# 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	
Setting Hyperion User Preferences Changing Default Opening Page (This is an optional setting change) Changing Hyperion Display Settings	4
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	
Maintain position data	
Maintain filled positions	
Maintain employees by position Fill to-be-hired vacancies	

Update Current Employees' Distributions & Data 2	24
Add an Additional Distribution for the same Employee 2	27
Delete a Distribution	31
Calculate and Allocate Compensation Budgets per Edit 3	33
Assigning an Existing Employee	36
Assigning a To-Be-Hired Employee	37
Employee Status Change4	12
Removing an Assignment 4	14
Change FTE       4         To change the position FTE only       4         To change the FTE for an employee       4	45
Promote a Position and employee including Fringe Benefit changes	18
Add Overtime Pay or Additional Earnings5	53
Add a Vacant Position5	56
Calculate and Allocate Compensation per Entity5	58
Review Allocation Results	55
Correct Allocation Errors	56
Copy Working Flat to Working Cut and Working Optimal6 Copy Working Flat to Working Optimal6	
Selecting Working Optimal for Editing7	70

SUPPORT UNIT BUDGET REQUEST	72
Forms for Support Unit Budget Request Accessing Forms	
SU HCP Push Validation	73
SU Budget Worksheet To input request dollars in for Working Flat and Working Optimal	
SU Budget Worksheet-Level 0 Accounts Only	
Populating Accounts	77
Comments and Supporting Details Adding Comments	81
Deleting Comments	

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

UBO_PSPB SU APPLICATION OVERVIEW	
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 enters 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

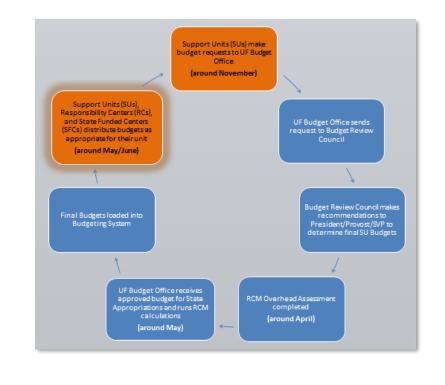
There are important milestones throughout the UF Budgeting process you should be aware of depending on whether you are budgeting for a Support Unit (SU), Responsibility Center (RC), Colleges, State Funded Center (SFC) or hybrid.

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.

ORACLE Enterprise Performance Management System Workspace, Fu	ision Edition
<u>Navigate</u> <u>F</u> ile <u>V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>H</u> elp	
🔥 📔 💋 🍲 Explore	
HomePage ×	
/Shared Workspace Pages/HomePage	
	٨
Recently Opened	Quick Links
📣 UBO_PSPB	Favorites
🚔 Open	Applications
	Planning
	FY14PSPB FY15PSPB
	FY15PPB
	FY16PSPB More
wedness Dave	
Workspace Pages	

### NOTE:

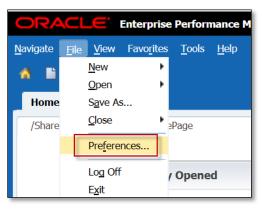
You may choose to display either the HomePage or the UBO\_PSPB Application as the opening page by changing this setting in Hyperion User Preferences.

### **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.

Preferences	ĸ
General	Default Startup Options       Content:       Home Page       1.   Use Current Page
Authentication	None Application 2. Home Page
Explore	Explore Document Favorite
Financial Reporting	Your e-mail address: gcadwallader@ufl.edu
Web Analysis Web Analysis	Accessibility Mode

3. Select the Application drop down menu and select UBO\_PSPB from the Planning list.

Preferences		×
General	Content: Application	Use Current Page
Authentication	Application:	1.
C	2. Planning ► FY14PSPB Prompt to Save Ur FY15PSPB	
Explore	Show Path For Do	
Financial Reporting	Your e-mail address: gcadwallader@uf	
Web Analysis Web Analysis	Accessibility Mod FY17SUPT Enable Screen UBO_PSPB 3.	

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.

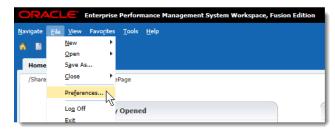
1. Open **UBO\_PSPB** from the **Quick Links** section of the Home Page. (If you've already changed the preferences to display UBO\_PSPB immediately upon login, you would skip this step).

late <u>F</u> ile <u>V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>H</u> elp <b>*</b>		
omePage ×		
Recently Opened	Quick Links	
🤳 ИВО_РБРВ	Favorites	
🚰 Open	Applications	
	Planning	
	🧼 FY14PSPB	
	FY15PSPB	
	FY15SUPT	
	🧼 FY16PSPB	More More More More More More More More
		- F11650PT
		JUBO_PSP

### 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.

ORACLE Enterprise Performance Manage
<u>N</u> avigate <u>F</u> ile <u>E</u> dit <u>V</u> iew Favo <u>r</u> ites <u>T</u> ools <u>H</u> elp
🔥 🖺 💋 🍖 Explore 🔝 🛷 🗷 📝 🚽
HomePage UBO_PSPB ×
Forms
My Task List
Budget Preparation
III Funds Budget
Support Unit Budget
•
▶ P <u>r</u> eferences

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	Use Application Default Comma V Comma
Page Options Remember selected page members Allow Search When Number of Pages Exceeds Indentation of Members on Page	Use Application Default Yes 50 Indent based on hierarchy
Other Options Show consolidation operators Partial Grid Fetch Size(Rows,Columns) Date Format High Contrast	Use Application Default
User Image Choose File Browse 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.

*=	Application Settings	Display Options	Printing Options	User Varia <u>b</u> le Options	
	Dimension	User Variable Name	Selected Membe	r	
General	Scenario	Current Scenario	SU_Budget		
<u> </u>	Version	Current Stage	Working Flat		
Authentication	Year	Current Year of Vi	FY17		
Explore					
Financial Reporting					
Financial Reporting					

**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:

⊳ For <u>m</u> s	User Preferences	User Preferences				
> My Task <u>L</u> ist	Application Settings	Display Options Pr	nting Options	User Variable Options		
Preferences	Application Settings					
references	Dimension	User Variable Name	Selected Mem	ber		
	Scenario	Current Scenario	SU_Budget		ŴI.	
	Version	Current Stage	Working Flat		Ŵ.,	
	Year	Current Year of Vi	FY17		Ŵ1.	
					Save Res	

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

You are now ready to navigate through the application.

## Workspace

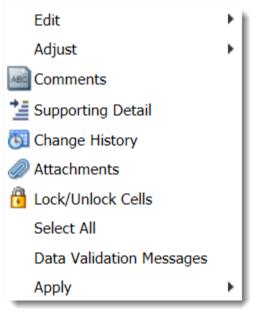


## **Toolbar Icons**

H	Save	Save the input data
4	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
5	Mass Allocate	Run a mass allocation

ABC	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.
M	Add/Edit Document	Add or edit attached documents for the selected cell.
5	Instructions	Show the instruction details for the open data form.
<b>*</b>	Open in Smart View	<b>Open data from in Smart View.</b> (This button does not work and will not be used.)

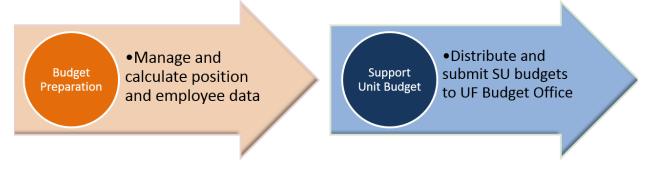
Some tools can be accessed by right-clicking on the desired area of the form and displaying the shortcut menu.



## **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.



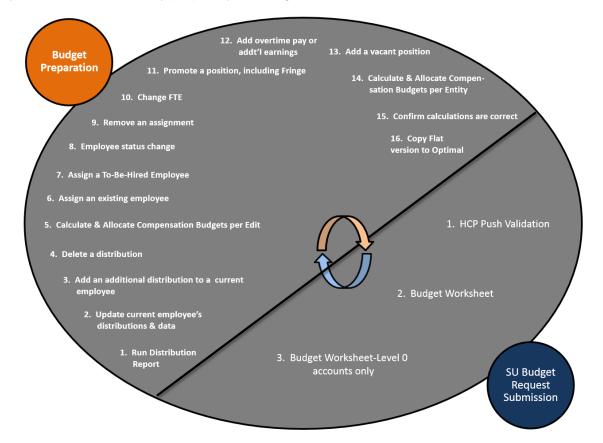
## **Budget Preparation Overview**

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  $\frac{1}{2}$  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.

myufl Enterprise Reporting
Public Folders My Folders
Public Folders > Financial Information
🔲 🛛 Name 🗘
Annual Financial Reports
E Budget
Contains reports for Expense Reimbursements and Tr
Financial Information Tool
Purchasing
Reference Reference queries related to various topics, code valu queries.
Subsidiary Detail Reports

t l	Public Folders	My Folders
lic Fo	olders > Financial Inform	nation > Budget
	Name 🗘	
	Budget Central Contains Budget o	content for Budget Director(s) and delegates as authorized by the UF Budget (
	Budget Preparation Contains Budget Preparation	on Preparation content for college and department budget preparer and reviewer
		Status Detail Cost Projection y re-run reports that provide future cost of payroll for the remaining portion of
	Payroll Cost Distril PRCD Cubes, Cop	<u>bution Analysis</u> yy of contents also located at Public Folders > Human Resources Information >
	RCM Responsibility Con	ater Management (PCM)
		Preparation content from the Hyperion Application for college and department L_INQUIRY user role.
		Job and FTE Report by College and Department - With Subtotals College and Department.
ŝ		Job and FTE Report by College and Department - Without Subtotals College and Department.
ŝ	FTE and Head Cou Head count and to	u <u>nt by College</u> otal FTE for specified employee categories within selected college-level units. T
		un <u>t by College and Department Detail</u> otal FTE details for individuals associated with specified employee categories w
š	Head count and to	unt by Department otal FTE for specified employee categories within selected department-level ur it combinations of departments as well as entire units. Opens as an Excel sprea

### **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

Public Folders My Folders					
Public Folders > Financial Information > Budget > UF Budgeting					
□ Name \$					
Additional Earnings + Benefits					
Benefit Selection					
Budgeted Lines + Benefits					
Support Unit Budget Request					
All Funds Budget - By Account					
All Funds Budget - By Summary Account					
Facts Last Updated					

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						
	AND Version: * Working Flat V Finish					
OR						

4. Choose your additional search criteria. In this example, we will use HR\_6201 data. Budgeted Lines + Benefits

Year: * FY17	AND Scenario: * SU_Budget V AND Version: * Working Flat V
-mployee:	OR       Keywords:       Type one or more keywords separated by spaces.       Search        Search        Options        Results:       Insert ◆
(ex: UFID_0000000)	← Remove
	Select all Deselect all Select all Deselect all OR
Entity:. (ex: HR_0101)	Generation       Generation         Options ♥       Insert ●         Results:       Insert ●
	Select all Deselect all Select all Deselect all
	OR Keywords: Type one or more keywords separated by spaces. Search Options ♥
<u>Comp Entity:</u> (ex: D_01010000)	Results: Choice:

Support Unit Budget Request

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.

		•	
	Keywords: Type one or more keywords separated by s Search		
	Options ×		
	Results:		Choice:
		Insert 🔶	
Entity: (ex: HR_0101)		Remove	
(ex HR_0101)			
	Select all Deselect all		Select all Deselect all
	OR	L	
	Keywords:		
	Type one or more keywords separated by s Search		
	·		
	Options ×		
	Results:	Incent A	Choice:
Comp Entity:		Insert 🄶	
(ex: D_01010000)		Remove	
	Select all Deselect all		Select all Deselect all

- 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.

1	my	ufl						
2	Entity	UFID and Name	HCP Employee	HCP Position	Job Title	Job Code	Union LD	
3	HR 3305	BERRESS TRANSPORT TRANSPORT	UFID 99995429	P 00000647	PROGRAM AST - 000908	JC 000908	Out of Unit - 00	TU2N
4	HR 3305	ADDRESS - BOUNDERS - STARTE - STARTER	UFID 99995429	P 00000647	PROGRAM AST - 000908	JC 000908	Out of Unit - 00	Fringe Tt
5	HR 3305	ADDRESS BUILDING ( TRANSPORT FROM AND )	UFID 99995429	P 00000647	PROGRAM AST - 000908	JC 000908	Out of Unit - 00	TU2N
6	HR 3305	ADDRESS BUILDING ( STARK) STORAGE	UFID 99995429	P 00000647	PROGRAM AST - 000908	JC 000908	Out of Unit - 00	Fringe TE
7	HR 1002	asserte: real manufile	UFID 99994750	P 00029168	INFO/PUBLICATIONS SVCS; CRD 3 - 001403	JC 001403	Out of Unit - 00	TA12
8	HR 1002	ABBR/TO: I HAR. MARKELER.	UFID 99994750	P 00029168	INFO/PUBLICATIONS SVCS; CRD 3 - 001403	JC 001403	Out of Unit - 00	Fringe Tt
9	HR 6045	AND A CONTRACTOR OF CONTRACT OF CASE	UFID 99985009	P 00000205	EXTENSION PROGRAM AST - 000816	JC 000816	Out of Unit - 00	Fringe Tt
10	HR 6045	AND AND ADDRESS AND ADDRESS AND ADDRESS ADDRES	UFID 99985009	P 00000205	EXTENSION PROGRAM AST - 000816	JC 000816	Out of Unit - 00	TU2N
11	HR 1180	and the destinant of	UFID 99981198	P 00018987	LABORATORY ANIMAL TECH - 001088	JC 001088	Operation Services - 32	Fringe TE
12	HR 1180	AND THE REPORT OF	UFID 99981198	P 00018987	LABORATORY ANIMAL TECH - 001088	JC 001088	Operation Services - 32	TU2N
13	HR 290801	AND TAKEN TRAILINGS - LATINGS	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	JC 001700	Out of Unit - 00	TU2N
14	HR 290801	ANT AND ALTERNAL APPROVE	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	JC 001700	Out of Unit - 00	Fringe Tt
15	HR 290801	ANT ALL ALL ALL AND AL	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	JC 001700	Out of Unit - 00	Fringe Tt
16	HR 290801	AND TAKEN THINKING AND	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	JC 001700	Out of Unit - 00	TU2N
17	HR 290801	CONTRACTOR CONTRACTOR	UFID 99979498	P 00017666	CLINICAL SERVICE REP 2 - 001700	JC 001700	Out of Unit - 00	Fringe TE

**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

P	ublic Folders My Folders							
Public Folde	Public Folders > Financial Information > Budget > UF Budgeting							
	Name 🗘							
	Additional Earnings + Benefits							
	Benefit Selection							
	Budgeted Lines + Benefits							
	Support Unit Budget Request							
	All Funds Budget - By Account							
	All Funds Budget - By Summary Account							
□ ፤►	Facts Last Updated							

2. Choose your required search criteria.

Additional Earnings + Benefits										
Year: * FY17	•	AND	Scenario:	* SU_Budget	•	AND	Version:	* Working Flat 💌	Finish	

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.

