PST954 Hyperion Budgeting

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

October 2016

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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 and Responsibility Centers enter budget data through web forms using a web browser. Current year budget and two years of actual data are provided to facilitate the budgeting process. Support Units and Responsibility Centers can also choose to open these same forms in Smart View which is integrated into Excel to input and submit the budget through Excel or use the Smart View Ad Hoc functionality.

UF 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), College, State Funded Center (SFC) or hybrid.

Starting in Noveember 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

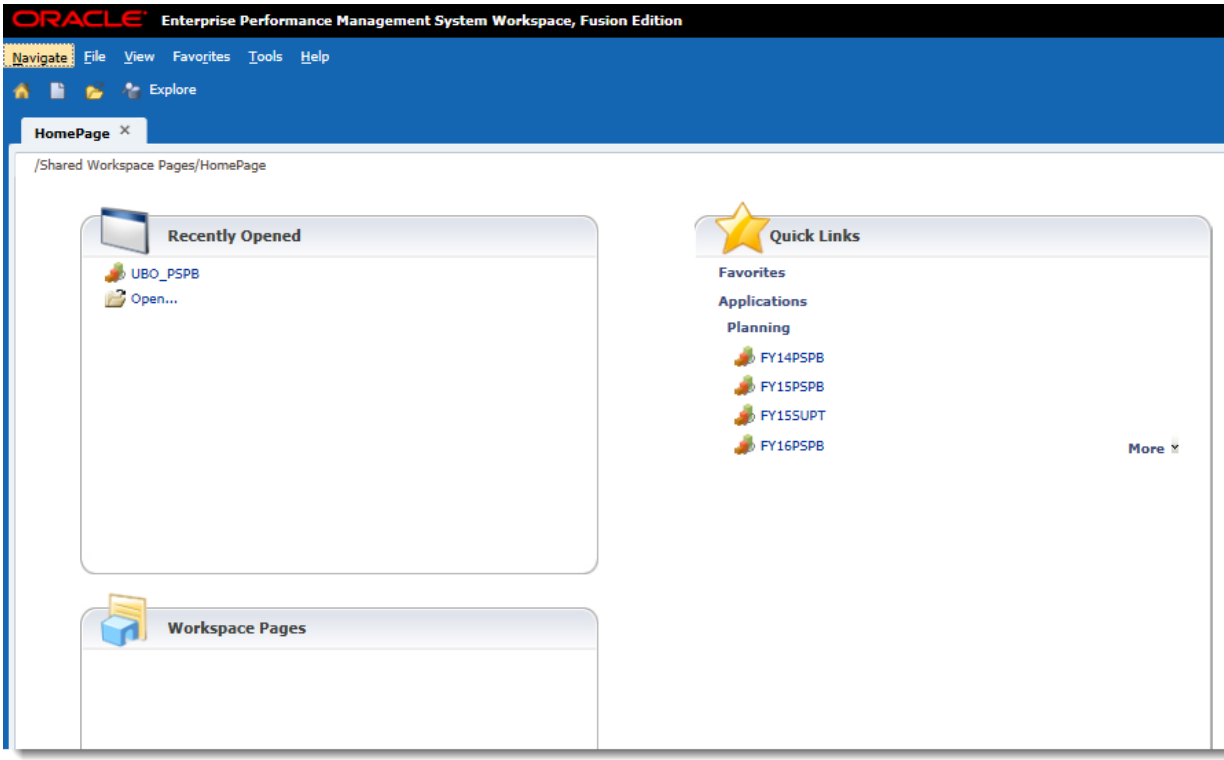
Starting in May/June, all budget personnel will receive their final budgets and can then manage and distribute the monies as appropriate across their Budget Preparation and All Funds Budget.

Click here for All Funds Budget Whole Cycle Document

Logging In

The Hyperion budget submission application is incorporated to the myUFL portal. After logging into myUFL, navigate to the NavBar. Go to Main Menu > Budgeting > UF Hyperion Budgeting. ***Internet Explorer 11 is the recommended browser.***

Hyperion opens with the HomePage displayed by default.



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.

NOTE: Also note that previous fiscal year data will appear on the HomePage. For example, above you can see FY14PSPB, FY15PSPB, and FY16PSPB. As the years pass, you will see FY17PSPB, FY18PSPB, etc. These applications are the view only data that was entered for that fiscal years submissions.

Setting Hyperion User Preferences

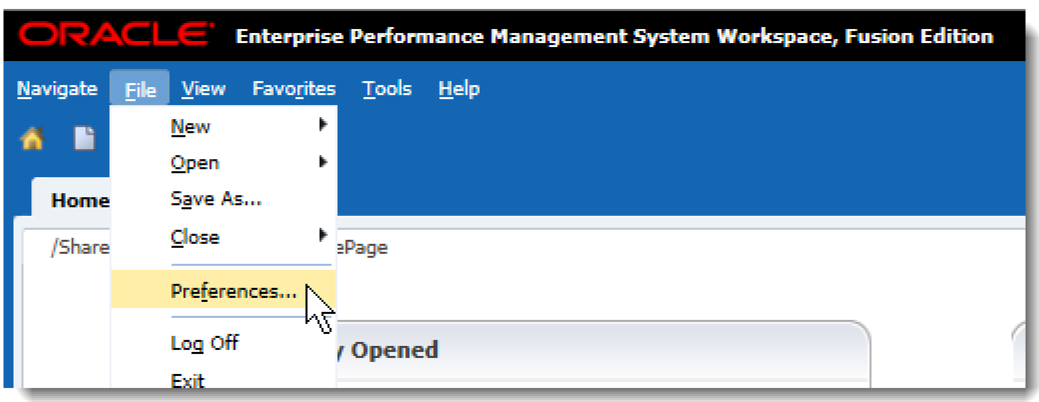
Changing Hyperion Display Settings

The display options must be established prior to using the Hyperion application for requesting UF budgets. It allows you to set the default page and the display options such as thousand number separator, demical separator et. al. It also allows you to set the user variables to display specific content in the forms.

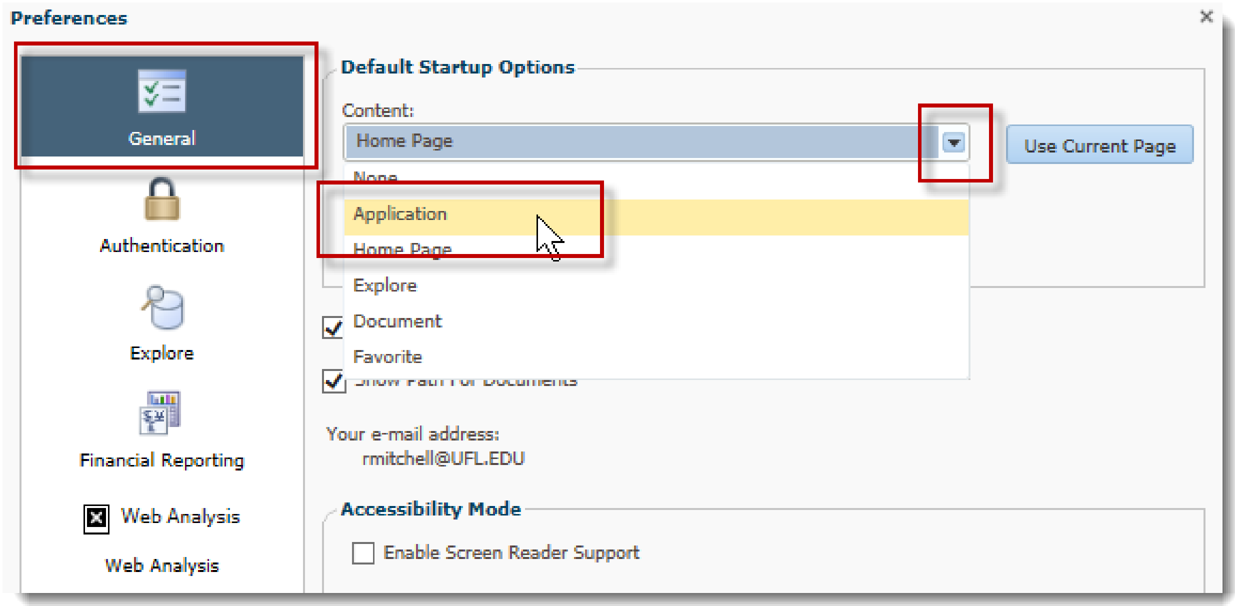
Set the default page when you log in to Hyperion

1. Go to myUFL and navigate to the NavBar. Click on **Main Menu > Budgeting > UF Hyperion Budgeting.**

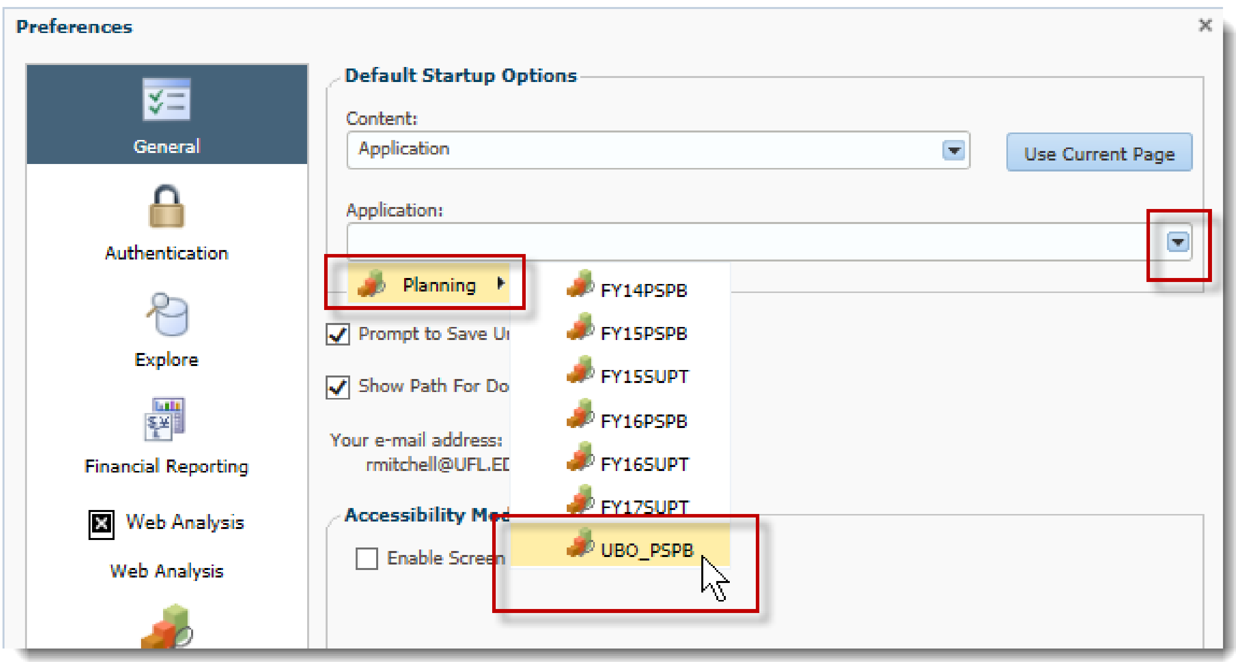
2. Go to **File** > **Preferences** from the Menu bar.



3. If you prefer the Homepage to be the default page when you log into Hyperion, from the **General** section, you can keep the content for **Default Startup Options** to be "**Homepage**". If you prefer the UBO_PSPB to open by default, from the **General** section select the **Home Page** drop down arrow and choose **Application**.



4. Now select the **Application** drop down arrow, choose **Planning** > **UBO_PSPB**



5. Click **OK**.

Note: Most users keep Homepage as the default page. It allows the users to look at all the applications that are available in Hyperion.

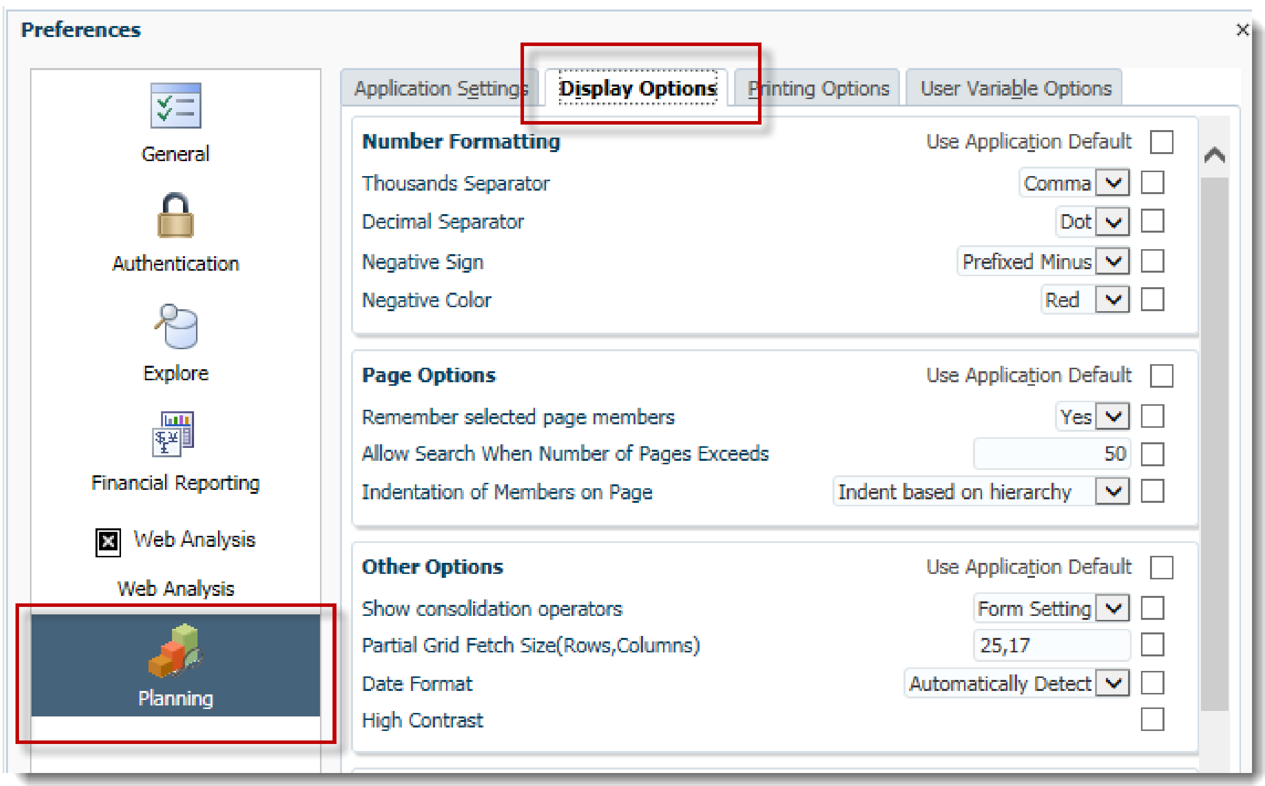
Set Display Options

You must go to UBO_PSPB first to set the display options.

6. Open UBO_PSPB.

7. Go to **File > Preferences.** Or click on the **Preferences** section on the left side menu area.

8. Go to Planning. Click on the Display Options tab.



9. 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

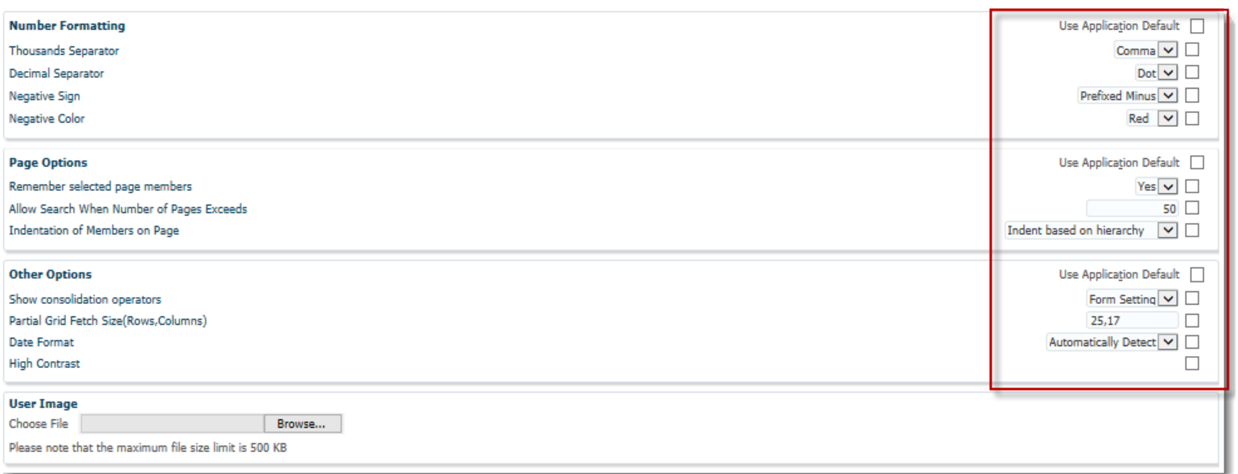
- Thousands Separator – choose Comma
- Decimal Separator – choose Dot
- Negative Sign – choose Prefixed Minus
- Negative Color – choose Black

Page Options

- Indentation of Members on Page – choose Indent based on hierarchy
- This option dictates the look and feel of data categories on web forms

Other Options

- Using the default settings is highly recommended

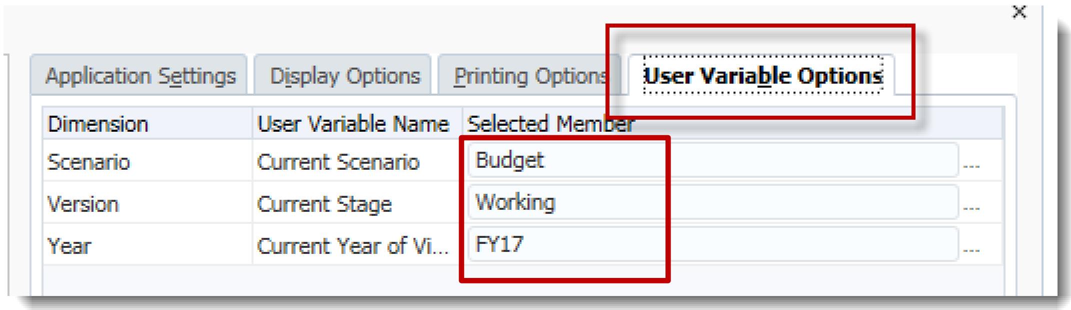


Changing Hyperion User Variable Settings

As part of the Hyperion preference setup, you will indicate three User Variable settings. These variables define the data content in the forms. For the All Funds Budget cycle, the variables should be setup as below.

- Scenario: Budget
- Version: Working
- Year: FYXX (the fiscal year you are budgeting for)

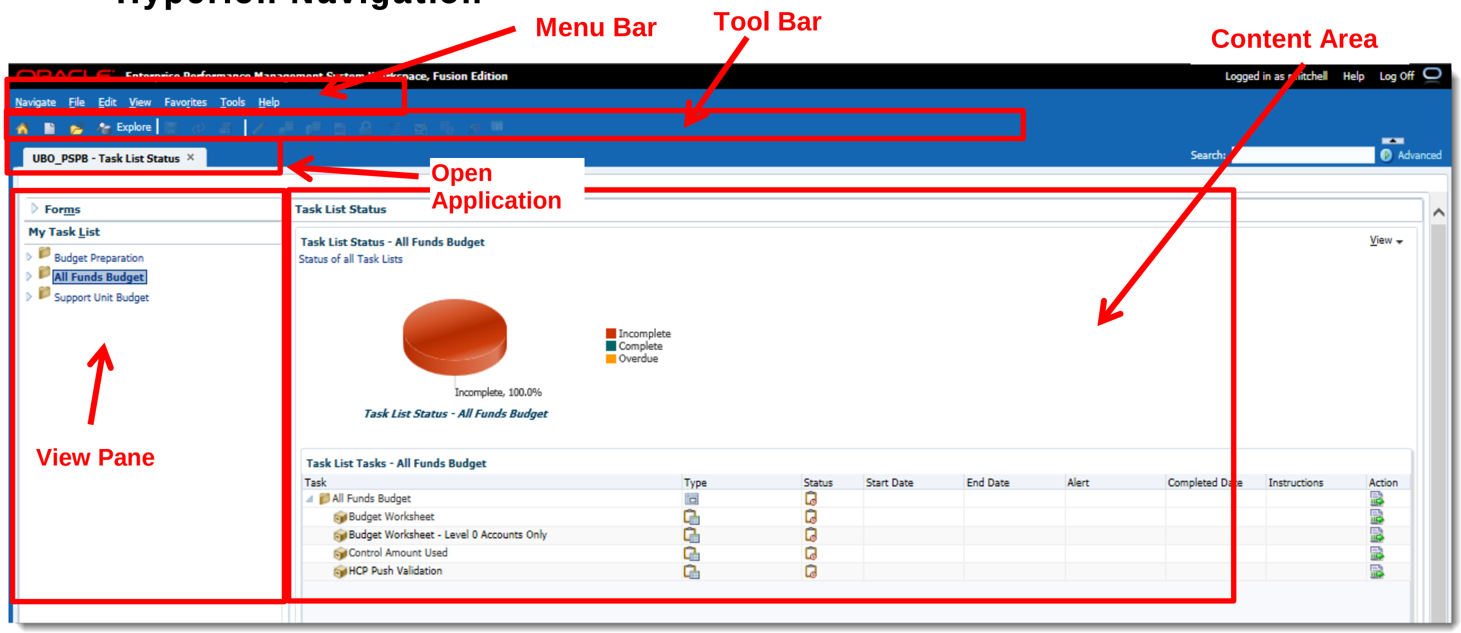
10. Click on the **User Variable Options** tab. Type in or select the proper variables.



