). You will also not see totals at bottom of columns. Please note either the SU Budget Worksheet form or this form can be used to input budget. Both forms do the same thing they just have a different view.

Please follow the procedures for SU Budget Worksheet.

Populating Accounts

The populating accounts procedure allows you to add accounts that were not previously used but will be needed and used in the future.

1. Right click anywhere in the SU Budget Worksheet form.
2. Select **Populate SU Account**.



Runtime Prompts - PopulateSUAccount

Prompt Text	Value
* Select Account(s) to add:	"621120"
* DO NOT CHANGE (Set By Form)	"Support Unit Funding"
* DO NOT CHANGE (Set By Form)	"Facilities"
* DO NOT CHANGE (Set By Form)	"No Dept Flex"
* DO NOT CHANGE (Set By Form)	"D_63100100"
* DO NOT CHANGE (Set By Form)	"No Fund"
* DO NOT CHANGE (Set By Form)	"No Program"

From the Runtime Prompts window, indicate the account you wish to add.

NOTE: Do NOT change any of the other fields in this window.

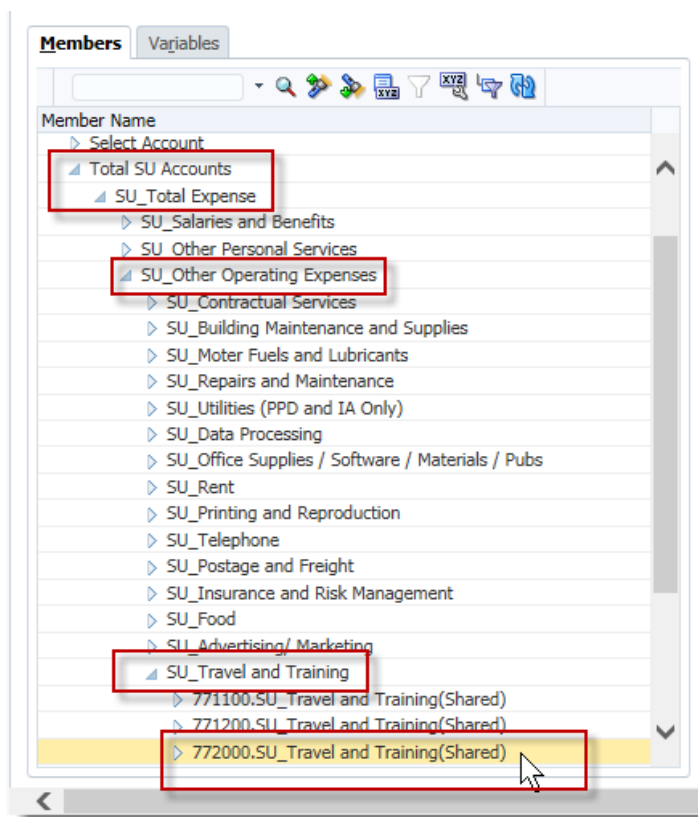
3. Click the **Members Selector** button.

Prompt Text	Value
* Select Account(s) to add:	"621120"
* DO NOT CHANGE (Set By Form)	"Support Unit Funding"

- Drill-down and locate the account you wish to add within the left Member Name column.
Note: When adding OPS Salary accounts please choose the second choice in the list as the first choice in the list is the pre-fringe benefit pool account and this account is no longer active. You will not be able to input data into this account cell once added.

In this example, we are going to add an additional Travel account.

- Click the **Total SU Accounts Expand** icon.
- Click the **SU_Total Expense Expand** icon.
- Click the **SU_Other Operating Expenses Expand** icon.
- Scroll down, if needed.
- Click the **SU_Travel and Training Expand** icon.
- Click the **772000** object.



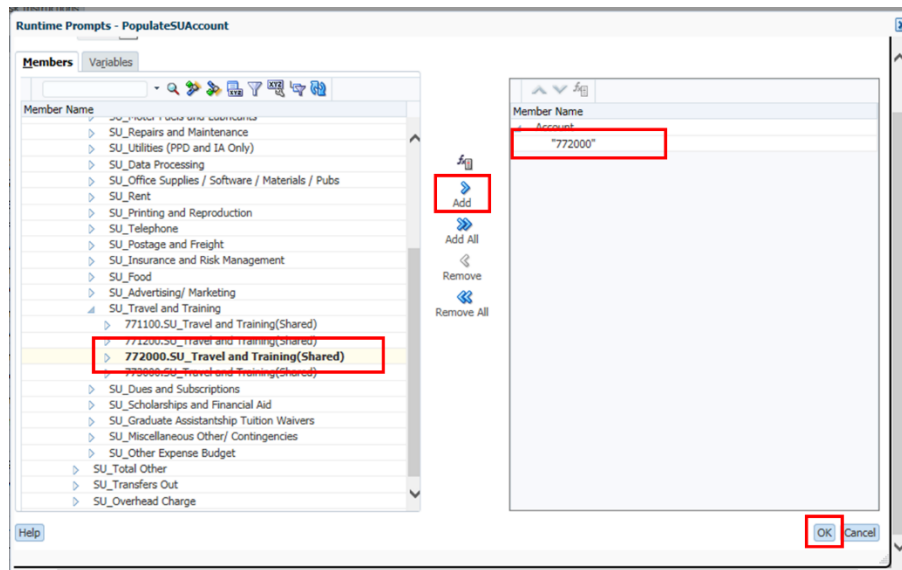
- Once you have located the desired account, you will move it to the right side Member Name Column.

12. Only the accounts listed on the right side will appear in your worksheet.

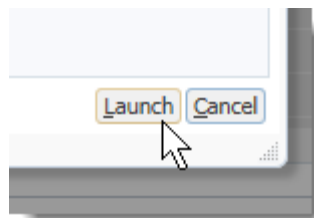
13. Click the **Right-pointing Select arrow**.

14. Confirm the correct account appears on the right side.

15. Click the **OK** button.

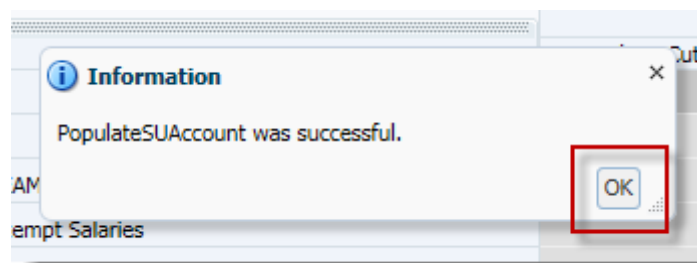


16. Click the **Launch** button.



17. After launching the rule, you will receive a confirmation message.

18. Click the **OK** button.



19. Scroll down to verify the new account has appeared in your worksheet.

20. Notice the new account now appears in the Travel and Training section.

771100 - IN STATE TRAVEL		1,000	1,000		1
771200 - OUT OF STATE TRAVEL		9,567	9,567		9
772000 - FOREIGN TRAVEL	0				
SU_Travel and Training	0	10,567	10,567		10,
791000 - MEMBERSHIPS and DUES		1,200	1,200		1
SU_Dues and Subscriptions		1,200	1,200		1,

NOTE:

You can also type in the GL accounts directly into the Select Account(s) to add: field if you know which account(s) to add.

You can add multiple accounts at once by separating each account with a comma.

Prompt Text	Value
* Select Account(s) to add:	771005, 713000, 799400
* DO NOT CHANGE (Set By Form)	"Support Unit Funding"

NOTE: When adding OPS Salary accounts please choose the second choice in the list as the first choice in the list is the pre-fringe benefit pool account and this account is no longer active. You will not be able to input data into this account cell once added.

21. Click within the Foreign Travel cell of the appropriate budget column.

22. Enter the amount you wish to budget for that account. For this example, enter "100".

23. Click the **Save** button.

NOTE: This account will remain in your worksheet as long as you budget for it by placing a value in the cell.

SU_Advertising/ Marketing					
771100 - IN STATE TRAVEL		1,000	1,000		
771200 - OUT OF STATE TRAVEL		9,567	9,567		
772000 - FOREIGN TRAVEL	0	5,000	1,000		
SU_Travel and Training	0	15,567	11,567		
791000 - MEMBERSHIPS and DUES		1,200	1,200		
SU_Dues and Subscriptions		1,200	1,200		
SU_Other Operating Expenses	0	72,817	66,917		

NOTE: If you decide you don't need/want to budget for this account, you can clear the cell of all data and save the worksheet. The account will no longer appear. Or, if you enter a "0" into the cell the account will remain visible (as long as you did not suppress zeros in your user preferences) for the current fiscal year.

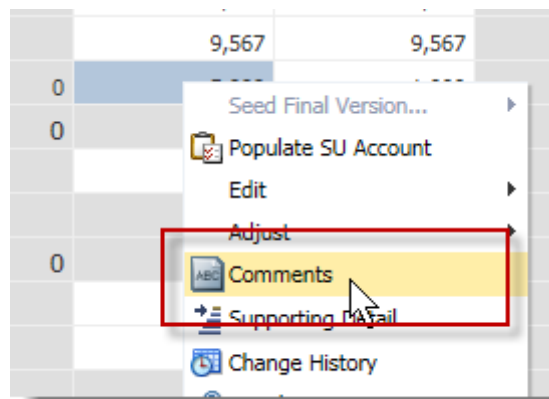
Comments and Supporting Details

To elaborate on or explain the data entered into any cell, you may choose to add comments, or supporting details to the appropriate cell.