Year: * FY17	Additional Earnings + Benefits  AND Scenario: *SU_Budget  AND Version: *Working Flat  Finish
<u>rour.</u> [[11]/	
<u>Employee:</u> (ex: UFID_0000000)	Keywords:         Type one or more keywords separated by spaces.         Search @         Options <sup>Ve</sup> Results:         Insert •         • Remove
	Select all Deselect all
	OR Keywords: Type one or more keywords separated by spaces. HR_6201 Search@ Options <sup>V</sup>
<u>Entity:</u> (ex: HR_0101)	Results: HR_6201 HR_6201 HR_6201

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

my	a					-	
	ıfl						ditional Earnings + Benefits
0x00y x8_6201 x8_6201	UFID and Name	HCP Employee HCP Position UPID_\$1509010 P_00005110 UPID_\$1509010 P_00005110	HUMAN RESOURCES: VICE PRES 7 - 101534	Job Code Union LD (#001556 Out of Unit - 30	Mit_UP	Annual Salary Spread Annual Ealer 40-16 N/A S10,650,07 N/A S10,650,07	FIT Comp Cert Reviel Comp Control Source: Comp Dating Comp Famil 8 No Comp Cert Review Comp Commitment Source D_SD110000 1011-0081140_31 8 No Comp Cert Review Comp Commitment Source D_SD110000 1010-0081140_31
HE 6001		URD_81509010 P_00005132	HUMAN RESOURCES, VICE FRES 7 - 501534	UC_DOTEDIE Duri of UMR - DD	Ange_Non-ServeR_Sarrangs	N/A \$10,650.17	© No Cong Coll Poli No Cong Commitment Source D_83010000 101-CR8NT-NO_50
H_6001 H_3401		UPID_76792134 P_00025901	HUMAN RESOURCES, VICE MIS 7 - 101534 VICE MIS & CO - 101696	pt_001686 Out of Unit - 50	https_Non-benefit_tamorg	N/A 570,520,00	He Cong Cast Pos No Cong Connectment Source D_62(10100 105-CRMMT NO_5)     No Cong Cast Pos No Cong Connectment Source D_140(10100 105-CRMMT NO_3)
-0_1401		UPIC_79792134 F_00035901 UPIC_59857710 F_00022468	EDUC/TRAINING PROCE, CRD 2 - 001348	35_0015856 Duit of Unit - 50 35_001344 Duit of Unit - 50	Arrige Non-Benefit (arring) Arrige Non-Benefit (arring)	NATA \$1,000.00	D No Cong Cost Pool No Cong Connetment Source 0_14010100 1100-05551.NO_50 Il No Cong Cost Pool No Cong Connetment Source 0_24170100 211-05551.NO_50
4,341 4,341 4,341 4,341		UPD 19817710 P 00022460	EDUC/TRAINING PROSE CKD 2 - 001344	(C_001344 Out of Line - 10) (C_000401 Http Sci Center Meruganal -	ABC_USP	N/A \$1,000.00	If No Comp Cast Rox No Comp Commitment Source D_34170100 211-CMN1-NO_5 If No Camp Cast Rox No Comp Commitment Source D_34110103 102-CMN1-NO_50
-0_3411		UPIC_45311762 P_00011381 UPIC_45311762 P_00011381	CHAR & AND PROF - 100400	(C_000400 Hith So Center Managerial -	2 frings_Non-Benefit_Carrings	N/A \$10,000.00	E No Comp Cost Pop No Comp Commitment Source D_34180100 171-CRENT.HDC_P
4,361		URD: 45331762 #_00011381	CHAR & ASD PROF - 000480 Chart & ASD PROF - 050480	32_0004800 Hith Sci Center Merugenei - 32_0004801 Hith Sci Center Merugenei -	2-htige_him.denett_familigi	NnA \$10,000.00	(I) No Cong Cod Roo No Cong Commitment Source 0_04110101 171-08047-05C_P II) No Cong Cod Roo No Cong Commitment Source 0_04110101 171-08047-05C_P
4381 4381 4381 4381		UPD_40311742 P_00011361 UPD_40311742 P_00011361	CHAR & ASO PROF - 500480 CHAR & ASO PROF - 500480	yC_000480 Http:Sci Center Managenal - yC_000480 Http:Sci Center Managenal -	2 ARE_LSP 2 ARE_LSP	N/A \$10,000.00 N/A \$10,000.00	II No Camp Cost Plus No Camp Commitment Source 0_24180100 121-CBML-HC_F II No Camp Cast Plus No Camp Commitment Source 0_24010100 102-CBMLT-NO_5
48,3411		UPID_45331752 P_00011381 UPID_45331752 P_00011381	CHINE & ASD PROF - 300480	x_000480 Httl So Center Managerial - x_000480 Httl So Center Managerial -	2 Anings Non-Benefit Samings	N/A \$10,000.00 N/A \$10,000.00	If the Careg Case Real No Careg Commitment Source 2_MR10100_102_CRN11.ND_01 If No Careg Case Real No. Song Commitment Source 2_MR10103_102_CRN11.ND_01
-H_3101		URG_45135710 P_00006223 URG_45135710 P_00006223	EXECUTIVE AST 3 - 101/130	3C_0011391 Out of Unit - 00 3C_0011391 Out of Unit - 00	AME_11P hunga Non-Benefit Saming	AV/A \$20,208.00	If No Cong Coll Pos No Cong Connectment Source D, 21110000, 101-C00MCAD, No. 10 100 Cong Coll Pos No Cong Connectment Source D, 21110000, 101-C00MCAD, 51
4310 9310 9340 9340		LPID_37416610 P_00011009	ADD DEAN & PROF - DOMES	(C_000456 Here to Center tiggine - 210	Amps_Non-benefit_damage	N/A \$12,000.00	0 Ne Camp Cast Roe No Comp Commitment Searce D_34010100 102-CRXMT-NO_50
		UPID_37418610 F_00011039 UPID_37418810 F_00011039	ASO DEAN & PROF - 900498	3C_000456 Hith Sci Center Bigble - 310 3C_000456 Hith Sci Center Bigble - 310	Amps Non-Senett Samings	NUM \$12,000.00	No. Cong. Colt. Pool No. Cong. Connectment Source 3, 24000100 201-08MNT-FDDR- No. Cong. Colt. Pool No. Cong. Connectment Source 3, 24000100 200-08MNT-61ANT
-0_3411 -0_3411		UPD_311418610 P_00011028	ADD DEAN & PROF - SIXNEM AND DEAN & PROF - SIXNEM	xC_000456 Http So Center Englise - 210 xC_000456 Http So Center Englise - 210	hings_handsivett_berings	Nera \$12,000.00 Nera \$12,000.00	If the Camp Cast Rue. No Camp Commitment Second D_34000100 1102-09091 400_30 If the Camp Cast Rue No Camp Commitment Second D_34000100 1102-09091.NO_30
40,340 40,340 40,340		UPID_37418610 #_00011038 UPID_37418610 #_00011038	ASO DEAN & PROF - STORING	jf_000456 Hith Sc Center Bigble - 110	(ARL)SP	N/A \$12,000.00 N/A \$12,000.00	It his Comp Cast Poe No Comp Commitment Source D_34001100 209-088NT-STATE
H_1401		1/PID_37418610 P_00011008	ASO DEAN & PROF - 200456	yC_000456 Http: So Center Eligible - 230 (C_000456 Http: So Center Eligible - 230	- MELSP	Narik \$12,000.00	In the Comp Cast Res No Comp Commitment Source D_34000100 301-08581-80086 In No Comp Cast Res No Comp Commitment Source D_34000000 100-08587-NO_30
H 379494 H 379494		UPD_37699648 P_00000805	58 YOLF PRESIDENT & PROF - 001522	x_001322 with Sci Center Managerial - x_001322 Hits Sci Center Managerial -	2 Norge_Non-Sevent_Samings		If the Comp Cash Res No Comp Commitment Source D_27010600 171-08681-07900 If the Comp Cash Res No Comp Commitment Source D_27010600 171-08861-07900
40,370101			SK VICE PRISIDENT & PROF - 001522 SK VICE PRESIDENT & PROF - 001522	xC_001322 Httl 5c Center Managenal - xC_001322 Httl 5c Center Managenal -	2 MBL_UP 2 Trings Non-Denetit Samings	N/A \$348,327.00 N/A \$348,327.00	2 No Comp Cost Res No Comp Commitment Source 0, 27010100 171-08081 HIGHC 9 No Comp Cost Res No Comp Commitment Source 0, 27010100 171-08081 HIGHC
40,0101		UPID_17109476 P_00005375	FINANCE & ADMIN: VICE FIEL 7 - DOT 144 FINANCE & ADMIN: VICE FIEL 7 - DOT 144	JC_001144 Out of Unit - 10	hings_Non-denetit_tamings http://www.senetit_tamings	N/A 59.626.00 N/A 29.626.00	If No Comp. Cast Roo. No. Comp. Commitment. Source D., & V/10000. 1135-CHMIT-NO, N II No. Comp. Cast Roo. No. Comp. Commitment. Source D., 41010000. 1135-CHMIT-ND, 30 0150-CHMIT-ND, 30
HE_2101		UPID_10535145 P_00522981	VICE PAILS & CPD - DO1800	35_001403 Out of Unit - 50	ABC_SSP	Fe'A \$9,000.00	© No Comp Cost Roo No Comp Commitment Source 0_21010000 199-CRRN1-NO_N
4010		UPD_10515145 #_00123981 UPD_10535145 #_00123981	VICE PRES & CPD - 001800	(C_001403) Out of Unit - 10 (C_001403) Out of Unit - 10	All_15P	N/A \$5,000.00 N/A \$5,000.00	Ne Cang Cast Roo Ne Cong Connetment Source 0_21010000 101-00051-NO_3     No Cang Cast Roo No Cang Connetment Source 0_21010000 109-08561 400_5
-10_2100 -10_0001		URD_10525145 P_00023981	VICE WEE & CPO - SO1803	(4_001403 Out of UHE - 50 (4_001718 Out of UHE - 50	hings_kim.denett_famigi hings_kim.denett_famigi	No. 89,000,00	D No Cong Cust Peo No Cong Convertment Isoria 0, 21010000 101-00081-NO_30 Il No Cong Cust Peo No Cong Convertment Source 0, 20110000 105-08897-NO_30
		Vecety #_00012839	Vice President & Aux Provide - 001719	IC_001718 Out of Unit   00	MILLIP	N/A \$17,009.51	If Ne Cang Cast Roc No Cang Convertment Source D_00010000 [109-CMMITING_N
	t Page_1 / 2 /					12 100	× 7

### **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** 

Pu	iblic Folders My Folders
Public Folder	s > <u>Financial Information</u> > <u>Budget</u> > <b>UF Budgeting</b>
	Name 🗘
	Additional Farnings + Benefits
	Benefit Selection
	Budgeted Lines + Benefits
	Support Unit Budget Request
	All Funds Budget - By Account
	All Funds Budget - By Summary Account
🗆 🧕 🕨	Facts Last Updated

2. Choose your required search criteria.

		Benefit Selectio	<u> </u>	
Year: * FY17	AND Scenario:	SU_Budget 💌 🗚	ND Version: * Working	Finish

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.

Benef	it Selection	
	udget 💌 AND Version: * Work	king Flat 💌 Finish
Type one or more keywords separated by Search		
Options V		
Results:		
	Remove	
Select all Deselect all	Select of	all Deselect all
Keywords:		
Type one or more keywords separated by	Q	
Results: HR_6201	Choice: Insert	
	OR  Keywords:  Type one or more keywords separated by:  Codoos   Results:   Select al Deselect al  COR  Keywords:  Type one or more keywords separated by:  HR_6201  Select Results:  Codoos   Results:  Codoos   Codoos	OR       Kaywords:       Type one or more keywords separated by spaces.       Search (2)       Oxtons <sup>10</sup> Results:       Insert ◆       Aremove       Select al Deselect al       OR       Kaywords:       Type one or more keywords separated by spaces.       HR_6201       Search (2)       Caboos <sup>10</sup> Results:       HR_6201       Search (2)       Caboos <sup>10</sup> Results:       HS_6201       Caboos <sup>10</sup>

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

		Select all Deselect all		
Cancel	< Back	Next >	Finish	

5. **Review** your report.