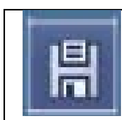
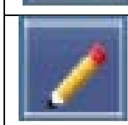
11. Click **Save**, then **OK**.
    You are now ready to navigate through the application.

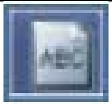
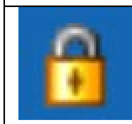
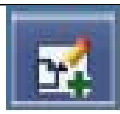
Workspace

Hyperion Navigation

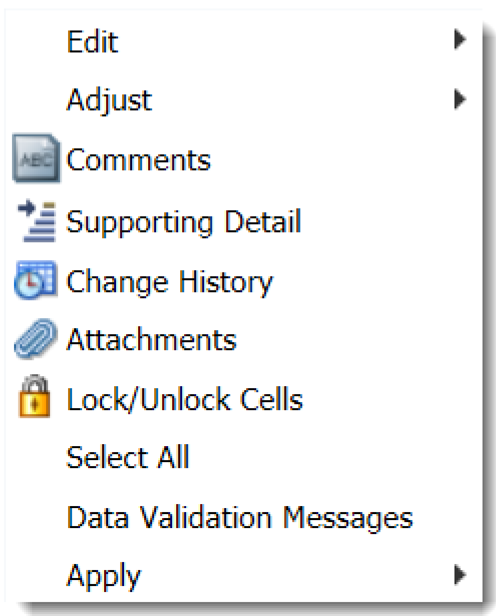


Toolbar Icons

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

	**Comment**	**Add or edit comment to the selected cell.**
	**Lock/Unlock Cells**	**Lock or unlock cells when spreading data.**
	**Supporting Detail**	**Add or edit supporting details to selected cell.**
	**Add/Edit Document**	**Add or edit attached documents for the selected cell.**
	**Instructions**	**Show the instruction details for the open data form.**
	**Open in Smart View**	**Open data from in Smart View.** *(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.

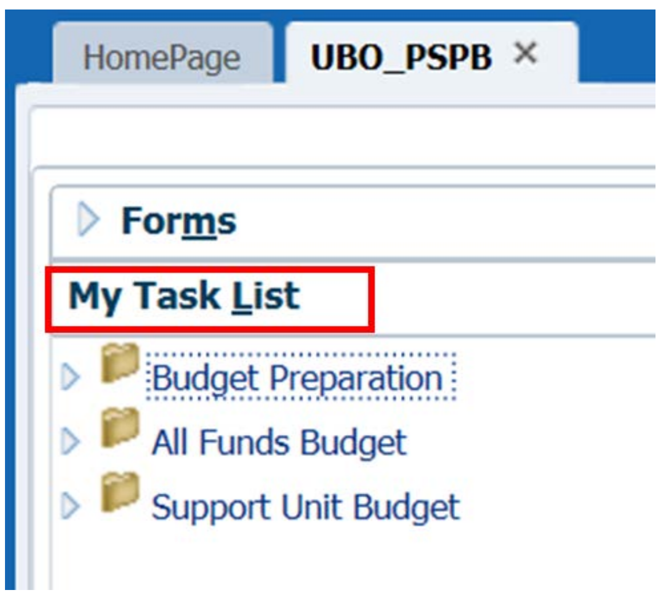


Hyperion Processes

There are two specific and individual processes you will complete using Hyperion to successfully submit your budget each fiscal year. Those processes include multiple procedural steps and are titled:

- Budget Preparation
- Budget Submission

Budget Preparation and All Funds Budget are now under the same place **My Task List**. You can work on the postions/employees changes and the operating budget in the same area (or mode).



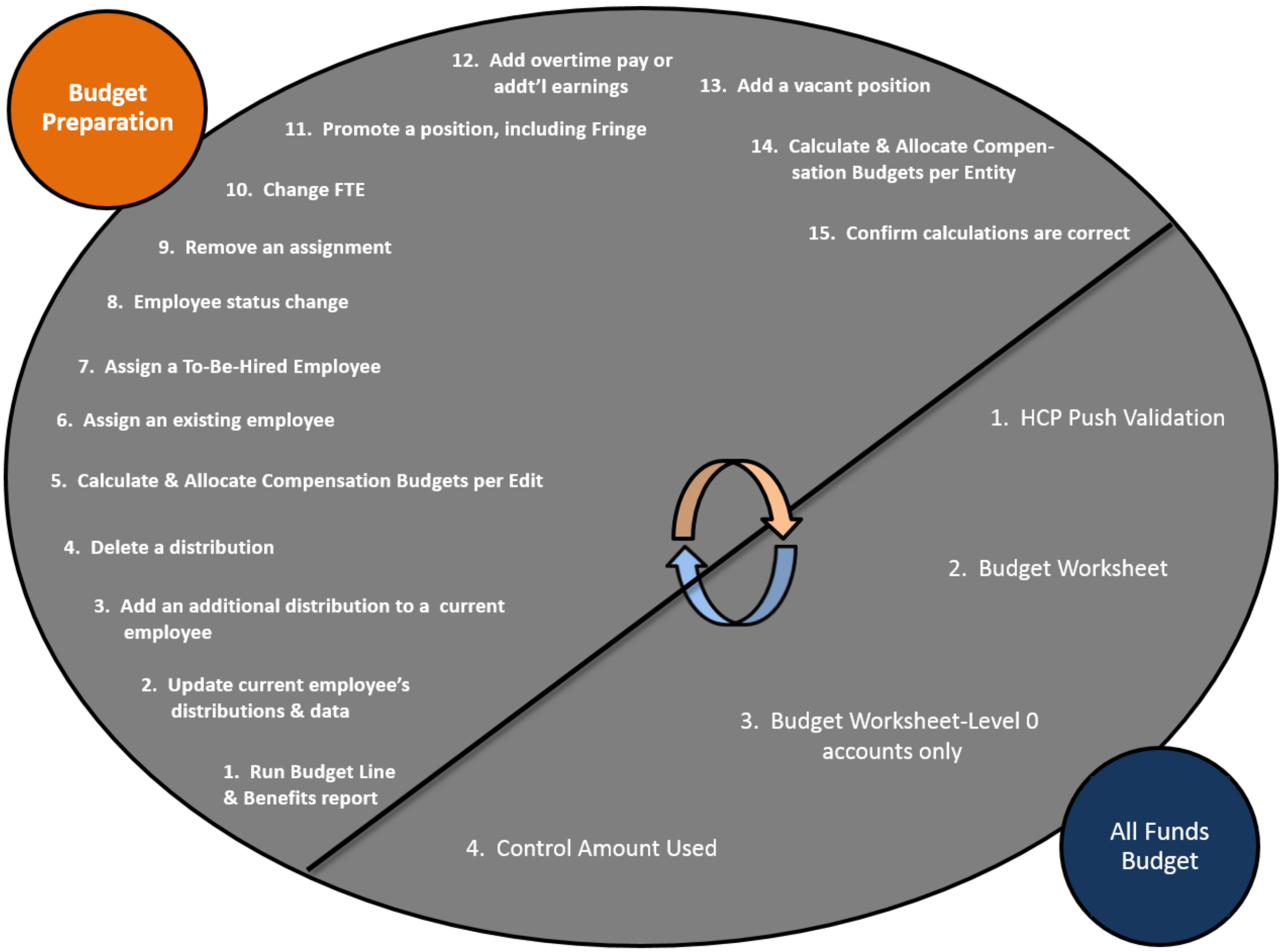
Budget Preparation Overview

The annual Budget Submission process includes completing relevant procedures within both Budget Preparation and Budget 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 should be completed first, prior to completing Budget Request Submission procedures.

There are a total of 15 budget prep procedures displayed in the image below from which you may choose to successfully prepare your budget.

Before we go into the details of the budget prep procedures. We recommend you to run some of the Hyperion report first to review the current employees and positions in your organizations and decide the personnel changes you need to make.



Running Hyperion Reports

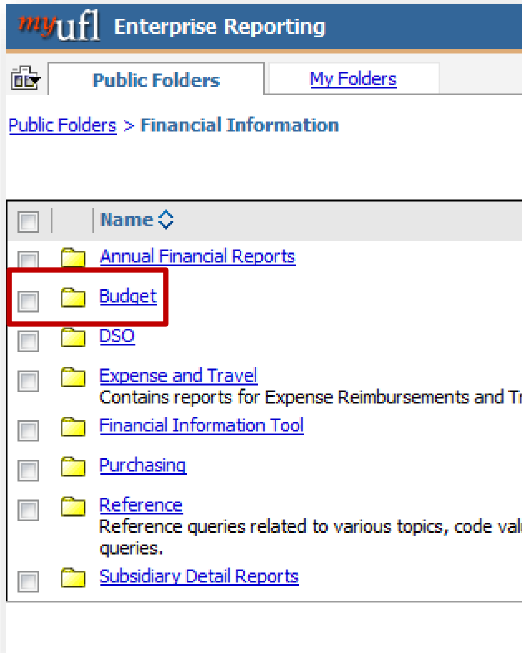
Please keep in mind that the reports will not be updated until after the push has occurred in Hyperion. The push runs every two hours starting at 7am and ending at 7pm Monday thru Friday. On Saturday and Sunday the push will run every two hours starting at 11am and ending at 7pm.

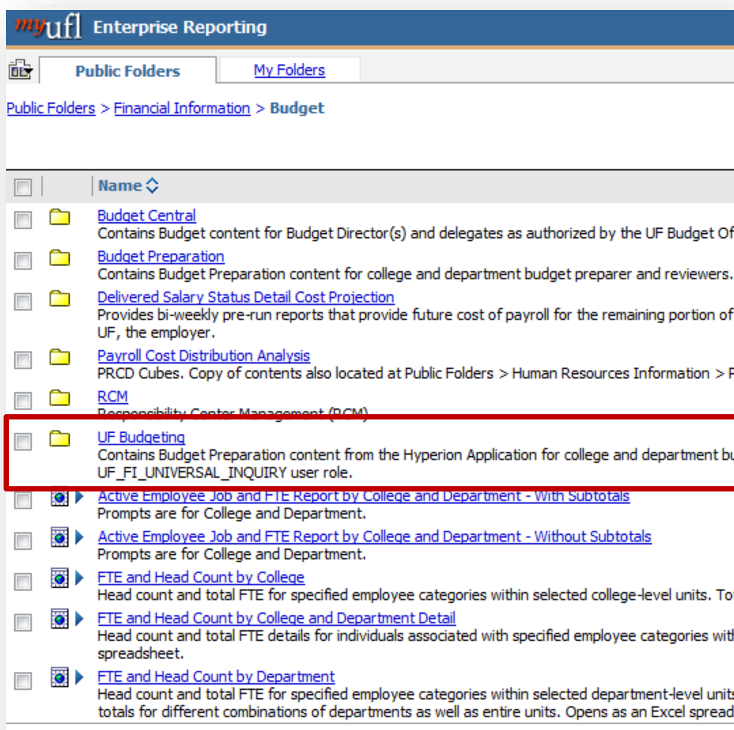
We have found that the push typically takes ½ hr to run. We recommend you run the reports an hour after the push times (7:30am, 9:30am, et al.) to see any changes that were made before the push occurred.

Navigation to all reports

1. Log into myUFL and navigate to the NavBar. Go to **Main Menu** > **Enterprise Reporting** > **Access Reporting**.

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

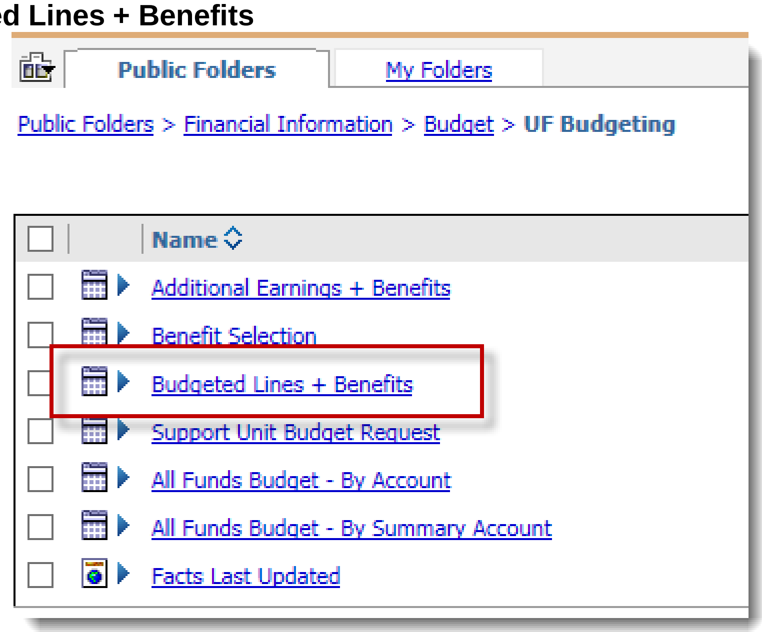

myufl Enterprise Reporting
Public Folders
My Folders
Public Folders > Financial Information
Name
Annual Financial Reports
Budget
DSO
Expense and Travel
Contains reports for Expense Reimbursements and Tr
Financial Information Tool
Purchasing
Reference
Reference queries related to various topics, code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


myufl Enterprise Reporting
Public Folders
My Folders
Public Folders > Financial Information > Budget
Name
Budget Central
Contains Budget content for Budget Director(s) and delegates as authorized by the UF Budget Off
Budget Preparation
Contains Budget Preparation content for college and department budget preparer and reviewers.
Delivered Salary Status Detail Cost Projection
Provides bi-weekly pre-run reports that provide future cost of payroll for the remaining portion of
UF, the employer.
Payroll Cost Distribution Analysis
PRCD Cubes. Copy of contents also located at Public Folders > Human Resources Information > P
RCM
UF Budgeting
Contains Budget Preparation content from the Hyperion Application for college and department bu
UF_FI_UNIVERSAL_INQUIRY user role.
Active Employee Job and FTE Report by College and Department - With Subtotals
Prompts are for College and Department.
Active Employee Job and FTE Report by College and Department - Without Subtotals
Prompts are for College and Department.
FTE and Head Count by College
Head count and total FTE for specified employee categories within selected college-level units. Tot
FTE and Head Count by College and Department Detail
Head count and total FTE details for individuals associated with specified employee categories with
spreadsheet.
FTE and Head Count by Department
Head count and total FTE for specified employee categories within selected department-level units
totals for different combinations of departments as well as entire units. Opens as an Excel spreads

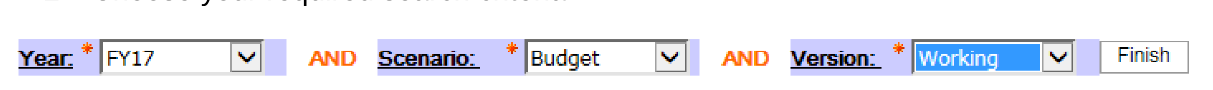
Budgeted Lines + Benefits Report

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. **We recommend that this be the first step in the budgeting process so that you know how the people data was loaded into Hyperion at the time of the snap shot.**

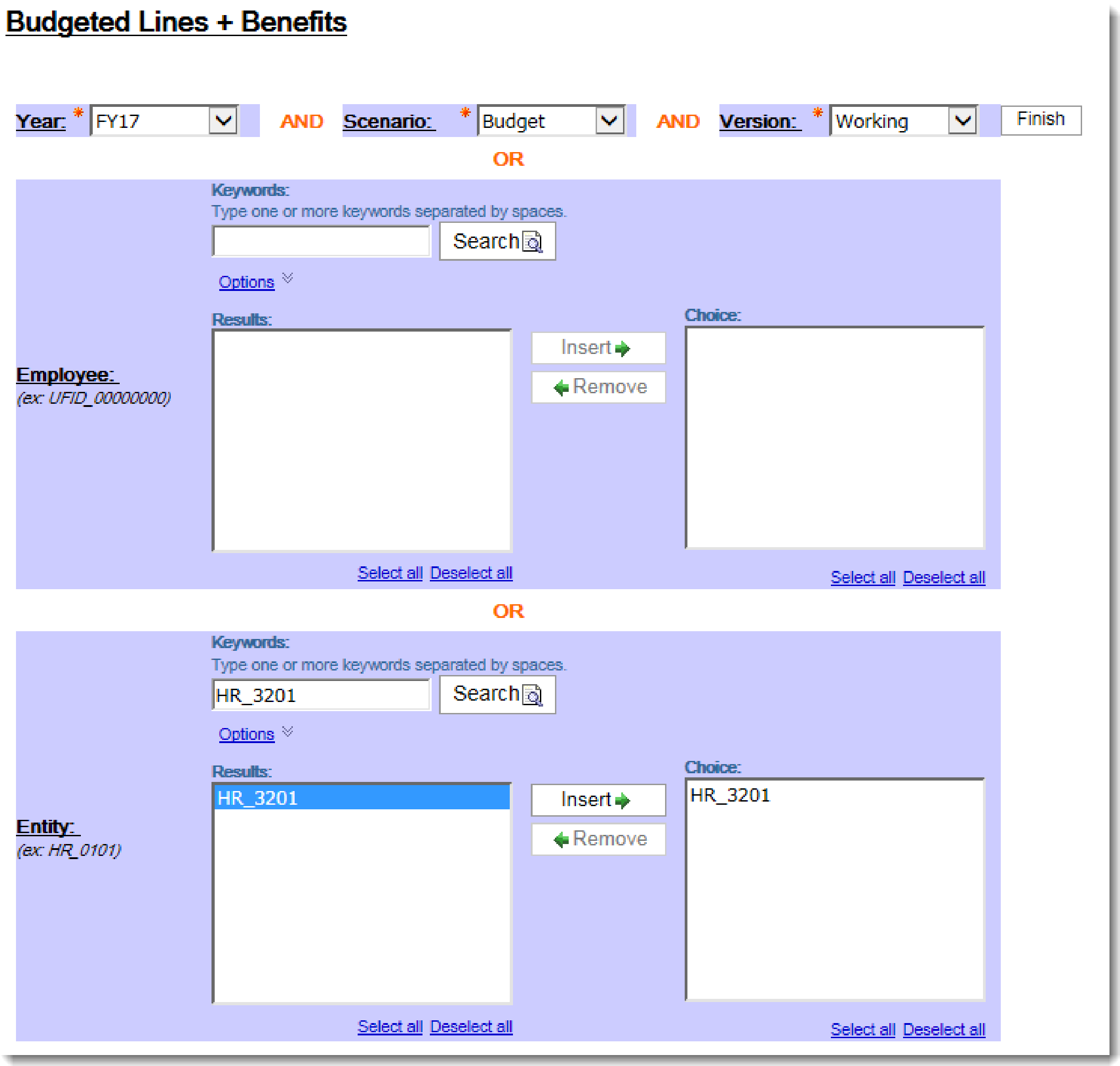
1. Select **Budgeted Lines + Benefits**



2. Choose your required search criteria.



3. Choose your additional search criteria. In this example, we will use HR_3201 data. After entering scroll to bottom of form or top of the form.

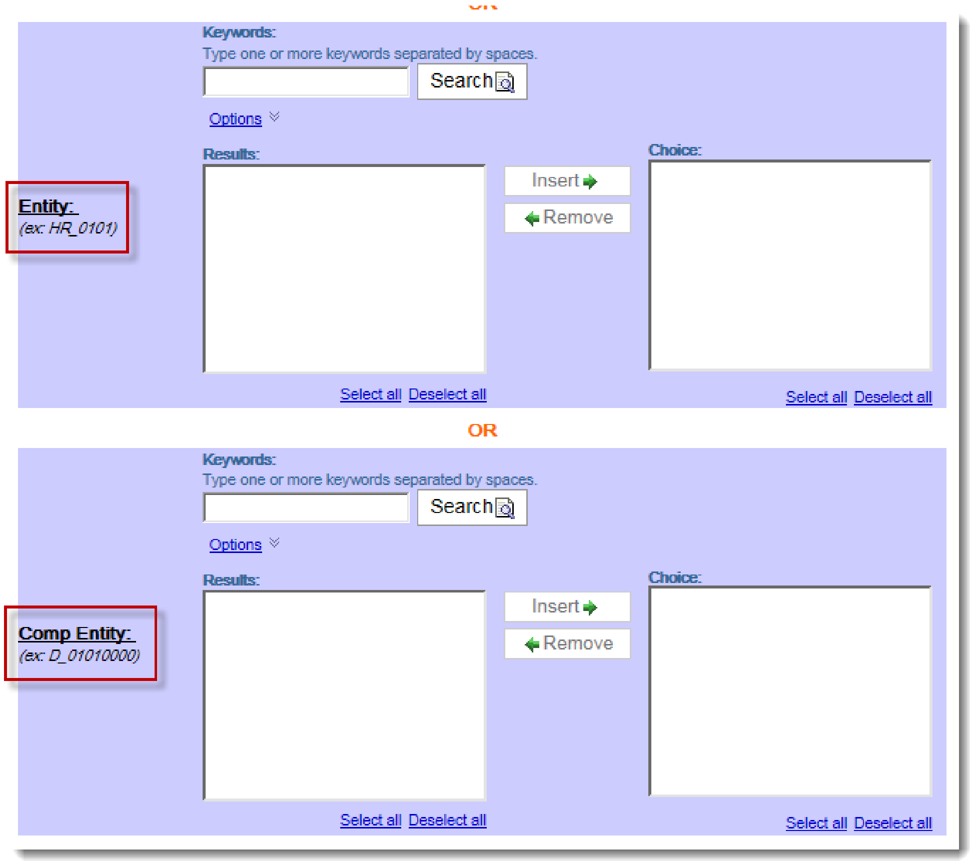


Please note that there are two types of Entities.