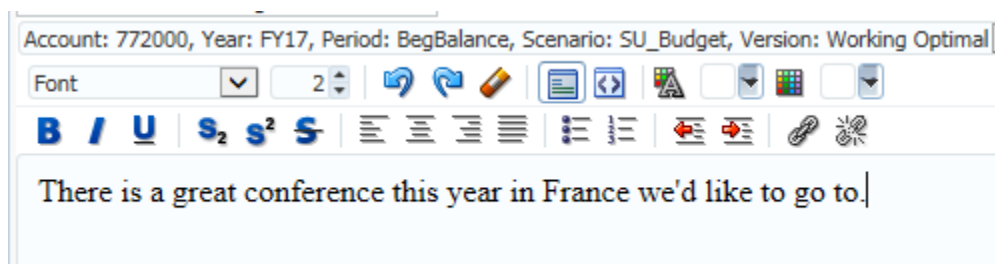
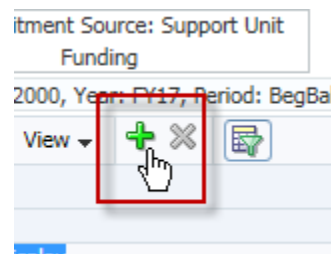
Adding Comments

Comments can be added to Level 0 or rollup accounts in both Budget Preparation forms and All Funds Budget forms.

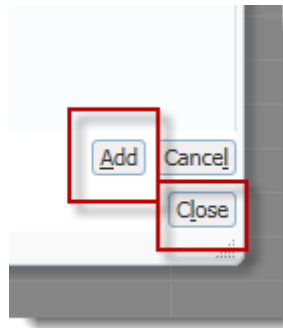
1. **Right click** on the cell to which you wish to add a comment.
2. Choose **Comments**.



3. Click **Add**, then type in the desired comment.



4. Click the **Add** button in the bottom right of window, then **Close** to return to form.



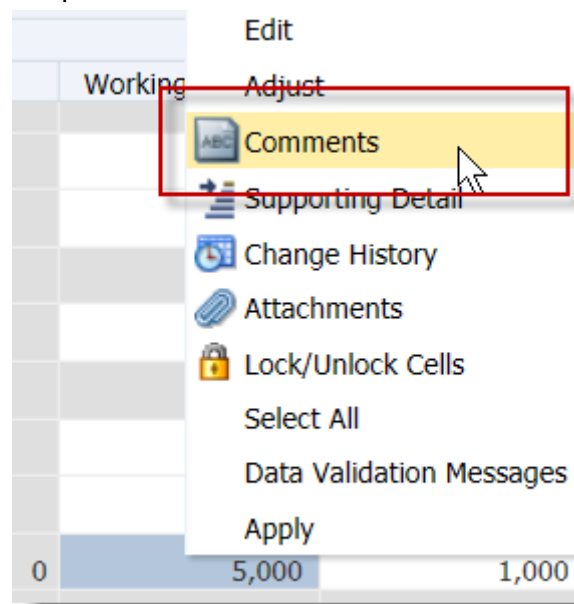
You can tell a cell has a comment attached by noting the icon that appears in the upper, right corner of the cell.

		9,567
0		5,000
0		15,567

NOTE: Comments cannot be edited, but you can add comments over comments if desired. Hyperion keeps track of the history for all comments.

Deleting Comments

1. **Right-click** the cell that has a comment.
2. Click the **Comment** option.






3. **Select** the comment you wish to delete (if there are more than one), click the **Delete** icon.

Comments

Dept Flex: No Dept Flex FundBudRefSOF: No Fund Program: No Program Entity: 63100100 - PPD-DIRECTORS OFC-ADMIN Cost Pool: Facilities

Commitment Source: Support Unit Funding

Account: 772000, Year: FY17, Period: BegBalance, Scenario: SU_Budget, Version: Working Optimal

Actions View   

Comment	User	Date
There is a great conference this year in France we'd like to go to.	rmitchell	9/27/16

- Click the **Close** button.
- Scroll down** to confirm the cell no longer displays the icon in the upper, right corner.

		1,000	
		9,567	
0		5,000	
0		15,567	
		1,200	
		1,200	
0		72,817	6

NOTE: Comments can be added to a level 0 member or parent member.

Supporting Details

This function allows you to add calculations or aggregate lines to your budget cells. For example Travel and Training, you can add the airfare cost, lodge, meals etc. to the cell as supporting details.

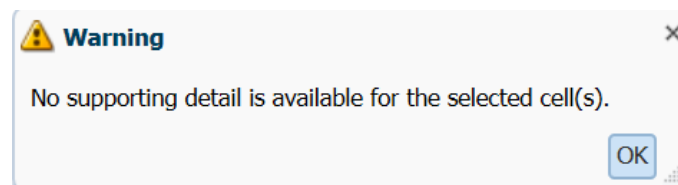
Supporting Details

This function allows you to add calculations or aggregate lines to your budget cells.

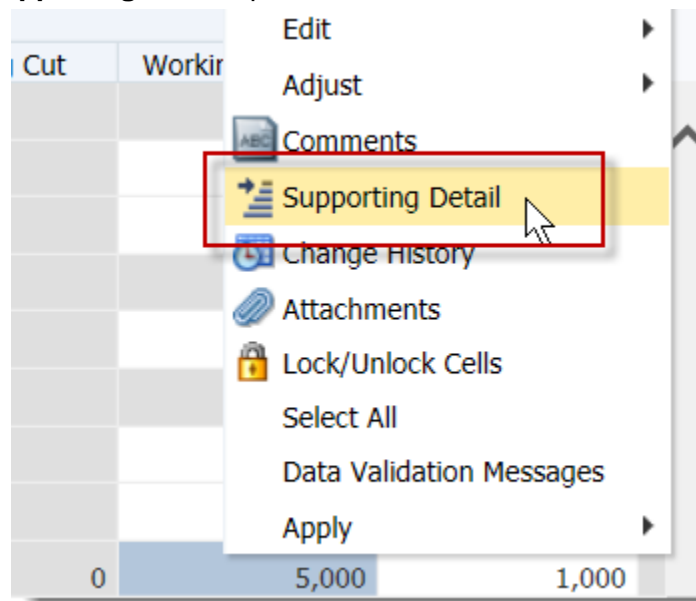
Supporting Details are "calculating" explanations you can add to specific cells if desired.

- Supporting details allows you to add in specifics of a cell's entry. For example, if travel expenses are expected to be higher than normal, you can use Supporting Details to explain everything that goes into that value.

Supporting details can only be added to "0" level cells, not to the roll up level. If you get the following error message, you are on a roll up level.













- Right-click** in cell to which you wish to add supporting details.
- Select the **Supporting Detail** option.



The Supporting Detail window will pop up for you to enter the supporting detail.

Supporting Detail










Actions ▾ View ▾          Detach 

	Label	Operator	FY17 BegBalance SU_Budget Working Optimal
>	Untitled	+ ▾	5,000.0
>	Total		5,000.0

You can add as many detail lines as needed. In this example, we will add Airfare and Hotel costs.

3. Type in the description of the first detail line in the Untitled field.
4. **Tab over** and **type** in the amount of this detail line.









Supporting Detail

Actions ▾ View ▾         Detach 

	Label	Operator	FY17 BegBalance SU_Budget Working Optimal
>	Airfare	+ ▾	2000
>	Total		2,000.0

5. To add an additional line on the same level, choose the **Add Sibling** button.









Supporting Detail

Actions ▾ View ▾         Detach

	Label	Operator		FY17 BegBalance SU_Budget Working Optimal
▶	Airfare	+	▼	2,000.0
▶	Untitled	+	▼	
▶	Total			2,000.0

6. **Type** in a description for the second detail line.
7. You will click the **Add Child** button if you need to include a calculated detail line. In this example, we will input the calculations that contribute to the lodging costs.

Supporting Detail

Actions ▾ View ▾         Detach

	Label	Operator		FY17 BegBalance SU_Budget Working Optimal
▶	Airfare	+	▼	2,000.0
▶	Lodging	+	▼	
▶	Untitled	+	▼	
▶	Total			2,000.0

NOTE: A child detail line will appear slightly indented from the previous parent line.

8. **Type** in the description of the child line.
NOTE: In this example, we are calculating 10 days of lodging at \$300 per night.

Supporting Detail

Actions View [Icons] Detach

	Label	Operator	FY17 BegBalance SU_Budget Working Optimal
>	Airfare	+ ▼	2,000.0
>	Lodging	+ ▼	300.0
>	Hotel Rate	+ ▼	300
>	Total		2,300.0

9. Click the **Add Sibling** button to add an additional detail line directly below Hotel Rate.

Account: 771100 - IN STATE TRAVEL Dept Flex: No Dept Flex
Entity: 62010000 - HR-HR ADMINISTRATION Cost Pool: General

Add Child **Add Sibling** Delete Delete All P

		FY15 BegBalance SU_Budget Working Cut
Airfare	+ ▼	3,000
Lodging	+ ▼	125
Hotel Rate	+ ▼	125
Untitled	+ ▼	
Total:		3,125

10. **Add** the appropriate description for the new detail line.












11. **Double click** the appropriate **operator symbol** for the calculation.

NOTE: In this example, we will be multiplying the Number of Days by the Hotel Rate to determine the expected In-State travel expenses for the Working Cut budget.

12. **Enter** the appropriate number of expected travel days.

Supporting Detail

Actions ▾ View ▾












 Detach

	Label	Operator	FY17 BegBalance SU_Budget Working Optimal
▶	Airfare	+ ▼	2,000.0
▶	Lodging	+ ▼	3,000.0
▶	Hotel Rate	+ ▼	300.0
▶	Number of days	* ▼	10
▶	Total		5,000.0

NOTE: The Total field will automatically calculate.

13. When all supporting details have been entered, click the **Save** button in upper, right corner of window, then click **OK**.