	~												
" <sup>y</sup> 1	ıfl										Ber	efit Selection	
lement Gro													
Earthy	OF IC and Manue	All Logicard	CT Passes	Aut Tale	And Kinds	Union LD	Element	Annual Status Same		FIL Comp Commit Server De	the Cost PostCosts East	Comp Front Comp Print	our Costs Deat Firs Debat
6.420		IPE MIDOOL		HERARA PERIOLPCES PER - DOREST			Frage Martin of P. Ann East		\$18,016.00			RECEIPTING AD BOY PING 7798	An Comp Days Fig. 44 Million
P. 424		UPD, MIROLD		HERAAA PRESCUPCED HER - DOOLD		ManaparalContential 3		Q-Montha .	\$34,074.00			BLORWING SOF PHG 796	An Comp Days For Im Nation
P1 420		1PD, N17294		PTOGRAMM NOT - DODGE		Advancements & Cherkup-1		@Mantul	825.412.04			RECEIVED NO. OF THE SHE	An Corp Day Fac to Many
P. 628		UPD_ROTING		PROGRAMAST -DEDIE			Fings, TEARN, UPI, No. Lo.		BOXHD04			EFORMTAD_OF PROJEET	As Core Der Fis. In No.
6(420		IFO, HINE		HAMAK PETRUPCES, OPEC10F4 - 8P				EMpeter	100,000.00			85-09W1-A0_30F PHQ 756	An Cong Days Fig. (c) Allows
6,620		UPD_MONG		HARAM RESOURCES OF ECTOR 4 - IN MARAM RETOURCES OF ECTOR 4 - IN				Note	450,000.00			BECREWT AG, SOF PEG, 758	As Comp Days Fig. to Many
P. 429		UPD SCHOOL		HAMAPEICACEI-RP - MILE		Mangena/Continuing 1 Managena/Continuing 1		U Montes	#16,000 ##			INCREME ADDRESS FROM AND ADDRESS ADDRE	An Cong Dep Far (nd Allor fee Cong Dep Far (nt Miles)
A 424		UPD NUMBER		-LAMA PETO PETI 40P 4000.0			Frage TEACH UNP'L Incoder		456,00048			INCIVAT-HICFOF PRIL KIN	An Comp Dest For Ind Also
P. 620		line scales		HARASS PRINCIPALITY - SOUND			Face TERMS USPE Non-Exe		450,000 48			BLCHTVDAD UNF PRO 188	In Carry Cast Fig. by Minut
#1 A240		UND INVESTIGATION		HERMAN PRESCRIPTION VICE PRINT 7 - 107			Fange VENNEL LINE Example		\$140,000.00			\$9-019W/T-MO, NOF PINE, 7100	An Complete Fig. Ind Mor.
#1.420F		unity, animana i		ARRAY PERCENCES, VCE PRES.7-30			Fings TEXAS USED Every		4040308-00			IN-CREATING NOT PING HIM	An Corp Des Fiel to None
61.420		UPD HINK	P. 0000012	HARAKTEROPICES VICE PREST - INF	1,000	Collection - 60	THE	Utilatie	\$240,000,000			BECREAT AD SOF PHIL AND	As Corp Det Fix Million
et 420		UPID, MILINE	P_0000012	HAMMA PERCENTICE PREST - 20	X,1655	Overal later - Mil	THE	4 Monto	404048-00	6 No-Comp Commitment Strate Ma	CompCost Par D 400000	RECIPIENT AD, SOF PHQ. 756	An Comp Days Fig. Ind Allow
#1,620 ····		1910, 4900018		HAMMINGOUNCES (PD 2: INVID			Frage, TEXABLURY, Early:	NUR	\$14,707.00			IN-ORWEAD, SOF PRICESS	No Comp Dept Fisc Int Micro
#1,400		010,4880019				Ow 14 194 - 90	140	EMunite	844,000.00			BECREATING, SOF PROJESS	An Comp Day For Int Minu
P(.420		UPD_REEKY		HOMMOTPHYTHE ALL UP - DODIN		Administration & Clemont - 2		UMunitur	\$94,051-00			BECREAT AC, SOF PRO, SHE	All Comp Dept File, for Allers
P. 638		und seens a		ICAMPTRATINE ALT UN-200019			Free, Still, 199, Early	hall	\$94,0%.00			BLOWB/AD_GOF PEQ.088	Re Comp Days File for Allow
#1,4200		UPD, ADDING		HAMA RECORDED AND ADDRESS		Managerial Continues 1	Freque VENNEL LINES ADDRESS	6) Months	#16,00748			BLOWN ALL SOF PHILING AND BLOWN ALL SOF PHILING	No Comp Day For In Many An-Comp Day For In Many
P. 420		UPID atomini		PROQUER NOT DRIVE			Frige TENHE UNP'S tam Ere		424.000.00			BI-CREW/AT AD, SOF PRO, KIM	As Cong Day Fig. In Nous
P_ 400		OFE ADDRESS		PRODUCED BY THE PRODUCED		Amount die 1 Genue 1		E-Months -	421,500,00			INCOMPTAG 10F PPG 188	An Correction For to Man
6,600		with showing		NAMES OF TAXABLE AND DESCRIPTION.			Farge, VERSE, 1879, Europe		\$11,000.00			RE-DWWTAD, SOF PRG, 77W	An Comp Day Fix to Alken
6.624		UPID, afternad		HAMMINESCUPIES ASCORD. SHOP			TAT	Ethorite	442,000.00			IN-COMMING NOT PING, FINE	An Comp Deal Fig. 10 Allow
61,420		OFD. NINCH		PRODUMENT INTERNE			Fop these strikes		405.041.00			BILCHWAT AD, DOF PHO, HUR	No Comp Days Fig. Int Million
#L42H		UPD WHICH		PRODUMENT, INC.	J. 100000	Advancements & Daniel - 1	1. TUN	12 Married	\$25,000.00			INCREATING SOF PHD HM	An Comp Dept Fig. In Million
et, 434		UPIE, 80479000	r departm	NAMES AND ADDRESS OF TAXABLE ADD	X. 10000	Out 10 1040 - 00	Frage TEARING STIFT, Exempt	140	\$74.00.0E	6 No-Cong Commenter Inser M	Cong Cour Po D 4004000	BLOWNTAD, SOF PRO, URB	No Comp Dept Fig. to Manual
#1,600		1910, 848,9800		HAMAN REBOURCES, DRIECTORIA, HP			tag	UMorela	874,741.18			INCOMMEND, NOF PINE, NEW	An Comp Day Par to Meso
49,428		UPID_00070000		HAMAS FERD INCES DIRECTORIA - INF			TAD	12 Months	874,941,20			BECHENT-CT-404 (FRQ,756	An Corp Del Fer 2nd Mon
40.400		UFID_INITIONS		HAMMARESOURCES OPECTORIE IN			Fage TLINE UP1 Early	444	\$74,962,00			RECEIPTED CT-ER (FRQ.756	As Curry Dept File 2nd Alkon
#1,600		und ermone		HAMA RESOURCES CRO > 40010			Frequ TLINK SIP's Exerce		#14.5m.25			85-DWM-40_30F PNL 798	An Comp Dapt For Int Name
e.co		unity, according		VERMANPEROUPCES CPD 5: 00000			140	© Musha	\$51,500.05 \$40,400.00			65-019WT40, 50F PN0, 758	An Comp Day Fis for Million
41,400 41,400		IFO MARK		HAMMA RETOURCES FREE, SF. BRIESS HAMMA RETOURCES FREE, SK. BRIESS				Chicago and	842,438,00			BECREWTING SOF PRO 716 BECREWTING SOF PRO 716	Re Core Der Fie in Mann An Core Der Fie in Mann
6,620		UND NAMES		HAMAN PERCENCIPAL OF ANY INCOME.			Farge TEARN, UNP'S Barner	No.	ATTACK N			NUCLIWITIAN SOF PTIG. MID	As Comp Days Fig. 2nd Ador
P. 610		and reaction				Cat of Log - 60	TAN	to Months	#14,010 PE			90-UNW140-10F PTQ.000	An Cong Day For Ind Also
P. 429		units research				Character - 60	fer	C'Alconiu	454.012.75			INCOMPTING SOF PROLINE	In Care Del Fe to Man
P. 629		UPD INNER				Ownering - 60	Fear State UPS Lone	144	#94.02.76			BECREWTING SOF PRO DB	As Corp Det Fiel Million
P. 610		UND THERETO				Our 18 184 - 50	Tesp	E-Manha	\$4.575 M			INCOME INCOME AND	Has Comp Days Fig. 14 Manual
#(A)#		UND, TRANSTOC	P. DOLLING	HERMAN PERCENCIPAL OF DISTRICT	4,000	Outstan - 66	Fings TERMS 1973 Entropy	Math.	94/07/14	1 No-Comp Commitment Source No.	Corp Contra D. 190068	VIONAP JEDROP PHIL MIN	An Complete Factor Atlant
PL 429		uPID, ferenals		HAMAN RESOURCES CRD 2 - HIGH			tag	(CMonto)	842,000.00			REDWINT AD, SOF PHIL, THE	As Corp Day Fe 10 Non
6,428		UPD_TORROT		HAMAK RESOURCES, CHO 2: SHOW			Fep. 2008, 1075, Kenp	April	142,000,00			RECIPIWI AG, SOF PHQ, 1708	As Corp Det Fix M Ress
6,620		UFID_29(0784)					Fog Time of the los		\$26,045.04			BACHENT AO, NOF PERCENT	Ain Comp Dapi Fis. Im Allone
e (6)		1000,7000040				MargenalContinues 2		© Muster	\$14,040.00			INCOMPAGE OF PAGE IN	An Comp Dept Fax for Allow
P. 60		010,1015050		HAMAA PERCENDING HIP MIL HORDS				EMunite	\$18,00C40			89-09997-M0_90F PR0_7100	As Cone Der Faller Mine
P_420		UPD NOTION UPD NUMBER		HAMAN PETCHPCET REP. 10. HIGEN HAMAN PETCHPCET ALTOPY & HIGEN			TAU TAU	April 20 Adventure	405/00/40			In-CHENTING SOF PHG 719	As Corp Dep Fix to Minor
P. 430		of the location of		VERANA PERSONNELLA ACTORY & SIME			Fage TERM, UNPL Earner		and loss to	<ol> <li>No-Comp Committeen Source In K. No-Comp Committeen Source In</li> </ol>		BI-CIVILITAD_GOF_PHQ_HIM	Ren Comp Days File for Allows Non-Comp Days File for Milese
0,600		UPD PROM		ICADEME SAFE THES, ANT OR & -DR			Frage VERSEL UNIT Example		494,00115			IN CREATING SOF PROLINE	An-Curle Dest File Int Alburn
P. 424				ACADEMIC SUPP SHOE ASYOP 4 - SN			Tep	Chinese .	494,24135			BI-CREW/AT-MO. SOF IPPO, KIM	An Comp Day Fire Int Micro
	And in case of the local division of the loc		-						No.	and a second second second		and the second se	and the second second
ALC: AND	ort Page_1 // 202								10 March 10				

### 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

	Folders My Folders
Public Folders > F	inancial Information > <u>Budget</u> > UF Budgeting
	•
Nan Nan	ne 🗘
Addi	tional Earnings + Benefits
🔲 🛗 🕨 Bend	efit Selection
Bud	geted Lines + Benefits
🗆 🛗 🕨 Supp	port Unit Budget Request
All F	unds Budget - By Account
	unds Budget - By Summary Account
Eact	s Last Updated
_	
d search crit	

2. Choose your required search criteria. Support Unit Budget Request

Year: * FY17 🗸	AND <u>Scenario:</u>	* 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 E	<u>Budget Request</u>	
Year: * FY17	AND Scenario: * SU_Budget V AND Version: * Working Flat V	Finish
E <b>ntity:</b> (ex: D_01 or D_01010000)	Choice:         D_62         Search ⊡           D_62010101         Insert →         D_62030000         D_62010100           D_62040000         ← Remove         D_62060300         D_6206000           D_62060000         D_62060000         D_62040100         D_62040000           D_62060000         D_62060000         D_62040000         D_62040000           D_62060000         D_62040000         D_62040000         D_62040000           D_62060500         D_62040000         D_62040000         D_62040000           D_62050100         ✓         D_6201000         D_6201000	
	Select all <u>Select all</u> <u>Select all</u>	

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

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

### 5. Review your report.

/15								November Allocation E						May Allocation	
	Working Flat SU_Budget D_62030000 621120		1,722.00	151.75	131.95	131.95	131.95	131.95	131.95	197.93	131.95	131.95	131.95	131.95	184.74
Y15	Working Flat SU_Budget D_62060200 621120		250,624.66	22,085.70	19,204.95	19,204.95	19,204.95	19,204.95	19,204.95	28,807.43	19,204.95	19,204.95	19,204.95	19,204.95	26,886.94
Y15	Working Flat SU_Budge D_62060500 631110		28,919.84	2,548.52	2,216.11	2,216.11	2,216.11	2,216.11	2,216.11	3,324.15	2,216.11	2,216.11	2,216.11	2,216.11	3,102.54
-Y15	Working Flat SU_Budget D_62060200 611110		381,386.25	33,608.75	29,225.00	29,225.00	29,225.00	29,225.00	29,225.00	43,837.50	29,225.00	29,225.00	29,225.00	29,225.00	40,915.00
-Y15	Working Flat SU_Budget D_62060300 631110		693,389.20	61,104.15	53,134.16	53,134.16	53,134.16	53,134.16	53,134.16	79,700.79	53,134.16	53,134.16	53,134.16	53,134.16	74,387.46
FY15	Working Flat SU_Budge D_62060100 611110		25,426.00	2,240.61	1,948.35	1,948.35	1,948.35	1,948.35	1,948.35	2,922.53	1,948.35	1,948.35	1,948.35	1,948.35	2,727.65
FY15	Working Flat SU_Budget D_62010100 621110		1,670,364.00	147,196.83	127,997.24	127,997.24	127,997.24	127,997.24	127,997.24	191,995.86	127,997.24	127,997.24	127,997.24	127,997.24	179,196.14
FY15	Working Flat SU_Budget D_62030000 621110		5,171.00	455.68	396.25	396.25	396.25	396.25	396.25	594.37	396.25	396.25	396.25	396.25	554.74
FY15	Working Flat SU_Budge D_62010000 631110		564,766.00	49,768.65	43,277.09	43,277.09	43,277.09	43,277.09	43,277.09	64,915.63	43,277.09	43,277.09	43,277.09	43,277.09	60,587.92
FY15	Working Flat SU_Budget D_62060200 621110		752,626.60	66,323.42	57,672.54	57,672.54	57,672.54	57,672.54	57,672.54	86,508.80	57,672.54	57,672.54	57,672.54	57,672.54	80,741.55
FY15	Working Flat SU_Budget D_62060200 631110		2,839,616.91	250,238.88	217,599.61	217,599.61	217,599.61	217,599.61	217,599.61	326,397.19	217,599.61	217,599.61	217,599.61	217,599.61	304,637.68
FY15	Working Flat SU_Budgel D_62060200 631120		1,292,025.69	113,856.67	99,005.80	99,005.80	39,005.80	99,005.80	39,005.80	148,508.70	99,005.80	99,005.80	99,005.80	99,005.80	138,608.12
FY15	Working Flat SU_Budge D_62060500 631120		13,158.53	1,159.56	1,008.32	1,008.32	1,008.32	1,008.32	1,008.32	1,512.47	1,008.32	1,008.32	1,008.32	1,008.32	1,411.64
FY15	Working Flat SU_Budget D_62010000 631120		256,969.00	22,644.78	19,691.11	19,691.11	19,691,11	19,691.11	19,691,11	29,536.67	19,691.11	19,691,11	19,691,11	19,691.11	27,567.56
FY15	Working Flat SU_Budgel D_62060300 621120	No Cost Pool No Commitment Sourc	5,228.10	460.71	400.62	400.62	400.62	400.62	400.62	600.93	400.62	400.62	400.62	400.62	560.87
FY15	Working Flat SU_Budge D_62010100 631120		165,565.00	14,590.02	12,686.97	12,686.97	12,686.97	12,686.97	12,686.97	19,030.46	12,686.97	12,686.97	12,686.97	12,686.97	17,761.76
FY15	Working Flat SU_Budget D_62060300 631120		315,492.09	27,801.98	24,175.64	24,175.64	24,175.64	24,175.64	24,175.64	36,263.46	24,175.64	24,175.64	24,175.64	24,175.64	33,845.85
FY15	Working Flat SU_Budget D_62060100 621120		49,166.00	4,332.64	3,767.51	3,767.51	3,767.51	3,767.51	3,767.51	5,651.26	3,767.51	3,767.51	3,767.51	3,767.51	5,274.5
FY15	Working Flat SU_Budgel D_62060100 631110		701,666.00	61,832.64	53,767.51	53,767.51	53,767.51	53,767.51	53,767.51	80,651.26	53,767.51	53,767.51	53,767.51	53,767.51	75,274.5
FY15	Working Flat SU_Budget D_62010100 621120		556,231.00	49,016.52	42,623.07	42,623.07	42,623.07	42,623.07	42,623.07	63,934.60	42,623.07	42,623.07	42,623.07	42,623.07	59,672.23
FY15	Working Flat SU_Budget D_62060300 621110		15,700.00	1,383.52	1,203.07	1,203.07	1,203.07	1,203.07	1,203.07	1,804.60	1,203.07	1,203.07	1,203.07	1,203.07	1,684.23
FY15	Working Flat SU_Budgel D_62060100 631120		319,258.00	28,133.85	24,464.21	24,464.21	24,464.21	24,464.21	24,464.21	36,696.32	24,464.21	24,464.21	24,464.21	24,464.21	34,249.90
FY15	Working Flat SU_Budget D_62010100 631110		363,878.00	32,065.88	27,883.37	27,883.37	27,883.37	27,883.37	27,883.37	41,825.06	27,883.37	27,883.37	27,883.37	27,883.37	39,036.72
FY15	Working Flat SU_Budget D_62010000 621110		1,871,189.00	164,894.05	143,386.13	143,386.13	143,386.13	143,386.13	143,386.13	215,079.20	143,386.13	143,386.13	143,386.13	143,386.13	200,740.58
FY15	Working Flat SU_Budgel D_62010000 621120		623,106.00	54,909.72	47,747.59	47,747.59	47,747.59	47,747.59	47,747.59	71,621.38	47,747.59	47,747.59	47,747.59	47,747.59	66,846.62
FY15	Working Flat SU_Budget D_62060200 611120		100,304.58	8,839.10	7,686.17	7,686.17	7,686.17	7,686.17	7,686.17	11,529.26	7,686.17	7,686.17	7,686.17	7,686.17	10,760.65
FY15	Working Flat SU_Budget D_62060100 611120		6,687.00	589.28	512.41	512.41	512.41	512.41	512.41	768.62	512.41	512.41	512.41	512.41	717.36
			147,645.00	13.010.86	11.313.79	11.313.79	11.313.79	11.313.79	11.313.79	16,970.69	11,313.79	11,313.79	11,313.79	11,313.79	15,839.3
FY15 Summa	Working Flat SU_Budge D_62060100 621110					\$1,074,126.54 \$									

## **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**

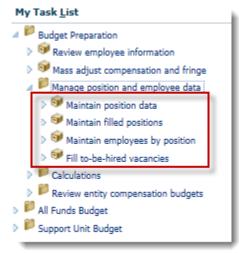
This form should only be used to make changes to existing and to-be-hired employees. This is where you would make any changes to distributions, salary, benefits, etc.