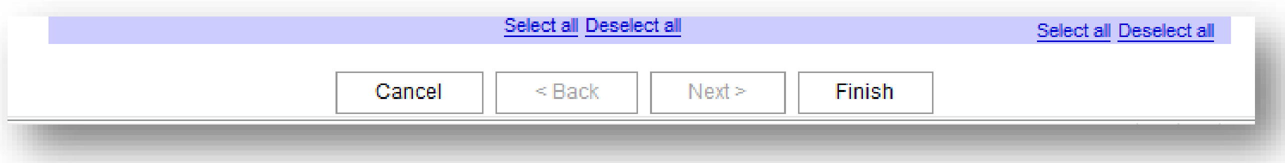
One is the employee's home department which is referred to as "Entity" on the search criteria page. The home department starts with "HR_".

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

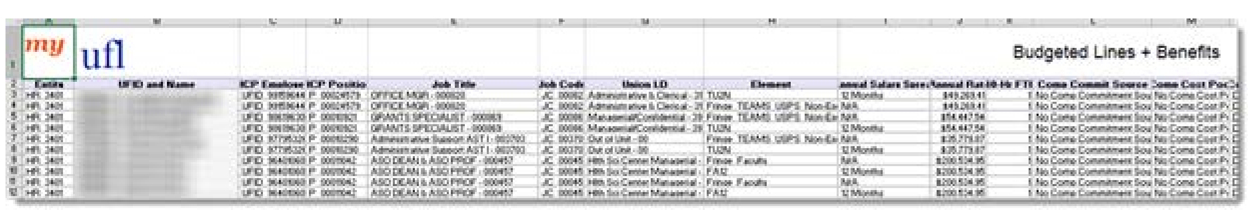
If you search by home department, the report will return all the positions/employees who are administrated in that department. If you search by the earnings department, the report will return all the positions/employees who are paid by that department.



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



5. **Review** your report.



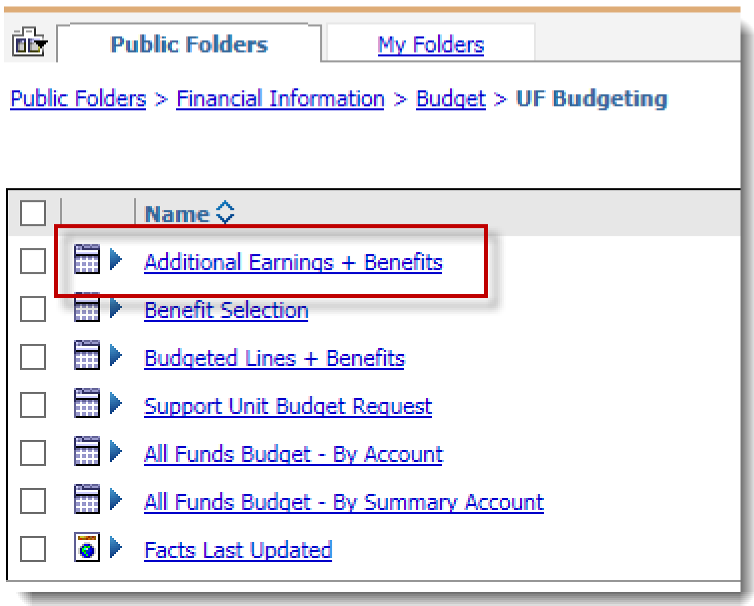
NOTE: At this time each person has at least two rows of data. The one row of data is the salary expense data line and the one row is the benefit data line.

NOTE: You do not have to run all of the below reports before you continue on with your budgeting work this is just to show you how to run the additional reports that are available for your use.

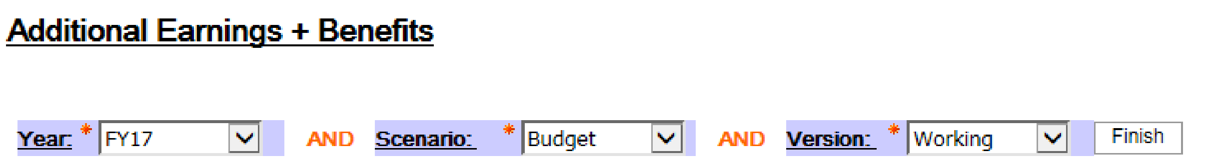
Additional Earnings + Benefits

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. 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.

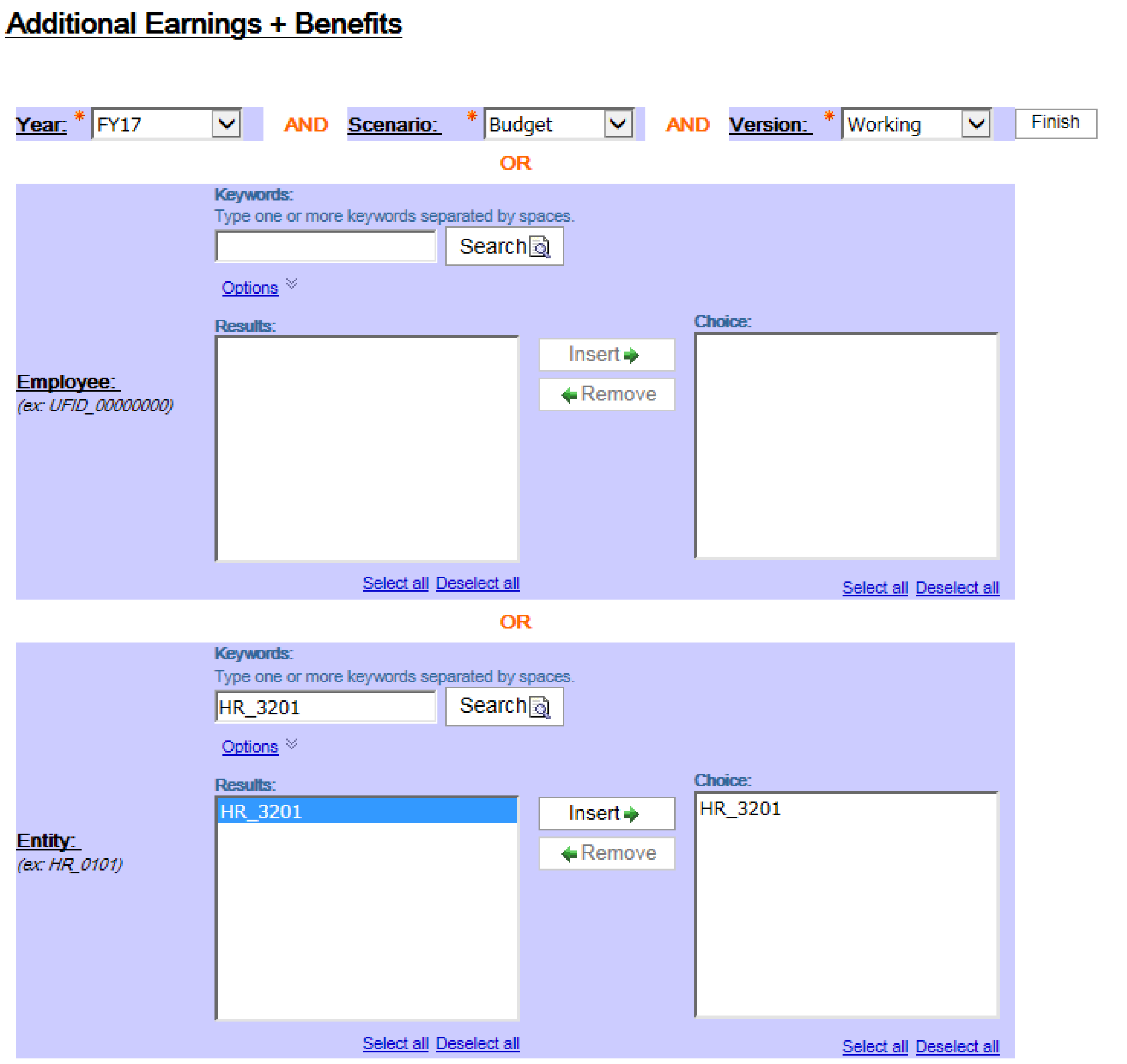
1. Select **Additional Earnings + Benefits**



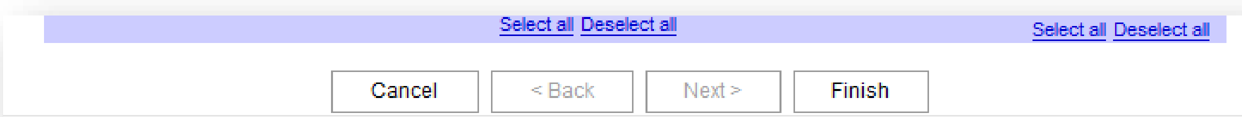
2. Choose your required search criteria.



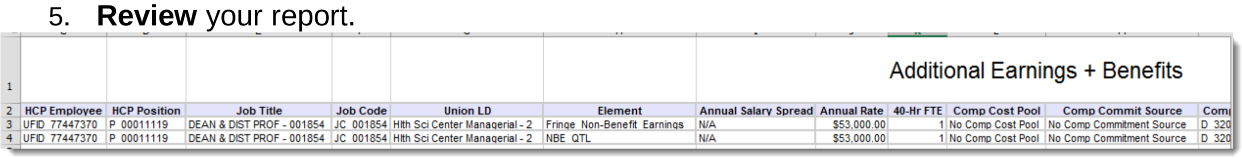
3. Choose your additional search criteria. In this example, we will use HR_3201 data. After entering scroll to bottom of form or top of the form.



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



5. **Review** your report.



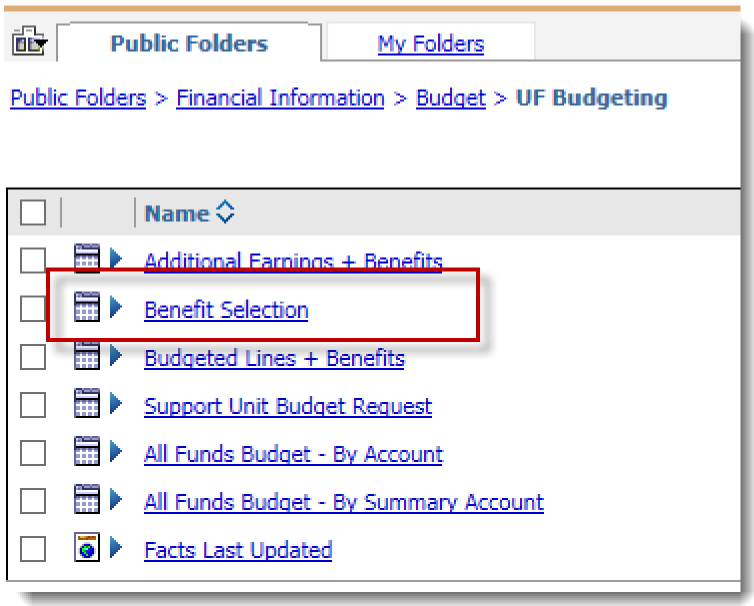
Additional Earnings + Benefits

HCP Employee	HCP Position	Job Title	Job Code	Union LD	Element	Annual Salary Spread	Annual Rate	40-Hr FTE	Comp Cost Pool	Comp Commit Source	Com
UFID 77447370	P 00011119	DEAN & DIST PROF - 001854	JC 001854	Hlth Sci Center Managerial - 2	Fringe Non-Benefit Earnings	N/A	$53,000.00	1	No Comp Cost Pool	No Comp Commitment Source	D 320
UFID 77447370	P 00011119	DEAN & DIST PROF - 001854	JC 001854	Hlth Sci Center Managerial - 2	NBE QTL	N/A	$53,000.00	1	No Comp Cost Pool	No Comp Commitment Source	D 320

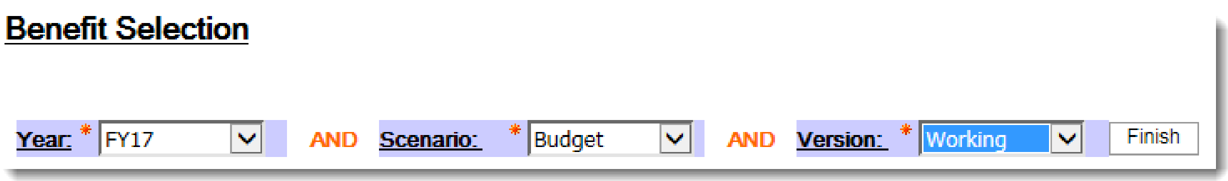
Benefit Selection

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

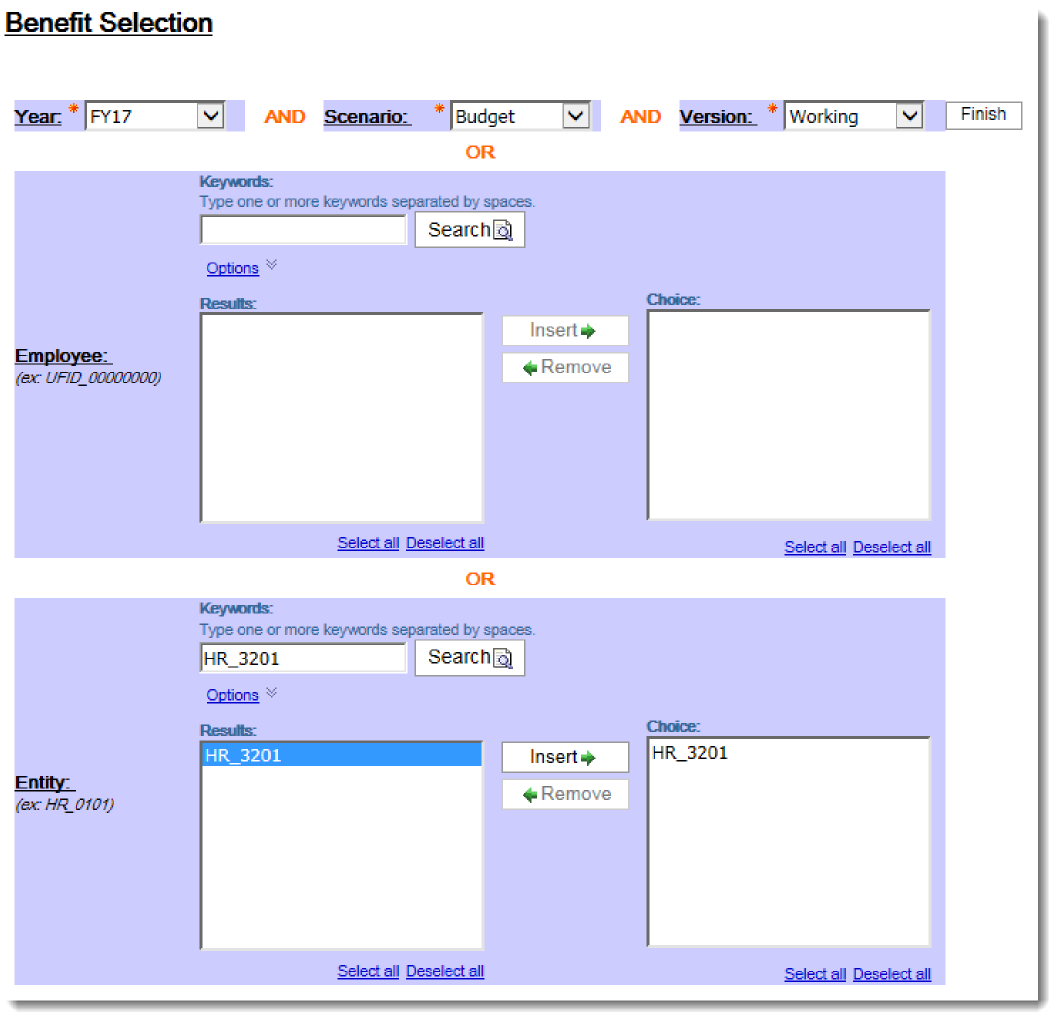
1. Select **Benefit Selection**



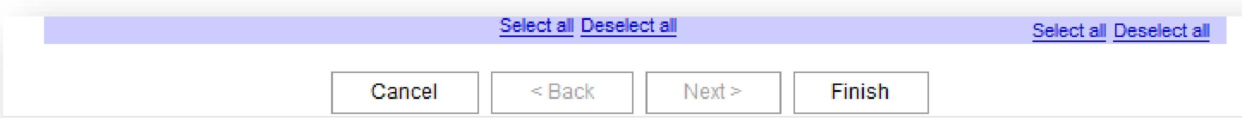
2. Choose your required search criteria.



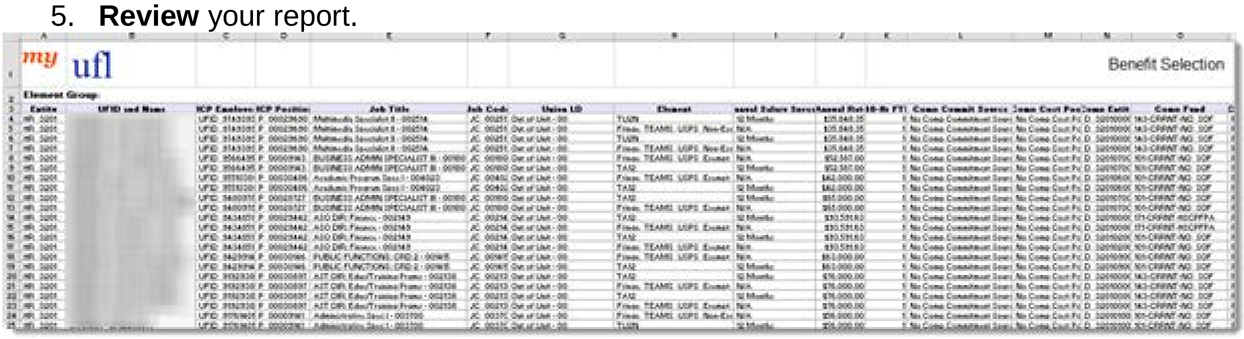
3. Choose your additional search criteria. In this example, we will use HR_3201 data. After entering scroll to bottom of form or top of the form.



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



5. **Review** your report.



Budget Preparation Processes

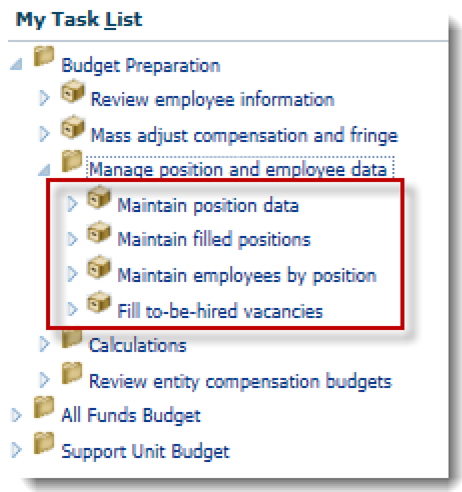
Manage Position and Employee Data Forms

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.

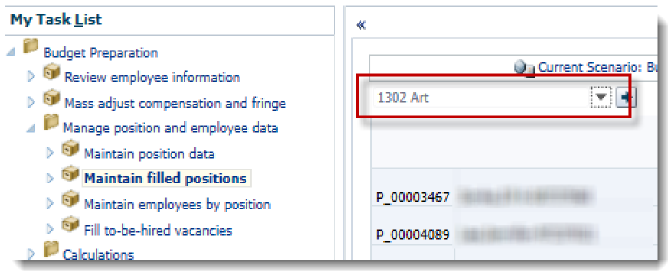
Fill to-be-hired vacancies
This form was originally designed to replace to-be-hired employees with named employees if they are hired. Because we don't add new hired employees to Hyperion after the snap shot, you will never need to use the Fill to-be-hired vacancies functionality. In this training, we 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.



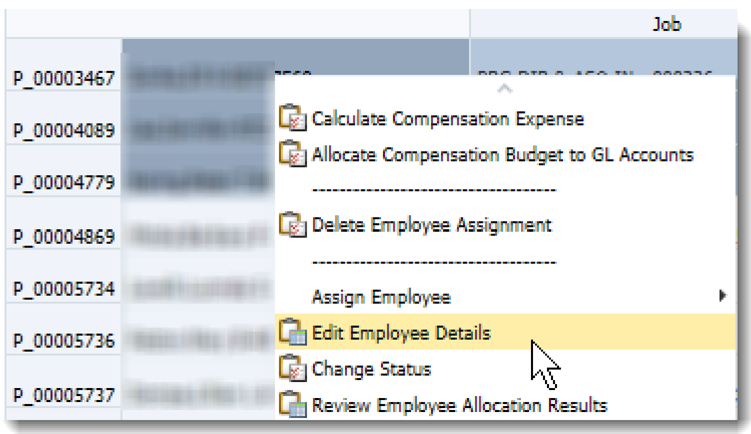
Update Current Employees' Distributions & Data

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

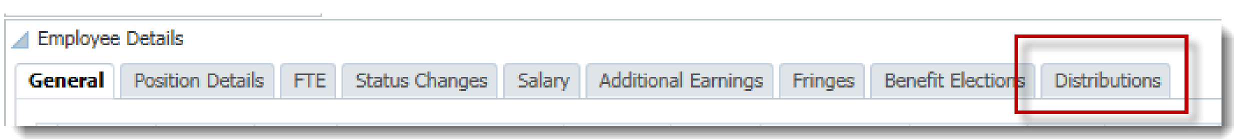
1. From the **Budget Preparation > Manage position and employee data > Maintain filled positions form**, choose your desired **Entity** from the Entity drop down field.