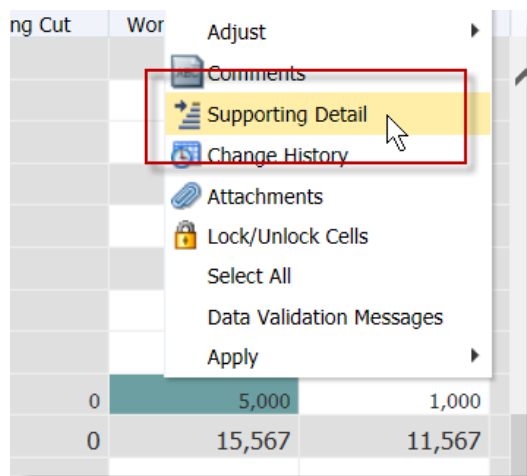
Help Refresh **Save** Cancel

14. **Scroll down** and **notice** that the cell(s) with the supporting detail will now be blue/green.

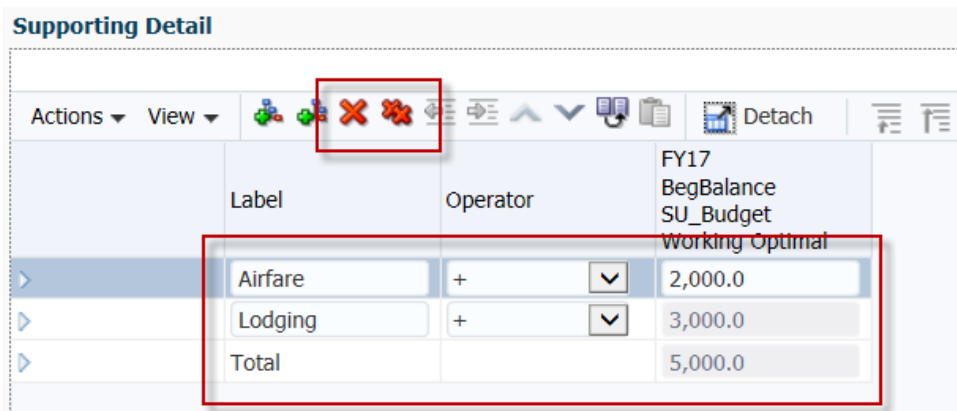
		1,000
		9,567
0		5,000
0		15,567
		1,200
		1,200

Editing/Deleting Supporting Details

1. Right-click the cell that has the Supporting Details you want to edit or delete.
2. Choose **Supporting Detail**. The supporting detail window will pop up for you to edit or delete.



3. Edit the values as needed or click the appropriate **Delete button** (Delete or Delete All).

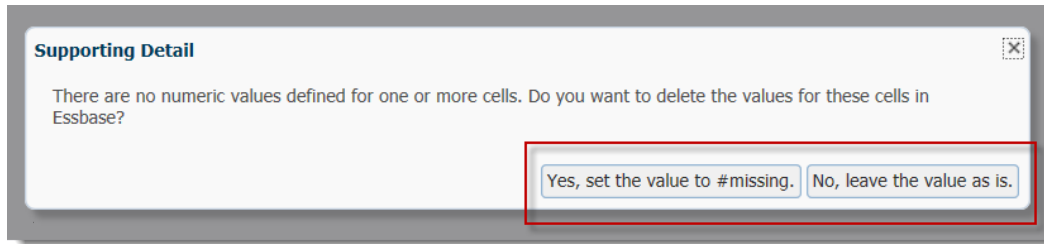


NOTE: Clicking Delete All will remove all Supporting Details from the cell.

4. Click the **Save** button.

After saving, you will determine whether you wish to remove the value and the supporting details from the cell on the main screen, or just delete the supporting details.

- Choosing Yes → all data will be removed, including the cell value.
- Choosing No → only the supporting details will be deleted.



In this case, we will remove the supporting details, but leave the value in the cell.

5. Choose **No, leave the value as it is**, then click **OK**.
6. **Scroll down** and **confirm** the supporting value has been removed from the cell(s).

	1,000
	9,567
0	5,000
0	15,567
	1,200

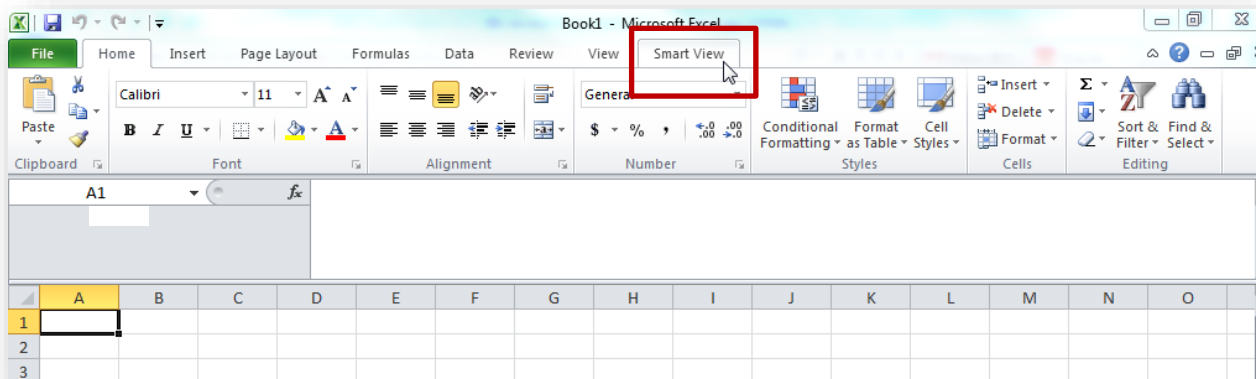
NOTE: Supporting Details can be added to a level 0 member or parent member.

Smart View

Opening Smart View

Smart View allows you to access and work in the same Hyperion forms in a more familiar Excel environment. Smart View is a plugin that must be installed on your computer prior to use. Contact your tech support if you need Smart View installed. Contact your tech support if you need Smart View installed or if you haven't upgraded Smart View to 11.1.2.5.

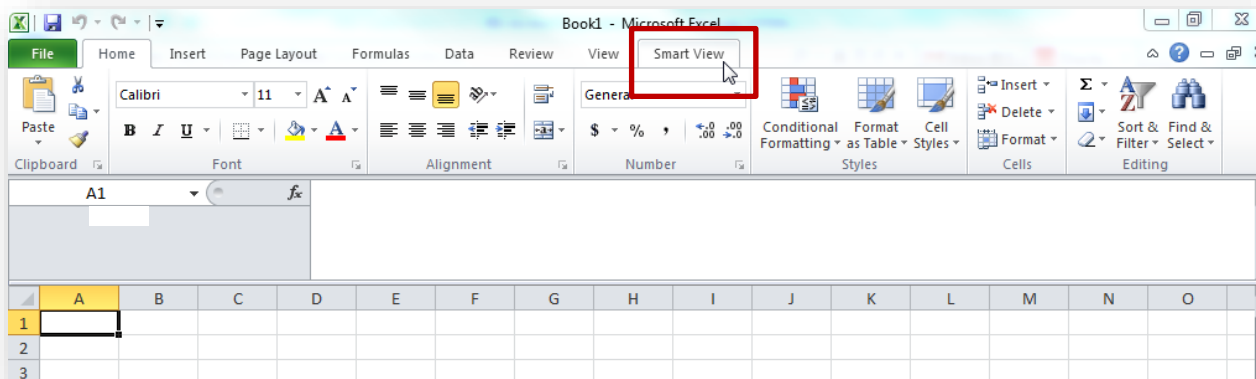
1. Open Excel and verify you can see a **Smart View** tab at the top of the application window.



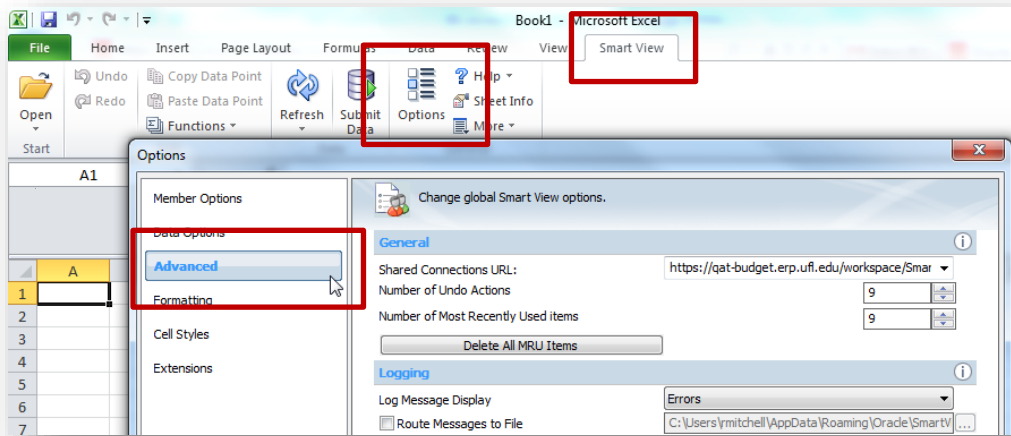
Setting up Smart View Shared Connections URL

Prior to using Smart View to complete all needed Budget Request Submission procedures, you will set up the appropriate Smart View connections.