#### 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.

> Forms	Task List Statu	15			
My Task List	Task - Maintai	n filled positions	k Instructions		
Beudget Preparation     Serview employee information     Serview employee information     Serview employee information and fringe	634001 PPD-8	iðy Current Scenar Sógarvc Admin-Admir (▼	and the second se		930
Manage position and employee data	L			Jab	Positi Star Dab
Waintain filled positions     Waintain employees by position	P_00005307		MANAGEMENT A	WALYSIS CRD 2 - 001133	7/1/
> 9 Fill to-be-hired vacancies	P_00006724		PHYSICAL PLAN	TI DIRECTOR 5 - 001211	7/1/
Calculations     BReview entity compensation budgets	P_00006751		OFFICE MOR - 0	00820	7/1/
All Funds Budget	P_00007049		TRAINING SPEC	IALIST - 000831	7/1/
P Support Unit Budget	P_00007078		SECRETARY: SR	- 000805	7/1/
	P_00007100				Y
	P_00007156		Calculate Compensat	ation Expense ion Budget to GL Accounts	4
	P_00011622				4
	P_00018271		Delete Employee As		4
	All Positions	Existing Employees	Aasign Employee		-
			Edit Employee Deta	da N	
			Compessante Compes	tocacon Kasules	
			Edit		

3. Click the **Distributions** tab.

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

4	Employe	e Deta	ils									
1	General	Positi	ion Details	FTE	State	tus Changes Salary		Additional Earnings		Fringes Benefit Election		Distributions
				-				All 11				
	Entity Segment		Entity Segment	Co Po Segn	ol	Commitmer Segm		Allocation Start Date	Allocation End Date			
	1st Allocation D_634002.		D_634002	Facili	ities	Support Uni	t Fundi	7/1/16	6/30/17	10	0	

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

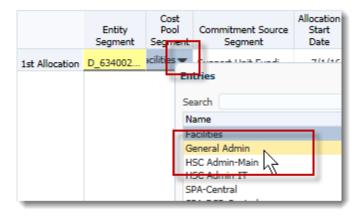
- 4. Select the Entity Segment drop down field and click on the down pointing arrow.
- 5. Enter the desired Entity number into the **Search** field (e.g., "6340"). Or choose it from the list.

**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.

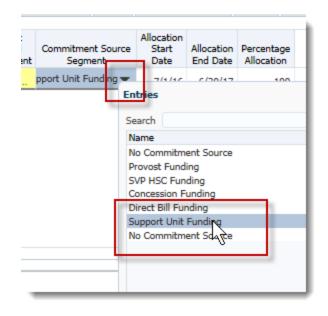
6. Click the new desired **Entity**.

~ <u>_</u>								
Employee	Deta	ils						
General	Posit	ion Details	FTE Sta	tus Changes	Salary	Additional	Earnings	Fringes
		Entity Segme <u>nt</u>	Cost Pool Segment	Commitmer Segm		Allocation Start Date	Allocation End Date	Percent Allocat
1st Alloca	ation	63400100-		Constant Unit	u miliada	7/4/47	C/20/17	_
			intries					×
		3	Search					- 11
			Name					
			D_6340010	0				
			D_6340020	R				^
			D_6340030	hit				
			D_6340040	0,,				
			D_6350000	0				
			D_6350010					
			D_6350020					
			D_6351000					
	_		D_6251010	0			_	

- 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**).



- 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.

rce	Allocation Start 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.

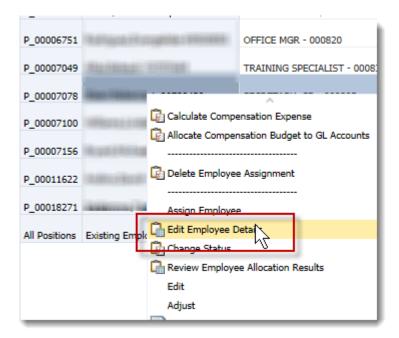
eneral	Positi	on Details	FTE	Status Ch	anges	Salary	Addi	tional Earnir	ngs Fring	jes Benefit	Elections	Distributions
		Entity Segment	-	ost Pool egment		nitment Sou Segment	irce	Allocation Start Date		Percentage Allocation		
1st Alloca	ation	D_634002	Gen	eral Ad	Suppo	rt Unit Fund	di	7/1/16	6/30/17	100		

## 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.

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

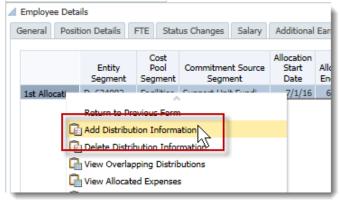


### 3. Click the **Distributions** tab.

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

4	Employe	e Detai	İs							1	
	General	Positi	ion Details	FTE Sta	tus Changes	Salary	Additional	Earnings	Fringes	Benefit Elections	Distributions
			Entity Segment	Cost Pool Segment	Commitmer Segm		Allocation Start Date	Allocation End Date	Percentag Allocation		
	1st Allo	cation	D_634002	Facilities	Support Uni	t Fundi	7/1/16	6/30/17	10	0	

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

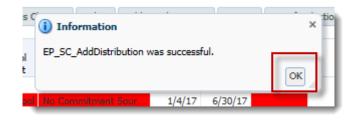


6. Enter the Effective Start or End Date if it's different.

ompt Text	Volue
* 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.

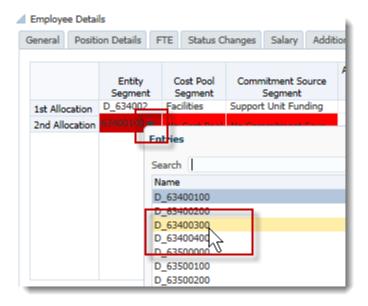
- 7. Click the **Add** button on the bottom, right of the screen.
- 8. Click **OK** to the pop up window.



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.



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	End Da	te	Percentage Allocation	
7/1/16	6/30/	.7	50	
1/4/17	6/30/	17	50	
		5		

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**.

My Task <u>L</u> ist	Task - Maintai	in filled positions Task Instruc	tions	
<ul> <li>Budget Preparation</li> <li>Seview employee information</li> <li>Seview dupt compensation and fringe</li> </ul>	634001 PPD-	Q Current Scenario: SU_Bu Bldgsrvc Admin-Admir ▼ →	idget	01
Manage position and employee data	P 00005307	Nerve (dec 1) 1 (Martin C	Job MANAGEMENT ANALYSIS CRD 2 - 00113	Posi St Da
Maintain employees by position     S     Fill to-be-hired vacancies     Calculations	P_00006734	Marca (Marcin   Margana / Komboo	PHYSICAL PLANT; DIRECTOR 5 - 001211	. 7/:
<ul> <li>Review entity compensation budgets</li> <li>All Funds Budget</li> <li>Support Unit Budget</li> </ul>	P_00006751 P_00007049	Halanan Tittas	OFFICE MGR - 000820 TRAINING SPECIALIST - 000831	7/:
	P_00007078 P_00007100		Compensation Expense Compensation Budget to GL Accounts	7/:
	P_00007156 P_00011622	Contraction	mployee Assignment	7/:
	P_00018271 All Positions		loyee Details	7/:
		Change S Change S Change S Review E Edit	imployee Allocation Results	
		Adiust	•	

- 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.

Employe eneral		on Details	FTE	Status Cha	inges	Salary	Addi	tional Earnin	ngs	Fringe	es Benefit	Elections	Distributions
		Entity Segment		Cost Pool Segment	Comr	nitment S Segment		Allocation Start Date		cation Date	Percentage Allocation	L	
1st Allo	ation	D_634002.	. Fac	ilities	Suppo	ort Unit Fu	undi	7/1/16	6/	30/17	50		
2nd Allo	cation	D 634001	Ge	neral Ad	Sunne	ort Unit Fi	indi 🛓	1/4/17	6/	30/17	50		
		Return to P	reviou	s Form									
	G	Add Distrib	<del>ition I</del>	nformation		_							
	G	Delete Dist	ibutio	n Informatio	۱N								
	C	View Overla	apping	Distributions	; k								
	C	View Alloca	ted Ex	penses		_							
	0	Colculate C		sation Exper	100								

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		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.

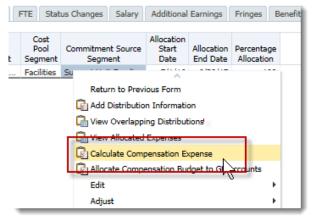
If you are in Edit Employee Details, you can right click on any input cell on any tab (except for the General tab) to run the calculate and allocate procedures for this position.

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

Employee Details

General	Posit	ion Details	FTE	Status Changes	Salary	Additional Earr	nings	Fring	jes Ben	efit Elections	Distributions
		Entity Segment	F	Fund Segment	Program Segment	Dept Flex Segment	Allocat Star Date	t /	Allocation End Date	Percentage Allocation	
1st Allo	cation	D_634002	101	-CRRNT-NO_SOF	PRG_05	No Dept Flex	7/1	/16	6/30/17	100	

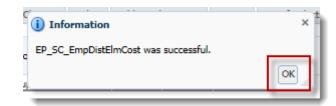
2. Click Calculate Compensation Expense.



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

EP_SC_EmpDistElmCost in Progress

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

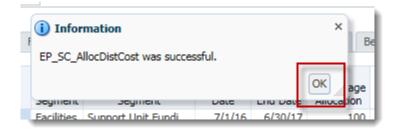


- 4. After the Launch Business Rules window closes, **right click** within the same cell on the form again.
- 5. Choose Allocate Compensation Budget to GL Accounts.

	FTE	Stat	us Char	nges	Salary	Additional	Earnings	Fringes	Benefit Elections
:	F	Cost Pool gment		nitmer Segm	nt Source ent	Allocation Start Date	Allocation End Date		-
	. Fac	tilities	Suppo	rt Lloë	F Eurodi	7/1/16	c/20/17	1	00
					Add Distrit View Overl View Alloca <del>Calculate (</del> Allocate Co Edit	Previous For oution Inform lapping Distr ated Expens Compensation	nation ibutions es <del>n Expense</del>	GL Accour	nts
		Yea	rTotal	ABC (	Adjust Comments Supporting				mber

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

6. 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.

Start Time		🖄 End Time	b Type Select Job Type
Stat <u>u</u> s	Select Run Status	Job Name	User Name
View 👻 🕺	Detach Job Type	一 こ Job Name	User Name Start Time End Time Run Stat
> 37	Rules	EP SC AddDistribution	rmitchell 9/22/16 2:03:38 PM 9/22/16 2:03:38 PM Complete
× 37	Rules	EP_SC_AddDistribution	rmitchell 9/22/16 2:03:38 PM 9/22/16 2:03:38 PM Complete 9/22/16 2:13:44 PM 9/22/16 2:13:44 PM Complete
		EP_SC_EmpDistElmCost	rmitchell 9/22/16 2:16:45 PM 9/22/16 2:17:32 PM Complete
> => > 52	Rules	EP SC EMDDISLEIMCOSL	

# 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.

307	MANAGEMENT ANALYSI	IS CRD 2 - 001133	7/1/16	5	Filled	12	months	40	0	1	1	Ac
734	PHYSICAL PLANT; DIRE	CTOR 5 - 001211	7/1/16	5	Filled	12	months	40	0	1	1	Ac
748	PROGRAM AST - 000909	0	7/1/14	-	Vacant	12	months	40	1	1	1	
751	OFFICE MGR - 000820	🔒 Edit Position De				12	months	40	0	1	1	Ac
752	FISCAL AST: SR - 0008					12	months	40				
762	SECRETARY; SR - 0008	Calculate Comp	ensation	n Expense		12	months	40				
049	TRAINING SPECIALIST	🔂 Allocate Compe	ensation	Budget to (	GL Accounts	12	months	40	0	1	1	Ac
078	SECRETARY; SR - 0008					12	months	40	0	1	1	Ac
100	CLERK; SR - 000798					12	months	40	0	1	1	Ac
156	CUSTODIAL SERVICES						monthe	40	. ^	1	1	Ac
622	CUSTODIAL SERVICES	Assign Employe	e			16	Assign	Existing	Employee		1	Ac
271	CUSTODIAL SERVICES	Edit	-			LC,	Assign	To-Be-H	ired Emplo	-764	1	Ac
ons	All	Adjust				+			-8	10	1	
		ABC Comments										- 1
_		Main Supporting Det	ail									

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 .

Prompt Text	Value
* Select Employee	UFID_41839908
123 * Enter FTE	( <u>1</u>
* Enter Effective Date	7/1/13
Enter Union Code	None
120 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.

occorron _ occorron and and interest in	in the second		11-1-20			out of one	 	10/0/00
P_00006748 Mitchell,Ronda Clemons-41839908	FROGRAM AST - 000908	•	7/1/16	UFID_418	Mitchell,R	None	Full-ti	9/15/08
	-	20		UFID 69!	Rodriaue:			

- 7. **Right click** on name of newly assigned existing employee and choose **Edit Employee Detail** to make any needed distribution and salary changes.
- 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.

- 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.

Position Details					
General Employ	/ee FTE	Statu	s Changes	Salary	Additional
	-				
	Proposed	FTE Start	FTE End		
-	FTE	Date	Date		
1st Assignment	1	7/1/	6/30/		
C U	pdate FTE	N	-		
C Ad	djust Period	I Lewigi D	etails		
R	eturn to Pre	evious Fo	rm		
🔂 a	alculate Cor	mpensati	on Expens	e	H
·- •					

- 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.

Value
1
07-01-2016

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

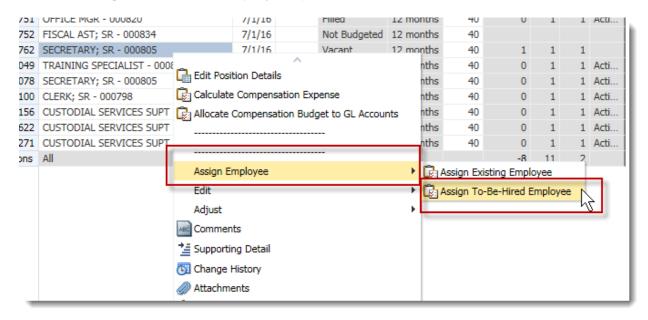
	Position	Details						
(	General	Employ	/ee	FTE	Statu	s Chan	ges	
								-
					FTE	FTE		-
				posed	Start	End		
	1st Assi	gnment		1				1
ľ	-		_	_				1
					N			
5								

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 Budge	eted 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.