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



3. Click the Distributions tab.

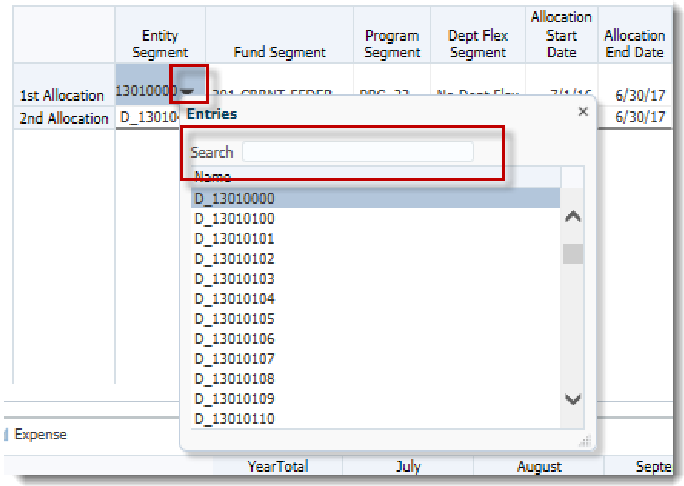


In this example, we will be changing the employee's Entity and assigning the appropriate Chartfield String. If any data is missing addressing these segments will clear the red cell color.

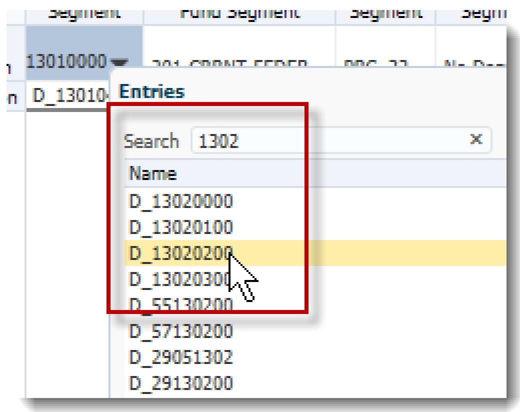
4. Click in the desired allocation Entity Segment field and click the **Entity Segment** drop down arrow.

5. Enter the desired Entity number into the **Search** field (e.g., "1302").

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

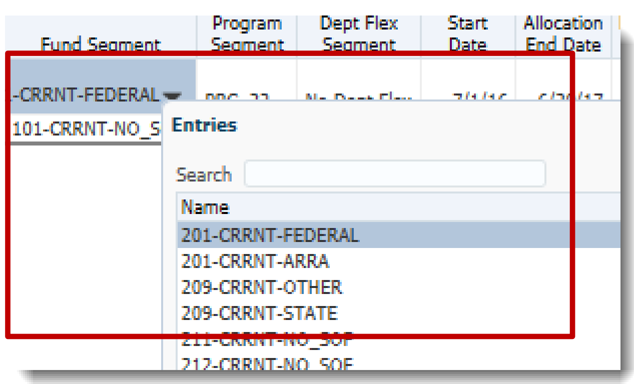


5. Click the new desired **Entity**.



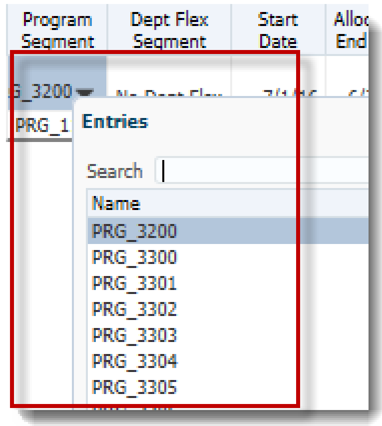
6. Click the **Fund Segment** drop down field.

7. Click the desired **Fund/Budget Reference/Source of Funds** option (e.g., **101-CRRNT-NO_SOF**).



8. Click the **Program Segment** drop down field.

9. Click the desired **Program** option (e.g., **PRG_1100**).



10. Type **No Dept Flex** into the Dept Flex drop down field.

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.

Allocation Start Date	Allocation End Date	Percentage Allocation
7/1/16	6/30/17	36
7/1/16	6/30/17	64

13. Click the **Save** button, then **OK** button. **NOTE**: If you had any red or yellow fields, they no longer appear once you save your changes.

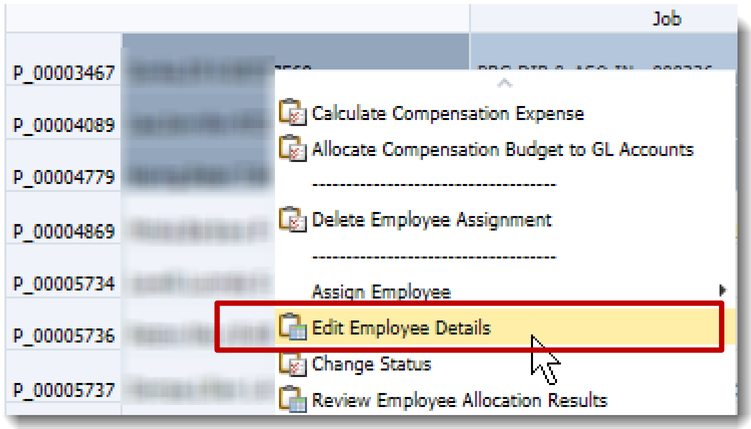
	Entity Segment	Fund Segment	Program Segment	Dept Flex Segment	Allocation Start Date	Allocation End Date	Percentage Allocation
1st Allocation	D_130202...	101-CRRNT-NO_SOF	PRG_11...	No Dept Flex	7/1/16	6/30/17	36
2nd Allocation	D_130104...	101-CRRNT-NO_SOF	PRG_11...	No Dept Flex	7/1/16	6/30/17	64

Add an Additional Distribution for the same Employee

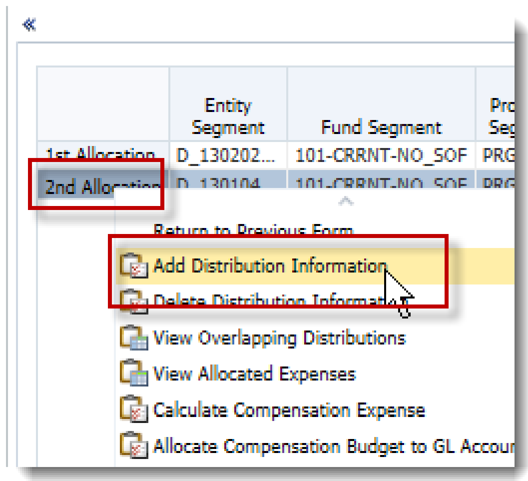
It's not uncommon for an employee to hold multiple positions or have multiple distribution sources at UF. This procedure covers how to add an additional distribution for the same employee.

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

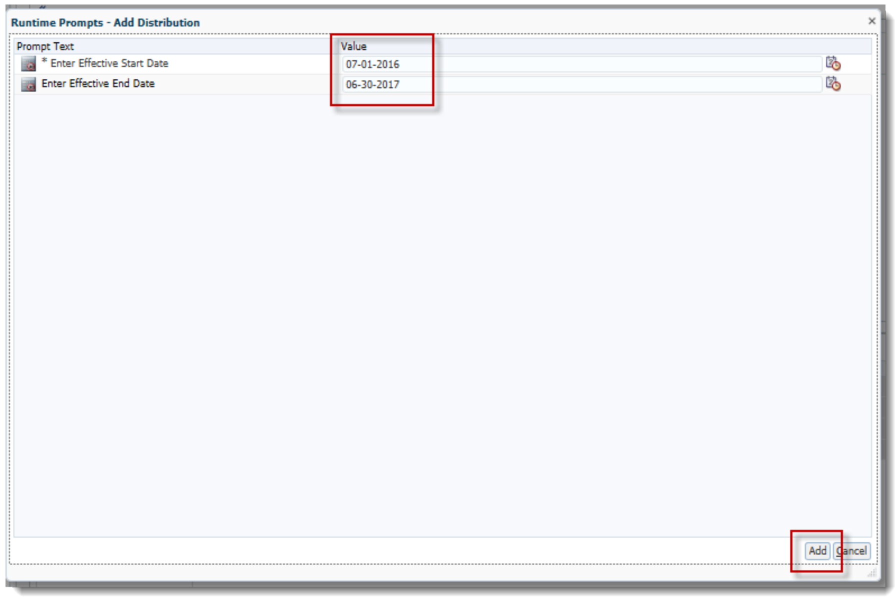
2. Right-click on the name of the employee for which you wish to change the distribution and select **Edit Employee Details**.



3. Go to the **Distributions** tab.
4. Right-click the **last Allocation** label.
5. Click the **Add Distribution Information** link.

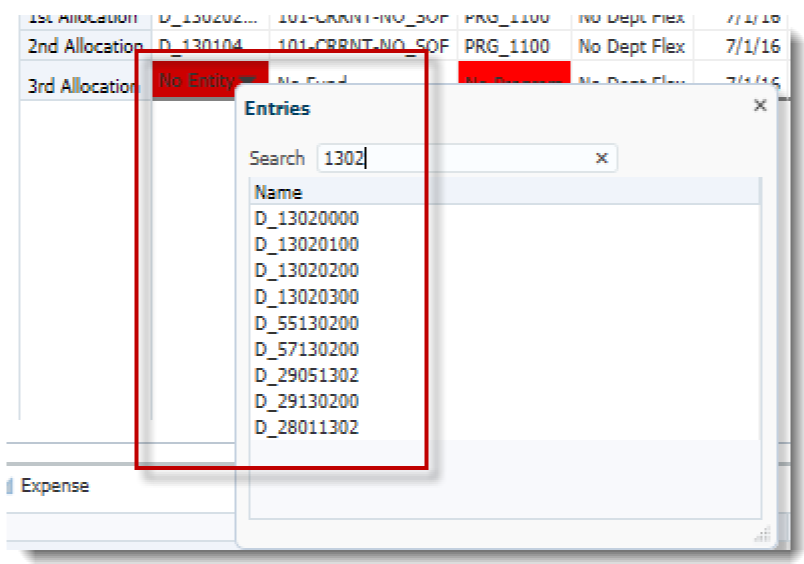


6. Enter the **Effective Start or End Date** if it's different.
7. Click the **Add** button.



8. 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.

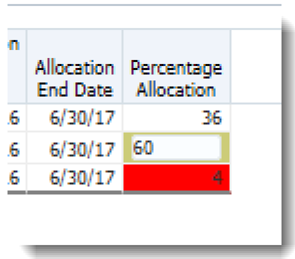
   NOTE: Red cells indicate required data that is currently missing.



9. Click the **Fund Segment**, **Program Segment** field, **Dept Flex** Segment, and **Allocation Start** and **End Dates** and enter the appropriate data. **Follow steps 7 – 11 from previous procedure, as needed**.

10. 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.

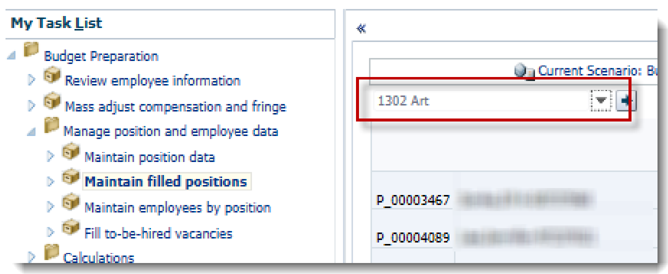


NOTE: In this example, the 2nd allocation was altered so all 3 allocations would total 100%.

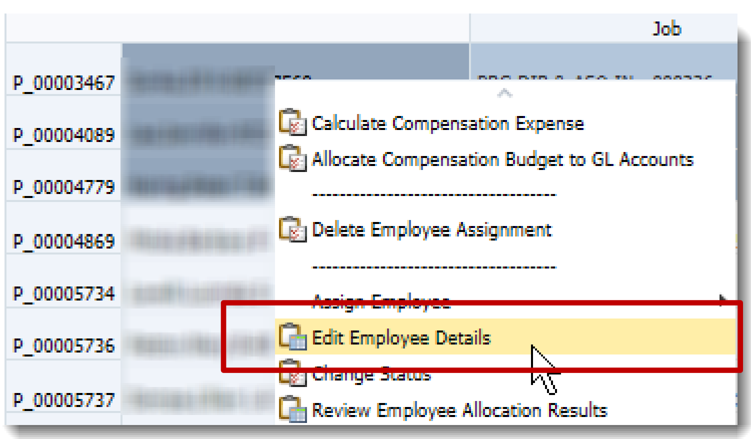
11. Click the **Save** button, then the **OK** button.
    NOTE: Remember any red or yellow cells should clear after saving.

Delete a Distribution

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



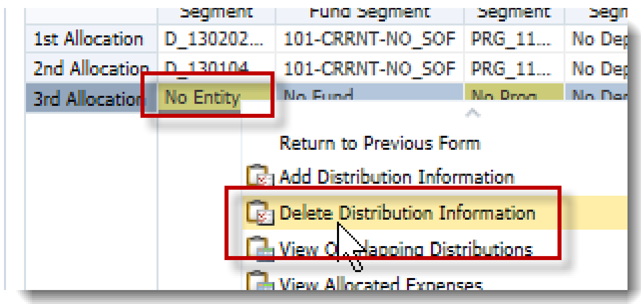
2. Right-click on the name of the employee for which you wish to change the distribution and select **Edit Employee Details**.



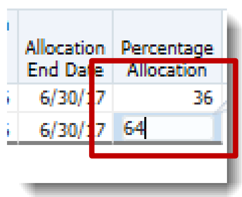
3. Go to the **Distributions** tab.

4. Right-click the **Allocation** label you wish to delete.

5. Select **Delete Distribution Information**.



6. Updae the **Percentage Allocation** field(s) of the remaining allocation(s) to equal 100%. **NOTE**: Remember, all lines must add up to 100.



8. Click the **Save** button, then the **OK** 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 Budgets Submission mode within Hyperion.

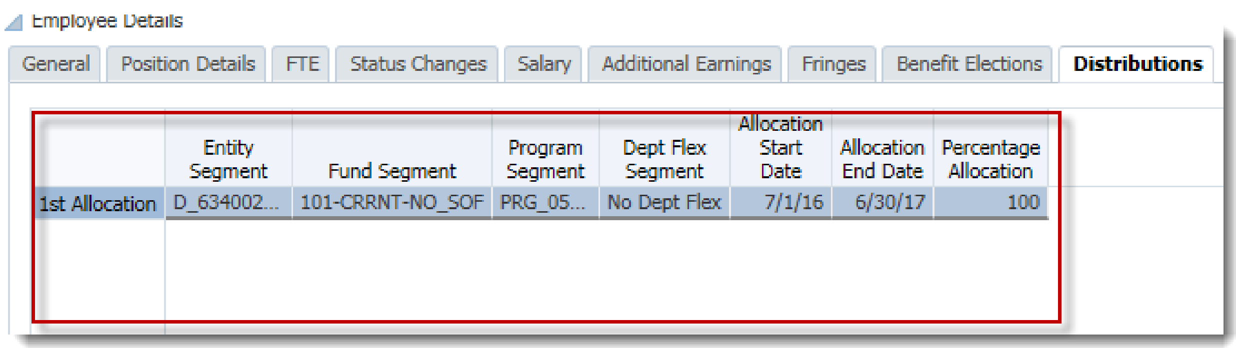
These procedures can take a long time depending on your area and number of employees. As such the University Budget Office recommends you run these procedures from the Budget Prep panel once all edits/updates are done.

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.

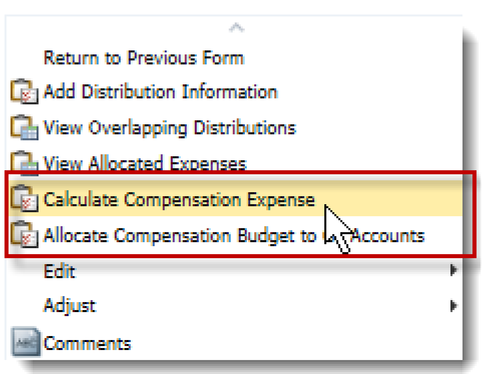
For example, if you are on the main Maintain position data or Maintain filled positions forms, you must right-click on the exact position row you just edited for the calculate and allocate procedures to run successfully. Otherwise, the edited data may not calculate and allocate correctly.

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.

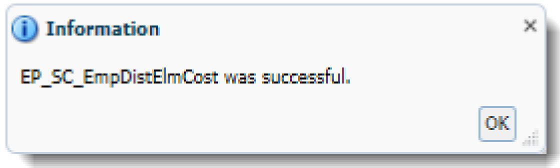
1. Right click anywhere in the main portion of the edited position.



2. Click **Calculate Compensation Expense**.

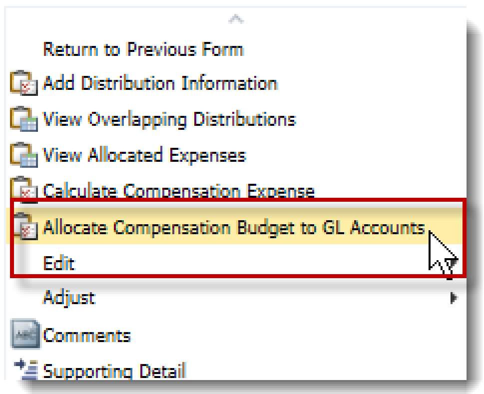


3. Confirm the calculation procedure was successful by noting the message that appears at on the window.

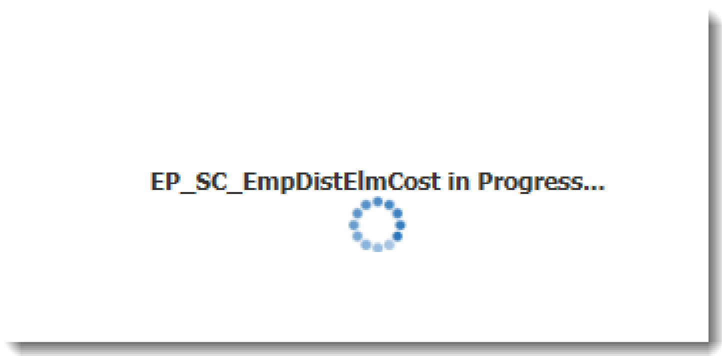


4. After the Launch Business Rules window closes, **right click** within the same cell on the form again.

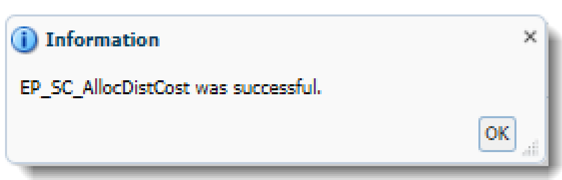
5. Choose **Allocate Compensation Budget to GL Accounts**.



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

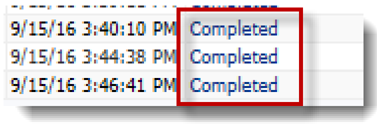


6. Confirm the procedures have completed successfully by noting the message that appears on the form.



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

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



Assigning an Existing Employee

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

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

1. From the **Maintain position data** form, right click the line of the position for which you want to assign an existing UF employee. **Make sure the position status is Vacant**. **NOTE**: If the position is listed as Not Budgeted, complete the following steps to assing FTE to the position first.

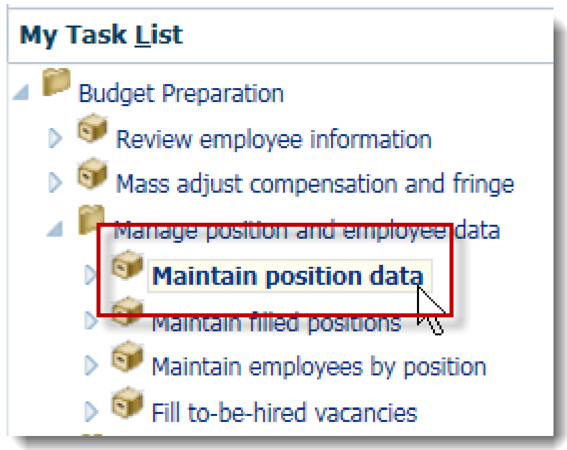
    a. Right click on position and choose Edit Position Details

    b. Click the FTE tab

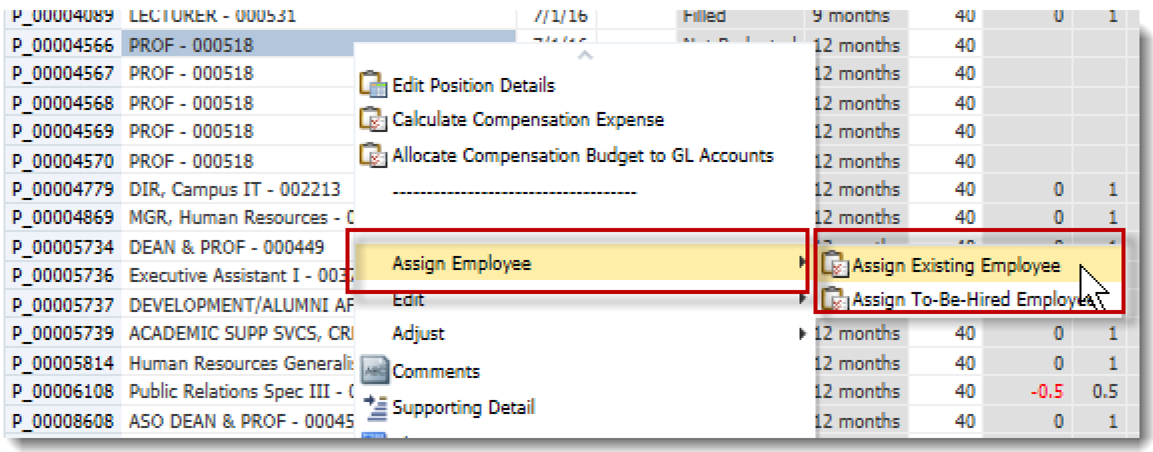
    c. Right click on assignment label and choose Update FTE

    d. Enter FTE value and the Start and End Dates
    NOTE: Leave the End Date blank to make this an ongoing change.