1. Open Excel and verify you can see a **Smart View** tab at the top of the application window.



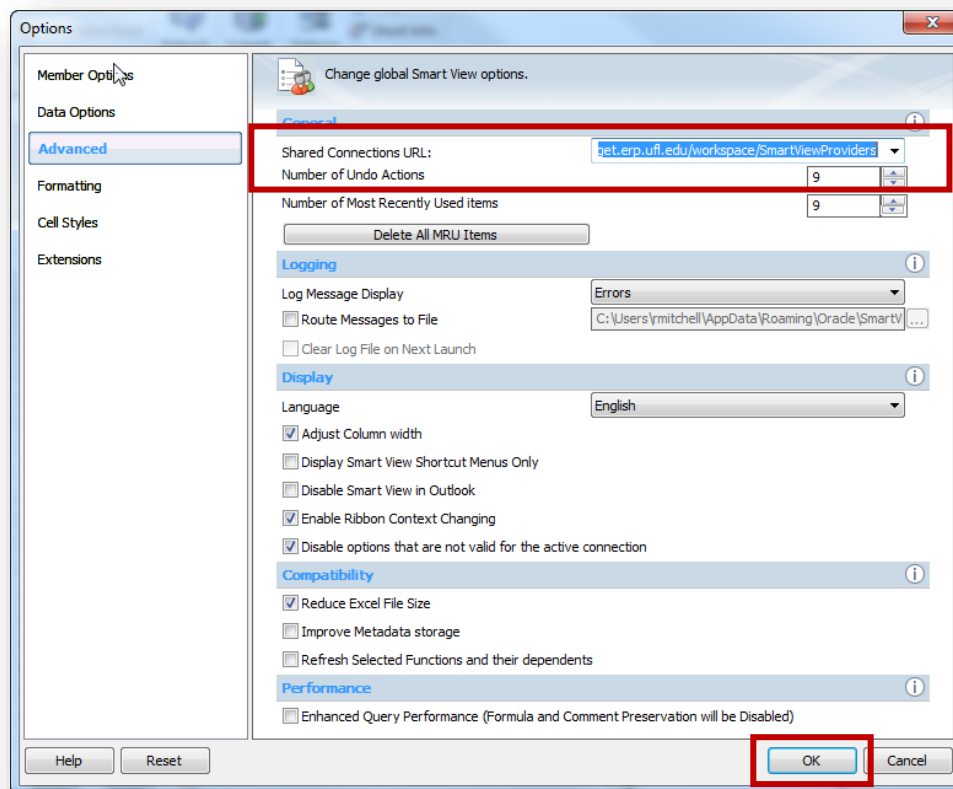
1. Click the **Smart View** tab, click the **Options** button and then select **Advanced**.



2. **Type or paste** the below URL in the Shared Connections URL field:

<https://prd4-budget.erp.ufl.edu/workspace/SmartViewProviders>.

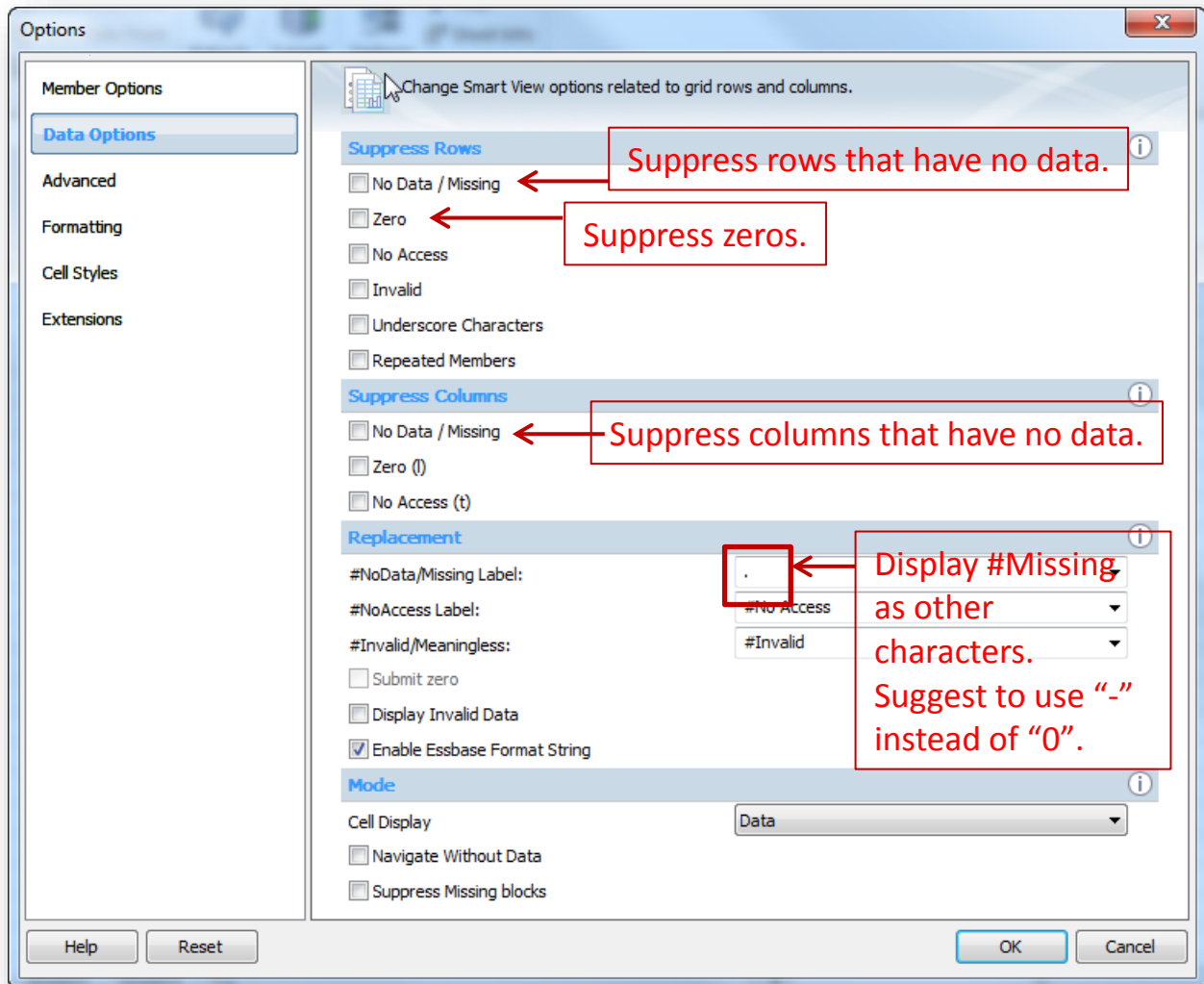
3. Click **OK**.



Smart View Option Settings

By default, missing data are displayed with #Missing. You can change the default display to other characters such as “-“. You can also make other formatting changes to Smart View.

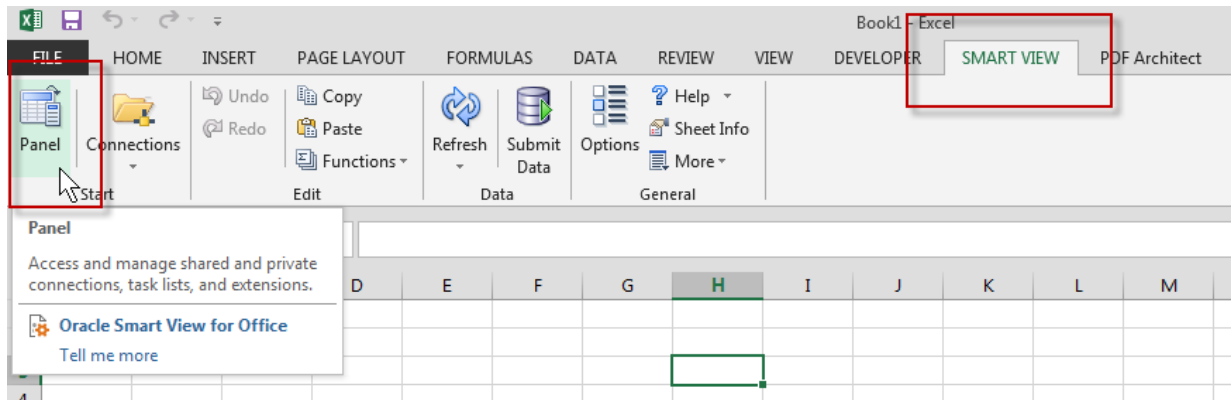
1. Click the **Smart View** tab, select **Options**, and select **Data Options**.



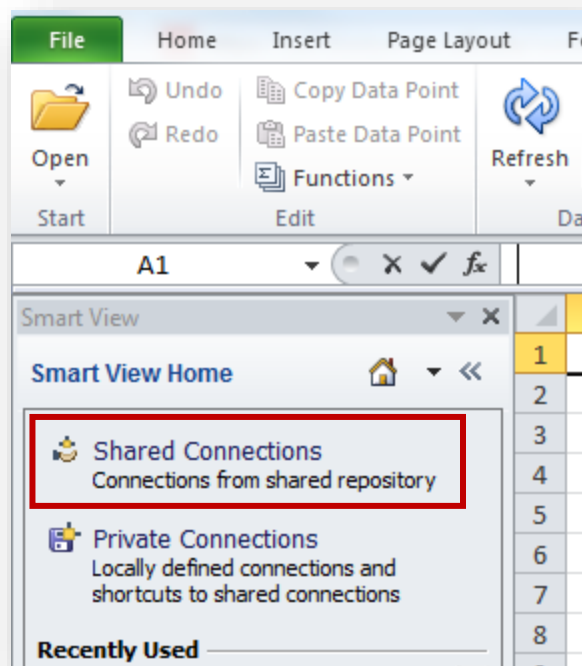
Connecting to Hyperion in Smart View

You are now ready to connect to Hyperion using Smart View.