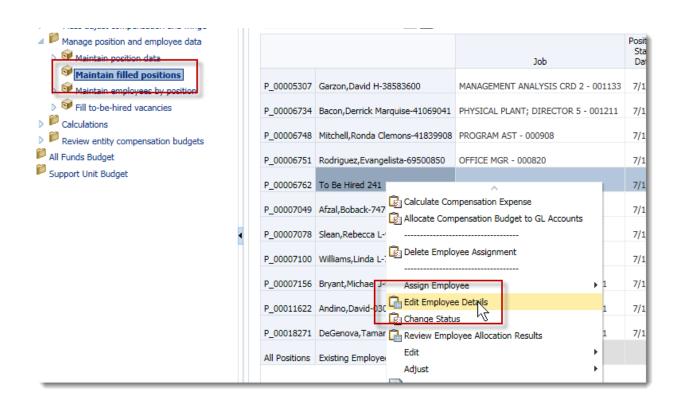
- 15. Enter the name of the new employee or a placeholder name or description if unknown. **NOTE**: If you know the UFID and want to input it best practice is to input it as UFID\_XXXXXXX otherwise if you input a number only the system will treat it as a dollar figure and add a decimal and cents.
- 16. 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
120 * Select Union Code	None
20 * 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.

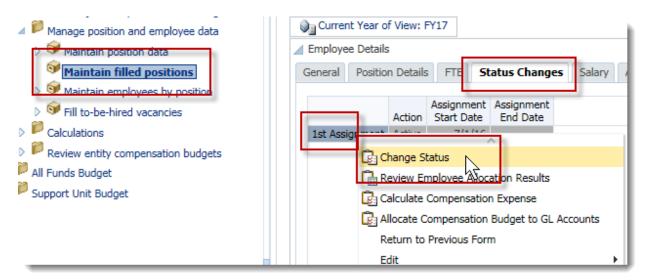
4	Employe	e Details	;			
	General	Positio	n Details	FTE	Status (	Chang
					-TF	
			Proposed	FTE Start	FTE End	
	1		TTC	Date	Date	
	1st Assi	gnment	1	7/1/		
	-					
					N	_
					6	

- 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	R
* Enter Effective Start Date		5
Enter Effective End Date		

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

Runtime Prompts - Change Status		
Prompt Text		Value
121 * Select Status	Example: 11/29/98	Active
* Enter Effective Start Date		Maternity
Enter Effective End Date		On Salt tica
		Leave of Absence Disability

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

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

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

Employe	e Details					
General	General Position Details		FTE	Status Changes		
		Action	_	nment Date	Assignment End Date	
1ot Acci	gnmont	Activo	7	/1/16	11/30/16	
2nd Ass	ignment	Inactive	12	2/1/16		
1						

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

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

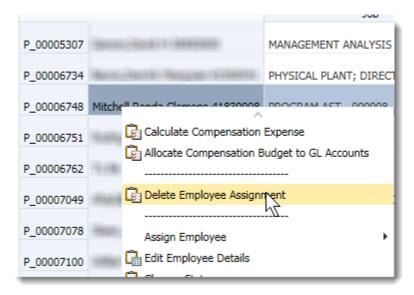
14. Go to **General** tab and change the appropriate **Assignment End Date**.

Employee	Details										
eneral	Position Deta	ils FTE	Status Changes	Salary	Additio	nal Earning	Is Fringes	Benefit Election	s Distr	ibutions	
					Annual				Defende		
Employ Numb	ee Employee	Hire Date	Employee Type		Salary Spread	FT/PT	Union Code	Termination Date	Default Weekly Hours	Assignment End Date	Status
UFID_7	74: Williams,I	4/2/	Team/USPS Non-Exe	em 12	2 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.



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			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 parttime, 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.

	4					
4	Position Details	-				
(	General Employ	/ee FTE	Statu	s Changes	Salary	
	4 4 4	FTE	FTE Start Date	FTE End Date		
	1st Assignment	Update FTE				
L		~		revious Fo	rm on Expense	

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.

-				
Position	Details			
General	Employe	ee FTE	Statu	s Change
		Proposed	FTE Start	FTE End
		Proposed FTE	Date	Date
1st Assi	gnment	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.

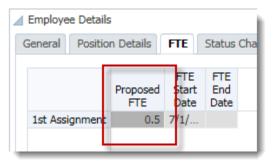
2 M							
Employe	e Details	100					1
General	Positio	n Detais	FTE	Status	Changes	Salary	4
		Proposed FTE	Start Date	End Date			
1st Assi	gnment	1	7/1/	<u>^</u>			-
	F	Return to Pi	revious f	Form			1
		Calculate Co	ompensa	tion Ex	pense		1
		docate Cor	npensat	on Bud	lget to GL	Accounts	1
	(B)	Jpdate FTE	N				
	G /	Adjust Perio	d layel	Details			1
	E	dit					ł
		Adjust					Ŀ

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
121 * Enter FTE	.5
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	

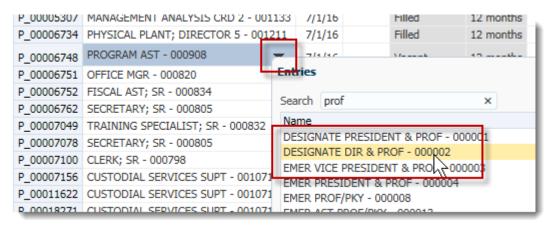
- 9. Click the Add button, then click OK.
- 10. Confirm the assignment updates correctly.



## 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.

and a	-	-		W			-	
Position	Details							
General	Employe	e	FTE	Status	Changes	Sala	<b>ry</b> Add	litional Ea
						-	_	
					Oction	Oction	Alleure	Ourseride
				Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value
TU2N	1st Eleme	nt C	hange	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	Additio	nal Earning	js Fri	nges	Benefit Election
			S. Er	nployee:	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 Ist 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.

		n Details						1	_		
G	General	Employ	vee FTE	Status	Changes	Sala	ry Add	itional Ear	nings	Fringes	Benef
[						_			9	Employe	e:Vacan
				Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value			
	TU2N	1st Elem	ent Change	0	7/1/		Yes	0			
			Retur	n to Prev	ious For	n m					
			Add S	alary Inf	ormation						
			🗕 📴 Delete	a Salary I	Informati	ion					
			- Calcul	ate Com	pensatio	n Expens	AF				_
	Expens	e	🕞 Alloca	te Comp	ensation	Budget	to GL Acc	ounts			
		:*:	i Edit								

49

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

Right-click a	and add	Salary G	rades				
Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value			
Expense Total Posit	ior	Add Salar Delete Sa Calculate Allocate (	Compensa		ense et to GL A	accounts	

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.

mber Name	Member Name	9
Element	⊿ Element	
▲ Salary Grades	FA12	
Faculty		
> FA09		
▶ FA10		
FA12		
> FASU		
COM Clinical Faculty	Add	
Exempt TEAMS/USPS	Add	
Non-Exempt TEAMS/USPS	3	
	Remove	
	<b>3</b>	
	Remove All	
		OK Ca

- 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 GI Accounts calculation.

Status	Change	s Sala	ary Ado	ditional Ea	rnings	Fringes	Benefit
					2	Employe	e:Vacancy
Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value			
0	7/1			~			
	Ē	] Add Sali <del>] Delete S</del> ] Calculat	-	nation		Acount	
		Edit	- ompens		Jer 1013	- acyound	·
_		cuit					-

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

Position	Details								
General	General Employee FTE Status Changes Sa				ary Additional Earning			Fring	es Benefit Electior
								S. Empl	oyee:Vacancy
					tion lue	Override Option Value	Option Start Date	Option End Date	Value Type I
Fringe	Faculty		1st Element Chan	ge 2	25.7	25.7	7/1/		Percentage of Over
Fringe	Non-Benefit	_Earnings	1st Element Chan	ge	5.4	5.4	7/1/		Percentage of Othe

#### **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	-	714.147	estical.	10					
P_00007078	SECRETARY; SR - 000805	Ent	ries							
P_00007100	CLERK; SR - 000798									
P_00007156	CUSTODIAL SERVICES SUPT - 00107	1	Search							
P_00011622	CUSTODIAL SERVICES SUPT - 00107	1 Na	ame							
P_00018271	CUSTODIAL SERVICES SUPT - 00107	TRAINING SPECIALIST 000831								
All Positions	All		SCAL AST - 00	IALIST; SR - 000832 00833	2					
		FIS AC AC	COUNTANT -	IONS SPV - 000835 000836						

**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.

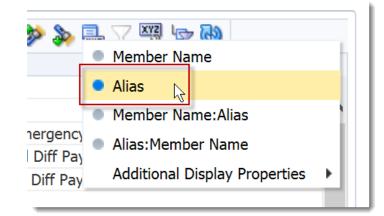
- 1. From **Maintain filled positions**, **right click** on the name of the person to whom you want to add overtime.
- 2. Click the Edit Employee Details option.
- 3. Click the Additional Earnings tab.
- 4. **Right-click** on the blue section that states "Right-click and add Additional Earnings Elements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

Employ	ee De	etails					10				n (
General	Po	sition De	tails F	TE	Status Cha	anges	Salary	Additio	nal E	arnings	Fringes
Right-c	lick an	nd add Ad	ditional	Earning	gs Elemen	ts					
	rride tion	Option Start			Earning	Allows Value					
Va	lue	Date				~					
			🕞 Cal	culate (	Compensa	ation Exp	ense				
				ocate O	ompensat	ion Budo	et to GL	Accounts			
					jet Impaci						
		1	Re	tum to	Previous I	onn					
			🕞 Ad	🛃 Add Additional Earnings							
		l	🕞 De	lete Ad	ditional Ea	arnings	42				
			Ed	t					•		
_			٨ط	it							

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

<u>Members</u>	Va <u>r</u> iables	
		- 🔍 🌮 🏪 🍸 🚟 🧐 🚱
Alias		

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.

- 🔍 🐎 🔜 🏹 📆 🚱		AV
Alias		Alias
Zelement		/ Element
ASB Asbestos Pay	^	"OTS Overtime"
CWE Campus or Weather Emergency		
OCH 230-On Call Hol-Wkend Diff Pay		
OCW 225-On Call Week Day Diff Pay		
OTS Overtime		
SEP Evening Shift 5% Differential		
SNP Night Shift 10% Differential		
UOT UPD Overtime		Add
ADU Additional Duties (HSC)		8
BNS Bonus		Remove
ESC 170-Extra Comp (S)		
ESH 175-Extra Comp (H)		Remove All
ESL 180-Extra Comp Lump Sum		
EPA Foundation Payment		

- 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".

Prompt Text	Value
* Enter Additional Earning	"OTS Overtime"
* Enter Effective Start Date	7/1/16

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".

	5		1 /							
4	Employe	e Detai	s							
	General	Positi	on Details	FTE	Status Char	iges :	Salary	Additional Earnings	Fring	jes
					Override	Option	Option			
					Option Value	Start Date	End Date	Value Type Input		E
	OTS OV	ertime	1st Elemer	nt Chang	9 500	7/1/		Amount - Spread with S	Sala	Be
					-					

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 D	ate	Value 1
OTS Overtime 1st Element Change	500	7/1/17			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.

TE S	tatus Chan	ides S	alary	Additiona	al Earnings	Fringes	Ber	nefit B
		5			<b>.</b>			
	Override Option Value	Option Start Date	Optio	n End Date	Value	Type Input		Ea
hange	E00	7/1/		7/20/2016	nount - Sprea	d with Sala	rv 🗨	Ber
	Entries						×	
	Search							
	Name							
	Amount - Spread with Salary							
	Percentage of Salary							- 1
	Percentage of Overall Earnings							
Y	Amount	t - July	Jther E	arnings				nber
	Amount - August							
	Amount - September							1,:
	Amount - October							
		t - Nove						3,9
		t - Decei t - Janua					~	2,3

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

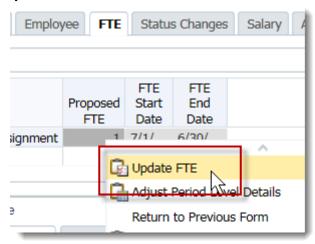
# Add a Vacant Position

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	vaiue
121 * 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.

Change	Sala	ary Ad	ditional Ear	
Option Start Date	Option End Date	Allows Value Change	Override Option Value	•
7/1/		Yes	20,000	J

- 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.

▷ Forms	Task List Status		
My Task List	Task - Calculate compensation budgets         Task Instruct		
<ul> <li>Budget Preparation</li> <li>Review employee information</li> <li>Mass adjust compensation and fringe</li> <li>Manage position and employee data</li> <li>Calculations</li> <li>Calculate compensation budgets</li> <li>Allocate compensation to general ledger a</li> <li>Review entity compensation budgets</li> <li>All Funds Budget</li> <li>Support Unit Budget</li> </ul>	Launch Business Rules Plan Type HCP Business Rule EP_SC_EmpDistElmCost_All Launch		

- 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**.

Runtime Prompts - EP_SC_EmpDistElmCost_All				
Value				
"Working Flat"	Ø1.			
"SU_Budget"	V			
HR_6310	VI.			
	Value "Working Flat" "SU_Budget"			

- 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.

- 🔍 🐎 🚟 👗 🦓 🔞			A V	
1ember Name			Member Name	
Entity			Entity	
Unspecified Entity	^		HR_6310	
Generic Entity				
⊿ HR_13				
HR_1301				
HR_1302				
HR_1303				
HR_1304		Add		
HR_5506				
▲ HR_63		3		
> HR_6310		Remove		
> HR_6320		~~~		
> HR_6330		Remove All		
HR_6340				

8. Click the **Launch** button.

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

(i) Information	×
EP_SC_EmpDistElmCost_All Rule was run successfully	
	ок "і

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

▷ For <u>m</u> s	Task List Status	
My Task <u>L</u> ist	Task - Allocate compensation to general ledger accounts	Task Instruction
<ul> <li>Budget Preparation</li> <li>Review employee information</li> <li>Review employee information</li> <li>Mass adjust compensation and fringe</li> <li>Manage position and employee data</li> <li>Maintain position data</li> <li>Maintain filled positions</li> <li>Maintain filled positions</li> <li>Maintain employees by position</li> <li>Fill to-be-hired vacancies</li> <li>Calculations</li> <li>Calculations</li> <li>Calculate compensation budgets</li> <li>Calculate compensation budgets</li> <li>Review entity compensation budgets</li> <li>All Funds Budget</li> <li>Support Unit Budget</li> </ul>	Launch Business Rules Plan Type HCP Business Rule EP SC AllocDistCost Launch	

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*."

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

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

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

Prompt Text	Value	
* Select Employee	EMP_6310	
* Select Entity	HR_6310	¥.,
* Select Position	PO5_6310	¥.,
🐺 * Select Scenario	SU_Budget	VI
* Select Version	Working Flat	Vi.