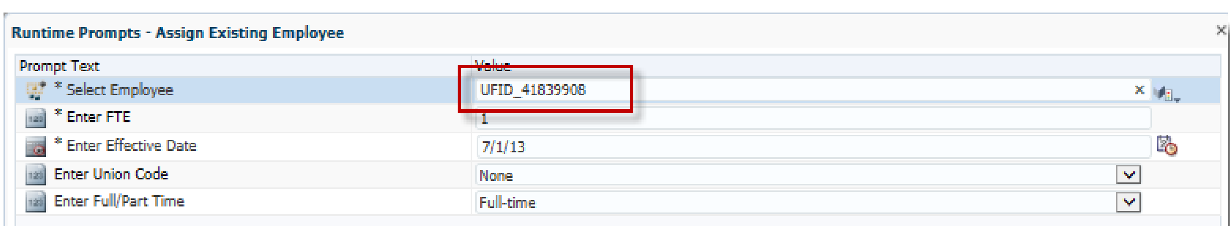
    e. Click Add, then OK.



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



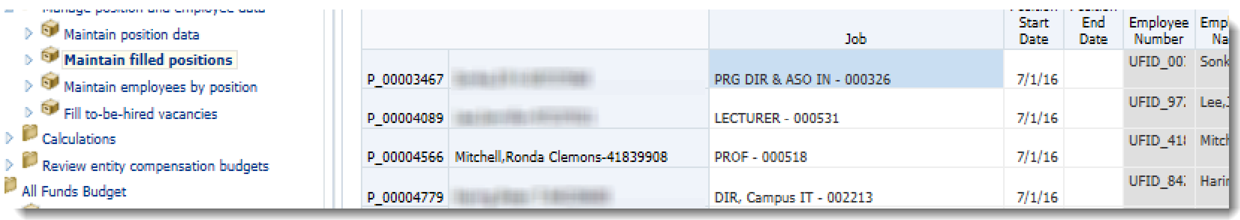
3. Click in the **Select Employee** field, delete any default text and enter the **UFID** of the appropriate employee.
   NOTE: the UFID must start with UFID_.



4. Enter the correct **FTE**, **Effective Date**, **Union Code** and **Full/Part Time** status, if different from position defaults.
   NOTE: All these fields are required.

5. Click the **Assign** button.

6. To confirm the change, click the **Maintain filled positions** form and verify the assigned employee data appears associated with the proper position.



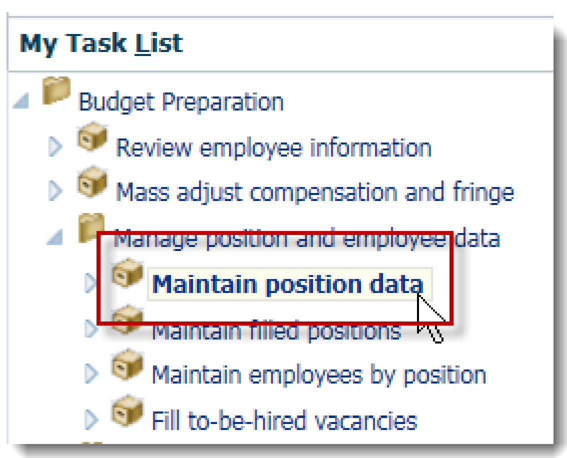
7. **Right click** on name of newly assigned existing employee and choose **Edit Employee Detail** to make any needed distribution and salary changes.

8. Click **Save** button.
NOTE: Remember to run the calculations for changes to become active.

Assigning a To-Be-Hired Employee

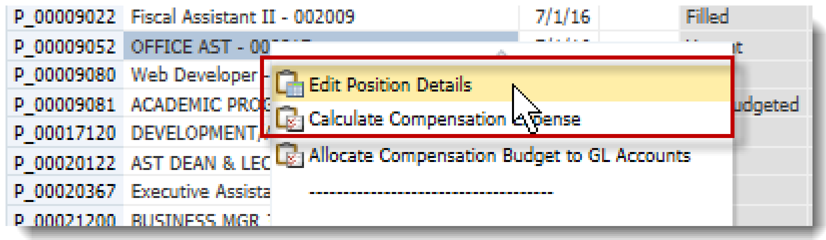
You would assign a To-Be-Hired employee for those positions not yet budgeted, but will be in the future or for new employees hired after the snap shot was taken. To include the budget information for the future employee in your budget preparation procedure, you would assign a To-Be-Hired employee as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

1. From the Maintain position data form, locate the position for which you wish to assign a To-Be-Hired employee.

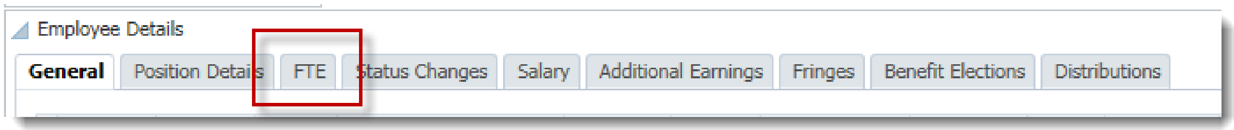


2. Notice the Occupancy Status for this position will indicate “Not Budgeted” or “Vacant”. If the position is listed as Not Budgeted, please go to step 3. If the position is vacant, please go to step 12.

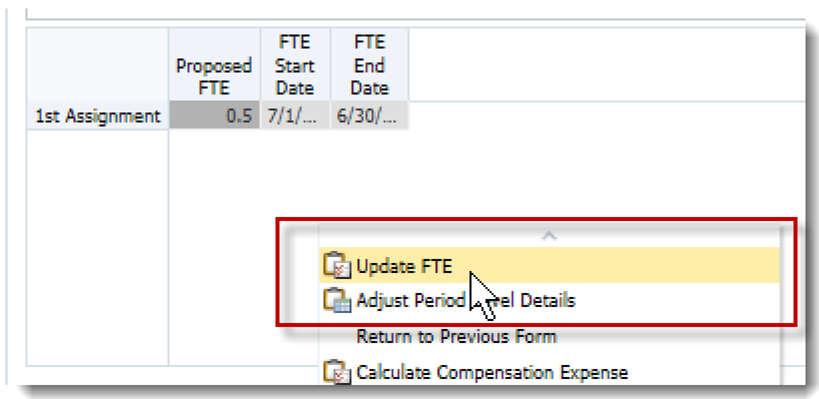
3. Right click on the position and choose Edit Position Details.



4. Go to the **FTE** tab.



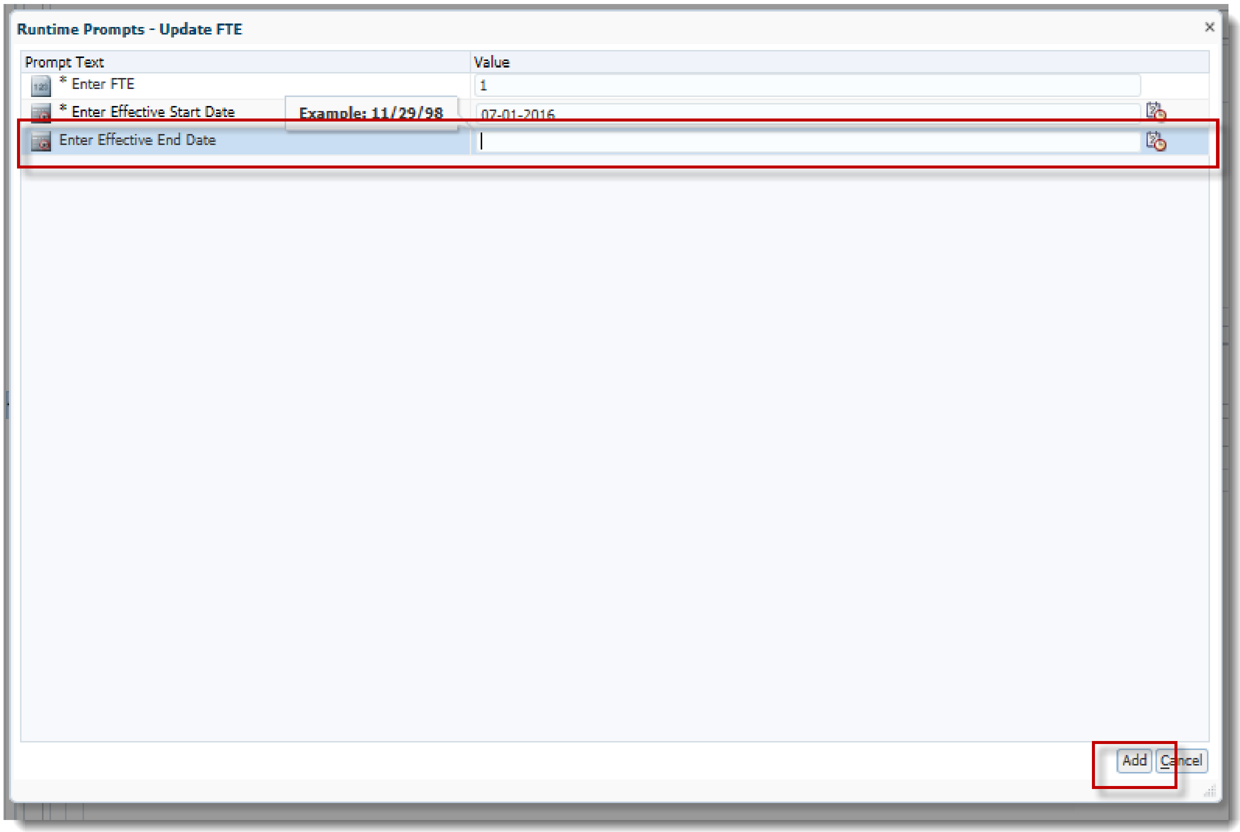
5. Right-click anywhere on the screen and choose **Update FTE**.



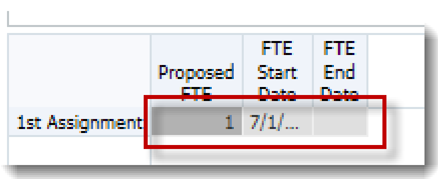
7. Input the FTE for this position.

8. 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.

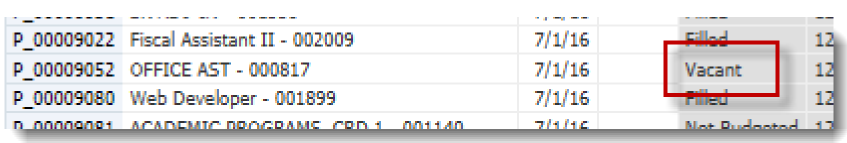
9. Click **Add**, then click **OK**.



10. Confirm the assignment appears on the FTE page.



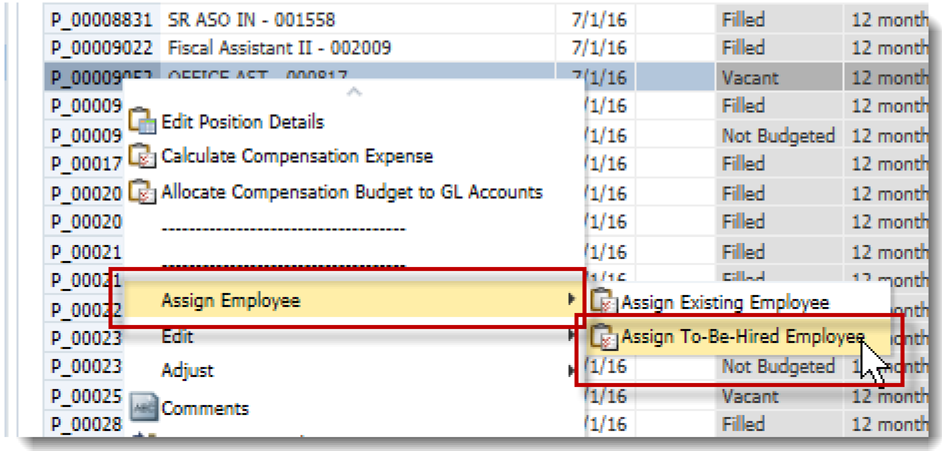
11. Click the **Maintain position data form** again and notice your position should now read Vacant in the Occupancy Status field.



12. **Right-click** the Position number.

13. Click the **Assign Employee** on the pop-up menu.

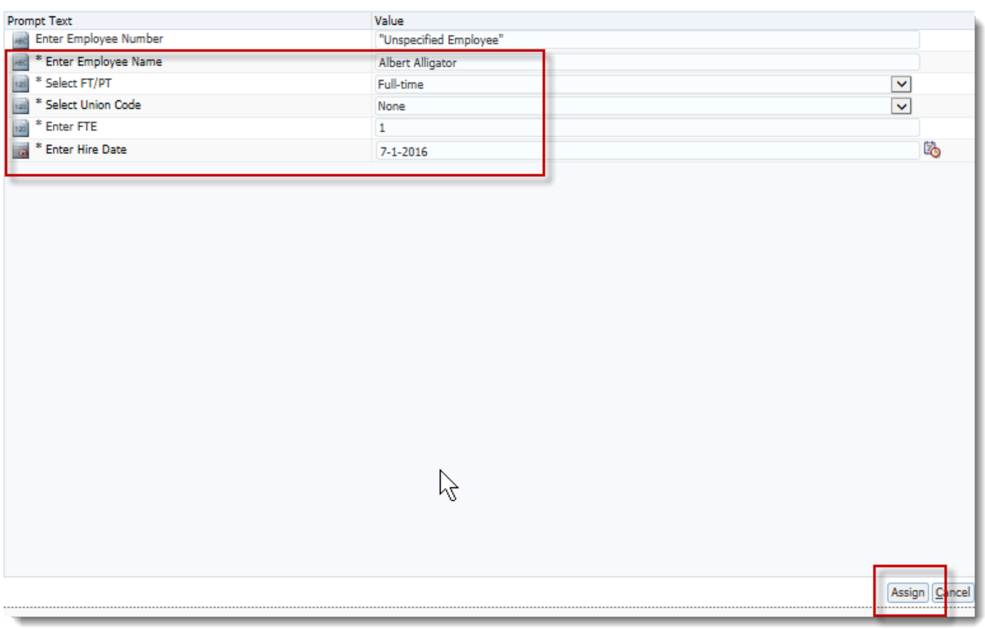
14. Click the **Assign To-Be-Hired Employee** option.



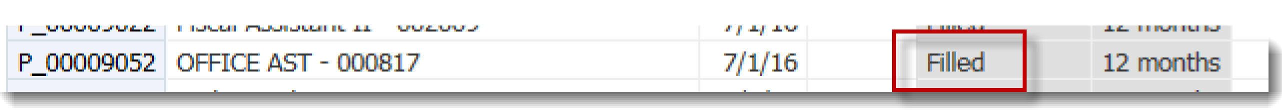
15. Enter the name of the new employee or a placeholder name or description if unknown. **NOTE**: If you know the UFID and want to input it best practice is to input it as UFID_XXXXXXXX otherwise if you input a number only the system will treat it as a dollar figure and add a decimal and cents.

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

17. Click the **Assign** button.

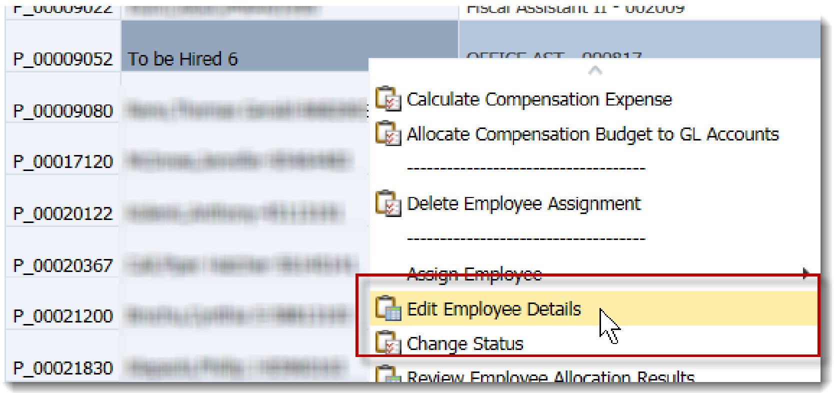


18. Note the message indicating the Position was filled successfully and the Occupancy Status of the position is now "Filled."

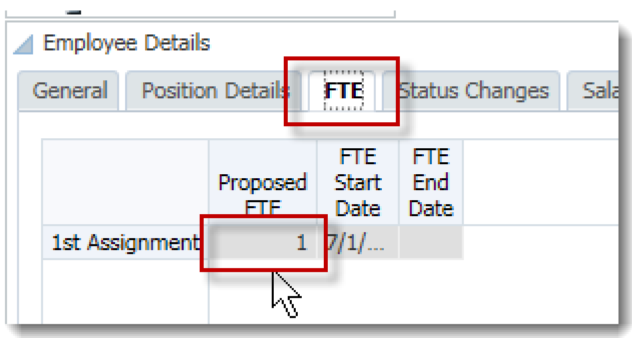


19. Click on the **Maintain filled positions** form and find the To-Be-Hired employee just assigned.

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



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



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

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

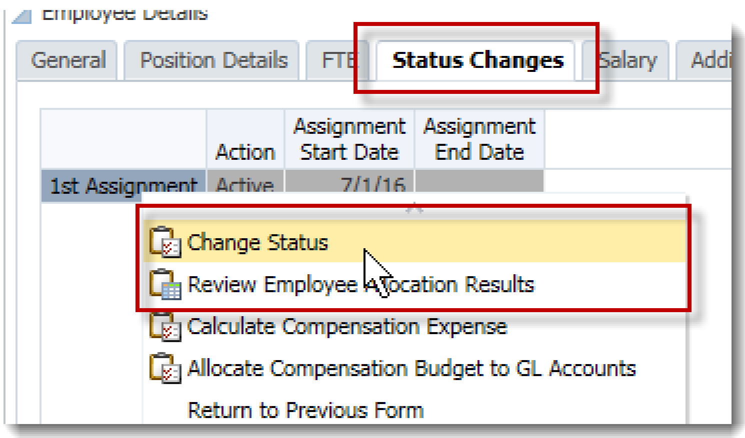
24. Choose the **Distribution** tab and input your distribution information and save.

25. Run both the Calculate and Allocate procedures.

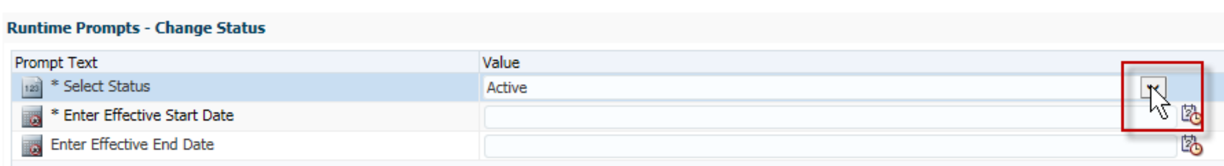
Employee Status Change

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

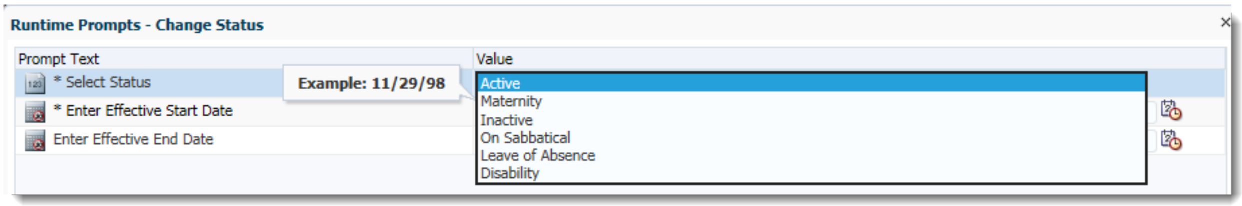
1. From Maintain filled positions form, **right-click** the relevant employee for which you are changing status.
2. Click the **Edit Employee Details**.
3. Click the **Status Changes** tab.
4. **Right-click** the blue assignment label of the assignment you wish to change.
5. Click the **Change Status**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



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

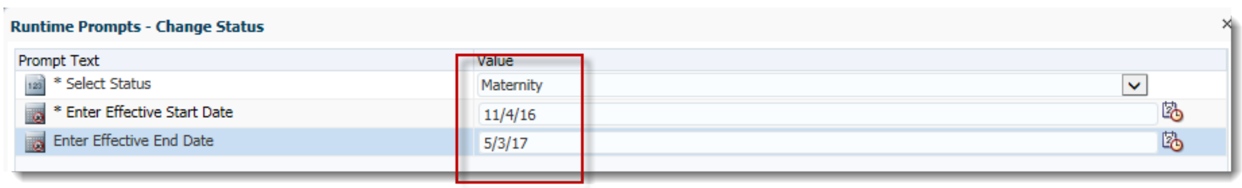


7. Click the appropriate status (e.g., **Maternity**, **Inactive, On Sabbatical, etc.**).

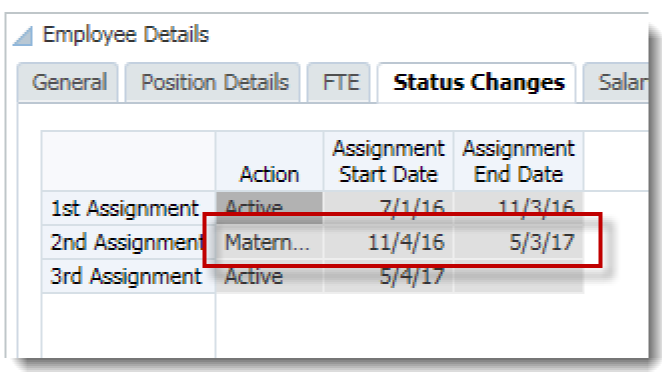


8. Enter the desired information into the **Enter Effective Start Date** field (e.g., "11/4/16") and **Enter Effective End Date** as appropriate.