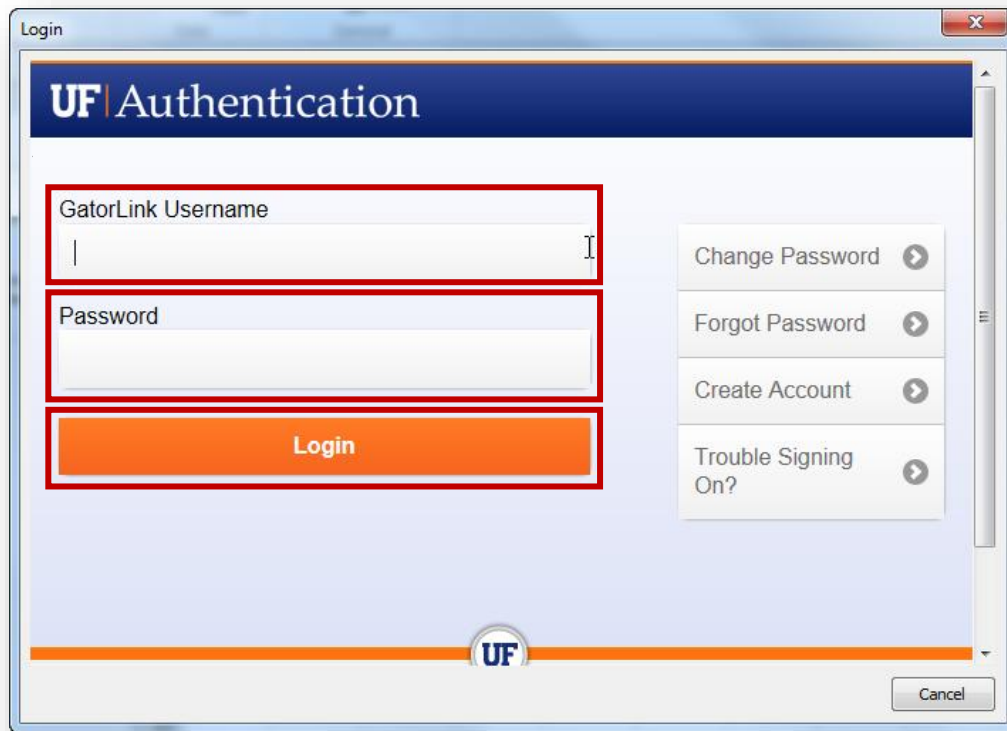
1. Click the **Smart View** tab, click the **Open** button, and then click **Smart View Panel**.



2. Select the **Shared Connections** option from the Smart View Home panel.

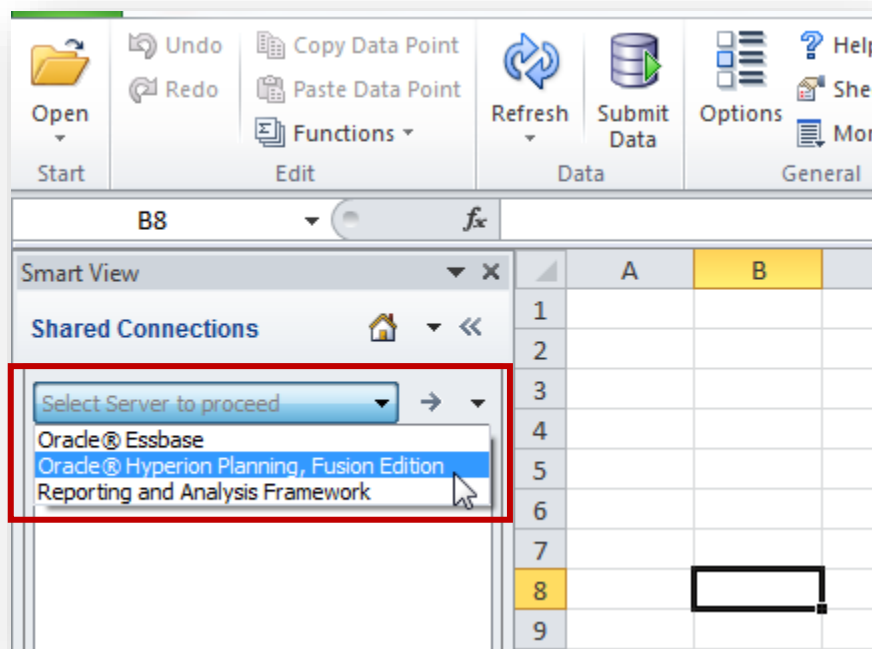


3. Type your **GatorLink Username** and **Password**. Click the **Login** button.



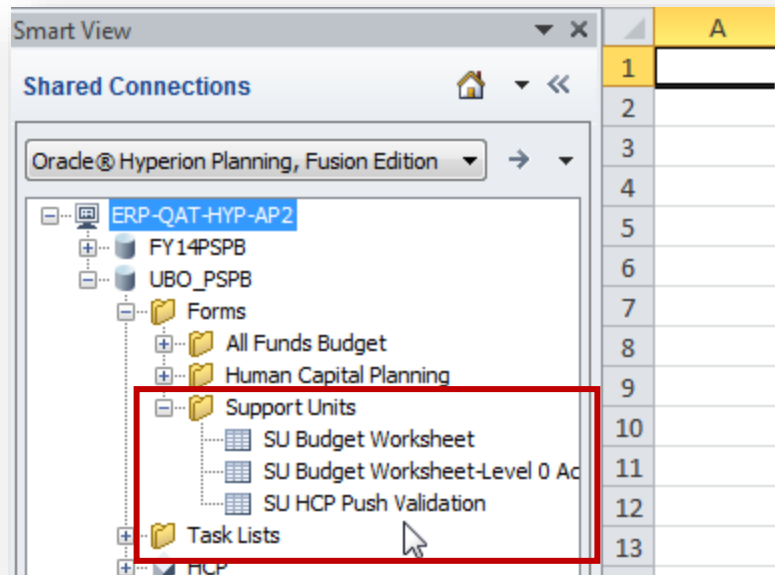
The image shows a web browser window titled "Login" with a blue header bar containing the "UF Authentication" logo. Below the header, there are three input fields: "GatorLink Username", "Password", and a large orange "Login" button. These three elements are grouped together and outlined with a red rectangular border. To the right of the input fields, there is a vertical list of links: "Change Password", "Forgot Password", "Create Account", and "Trouble Signing On?", each with a right-pointing arrow. At the bottom of the window, there is a "Cancel" button and a small "UF" logo in the center of a blue bar.

4. Select "**Oracle Hyperion Planning, Fusion Edition**" from the Shared Connections Select Server drop down field.

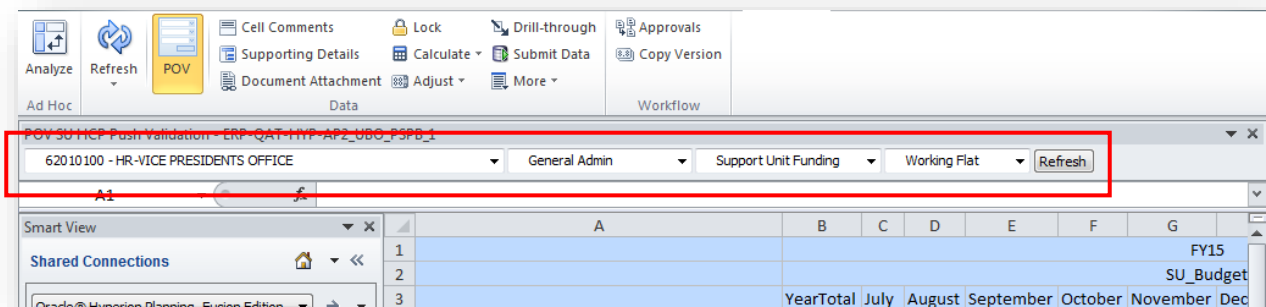


You should see the Hyperion server at the top of the Shared Connections panel.

5. Expand each level as follows: **UBO_PSPB > Forms > Support Units**.
6. **Confirm** you can see the three Budget Request Submission forms: SU Budget Worksheet, SU Budget Worksheet-Level 0 Account and SU HCP Push Validation. Click on the form you need to work on. Select **Open form** on the bottom.



7. Select your **Entity**, **Cost Pool**, **Commitment Source** and **Budget Version** from the Point of View (POV) bar at top of screen.

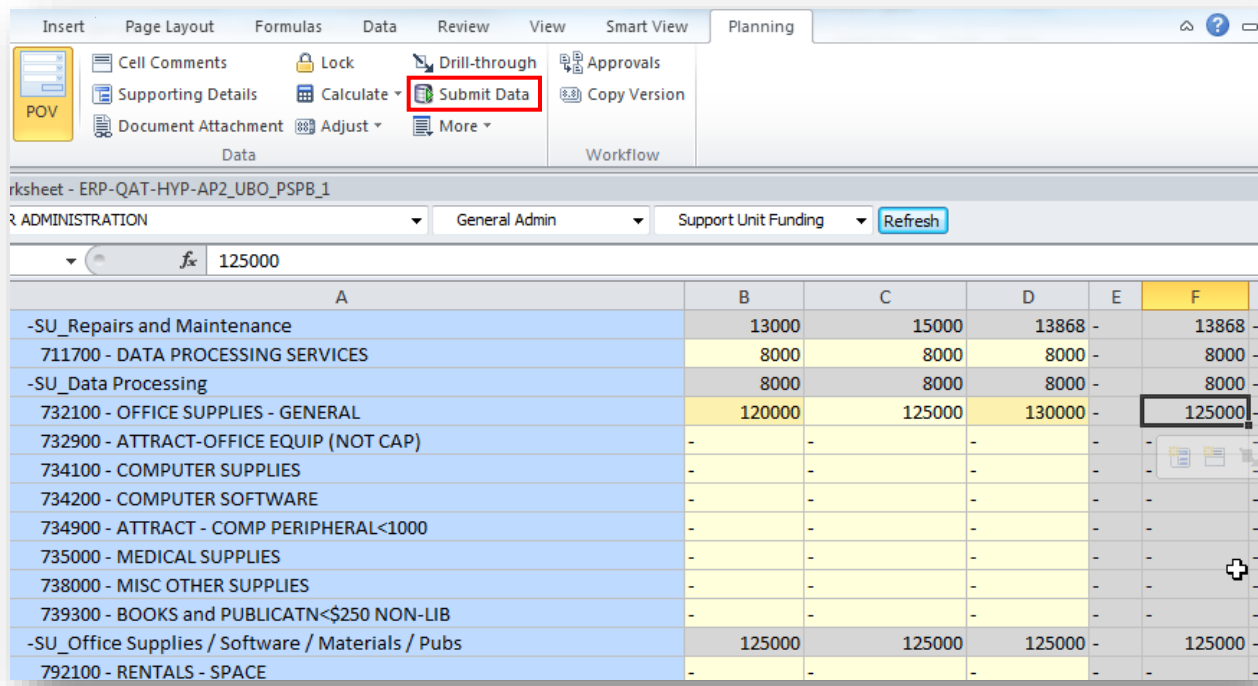


8. You are encouraged to use the Smart View forms in the same order as you did in Hyperion. Please refer to procedures [SU HCP Push Validation](#), [SU Budget Worksheet](#) or [SU Budget Worksheet-Level 0 Accounts](#) as needed.