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

Runtime Prompts - EP_SC_AllocDistCost		
Prompt Text	Value	
🐺 * Select Employee	"New Employees"	Vi,
📑 * Select Entity	HR_6310	Ø1.
* Select Position	POS_6310	91.
🐺 * Select Scenario	SU_Budget	91_
* 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* 

Runtime Prompts - EP_SC_AllocDistCost		
Prompt Text	Value	
* Select Employee	"New Employees"	91.
* Select Entity	HR_6310	WI.
* Select Position	"Total New Positions"	VI.
🐺 * Select Scenario	SU_Budget	91.
* 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_11121914310	¥.,
👷 * Select Entity	HR_1302	Ma Co
🐺 * Select Position	"All Positions"	¥.,
👷 * Select Scenario	"Budget"	Ø.
👷 * Select Version	"Stage 1"	

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.

embers Variables				
- 🔍 🎾 🎥 🏹 📆 🕅			AV	
ember Name			Member Name	
Employee			A employee	
Total Employees	^		EMP_6310	
Unspecified Employee				
Vacancy				
Existing Employees				
EMP_President				
EMP_Senior Vice President for Academic Affairs and Provost				
EMP_Senior Vice President for Administration and Chief Operat.		Add		
EMP_Senior Vice President for Agriculture and Natural Resource	ts .	ADD		
EMP_Senior Vice President for Health Affairs		4		
EMP_Vice President and Chief Financial Officer		Remove		
EMP_Vice President and Chief Information Officer		3		
EMP_Vice President and General Counsel	- 11	Remove All		
EMP_Vice President for Business Affairs				
EMP_61				
▲ EMP_CO				
EMP_6310				
EMP_6330				
EMP_6340				
EMP_6350				
> EMP_6351				
<ul> <li>EMP_6352</li> <li>EMP 6353</li> </ul>				
EMP_6353	~			
				1
lp l				OK Cance

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

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

Runtime Prompts - EP_SC_AllocDistCost		
Prompt Text	Value	
* Select Employee	EMP_6310	
* Select Entity	HR_6330	1
📑 * Select Position	POS_6330	
📑 * Select Scenario	SU_Budget	1
* Select Version	Working Flat	W1_

- 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.

- 🭳 🌮 🚟 🏹 📆 🖓			~~	
1ember Name			Member Name	
Entity			⊿ Entity	
Unspecified Entity			HR_6310	
Generic Entity				
∡ Total Entity				
HR_President				
HR_Senior Vice President for Academic Affairs and Provost				
HR_Senior Vice President for Administration and Chief Operation				
HR_Senior Vice President for Agriculture and Natural Resource	tes	Add		
HR_Senior Vice President for Health Affairs		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
HR_Vice President and Chief Financial Officer		~		
HR_Vice President and Chief Information Officer		Remove		
HR_Vice President and General Counsel		≪≪		
▲ HR_Vice President for Business Affairs		Remove All		
▶ HR_61				
HR_6310				
HD 6320				
▶ HR_6330				
HR_6340				
HR_6350				
> HR_6351				
→ HR_6352				
NR_6353				
HR_6354				
N HD 6355				
		1		OK Can

To change the position selection, click the  $\ensuremath{\textbf{Search}}$  button next to the Select Position box.

tuntime Prompts - EP_SC_AllocDistCost		[
Prompt Text	Value	
* Select Employee	EMP_6310	WI_
🐺 * Select Entity	HR_6310	
* Select Position	POS_6330	90.
🐺 * Select Scenario	SU_Budget	
* Select Version	Working Flat	¥8

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.

Members Variables			
- 🔍 🎾 🌺 🖫 🏹 🖓 🖓	AV		
Member Name	Member Nan	ne .	
Position	A Position		
Default Position		_6310	
∡ All Positions			
Unspecified Position			
⊿ Total Existing Positions			
POS_President	· · · · · · · · · · · · · · · · · · ·		
POS_Senior Vice President for Academic Affairs and Provost			
POS_Senior Vice President for Administration and Chief Operati	<b>≫</b> Add		
POS_Senior Vice President for Agriculture and Natural Resources	Add		
POS_Senior Vice President for Health Affairs	8		
POS_Vice President and Chief Financial Officer	Remove		
PO5_Vice President and Chief Information Officer			
PO5_Vice President and General Counsel	Remove All		
A POS_Vice President for Business Affairs			
> POS_61			
4 005_52			
> PO5_6310			
POS_6320			
POS_6330			
POS_6340			
POS_6350			
POS_6351			
PO5_6352			
PO5_6353 V			
N DOC 6354			

- 23. Confirm *Scenario* and *Version* fields display **SU\_Budget** and **"Working Flat" or "Working Optimal"**.
- 24. Click the **Launch** button.

ompt Text	Value	
Select Employee	EMP_6310	98.
* Select Entity	HR_6310	98.
* * Select Position	PO5_6310	V.
* Select Scenario	SU_Budget	
Select Version	Working Flat	98.

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**.

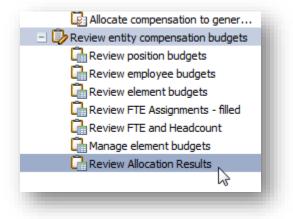
#### **Remember the BEST PRACTICE**

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.

Perior	: YearTota	Current Year of View	N: FY15	Qurrent Scenario: SU	Budget 🔍 🔍 Curre	nt Stage: W	orkin
Grenor	in rearroad			• _ current occinanor oo_		in ouger iv	ornan
Page 6	201 Admini	stration 🔻 🙌 Go					
			To	otal Compensation Expense	Allocated Expense	Difference	$\frac{1}{2}$
P_000047	00 Penrod	,Gloria J-54782460		52,080.90048	52,081	0	•
P_000050	09 To be H	lired 1		70,700	70,700	0	E
P_000051	32 Fussell,	Paula V-91509010		297,598	297,598	0	
P_000052	59 Johnso	n,Melba-87298149		38,382	38,382	0	
P_000052	73 To be H	lired 3		129,700	129,700	0	
P_000052	74 To be H	fired 5		147,840	147,840	0	
P_000053	74 Cook,P	atricia A-79057540		49,842	49,843	- 0	
P_000054	78 Adkinso	on, Janice L-92344280		68,615	69 <mark>,</mark> 925	-1,311	
P_000054	79 To be H	lired 4		0		0	
P_000054	80 Czaple	wski,Kimberly M-07027900		155,143	155,143	0	
P_000054	81 Moon,C	Courtney-79747570		73,475	73,475	-0	
P_000054	84 Wease	Amanda S-80397890,		70,803	70,803	0	
P_000054	86 Steven	son,Donald W-32273710		61,310	61,310	-0	
D 0000E4		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	Edit Position Details Edit Employee Details
P_00005480	Czaplewski,Kimberly M-07027900	Change atus 1
P_00005481	Moon,Courtney-79747570	Size-to-Fit
P_00005484	Wease,Amanda S-80397890	Filter  Sort
P_00005486	Stevenson,Donald W-32273710	Analyze
	Kiesel,Heather N-03094340	New Ad Hoc Grid

- 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.

Period: YearTotal		r: FY15 🛛 🌒 Current Scena	ario: SU_Budget	€]Curre	nt S
age 620	1 Administration 🔻 🙌 🛛 Go				
		Total Compensation Expense	Allocated Expense	Difference	÷
2_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

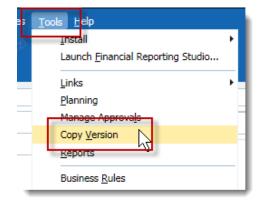
**NOTE**: Occasionally, an additional budgets may be required. For example, depending on state budget expectations, Working Cut may be required. You will receive notice from the UBO each year on which budgets are required.

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**

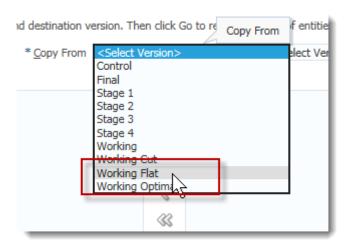
1. Click **Tools** > **Copy Version** from menu bar.



2. Choose **SU\_Budget** from Scenario drop down field.

Copy Version				
Planning Units				
Select a scenario, source version, and Scenario ersion.				
* Scenario <select scenario=""> Select</select>				
Available Entities				
· · · · · · · · · · · · · · · · · · ·				

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



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

retrieve the	list of entities.	Сору То
* <u>C</u> opy To	<select version=""> Working Working Flat</select>	•
cted Entiti	Working Flat	

5. Click **Go** button.

Copy Version						
Planning Units						
Select a scenario, source version, and destination version. The	n click Go to retrieve the list of entities.					
* Scenario SU_Budget   * Copy From Working F	ilat 🔽 * Copy To Working Optimal 🗹 🔒					
Available Entities	Selected Entities					

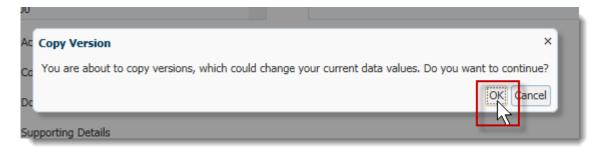
- Scroll down and choose your appropriate Budget Prep Entities (always starts with HR\_ and D\_) from the Available Entities list. Be sure to choose both or the financial data will not be copied over.
- 7. Click the right-pointing Select arrow.
- 8. Confirm Entity appears in the Selected Entities list.

* Scenario SU_Budget  * Copy From Work	ing F	Flat	* <u>C</u> opy To Wor	king Optimal 🔽 🔶
Available Entities			Selected Entities	
HR_6320			D_63400000	
HR_6330		~	HR_634001	
HR_634002		1		1
HR_634003		>>>		
HR_634004				
HR_634005		~		
HR_6350		$\langle \langle \rangle$		
HR_6351		~~		
HR_6352	5			
HR_6353	*			
UD_0054				

- 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.

Selected Ell	uues
(i) Information	×
The version has been successfully copied.	
	OK
a	5

## **Selecting Working Optimal for Editing**

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

▷ For <u>m</u> s
My Task <u>L</u> ist
⊿ 🖗 Budget Preparation
Review employee information
Mass adjust compensation and fringe
Manage position and employee data
> 🕅 Maintain position data
Maintain filled positions     Maintain employees by position     S     Fill to-be-hired vacancies      Calculations

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

Task - Maintain position data	Task Instructions		
Employee:Vacancy 634001 PPD-Bldgsrvc Admin-Ad	Gurrent Scenario: SU_Budget mir ▼ ◆	Current Stage: Working Flat	Q⊒ Current Year of View: FY17
	Position Position	Appual Default 40-	

**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**.

Members Variables Member Name ▲ Version > Working > Working Flat > Working Optimal > Final > Control > Stage 1 > Stage 2 > Stage 3 > Stage 4	>> Member Name ✓ Version "Working Optimal" Add © Remove Kemove All	
---	---	--

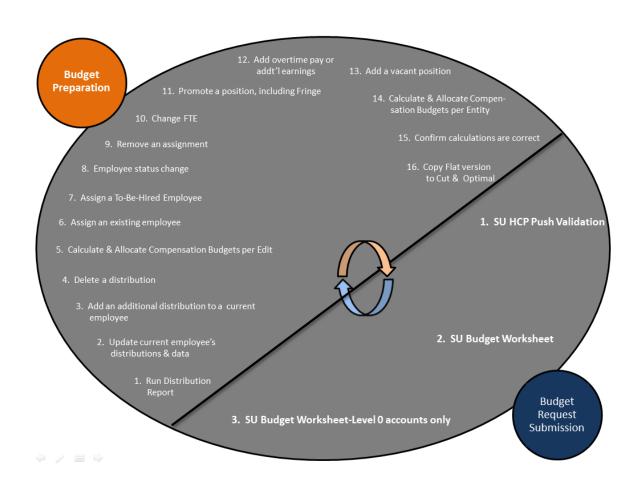
7. Confirm Current Stage icon displays Working Cut.

Task - Maintain position data	Task Instructions			
Employee:Vacancy 634001 PPD-Bldgsrvc Admin-Ad	Qi Current Scenario: SU_Budget mir ▼	Q Current Stage: Work	ing Optimal	Current Year of View: FY17

- 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.

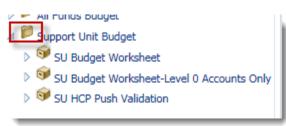
# Support Unit Budget Request



## 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 forms 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.
- 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.

6	ask List Status				
	Task - SU HCP Push Validation	ask Instructions			
	63100100 - PPD-DIRECTORS OFC-	Facilities	Support Unit Funding	▼ Working Flat	
					2

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).
- Select the Cost Pool for your department from the Cost Pool drop down field (if needed).
- Select the Commitment Source from the Commitment Source drop down field (if needed).
- 4. Click the **Go** button.

Task - SU Budget Worksheet	Task Instructions		
63100100 - PPD-DIRECTORS O	FC-, 💌 Facilities	Support Unit Funding	
4			FY17
			SU_Budget

## 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 - SU Budget Worksheet Task Instructions				
63100100 - PPD-DIRECTORS OFI	Support Unit Fundi	ng 💽 💽		
		SU_Bu		
	Working Cut	Working Optimal	Working Flat	Final
FTE				
621110 - EXEMPT TEAMS/USPS-EARNINGS		151,783	151,783	151,7
SU_TEAMS/USPS-Exempt Salaries		151,783	151,783	151,78
621120 - EX TEAMS/USPS-EARN FRNG POOL		50,544	50,544	50,54
SU_TEAMS/USPS-Exempt Fringe Benefit Pool Expense		50,544	50,544	50,54

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

Task - SU Budget Worksheet	Task Instructions				
63100100 - PPD-DIRECTORS	OFI Facilities	•	Support Unit Fundi	ng 🔻 🔶	
				FY1	7
				SU_Bu	dget
			Working Cut	Working Optimal	Working Flat
734100 - COMPUTER SUP	PPLIES			500	500
734200 - COMPUTER SOF	TWARE				
734800 - ATTRACT-COM	P EOUIP (NOT CAP)				
734900 - ATTRACT - COM	1P PERIPHERAL			3,000	3,000
738000 - MISC OTHER SI	JPPLIES				
739300 - BOOKS and PUE	BLICATN				

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.

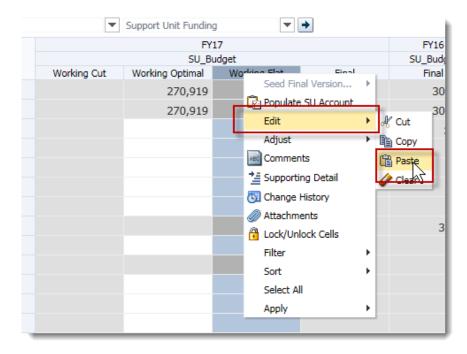
3. Find the GL account to copy from. Righ click and choose Edit >Copy data (or Cntrl+C).

•	Support Unit Funding		•			
	FY1	.7		F	(16	FY15
	SU_Bu			SU_E		al Version
Working Cut	Working Optimal	Working Flat	Final	Fi	Populate	SU Account
	270,919	270,919	4	Cut	Edit	
	270,919	270,919		Copy	Adjust	
				Past	Commer	ts
				Clear	挡 Supporti	ng Detail
			_		🛐 Change	History
					Attachm	ents
					🔒 Lock/Un	ock Cells
					Filter	
					Sort	
					Select Al	I
					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.

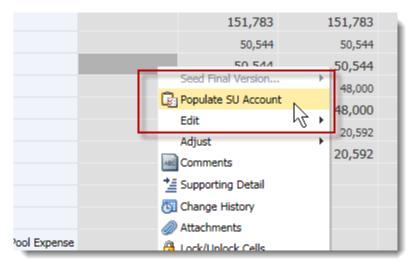
This form only displays accounts and the accounts don't expand (roll up). You will also not see totals at bottom of columns. Please note either the SU Budget Worksheet form or this form can be used to input budget. Both forms do the same thing they just have a different view.

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.**



Prompt Text	Value	
* Select Account(s) to add:	"621120"	) <b>(</b>
💱 * 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"	) (mail and a state of the stat
🛒 * DO NOT CHANGE (Set By Form)	"No Fund"	Ø.
🐺 * DO NOT CHANGE (Set By Form)	"No Program"	Ø.