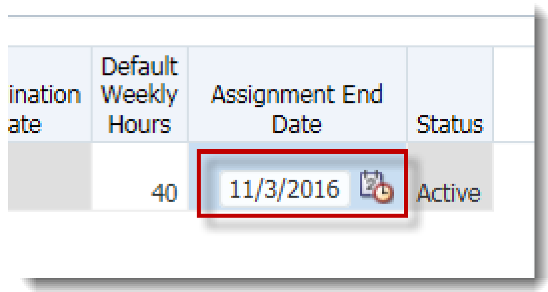
9. Click the **Change** button at bottom of page.



10. **Confirm** the additional allocation displays with the appropriate Action.



11. Go to **General** tab and change the appropriate **Assignment End Date** to 11/3/16 to reduce the amount of salary expense being charged for this individual to the appropriate time period.



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

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

13. **Right-click** within any form cell to access the pop-up menu.

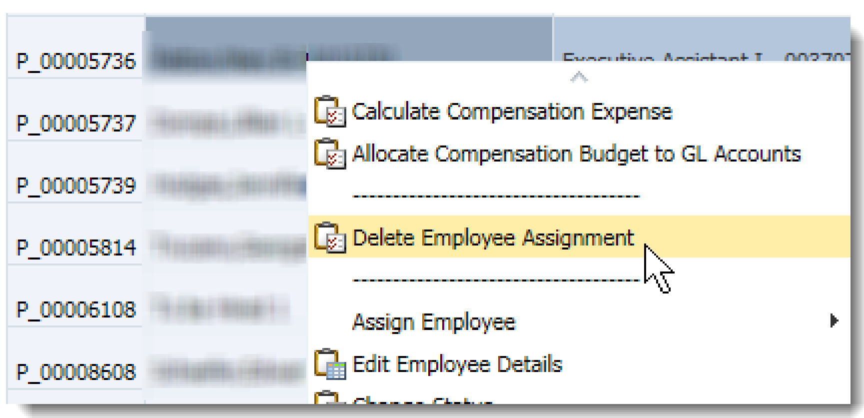
14. Click the **Return to Previous Data Form** option.

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.

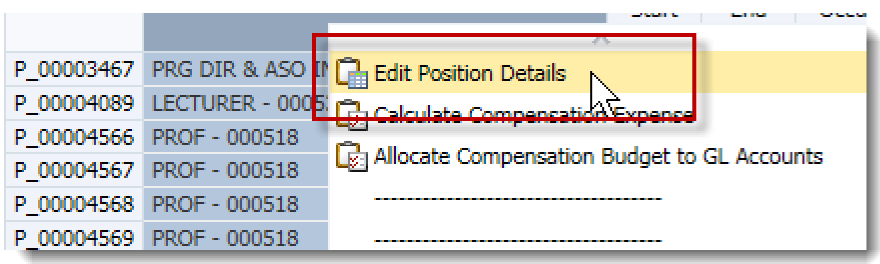
	Job	Position Start Date	Position End Date	Occupancy Status	Annual Salary Spread	Default Weekly Hours	Available FTE	40-Hour FTE	Total FTE	Status
P_00003467	PRG DIR & ASO IN - 000326	7/1/16		Filled	9 months	26.8	0	0.67	1	Acti...
P_00004089	LECTURER - 000531	7/1/16		Filled	9 months	40	0	1	1	Acti...
P_00004566	PROF - 000518	7/1/16		Not Budgeted	12 months	40				
P_00004567	PROF - 000518	7/1/16		Not Budgeted	12 months	40				
P_00004568	PROF - 000518	7/1/16		Not Budgeted	12 months	40				

FTE may be changed either per position or per employee.

To change the position FTE only.

1. From the **Maintain position data** form, right click on the position to which you wish to change the FTE.

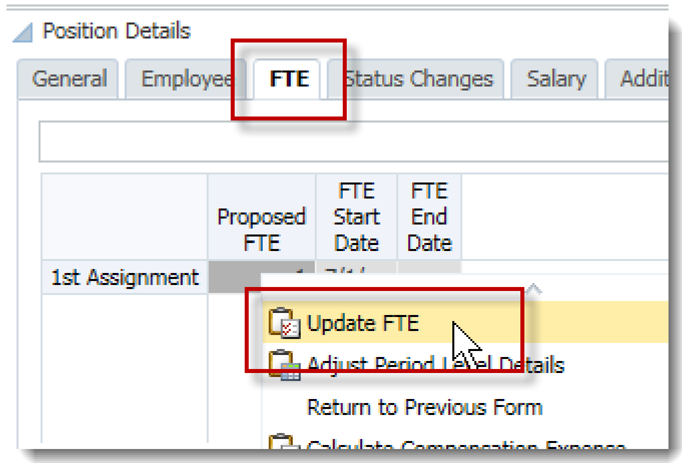
2. Click the **Edit Position Details** option.



3. Click the **FTE** tab.

4. Right-click in the **Proposed FTE** field.

5. Select **Update FTE** from the pop-up menu.



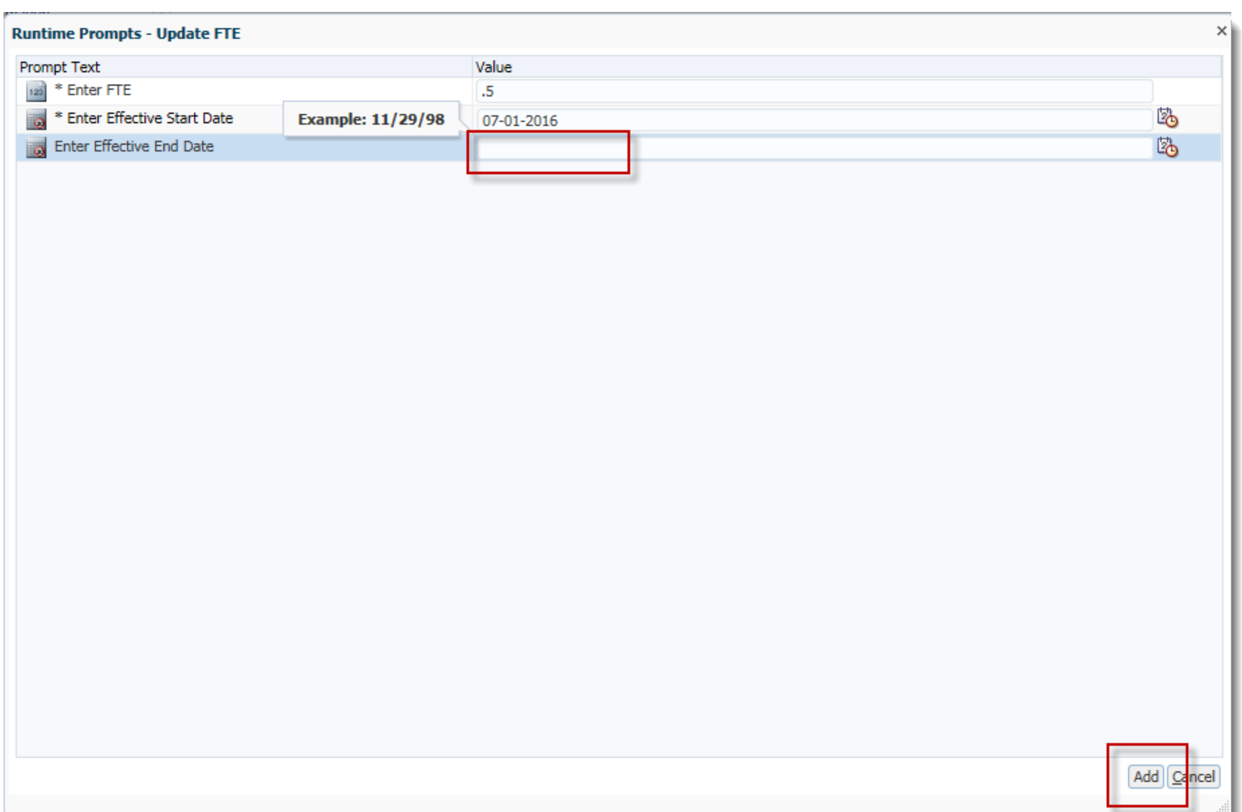
In this example, we are changing the position from a 1.0 FTE to a 0.5 FTE.

6. Replace the 1 in the Enter FTE field with .5.

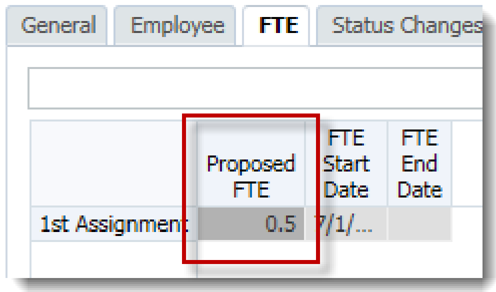
7. Select the default data in the **Effective End Date** field.

8. Press **[Delete]** on the keyboard to remove the Effective End Date to make this an ongoing change.

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

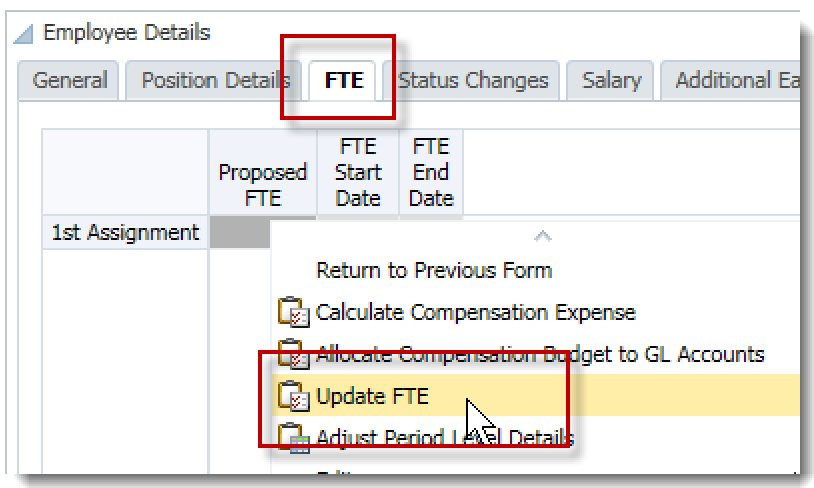


10. Confirm the assignment updates correctly.



To change the FTE for an employee.

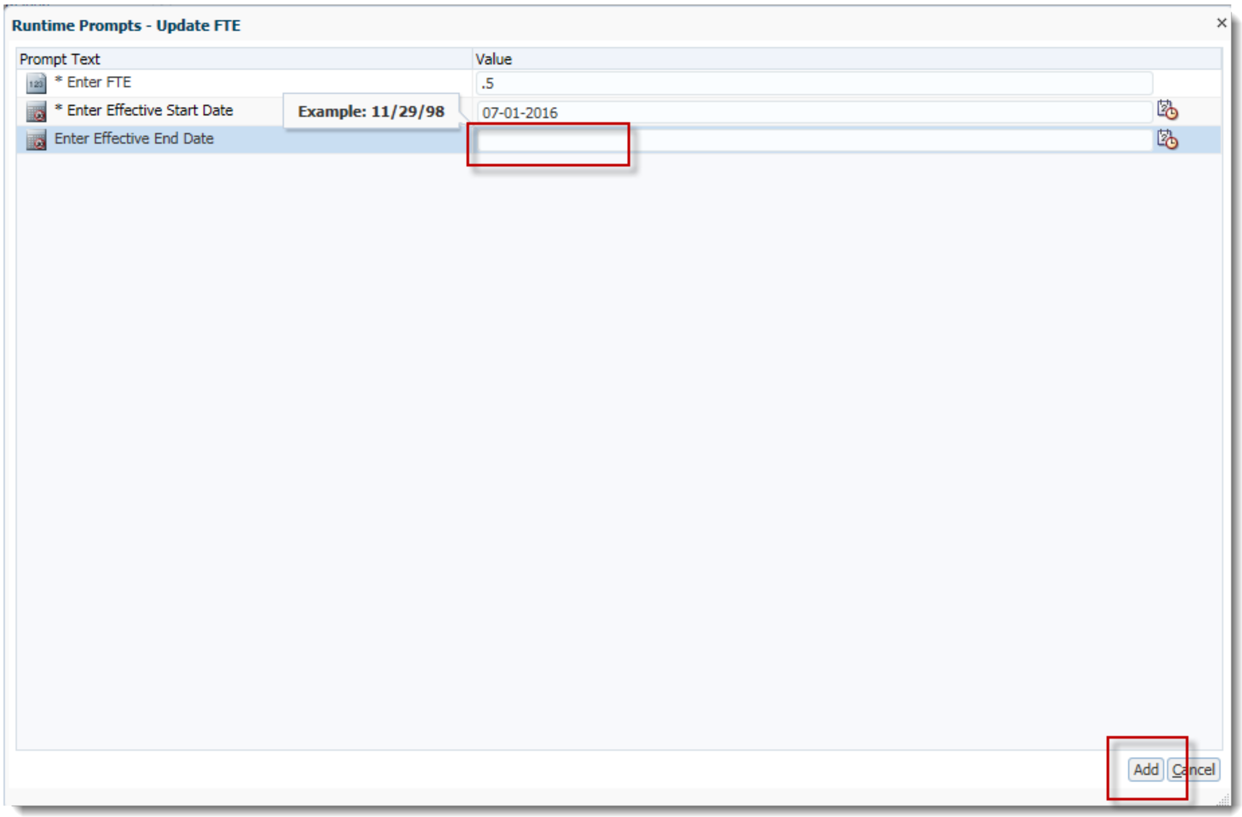
1. From the **Maintain filled positions**, right click on the name of the individual you wish to change the FTE.
2. Click the **Edit Employee Details** option.
3. Click the **FTE** tab.
4. Right-click in the **Proposed FTE** field.
5. Select **Update FTE** from the pop-up menu.



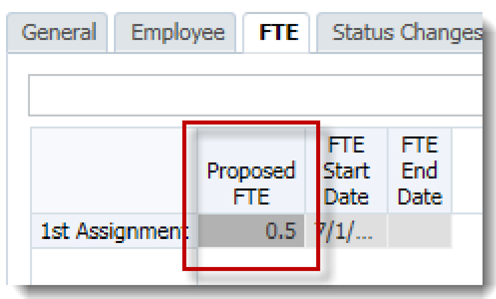
In this example, we are changing the position from a 1.0 FTE to a 0.5 FTE.

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

9. Click the **Add** button.



10. Confirm the assignment updates correctly.



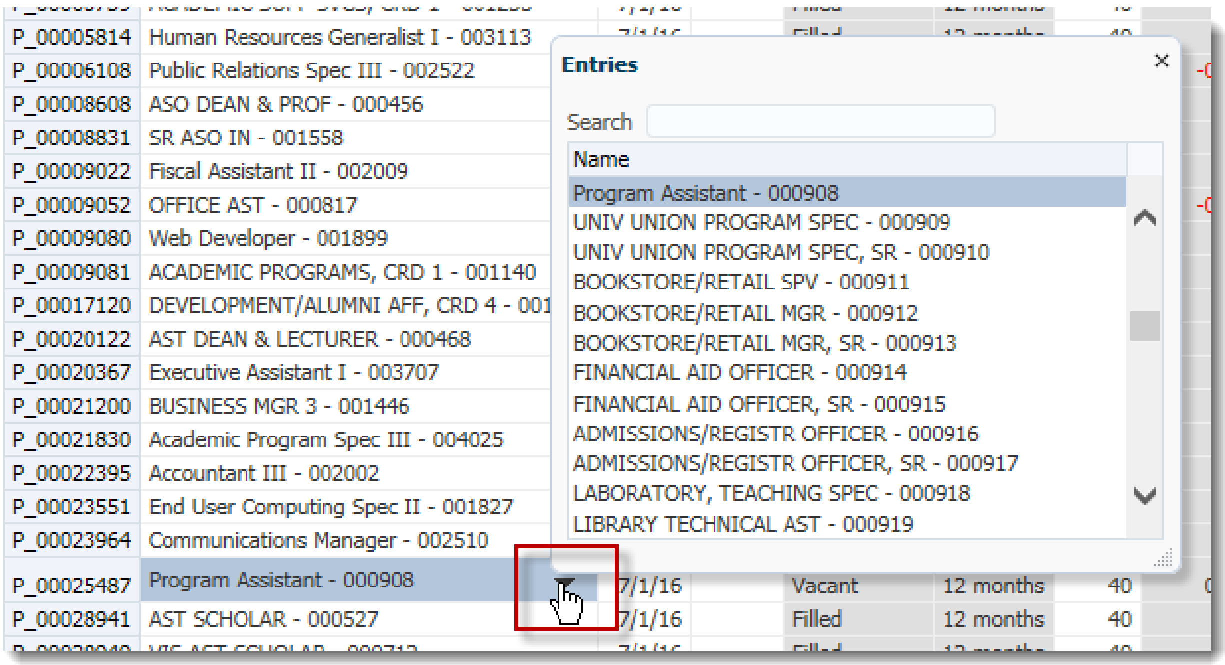
Promote a Position and Employee including Fringe Benefit changes

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.

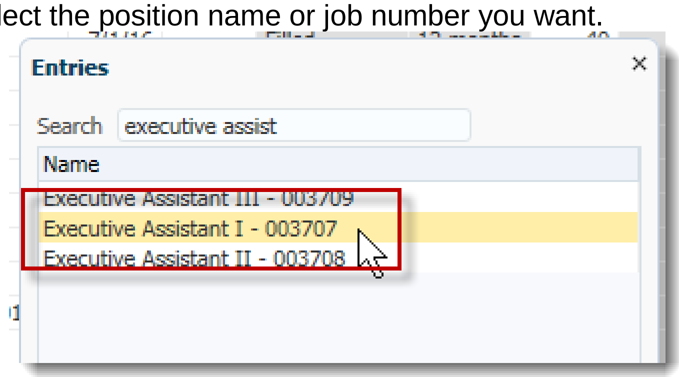
2. Click on the job name cell.

3. Click the job drop down arrow.



4. Use the Search field to search for a position name or job number.

5. Once found, select the position name or job number you want.



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

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

7. If the salary admin plan remains the same, skip to step 22.

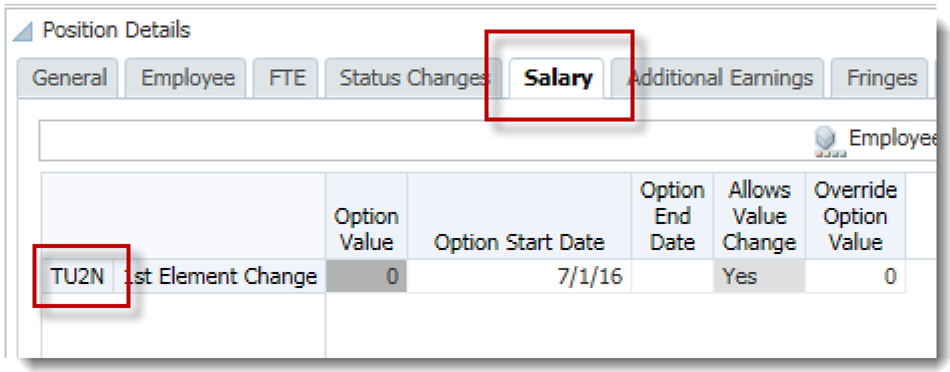
In this example, we need to change the benefits from a Non-Exempt Staff rate to a Exempt rate.

Change the Salary Admin Plan

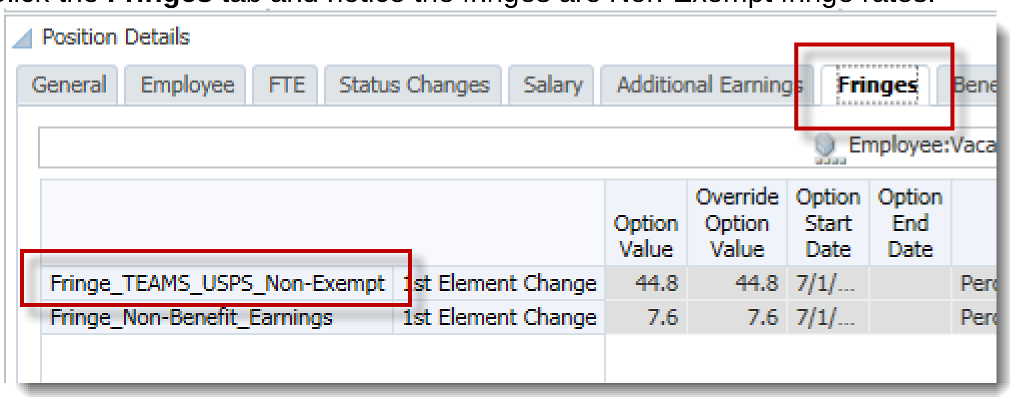
8. **Right-click** on the newly changed position.