Input and Save Budget Data in Smart View

As with Hyperion, you can enter or paste data into any open cell.

1. Once you have entered data for all three budgets (Working Flat, Working Cut (if required) and Working Optimal), click **Submit Data** button to save and submit the data.



Worksheet - ERP-QAT-HYP-AP2_UBO_PSPB_1

ADMINISTRATION General Admin Support Unit Funding Refresh

fx 125000

A	B	C	D	E	F
-SU_Repairs and Maintenance	13000	15000	13868	-	13868
711700 - DATA PROCESSING SERVICES	8000	8000	8000	-	8000
-SU_Data Processing	8000	8000	8000	-	8000
732100 - OFFICE SUPPLIES - GENERAL	120000	125000	130000	-	125000
732900 - ATTRACT-OFFICE EQUIP (NOT CAP)	-	-	-	-	-
734100 - COMPUTER SUPPLIES	-	-	-	-	-
734200 - COMPUTER SOFTWARE	-	-	-	-	-
734900 - ATTRACT - COMP PERIPHERAL<1000	-	-	-	-	-
735000 - MEDICAL SUPPLIES	-	-	-	-	-
738000 - MISC OTHER SUPPLIES	-	-	-	-	-
739300 - BOOKS and PUBLICATN<\$250 NON-LIB	-	-	-	-	-
-SU_Office Supplies / Software / Materials / Pubs	125000	125000	125000	-	125000
792100 - RENTALS - SPACE	-	-	-	-	-

NOTE:

The unsaved data appears orange in Smart View. When data is submitted, the cell turns yellow.

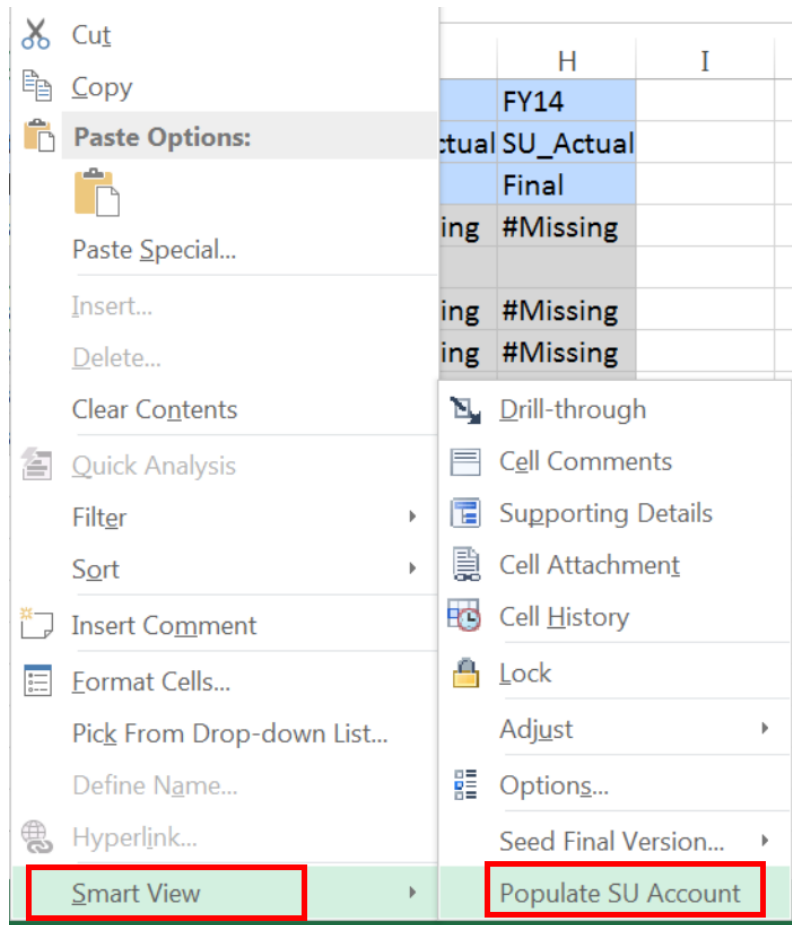
Copy, Paste and Cut

The copy, paste and cut function are the same as those in Excel.

Populating Accounts

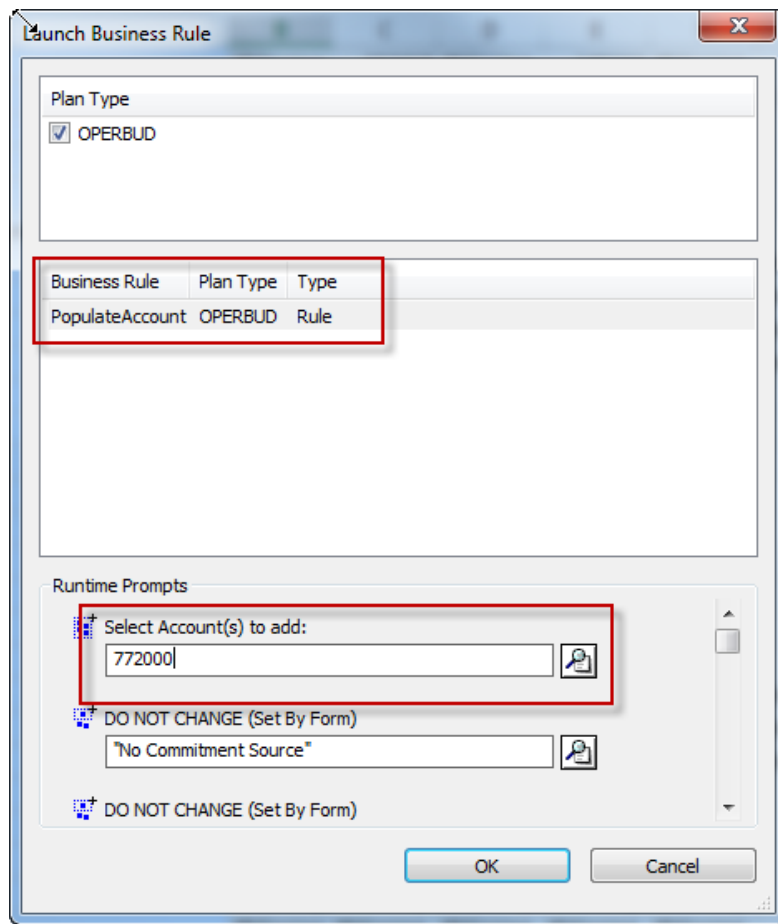
The populating accounts procedure allows you to add accounts that were not previously used but will be needed and used in the future.

1. From the **Planning** tab, **right-click** on the form.
2. Right click on the form. Select **Smart View > Populate SU Account**

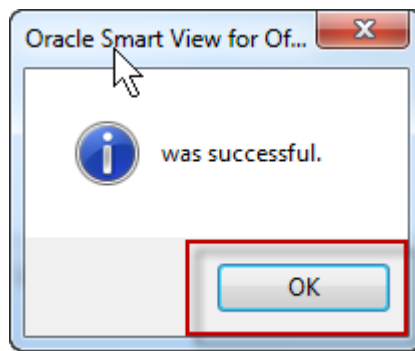


In this example, we will use Account Code 772000.

3. Enter the appropriate Account code in the Select Account(s) to add: field.



4. Click the **OK** button.
5. **Note** the “was successful” message that appears within the pop-up window..
6. Once this message appears, click the **OK** button.



7. Confirm the account displays in the worksheet.

-SU_Advertising/ Marketing	37000	37000	37000	-	37000	-	-	
771100 - IN STATE TRAVEL	7000	7500	7500	-	7500	-	1749	
771200 - OUT OF STATE TRAVEL	7500	7500	7500	-	7500	-	2618	
772000 - FOREIGN TRAVEL	0	-	-	-	-	-	-	

You can now begin budgeting for this account.