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"	90-

4. 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.

- 5. Click the **Total SU Accounts Expand** icon.
- 6. Click the **SU\_Total Expense Expand** icon.
- 7. Click the SU\_Other Operating Expenses Expand icon.
- 8. Scroll down, if needed.
- 9. Click the **SU\_Travel and Training Expand** icon.
- 10. Click the **772000** object.

- 🔍 💯 🖓 🛄	
Member Name	
Select Account	
Total SU Accounts	^
✓ SU_Total Expense	
SU_Salaries and Benefits	
SU Other Personal Services	
SU_Other Operating Expenses	
SU_Contractual Services	
SU_Building Maintenance and Supplies	
SU_Moter Fuels and Lubricants	
SU_Repairs and Maintenance	
SU_Utilities (PPD and IA Only)	
SU_Data Processing	
SU_Office Supplies / Software / Materials / Pubs	
SU_Rent	
SU_Printing and Reproduction	
SU_Telephone	
SU_Postage and Freight	
SU_Insurance and Risk Management	
SU_Food	
SIL_Advertising/ Marketing	
✓ SU_Travel and Training	
771100.SU_Travel and Training(Shared)	
771200.SU_Travel and Training(Shared)	$\sim$
772000.SU_Travel and Training(Shared)	

11. 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.

embers	Variables				
	- Q 🎾 🎥 🏆 🚟 🦙 🔞			~~ ~ <del>/</del>	
lember Na	p so_noter r des and capitents			Member Name	
	SU_Repairs and Maintenance			4 Account	
	SU_Utilities (PPD and IA Only)	$\sim$		"772000"	
	SU_Data Processing		£		
	SU_Office Supplies / Software / Materials / Pubs				
	SU_Rent		Add		
	SU_Printing and Reproduction				
	SU_Telephone		>>>		
	SU_Postage and Freight		Add All		
	SU_Insurance and Risk Management		8		
	SU_Food		Remove		
	SU_Advertising/ Marketing		42		
	∡ SU_Travel and Training		Remove All		
	771100.SU_Travel and Training(Shared)				
	771200.SO_Travel and Training(Shared)	1.1			
	> 772000.SU_Travel and Training(Shared)				
	770000.50_Travel and Training(Chared)	- II			
	SU_Dues and Subscriptions				
	SU_Scholarships and Financial Aid				
	SU_Graduate Assistantship Tuition Waivers				
	SU_Miscellaneous Other/ Contingencies				
	SU_Other Expense Budget				
	SU_Total Other				
	SU_Transfers Out				
Þ	SU_Overhead Charge	*			

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.

on	n Runtime Prompts - PopulateAccount					
	Prompt Text	Value				
ks	* Select Account(s) to add:	771005, 713000, 799400				
ihe	📑 * 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 acount. 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	1
SU_Travel and Training	U	15,56/	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 visable (as long as you did not suppress zeros in your user preferences) for the current fiscal year.

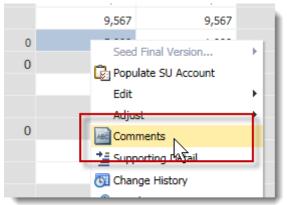
## **Comments and Supporting Details**

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**

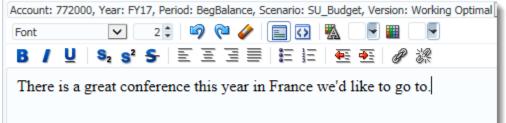
Comments can be added to Level 0 or rollup accounts in both Budget Preparation forms and All Funds Budget forms.

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

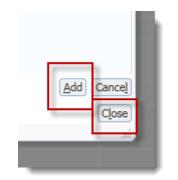


3. Click **Add**, then type in the desired comment.





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



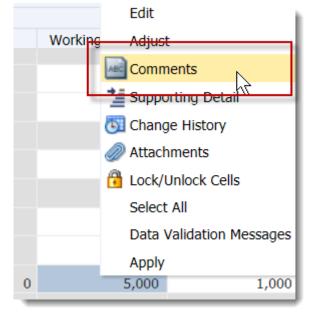
You can tell a cell has a comment attached by noted the icon that appears in the upper, right corner of the cell.



**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**

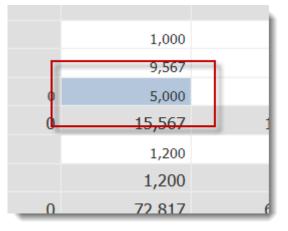
- 1. **Right-click** the cell that has a comment.
- 2. Click the **Comment** option.



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	ADM Entity: 63100100 - F		Cost Pool: Facilities
Commitment Source: Support Unit Funding					
Account: 772000, Year: FY17, Period: Begl Actions - View - + X	Balance, Scenario: SU_Budge	t, Version: Working Op	otimal 🗸		
6					
Comment				User	Date
There is a great conference this yea	ar in France we'd like to	go to.		rmitchell	9/27/16

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



**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.

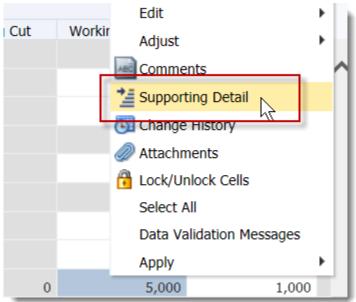
Supporting Details are "calculating" explanations you can add to specific cells if desired.

• 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.



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



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

Actions - View	- 🞄 🖧 💥 🦓	e 💀 木 🕆 🔒 (	🗋 🛃 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 -	- 🎄 🜲 💥 🍇 🖉	e 🚈 🔺 🗸 😲 🛙	🗎 🛃 Detach 🛛 📮
	Label	Operator	FY17 BegBalance SU_Budget Working Optimal
>	Airfare	+ 🗸	2000
Þ	Total		2,000.0

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

Actions - View -	• • 🐺 🛪 🛚	<b>a</b> 🕂 🕶 🙀	🖳 💼 📑 Detach	Ŧ
	Label	Operator	FY17 BegBalance SU_Budget Working Optimal	
D	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 Deta	il				
Actions - View	- 👬 📲 🗙	🍓 🅶 🗻 🕥	- 🕛 (	Detach	青青
	Label	Operator		FY17 BegBalance SU_Budget Working Optimal	
Þ	Airfare	+	$\checkmark$	2,000.0	
4	Lodging	+	$\checkmark$		
>	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.

86

Supporting Detail					
	9 9 0.0 00. 7			20000225	_
Actions - View -	🞄 🚕 🗶 🍇 🍕		J	Detach	₹ Î
	Label	Operator		FY17 BegBalance SU_Budget Working Optimal	
D	Airfare	+	<b>~</b>	2,000.0	
4	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.

Entity: 62010	000 - HR-HR ADMINIS	STR/	\TIO	N	Cost Pool: Gene	
Add Child	Add Sibling De		ete		Delete All	
L	3	J			FY15	
					BegBalance	
					SU_Budget	
					Working Cut	
Airfare			+	•	3,000	
Lodging			+	•	125	
Hotel Rate			+	•	125	
Untitled			+	•		
			Tota	al:	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.

Actions - View -					
	- 👶 🖧 🍇	🔁 🚈 🔺 🗸		Detach	
	Label	Operator		FY17 BegBalance SU_Budget Working Optimal	
▶	Airfare	+	$\checkmark$	2,000.0	
4	Lodging	+	$\checkmark$	3,000.0	
$\rightarrow$	Hotel Rate	+	~	300.0	
Þ	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**.

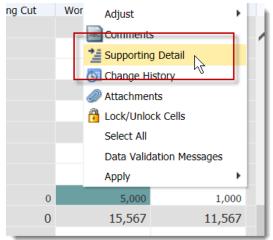


14. Scroll down and notice that the cell(s) with the supporting detail will now be blue/green.

	1,000	
E	9,567	- I
•	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). Supporting Detail

Actions 🗸	- View 🗕 🎄 🐝 🌂	🕻 📲 🚈 🗻 🗸 🗸	😲 💼 🛛 🚮 Detach	TE TE
	Label	Operator	FY17 BegBalance SU_Budget Working Optimal	_
>	Airfare	+	2,000.0	
Þ	Lodging	+	✔ 3,000.0	
Þ	Total		5,000.0	

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

4. Click the **Save** button.

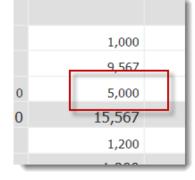
After saving, you will determine whether you wish to remove the value and the supporting details from the cell on the main screen, or just delete the supporting details.

- Choosing Yes  $\rightarrow$  all data will be removed, including the cell value.
- Choosing No  $\rightarrow$  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).



**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.

File	Home	Insert Page	Layout F	ormulas	Data F	Review	View Sm	art View						a 🕜 🗆 🕯
* .	Calibri	- 11	· A A	= =	_	_	Genera	2	S		11	¦ •= Insert →	Σ·A	
ste 🛷	BI	Π - 🖂 -	<u></u> → <u>A</u> →		■律律	<u>+a</u> + ▼	\$ - % ,	00. 0. <b>→</b> 0.◆ 00.	Conditiona Formatting		Cell Styles *	📳 Format 👻	Sort	& Find & r ▼ Select ▼
oboard 🛛	ā.	Font	6	i A	lignment	- Gi	Number	r G		Styles		Cells	Edi	ting
А	В	С	D	E	F	G	Н	1	J	K	L	M	N	0
A	В	C	D	E	F	G	Н	I	J	К	L	M	N	0
A	В	С	D	E	F	G	Н	I	J	К	L	M	N	0

## 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.

	17 - (	(≝ -  ∓					Boo	ok1 - Microso	oft Excel	1					- 0	23
File	Ho	me 1	insert Page	Layout	Formulas	Data I	Review	View Sm	art View						∾ 🕜 🗆	đ
Ĉ	∦ ⊫⊒ -	Calibri	- 11	· A A	= =	≫		Genera	4				¦a•■ Insert →	Σ - -	27 🕅	
aste *	<b>V</b>	BI	<u>u</u> - <u> </u>	🍐 - <u>A</u> -		≡ ∉ ∉	• <b>a</b> • •	\$ - % ,	00. 0.⇒ 0.♦ 00.	Conditional Formatting		Cell Styles *	- Format •	_	Sort & Find & Filter ▼ Select ▼	
pboa	rd 🗔		Font	ſ	s 🖌	Alignment	5	Numbe	r G		Styles		Cells		Editing	
	A1		• (*	f <sub>x</sub>												
	A1		<b>▼</b> (°	f <sub>x</sub>												
	A1 A	В	• (* C	fx D	E	F	G	Н	1	J	К	L	M	N	0	
		В			E	F	G	Н	I	ſ	К	L	M	N	0	
		В			E	F	G	Н	I	L	К	L	M	N	0	

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

File	17) - (21 - Home	Insert Page Layout For	Book1 - Vicrosoft Excel	
) pen	්තු Undo ලූඩ Redo	Copy Data Point Paste Data Point Functions •	P H I P + P + P + P + P + P + P + P + P + P	
art		Options		×
	A1	Member Options	Change global Smart View options.	
		Data Options	General	i
	A	Advanced	Shared Connections URL: https://qat-budget.erp.ufl.edu/workspace/Smar	-
		Formatting	Number of Undo Actions 9	*
		Cell Styles	Number of Most Recently Used items 9	<b>÷</b>
-		Cell Styles	Delete All MRU Items	
	- 1	Extensions	Logging	(j)
	_		Log Message Display Errors	-
	- 1		Route Messages to File C:\Users\rmitchell\AppData\Roaming\Oracle\Sma	rtV

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

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

3. Click **OK**.

lember Opti	Change global Smart View options.	
ata Options	Conoral	
Advanced	Shared Connections URL:	get.erp.ufl.edu/workspace/SmartViewProviders 👻
Formatting	Number of Undo Actions	9
-	Number of Most Recently Used items	9
Cell Styles	Delete All MRU Items	
extensions	Logging	<u>(</u> )
	Log Message Display	Errors
	Route Messages to File	C: \Users \rmitchell \AppData \Roaming \Oracle \SmartV
	Clear Log File on Next Launch	
	Display	<u>(</u> )
	Language	English 💌
	Adjust Column width	
	Display Smart View Shortcut Menus Onl	у
	Disable Smart View in Outlook	
	Enable Ribbon Context Changing	
	Disable options that are not valid for th	e active connection
	Compatibility	<u>(</u> )
	Reduce Excel File Size	
	Improve Metadata storage	
	Refresh Selected Functions and their de	ependents
	Performance	<u>()</u>
	Enhanced Query Performance (Formula	and Comment Preservation will be Disabled)
	][	
Help Reset		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.

ata Options	Suppress Rows		
dvanced		Suppress rows t	hat have no data. 🛈
	🔲 No Data / Missing 🖌 🗕		
ormatting	Zero	uppress zeros.	
ll Styles	No Access		
	Invalid		
tensions	Underscore Characters		
	Repeated Members		
	Suppress Columns		<u>(</u> )
	🔲 No Data / Missing	-Suppress column	is that have no data.
	🗌 Zero (l)		
	No Access (t)		
	Replacement		0
	#NoData/Missing Label:	. <	Display #Missing-
	#NoAccess Label:	#No Access	as other 🔹
	#Invalid/Meaningless:	#Invalid	characters.
	Submit zero		
	Display Invalid Data		Suggest to use "-"
	Enable Essbase Format String		instead of "0".
	Mode		(j)
	Cell Display	Data	-
	Navigate Without Data		
	Suppress Missing blocks		
Help Reset			OK Cancel

## **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.

🚺 🔒 🕤 👌							Book1 - Exc	e		
FILE HOME	INSERT	PAGE LAYOU	T FORMUL	AS DATA	REVIEW	VIEW D	EVELOPER	SMART V	IEW PD	F Architect
Panel Connections	්බු Undo @I Redo	Edit Copy	Refresh S	ubmit Data	<ul> <li>P Help ▼</li> <li>Sheet Info</li> <li>More ▼</li> <li>General</li> </ul>			-		
Panel Access and manage s connections, task lists			E	F G	н	I	J	К	L	м
Gracle Smart Vie Tell me more	w for Office									

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

File	Home	Insert	Page Lay	out	Fc
Open	යි) Undo (21 Redo	Copy D Paste D <b>E</b> Function	Data Point	Refre	<b>e</b> sh
Start		Edit			Dat
	A1	(0	X 🗸 f;	e l	
Smart Vi	ew		-	×.	
Smart	View Home		☆ • «		L2
	hared Conn onnections fro		pository		3 4
	rivate Conn cally defined		and		5
sł	nortcuts to sha				7
Recen	tly Used —				

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

GatorLink Userna	me	Ť		
1		L Change Pa	ssword 🕥	
Password		Forgot Pass	sword 📀	E
		Create Acc	ount O	
	Login	Trouble Sig On?	ning 🗿	

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

B8       fx         Smart View       ▼ ×       A       B         Shared Connections       ↑       1       1         Select Server to proceed       ↑       3       4         Oracle ® Essbase       ↑       4       5         Oracle ® Hyperion Planning, Fusion Edition       5       6         Reporting and Analysis Framework       7       8	Open Start	්තු Undo (21 Redo	Copy Data Copy Data Paste Data Functions Edit	Point	Re	efresh Da	Submit Data	Options	P Help She ■ Mor eneral
Shared Connections 1   Select Server to proceed >   Oracle & Essbase 4   Oracle & Hyperion Planning, Fusion Edition 5   Reporting and Analysis Framework 6   7 8		<b>B</b> 8	• (*	f,	c				
Shared Connections <ul> <li>✓<ul> <li>2</li> <li>3</li> <li>4</li> <li>5</li> <li>6</li> <li>7</li> <li>8</li> <li>4</li> <li>5</li> <li>6</li> <li>7</li> <li>8</li> <li>4</li> <li>5</li> <li>6</li> <li>7</li> <li>8</li> <li>1</li> <li>2</li> <li>3</li> <li>4</li> <li>5</li> <li>7</li> <li>8</li> <li>1</li> <li>2</li> <li>3</li> <li>4</li> <li>5</li> <li>7</li> <li>8</li> <li>1</li></ul></li></ul>	Smart Vi	ew		-	×		Α	В	
Select Server to proceed       4         Oracle® Essbase       4         Oracle® Hyperion Planning, Fusion Edition       5         Reporting and Analysis Framework       6         7       8	Shared	Connectior	is 🟠	<del>•</del> «					
Oracle@Essbase       5         Oracle@Hyperion Planning, Fusion Edition       5         Reporting and Analysis Framework       6         7       8	Select S	Server to proc	eed 👻	→ <b>-</b>	-	3			
Reporting and Analysis Framework     6       7     8					1				_
6       7       8					Ш				- 1
8	_	· ·		10	1				-
						7			- 1
						8			_!
9						9			

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.
- 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.