9. Choose **Edit Position Details**.

10. Click the **Salary** tab. Notice the Salary Admin Plan still says TU2N which is a Non-Exempt salary admin plan.

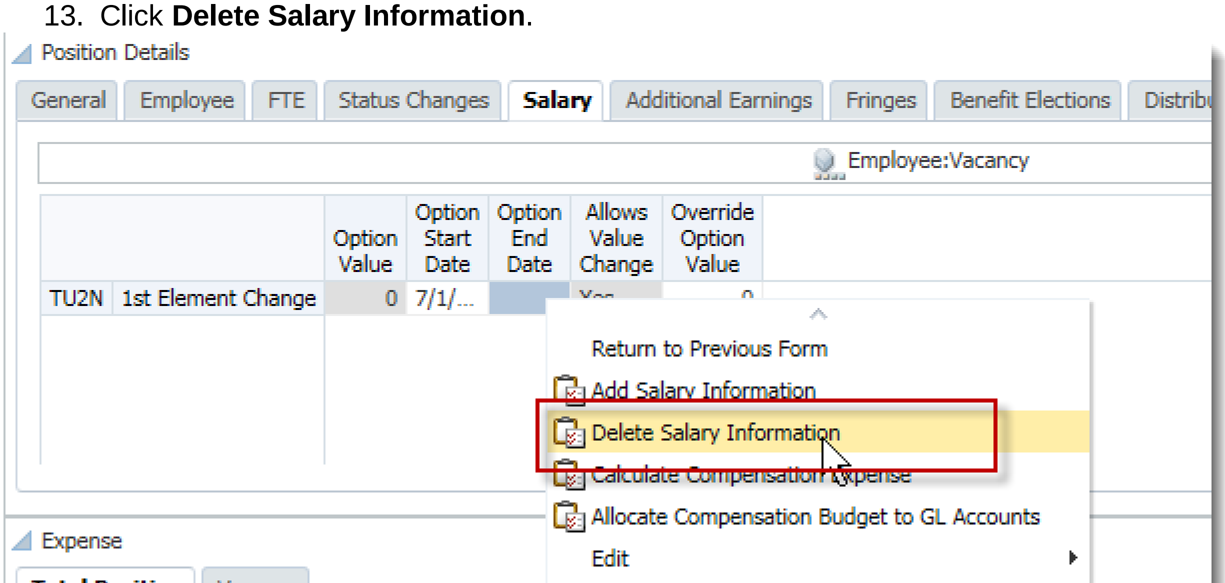


11. Click the **Fringes** tab and notice the fringes are Non-Exempt fringe rates.

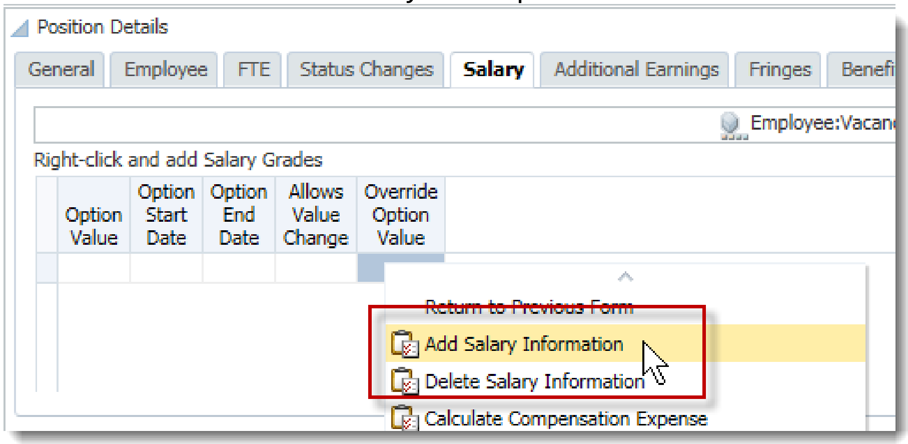


12. Go back to the Salary tab and **right click** on any of the cells in the Position Details section.

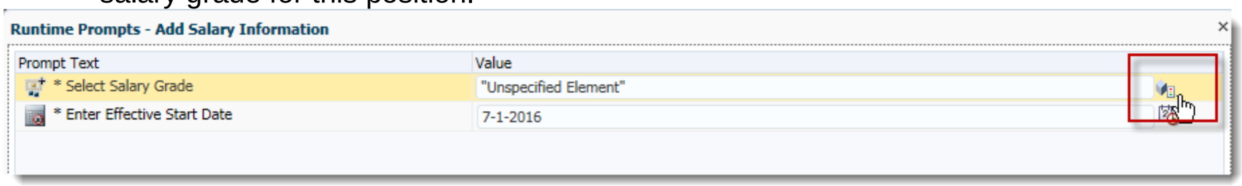
13. Click **Delete Salary Information**.



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



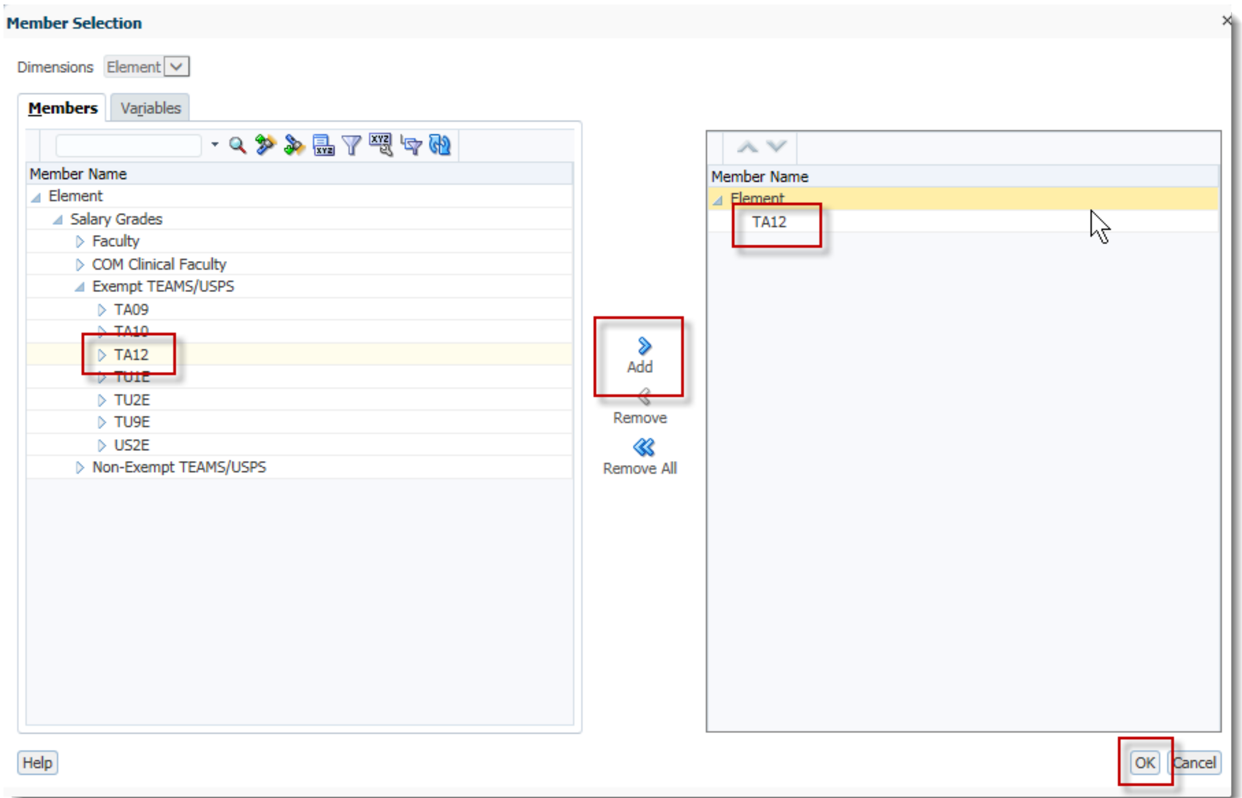
15. Click the **Salary Grade Select Members** icons to search for and locate the appropriate salary grade for this position.



In this example, we will choose TA12, which is a 12 month TEAMS Exempt Salary Admin Plan.

16. Expand the Salary Grades and Faculty categories, and then click TA12.

17. Once TA12 is chosen click the right arrow to send it over to the Element area on the right hand side and then click OK.

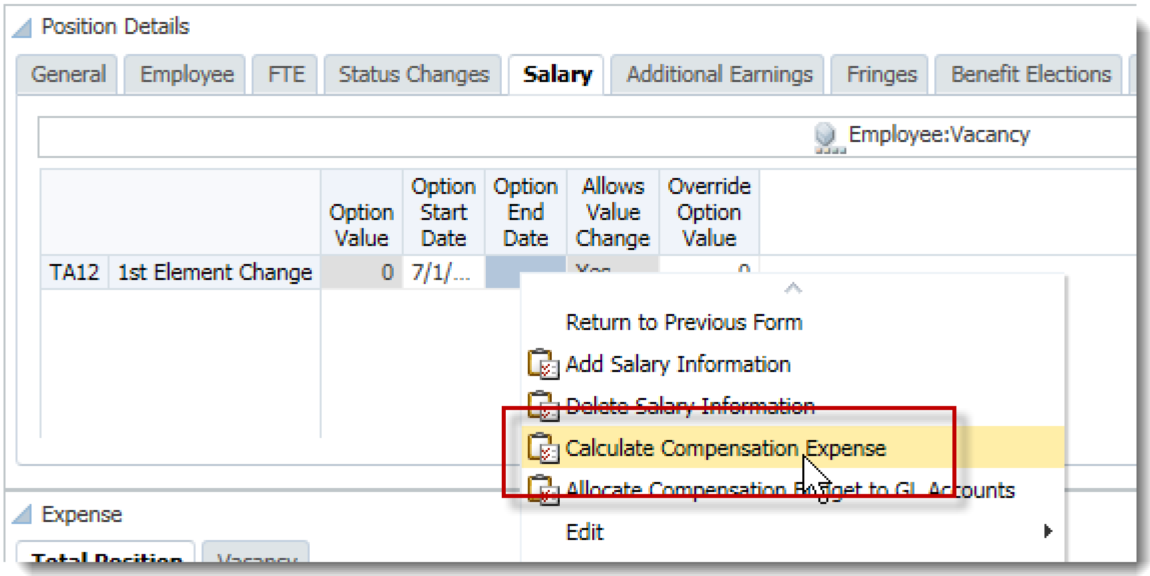


18. From the Add Salary Information window, adjust your Effective Start Date if needed. In this example, we will leave it at 7-1-2016.

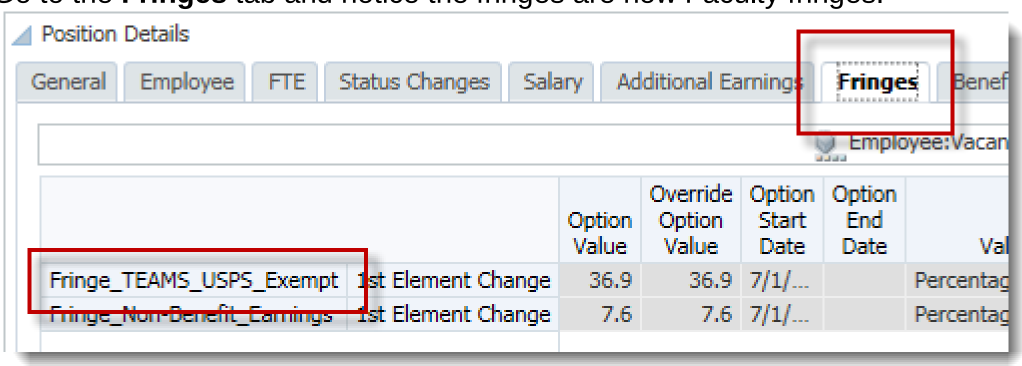
19. Click the **Add** button.

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

20. **Right-click** on any cell in the **Position Details** section and choose **Calculate Compensation Expense**. Once it is finished, run the **Allocate Compensation Budget to GL Accounts** calculation.



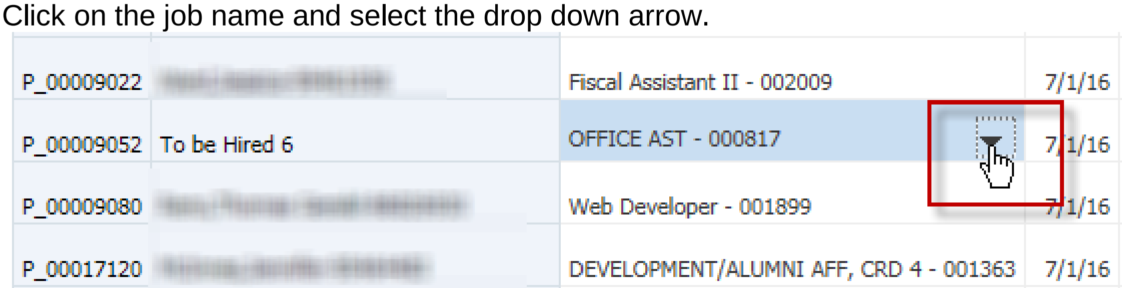
21. Go to the **Fringes** tab and notice the fringes are now Faculty fringes.



Promote an Individual

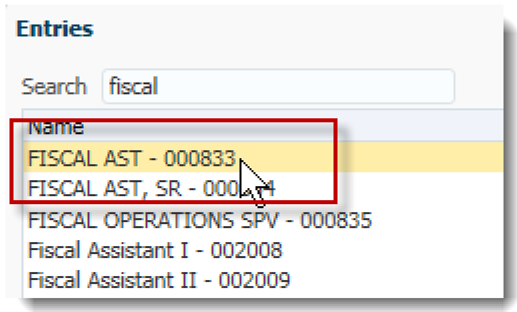
22. Click **Maintain filled positions** from the Budget Prep panel.

23. Click on the job name and select the drop down arrow.



24. Use the top field to search for a position name or job number.

25. Click the position name or job number you want.



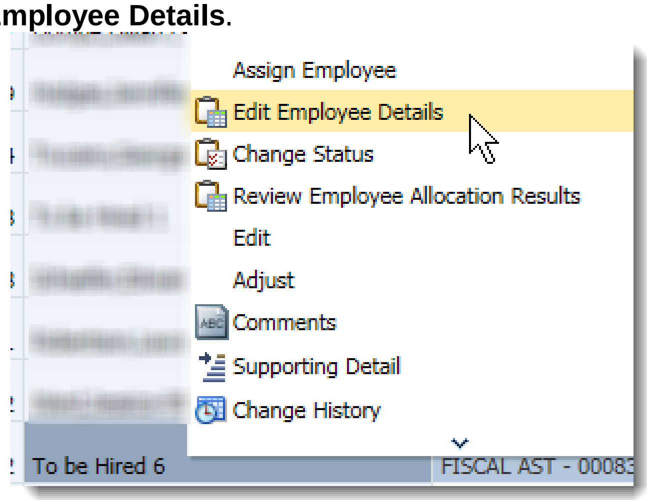
NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.

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

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

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

28. Choose **Edit Employee Details**.



29. Repeat steps 10 – 21 above if you need to change the salary admin plan.

30. Click the **Save** button.

31. **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.

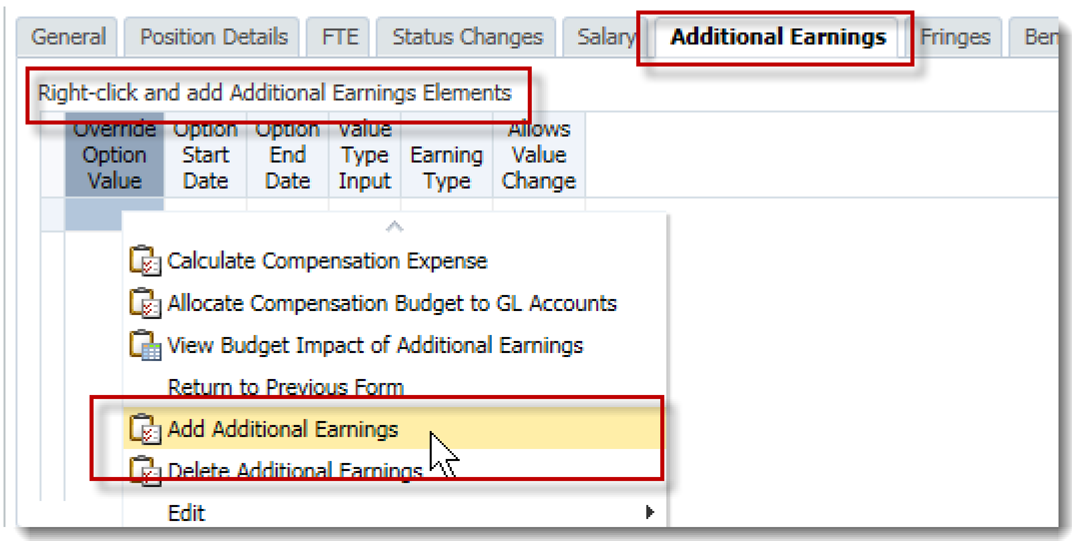
1. From **Maintain filled positions**, **right click** on the name of the person to whom you want to add overtime.

2. Click the **Edit Employee Details** option.

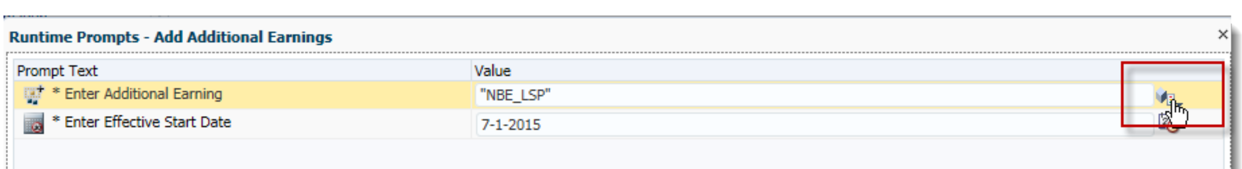
3. Click the **Additional Earnings** tab.

4. **Right-click** underneath the section that states "Right-click and add Additional Earnings Elements".

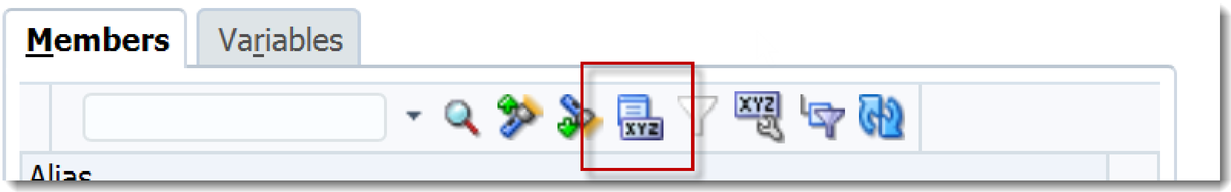
5. Click the **Add Additional Earnings** option.



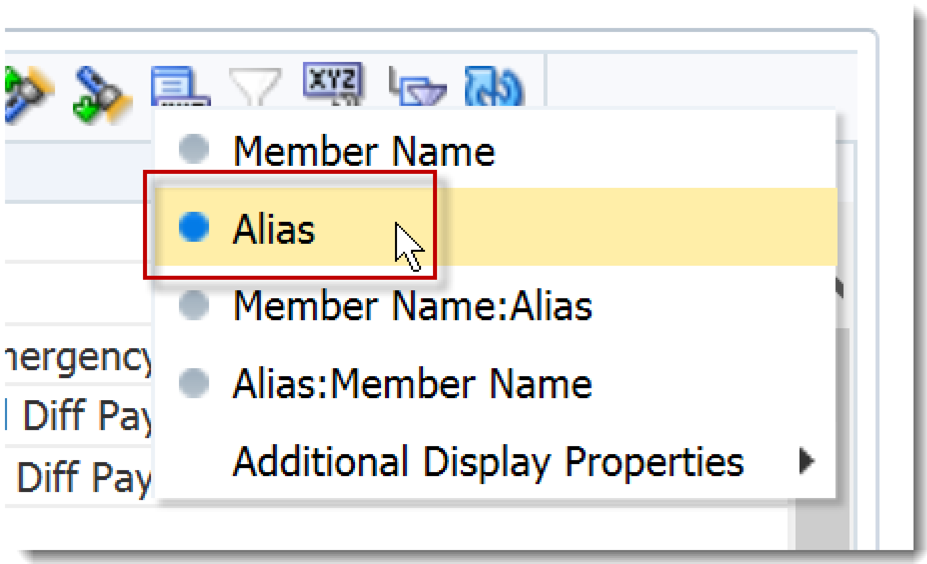
6. Click the **Enter Additional Earning Select Members** drop down icon.