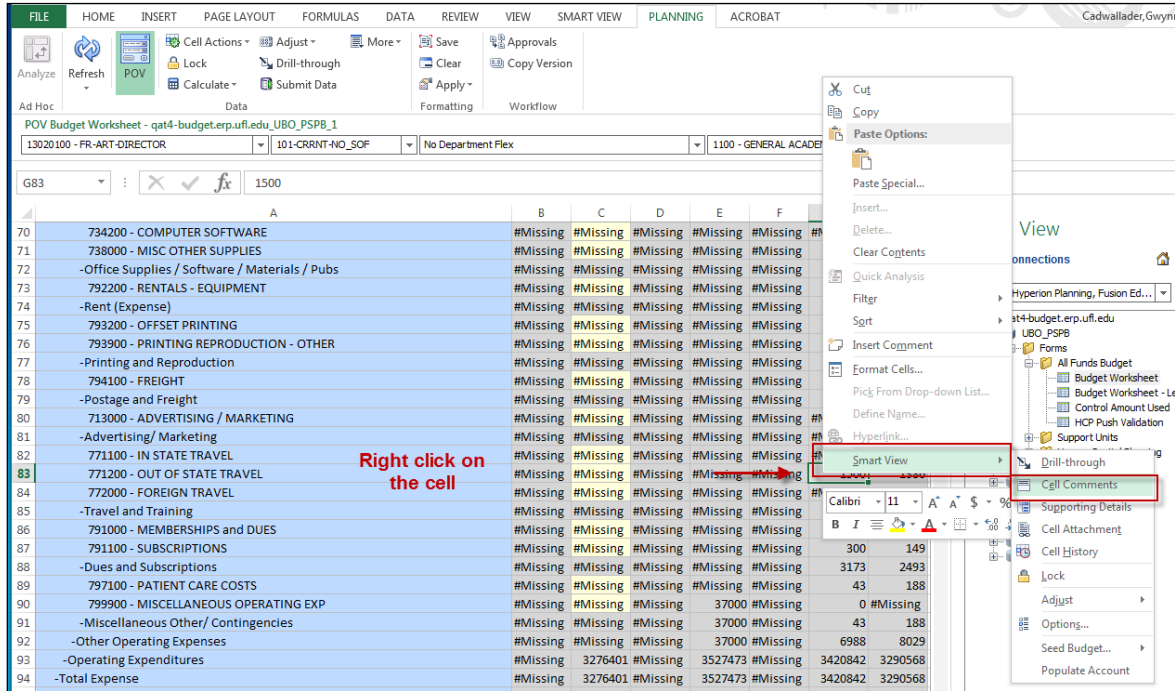
NOTE: If you decide you don't need/want to budget for this account, you can clear the cell of all data and save the worksheet. The account will no longer appear. Or, if you enter a "0" into the cell the account will remain visible (as long as you did not suppress zeros in your user preferences) for the current fiscal year.

Adding Comments

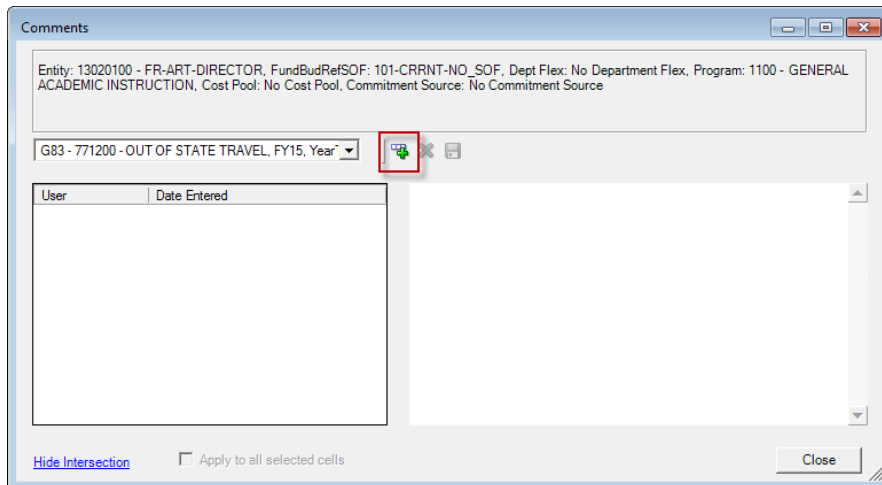
You can add **Comments** to cells in Smart View. Adding **Comments** is a simple, non-calculating way to elaborate on the content of a cell.

25. To attach a Comment, simply **right click the cell** to which you want to attach the comment.

26. Hover over the **Smart View** menu item and select **Cell Comments**.



27. Click Add Comment button.



28. On the right side box, enter "**This is a comment.**"

Adding a Comment offers a history record feature that keeps track of changes made to the comment. You cannot edit a comment but when you add a new comment you will be able to see the prior versions.

29. Click the **Save** button in the middle of the popup window. You should see your name, timestamp and the comments show up on the left side.

30. Click Close.

31. Note the cell is outlined in blue.

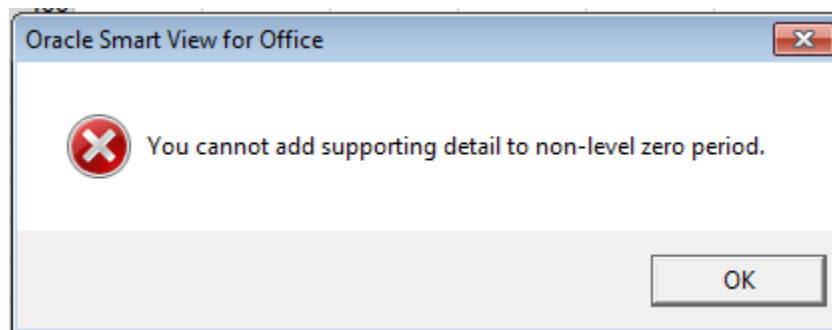
-Advertising/ Marketing	#Missing	130
771100 - IN STATE TRAVEL	#Missing	160
771200 - OUT OF STATE TRAVEL	1500	1386
772000 - FOREIGN TRAVEL		000

Adding Supporting Details

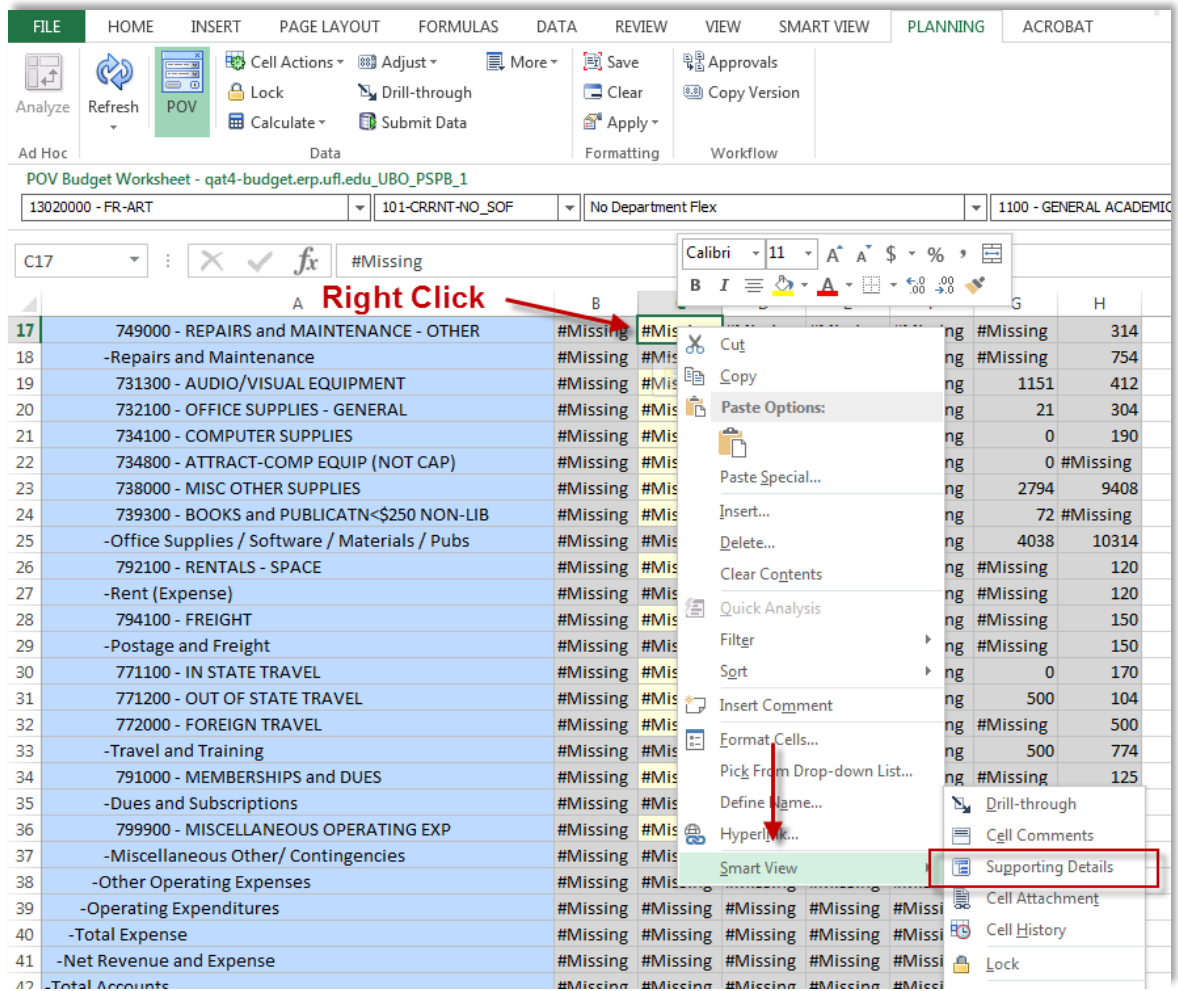
You can add **Supporting Details** to cells in Smart View.

Supporting Details are "calculating" explanations you can add to specific cells if desired.

- Supporting details allows you to add in specifics of a cell's entry. For example, if travel expenses are expected to be higher than normal, you can use Supporting Details to explain everything that goes into that value.
- Supporting details can only be added to "0" level cells, not to the roll up level. If you get the following error message, you are on a roll up level.



32. To add Supporting Details, first you must **right-click the cell** to which you want to add the supporting details.
33. From the pop-up menu, hover over the **Smart View** option and click the **Supporting Details** menu.