Smart View 💌 🗙		А
Shared Connections 🔗 👻 🐇	1	
	2	
Oracle® Hyperion Planning, Fusion Edition 🔻 🔶 👻	3	
	4	
ERP-QAT-HYP-AP2	5	
FY14PSPB     UBO PSPB	6	
i i i i i i i i i i i i i i i i i i i	7	
🕀 🗭 All Funds Budget	8	
· ☐ · · [] Human Capital Planning	9	
Support Units	10	
SU Budget Worksheet-Level 0 Ac	11	
SU HCP Push Validation	12	
🗄 🗭 Task Lists	13	

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

Analyze Ad Hoc	Refresh	POV	Cell Comments Cell Comments Supporting Deta Document Attac	ails		<ul> <li>▶ Drill-through</li> <li>▶ Submit Data</li> <li>■ More *</li> </ul>	환화 Approvals 행 Copy Version Workflow								
			- ERP-QAT-HYP-AP	2_080_	PSPB_1		n 👻 Su	pport Ur	it Funding	•	Working Fl	lat 🔻 Re	fresh		* X
Smart Vie Shared		ons		▼ × ≪ -	1	A			В	С	D	E	F		15
Oraclas	- Humorian I	Donning E	iucion Edition 📼 🛋	_	3				YearTotal	July	August	September	October	_	udget r Dec

8. You are encouraged to use the Smart View forms in the same order as you did in Hyperion. Please refer to procedures <u>SU HCP Push Validation</u>, <u>SU Budget Worksheet</u> or <u>SU Budget Worksheet-Level 0 Accounts</u> 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.

Insert Page Layout Formulas Data Review View Smart View	v Planning				a 🕜 c
📑 Cell Comments 🔒 Lock 🔄 Drill-through 📲 Approvals					
📑 🔚 Supporting Details 🛛 🖩 Calculate 🛛 🗊 Submit Data 🛛 🗐 Copy Version	i				
POV					
Data Workflow					
sheet - ERP-QAT-HYP-AP2_UBO_PSPB_1					
ADMINISTRATION	Support Unit Fund	ing 🔻 Refresh			
• (fx   125000					
A	В	С	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	- E	125000
	120000	125000	130000	- L	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.

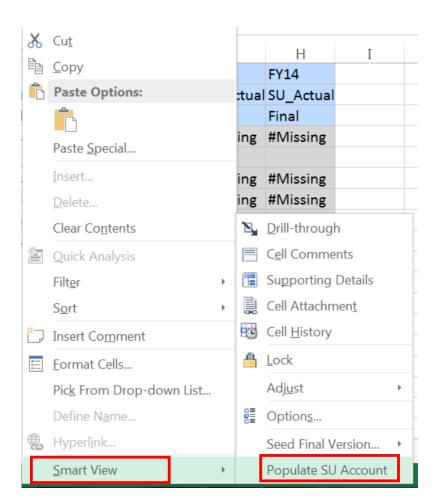
## Copy, Paste and Cut

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.

6	aunch Business Rule	J
	Plan Type V OPERBUD	
	Business Rule Plan Type Type PopulateAccount OPERBUD Rule	
	Runtime Prompts	44

- 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.

Oracle Smart Vi	ew for Of
4	
🚺 🚺 wa	s successful.
	ОК

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	-	-	-	-	-	-

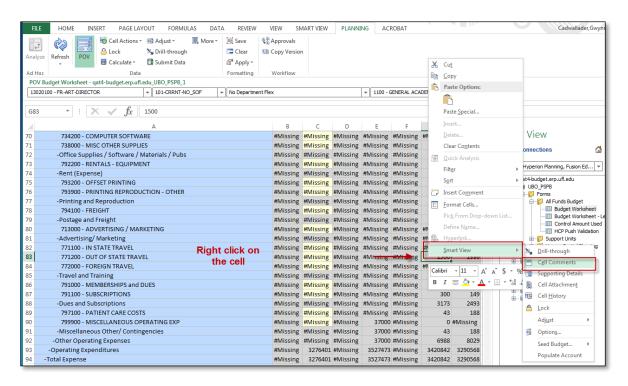
You can now begin budgeting for this account.

**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.

omments			- • ×
Entity: 13020100 - I ACADEMIC INSTRI	FR-ART-DIRECTOR, FundBudRefSOF JCTION, Cost Pool: No Cost Pool, Cor	: 101-CRRNT-NO_SOF, Dept Flex: No Department Flex, Program: mmitment Source: No Commitment Source	1100 - GENERAL
G83 - 771200 - OU	T OF STATE TRAVEL, FY15, Year 💌		
User	Date Entered		<b></b>
			-
Hide Intersection	Apply to all selected cells		Close

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

Comments		×
Entity: 13020100 - FR-ART-DIRECTOR, FundBudRefSOF: 1 ACADEMIC INSTRUCTION, Cost Pool: No Cost Pool, Comm	01-CRRNT-NO_SOF, Dept Flex: No Department Flex, Program: 1100 - GENER, nitment Source: No Commitment Source	AL
G83 - 771200 - OUT OF STATE TRAVEL, FY15, Year 💌	SAVE	
User Date Entered	This is a comment.	^
1		
		÷
Hide Intersection Apply to all selected cells	Close	

**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.

Comments			- • •							
Entity: 13020100 ACADEMIC INST	- FR-ART-DIRECTOR, FundBudRefSOF: 1( RUCTION, Cost Pool: No Cost Pool, Comm	11-CRRNT-NO_SOF, Dept Flex: No Department Flex, Program: tment Source: No Commitment Source	1100 - GENERAL							
G83 - 771200 - OUT OF STATE TRAVEL, FY15, Year 🔽 🛛 🦉 💥 📄										
User	Date Entered		*							
gcadwallader	8/3/16 11:46 AM	This is a comment.								
			<b>*</b>							
Hide Intersection	Apply to all selected cells		Close							

- 30. Click Close.
- 31. Note the cell is outlined in blue.

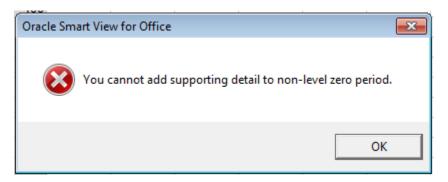
· · · · · · · · · · · · · · · · · · ·	0	
-Advertising/ Marketing	#Missing	130
771100 - IN STATE TRAVEL	#Missing	160
771200 - OUT OF STATE TRAVEL	1500	1386
		600

## **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.

	LE HOME INSERT PAGE LAYOUT FORMULAS	DATA R	EVIEW	V	IEW SMART VIEW	PLANNI	ING ACRO	DAT
						PLAININ	ING ACK	JDAT
	1 🚱 📰 🕸 Cell Actions 🕶 🕅 Adjust 🕶 📃 Mol				Approvals			
Ana	- Cock S Drill-through	Cle	ear	) (	Copy Version			
	🗸 🔲 🖬 Calculate 🛪 📑 Submit Data	🚰 Ap	ply -					
Ad I	loc Data	Forma	tting	١	Workflow			
PC	V Budget Worksheet - qat4-budget.erp.ufl.edu_UBO_PSPB_1							
13	020000 - FR-ART = 101-CRRNT-NO_SOF	👻 No De	partmer	nt Flex	(		👻 1100 - GE	NERAL ACADEM
_			_	0.0	1 11 A T A			
C1	7 • : $\times \sqrt{f_x}$ #Missing			Calil				
	🗚 Right Click 🛌	В		В	$I \equiv \Delta \cdot \Delta \cdot \Box \cdot$	€.0 .00 .00 →.0	💉 G	н
17	749000 - REPAIRS and MAINTENANCE - OTHER	#Missing	#Mis			'''''ng		314
18	-Repairs and Maintenance	#Missing	_		Cu <u>t</u>	ng		754
19	731300 - AUDIO/VISUAL EQUIPMENT	#Missing	210	E-	<u>C</u> opy	ng		412
20	732100 - OFFICE SUPPLIES - GENERAL	#Missing			Paste Options:	ng	,	304
21	734100 - COMPUTER SUPPLIES	#Missing			<u>_</u>	ng	,	190
22	734800 - ATTRACT-COMP EQUIP (NOT CAP)	#Missing				ng		#Missing
23	738000 - MISC OTHER SUPPLIES	#Missing	#Mis		Paste <u>S</u> pecial	ng		9408
24	739300 - BOOKS and PUBLICATN<\$250 NON-LIB	#Missing	#Mis		Insert	ng	72	#Missing
25	-Office Supplies / Software / Materials / Pubs	#Missing	#Mis		Delete	ng	4038	10314
26	792100 - RENTALS - SPACE	#Missing	; #Mis		Clear Contents	ng	g #Missing	120
27	-Rent (Expense)	#Missing	#Mis	67	_	ng	#Missing	120
28	794100 - FREIGHT	#Missing	; #Mis		Quick Analysis	ng	#Missing	150
29	-Postage and Freight	#Missing	; #Mis		Filt <u>e</u> r	l ng	#Missing	150
30	771100 - IN STATE TRAVEL	#Missing	; #Mis		S <u>o</u> rt	l ► ng	; 0	170
31	771200 - OUT OF STATE TRAVEL	#Missing		*7	Insert Co <u>m</u> ment	ng		104
32	772000 - FOREIGN TRAVEL	#Missing			Format Cells	ng		500
33	-Travel and Training	#Missing			-	ng		774
34	791000 - MEMBERSHIPS and DUES	#Missing			Pick From Drop-down List.	TIS .	#Missing	125
35	-Dues and Subscriptions	#Missing			Define N <u>a</u> me	N N	<u>D</u> rill-throu	gh
36	799900 - MISCELLANEOUS OPERATING EXP	#Missing		8	Hyperl <mark>M</mark> k	E	C <u>e</u> ll Comn	nents
37	-Miscellaneous Other/ Contingencies	#Missing			Smart View		Supporting	Details
38 39	-Other Operating Expenses	#Missing			#Missing #Missing #I	Missi a	Cell Attack	men <u>t</u>
39 40	-Operating Expenditures -Total Expense	_			#Missing #Missing #I	VIISSI -	-	v
40	-Net Revenue and Expense	-			#Missing #Missing #I			, 
	-Net Revenue and Expense	-		-	#Missing #Missing #	_	<u>L</u> ock	

34. Click on Add Child.

upporting 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 12> 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		
• Program: 1100 - GE	NERAL A	FundBudRefSOF: 101-CRRNT-NO_SOF     Dept Flex: No Department Flex CADEMIC INSTRUCTION     Cost Pool: No Cost Pool mitment Source     Account : 749000 - REPAIRS and MAINTENANCE - OTHER
⊕ Expand 🗆 Co	llapse	Add Child      Add Sibling      X Delete      Delete All     Add Sibling     Y Move Up     Own     Ø Duplicate Row     12b Fill
Copy 💼 Paste		
		FY17/BegBalance/Budget/Working
▶Rental Car	+	150.00
L	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 multply.

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

Supporting Details		
	IERAL AC	FundBudRefSOF: 101-CRRNT-NO_SOF     Dept Flex: No Department Flex ADEMIC INSTRUCTION     Cost Pool: No Cost Pool nitment Source     Account: 749000 - REPAIRS and MAINTENANCE - OTHER
Expand      Coll	apse	🕈 Add Child 🛛 🖶 Add Sibling 🛛 🗙 Delete 🗙 Delete All 📗
	mote 4	습 Move Up 🕂 Move Down 🛛 🖋 Duplicate Row 12Þ Fill 📔
🖹 Copy 💼 Paste		
		FY17/BegBalance/Budget/Working
Rental Car	+	150
Tolls	+	15
E Hotel	+	740
Hilton	+	Double click to
L-4 nights	*	4
L	·· Total:	so 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.

Supp	orting Details				
• 🖬	ntity: 13020000 - F	R-ART	FundBudRefSOF: 101-CRRNT-NO_SOF     Dept Flex: No Department Flex		
• Pr	Program: 1100 - GENERAL ACADEMIC INSTRUCTION     Cost Pool: No Cost Pool				
• Co	ommitment Source:	No Comr	mitment Source • Account : 749000 - REPAIRS and MAINTENANCE - OTHER		
. 🕀	Expand 🗆 Col	apse	+ Add Child 💠 Add Sibling 🛛 🗙 Delete 🗙 Delete All		
4	Promote 🖒 De	mote	☆ Move Up		
<u> </u>	Copy 😭 Paste				
			FY17/BegBalance/Budget/Working		
	-Rental Car	+	150		
⊳	Tolls	+	15		
	+ Hotel	+	740		
	Hilton	+	185		
	-4 nights	*	4		
	L	- 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.

<b>B</b> ) E	Booki I.				
	ni	ghlighted in orange.		с	D
1				FY14	
2				Budget	
3			Working Cut	Working Optimal	Working Flat
4			Base	Base	Base
5	FTE		-	3.00	3.0
6					
7	611110 - FACULTY-EARN	INGS	600.00		7 600.0
8	-Faculty Salaries		600.00		600.0
10	+Faculty Fringe Benefit	Coll with supporting	129.20		139.2
13		Cell with supporting	400.00		2,000.0
16	+Faculty Additional Pay	dotaile	40.60		58.0
18		details	000.00		1,000.0
20	+Faculty-COM Fringe Ben		187.00		187.0
22	+Faculty-COM Additional	•	1,000.00		
24		Pay Fringe Benefit Pool Expense	 29.00		
25	-Faculty Salaries and Bene		4,395.80		3,984.2
49	+Teams Salaries and Benef		103,760.00	103,760.00	103,760.0
53	+Other Salaries and Benefi	a a ma ma a m t a	 -	-	-
55	+Salary and Benefits Budge		 -	-	-
56	-Salaries and Benefits	has blue outline.	 108,155.80		107,744.2
83	+Other Personal Services	has blue butille.	2,354.70		
223	+Other Operating Expenses		1,000.00	1,000.00	0.0
237	+Total Other		-	-	-
243 244	+Transfers Out -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.

 $\mathfrak{G}$