34. Click on Add Child.

Supporting Details

- Entity: 13020000 - FR-ART
- FundBudRefSOF: 101-CRRNT-NO_SOF
- Dept Flex: No Department Flex
- Program: 1100 - GENERAL ACADEMIC INSTRUCTION
- Cost Pool: No Cost Pool
- Commitment Source: No Commitment Source
- Account: 749000 - REPAIRS and MAINTENANCE - OTHER

Expand Collapse **Add Child** Add Sibling Delete Delete All

Promote Demote Move Up Move Down Duplicate Row Fill

Copy Paste

FY17/BegBalance/Budget/Working	
Total:	

Help Submit Cancel

35. Enter "**Rental Car**" in the left side and enter "150.00" in the right side field.

36. Click the **Add Sibling** option.

Supporting Details

- Entity: 13020000 - FR-ART
- FundBudRefSOF: 101-CRRNT-NO_SOF
- Dept Flex: No Department Flex
- Program: 1100 - GENERAL ACADEMIC INSTRUCTION
- Cost Pool: No Cost Pool
- Commitment Source: No Commitment Source
- Account: 749000 - REPAIRS and MAINTENANCE - OTHER

Expand Collapse Add Child **Add Sibling** Delete Delete All

Promote Demote Move Up Move Down Duplicate Row Fill

Copy Paste

FY17/BegBalance/Budget/Working	
Rental Car	150.00
Total:	

Help Submit Cancel

37. Enter "**Tolls**" on the next line.

38. Enter "**15.00**" for the **Tolls**.

Next you will enter hotel expenses. The hotel will cost \$185.00 for four nights.

39. Click the **Add Sibling** button.

40. Enter "**Hotel**" as the expense type.

41. Click the **Add Child** button.

42. Enter "**Hilton**" as the hotel.

43. Enter the nightly amount in the next field. For this example, enter "**185.00**".

44. Click the **Add Sibling** button again.

45. Enter the number of nights. In this example, enter "**4 nights**".

46. Double Click the **+ cell** to select a different function.

47. Click the ***** to multiply.

48. Enter "**4**" as the number of nights. Note that the **Total** is updated.

Supporting Details

- Entity: 13020000 - FR-ART • FundBudRefSOF: 101-CRRNT-NO_SOF • Dept Flex: No Department Flex
- Program: 1100 - GENERAL ACADEMIC INSTRUCTION • Cost Pool: No Cost Pool
- Commitment Source: No Commitment Source • Account : 749000 - REPAIRS and MAINTENANCE - OTHER

Expand Collapse Add Child Add Sibling Delete Delete All

Promote Demote Move Up Move Down Duplicate Row 12b Fill

Copy Paste

		FY17/BegBalance/Budget/Working
Rental Car	+	150
Tolls	+	15
Hotel	+	740
Hilton	+	185
4 nights	*	4
Total:		905

Double click to change the function

Help Submit Cancel

49. To delete a row, click the **Delete** button.

50. To delete all rows, click the **Delete All** button.

Supporting Details

- Entity: 13020000 - FR-ART
- FundBudRefSOF: 101-CRRNT-NO_SOF
- Dept Flex: No Department Flex
- Program: 1100 - GENERAL ACADEMIC INSTRUCTION
- Cost Pool: No Cost Pool
- Commitment Source: No Commitment Source
- Account : 749000 - REPAIRS and MAINTENANCE - OTHER

Expand Collapse Add Child Add Sibling Delete Delete All

Promote Demote Move Up Move Down Duplicate Row 128 Fill

Copy Paste

FY17/BegBalance/Budget/Working		
Rental Car	+	150
Tolls	+	15
Hotel	+	740
Hilton	+	185
4 nights	*	4
Total:		905

Help Submit Cancel

51. Click the "**Submit**" button.

- The amount is entered into the field and it turns a different color, indicating it is saved.

-Contractual Services	#Missing	#Missing	#M
742300 - REPAIRS and MAINT - VEHICLES	#Missing	#Missing	#M
749000 - REPAIRS and MAINTENANCE - OTHER	#Missing	905	#M
-Repairs and Maintenance	#Missing	905	#M
721100 - ELECTRICITY	#Missing	0	#M
-Utilities Expense	#Missing	0	#M
731300 - AUDIO/VISUAL EQUIPMENT	#Missing	#Missing	#M

Below screenshot shows the color coding for cells with comments, supporting details, and unsaved data. Attaching documents using Smart View does not work if you need documents attached please do so within Hyperion.

The screenshot shows an Excel spreadsheet titled 'Book1' with a budget table. The table has columns for 'Working Cut Base', 'Working Optimal Base', and 'Working Flat Base'. The rows list various budget items, including 'FTE', '611110 - FACULTY-EARNINGS', and 'Total Expense'. Three callout boxes highlight specific features: 'Cells with unsaved data are highlighted in orange.' points to the 'FTE' row; 'Cell with supporting details' points to the '611110 - FACULTY-EARNINGS' row; and 'Cell with comments has blue outline.' points to the 'Total Expense' row.

	Working Cut Base	Working Optimal Base	Working Flat Base
5 FTE	-	3.00	3.00
7 611110 - FACULTY-EARNINGS	600.00	1,000.00	600.00
8 -Faculty Salaries	600.00	1,000.00	600.00
10 +Faculty Fringe Benefits	139.20	232.00	139.20
13 +Faculty Additional Pay	400.00	3,500.00	2,000.00
16 +Faculty Additional Pay	40.60	101.50	58.00
18 +Faculty-COM Salaries	000.00	1,000.00	1,000.00
20 +Faculty-COM Fringe Benefit Pool Expense	187.00	187.00	187.00
22 +Faculty-COM Additional Pay	1,000.00	-	-
24 +Faculty-COM Additional Pay Fringe Benefit Pool Expense	29.00	-	-
25 -Faculty Salaries and Benefits	4,395.80	6,020.50	3,984.20
49 +Teams Salaries and Benefits	103,760.00	103,760.00	103,760.00
53 +Other Salaries and Benefits	-	-	-
55 +Salary and Benefits Budget	-	-	-
56 -Salaries and Benefits	108,155.80	109,780.50	107,744.20
83 +Other Personal Services	2,354.70	1,852.20	-
223 +Other Operating Expenses	1,000.00	1,000.00	0.00
237 +Total Other	-	-	-
243 +Transfers Out	-	-	-
244 -Total Expense	111,510.50	112,632.70	107,744.20

Security

The following myUFL security roles are created for the support unit users.

UF_N_BP_COLLEGE_PLANNER

This role will grant access to view and update budget information in UF's budget software at the college level.

UF_N_BP_COLLEGE_VIEWER

This role will grant access to view budget information in UF's budget software at the college level

UF_N_BP_DEPT_PLANNER

This role will grant access to view and update budget information in UF's budget software at the department level

UF_N_BP_DEPT_VIEWER

This role will grant access to view budget information in UF's budget software at the department level

To have access to Hyperion application, the support unit users should request the **UF_N_BP_COLLEGE_PLANNER** role.

The support unit users have read and write access to their responsible areas only. For example, the VP and Chief Information Officer user can only view and input budget for all IT departments, not other areas like Finance and Accounting. The SVP areas have read access to all the areas under their umbrella. For example, the SVP for Academic Affairs and the Provost Office can view the budget of DOCE, Graduate School, Library, International Center, Enrollment Management, CFO, Purchasing, Contracts and Grants, Finance and Accounting, and Student Affairs. However, the SVP for Academic Affairs and the Provost Office can only input and modify budget for the Provost's Office, not the other areas just mentioned.

UBO_PSPB SU Application Overview

Dimensions represent the key components of the application. The UBO_PSPB Support Unit Budget application contains the following dimensions:

- Account
- Entity
- Commitment Source
- Cost Pools
- Fund
- Program
- Dept Flex
- Scenario
- Version
- Year
- Periods

Account

The Account dimension in UBO_PSPB is based on the account structure in PeopleSoft Financial system. Not all GL accounts in PeopleSoft Financial system are included in UBO_PSPB since the support units do not budget to every single GL accounts. To see the Account dimension hierarchy, go to SU Budget Worksheet. Expand and collapse the account to see the details.

The account dimension will be revised each fiscal year.

Entity

The Entity dimension in UBO_PSPB is based on the Department structure in PeopleSoft Financial system. It is modified to reflect the budget reporting hierarchy.

Commitment Source

This is the support unit's funding source. Below is the dimension hierarchy:

- Total Commitment Source
 - Support Unit Funding
 - Provost Funding
 - SVP HSC Funding
 - Concession Funding
 - Direct Bill Funding
 - No Commitment Source

Cost Pools

Cost Pools dimension represent the cost pools your unit falls in. It is required to select a cost pool for your budget in UBO_PSPB. When you login to UBO_PSPB, you will only see the cost pools that your units belong to. Some units, for example, DSR or EH&S, Library, will see multiple cost pools. Please pay attention to which cost pool you are budgeting.

Below is the cost pool dimension hierarchy:

Total Cost Pool

- Info Technology

- Bond Payment

- Facilities

- General Admin

- HSC Admin

 - HSC Admin-Main

 - HSC Admin-IT

- Sponsored Project Admin

 - SPA-Central

 - SPA-DSR Admin

 - SPA-DSR Central

 - SPA-DSR IRB-1

 - SPA-DSR IRB-2

 - SPA-DSR IRB-3

 - SPA-DSR IACUC

 - SPA-DSR Animal Care

 - SPA-DSR Biostatistics

- Library

 - Library-Main

 - Library Administration

 - Library HSC

- Student Services

 - Campus Student Admin

 - Grad ST Admin

Fund

This dimension should be No Fund.

Program

This dimension should be No Program.

Dept Flex

This dimension should be No Dept Flex.

Scenario

This dimension shows the data is for SU_Actual or SU_Budget.

Version

This dimension shows whether you are working on or reviewing budget cut, optimal budget or flat budget or your final budget.

Year

This dimension shows the fiscal year.

Periods

This dimension shows the month of the fiscal year from July to June.