7. Click the **Display Properties** icon.



8. Click the **Alias** menu.

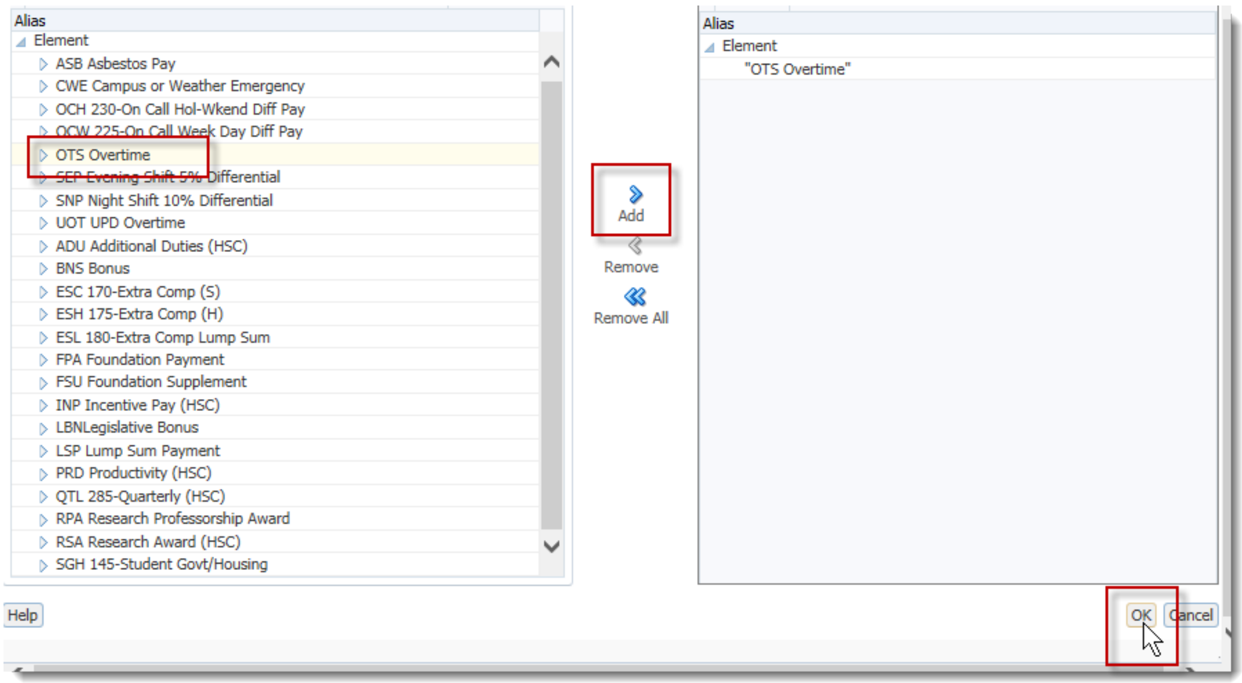


9. Select **OTS Overtime**.

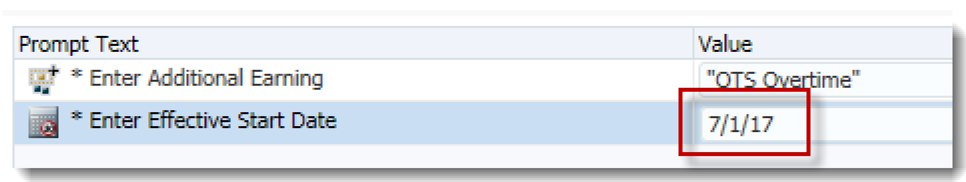
NOTE: In this example we are selecting an overtime payment. You would choose the correct additional earnings for your purpose.

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

11. Click the **OK** button.

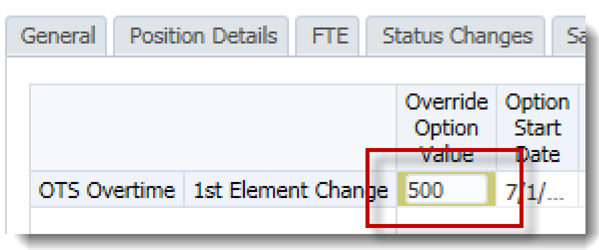


12. If you want to make this effective as of July 1, 2017, click inside the **Effective Start Date** field. For example, change the date to "7-1-2017".

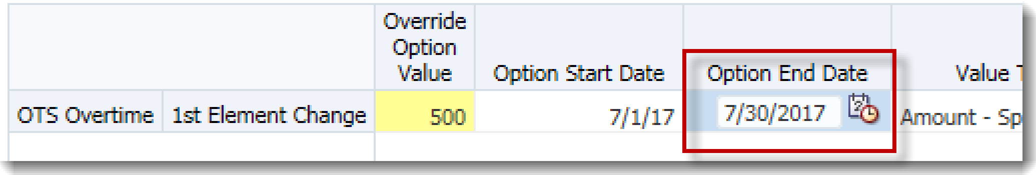


13. Click the **Add** button.

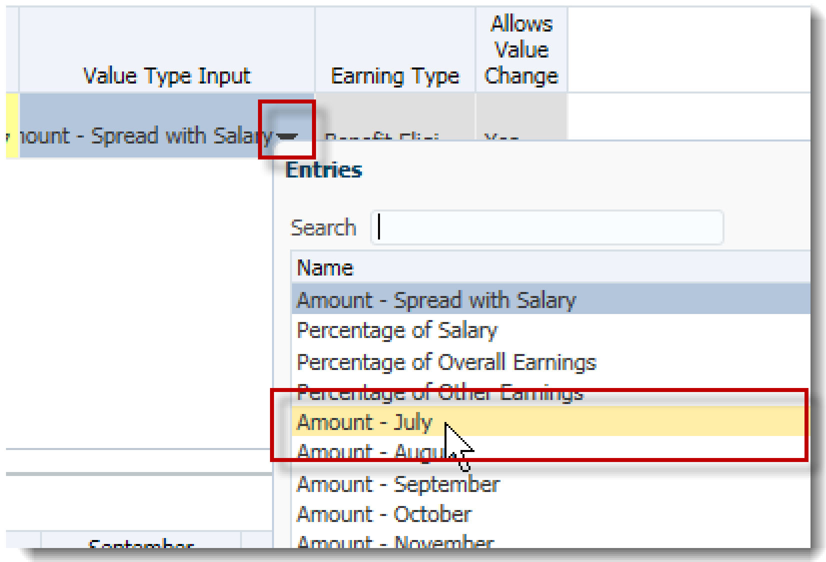
14. Click in the **Override Option Value** field and enter the Amount of the additional earnings. For example, enter "500.00".



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



16. Click the **Value Type Input** field and a drop down list will appear. Select **Amount - July**.



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

Add a Vacant Position

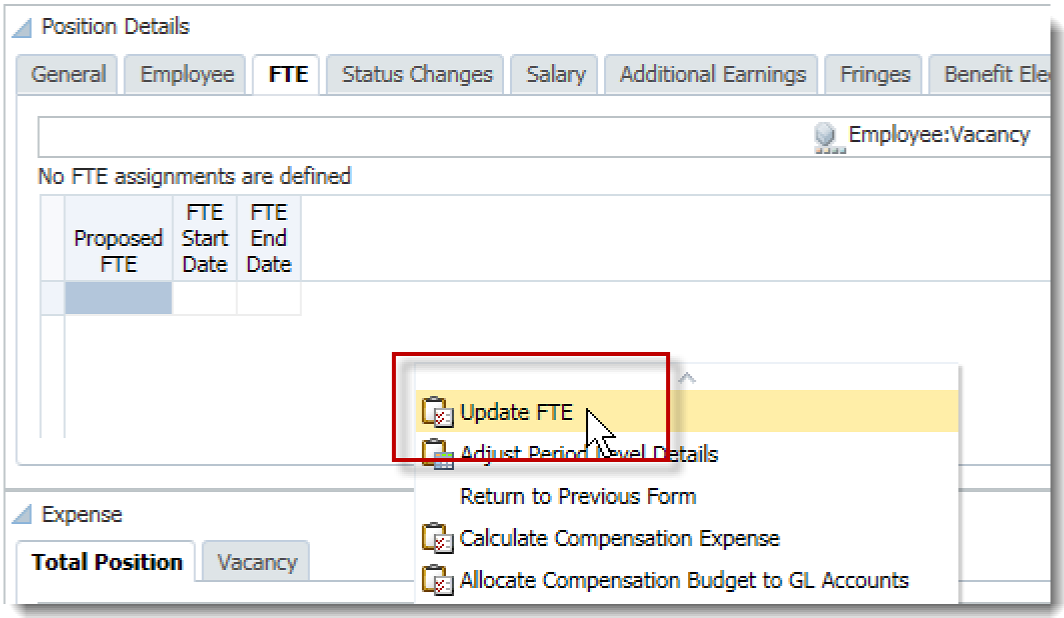
If you want to hold a specific dollar amount, but do not plan to hire someone in the near future for a specific position you can add a truly vacant line to hold dollar amounts.

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:

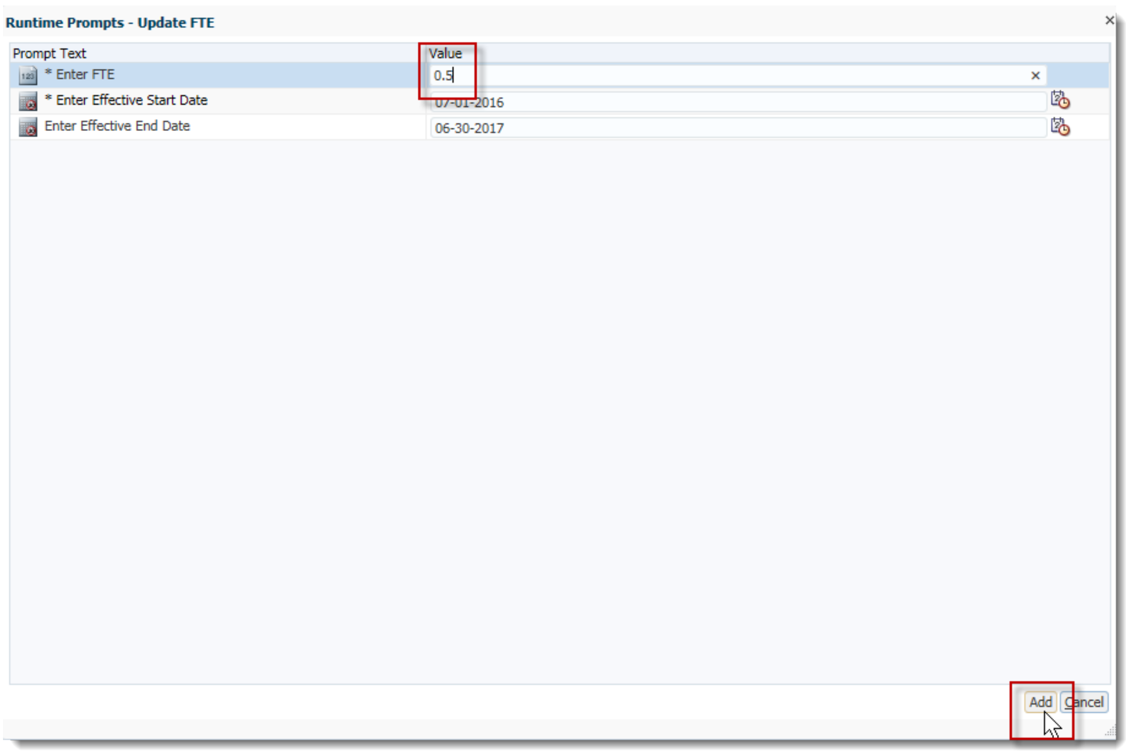
a. **Right-click** anywhere on the assignment line.

b. Choose **Update FTE**.



c. Enter the appropriate FTE.

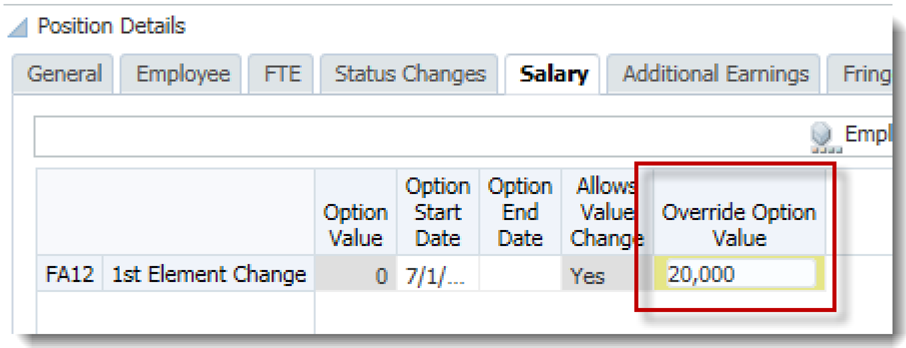
d. Click the **Add** button.



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.



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

7. Go to the **Distributions** tab and input your distribution information and save.

8. Run both the Calculate and Allocate procedures.

Calculate and Allocate Compensation per Entity

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

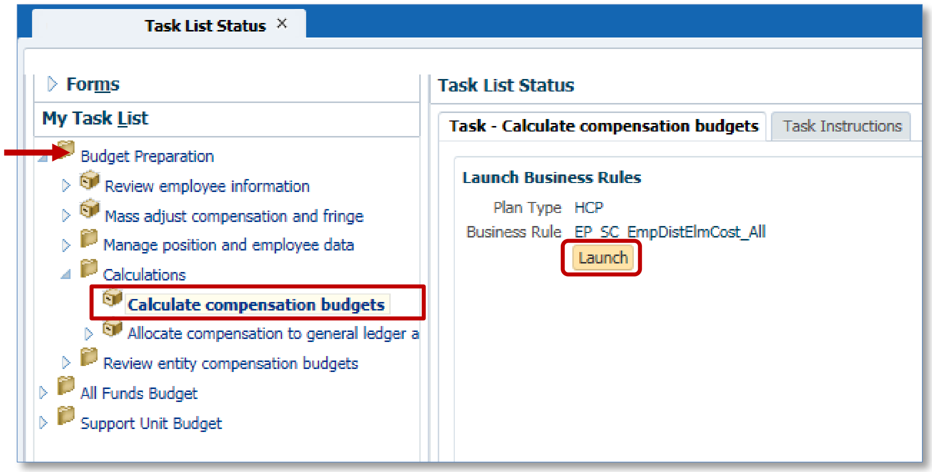
Complete these tasks to run the calculation and allocations after all of your transactions for the day.

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

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

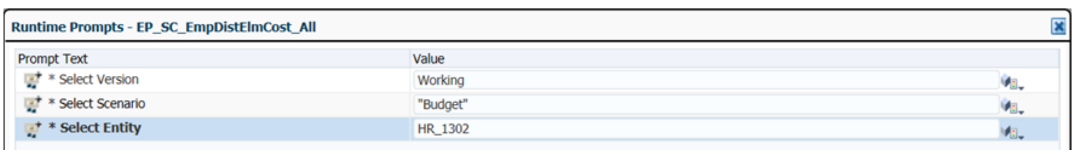
1. Navigate to: **My Task List > Budget Preparation > Calculations** > **Calculate compensation budgets**.

2. Click the **Launch** button.



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

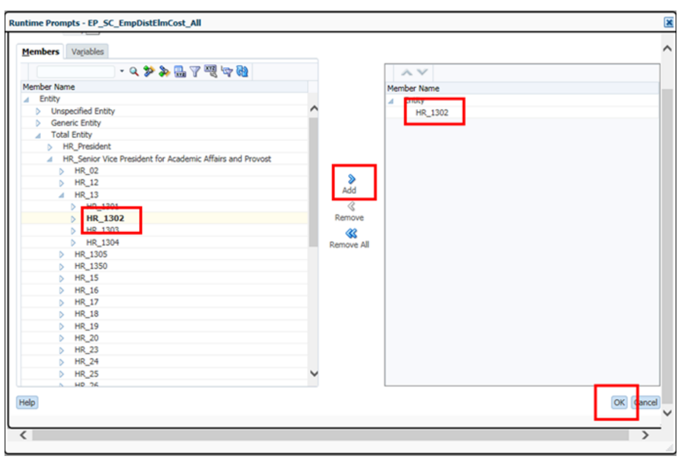
4. Select the appropriate **Entity**.



5. Click your **Department or College** (if you are small size college) to select it.

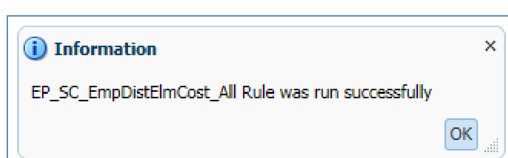
6. Click the **right arrow** to move it to the right side of the screen.

7. Click the **OK** button.



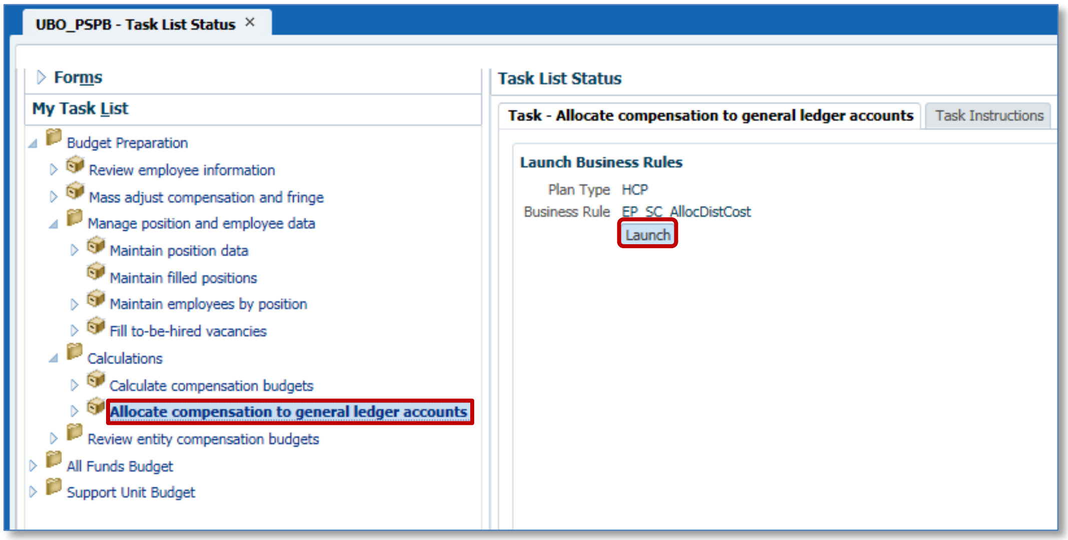
8. Click the **Launch** button.

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



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

10. Click the **Launch** button.



Before going into details on how to select the calculation criteria, let's define some concepts.

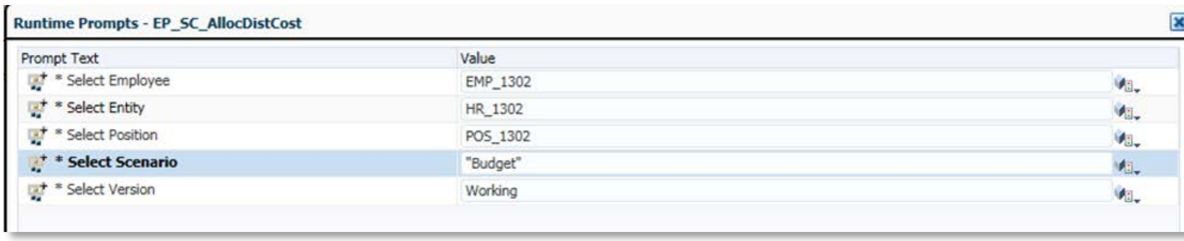
- **Existing Employees** are all of the pre-loaded employees. Existing Employees have a valid 8-digit UFID.
- **Existing Positions** are all of the pre-loaded positions. Any position that starts with "**P_**," "**P_A**," "**SA_**," or "**SB_**" is an existing position.
- **To-Be Hired Employees** start with "**To_Be_Hired**" followed by a digit. An example is: "**To Be Hired 1**."
- **New Positions** are all added to Hyperion by the Budget Office per requests from a unit. They start with "**New Position**." An example is: "***New Position 100***."

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

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

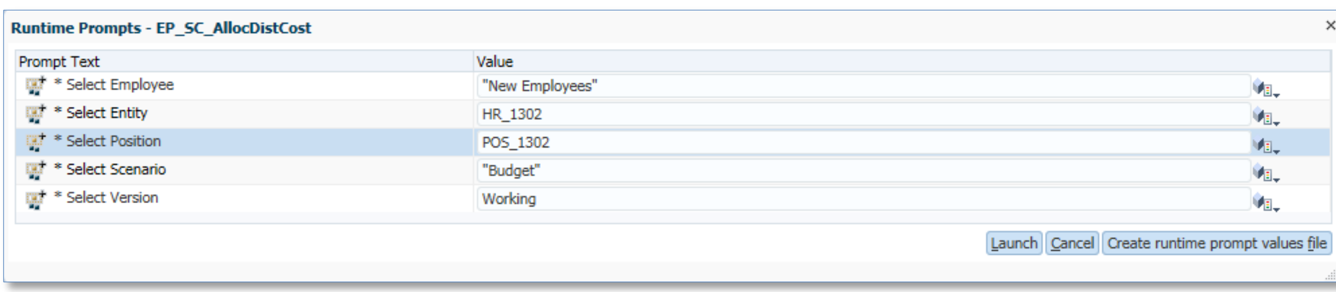
Each of these calculations correspond with different parameters, which are shown below. Review the list of employees/positions in your department. In most cases, you will have existing employees on existing positions. When you run the allocate compensation calculations for these instances, make sure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

Instance 1: Existing employees on existing positions



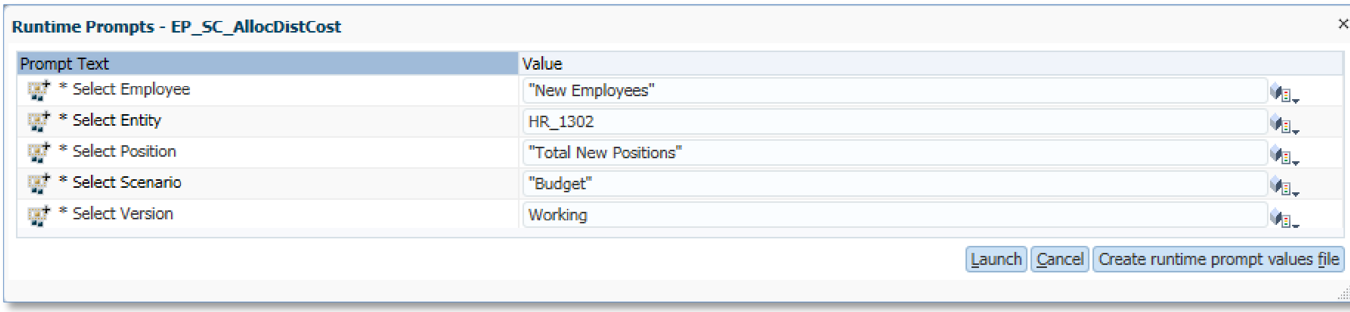
If you have existing employees on existing positions, you need to set these parameters: Make sure you select **EMP_XXXX** for ***Employee*** criteria and **POS_XXXX** for ***Position*** criteria. You can also type those values directly into the boxes. The ***Scenario*** should always be “**Budget**”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

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



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

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



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

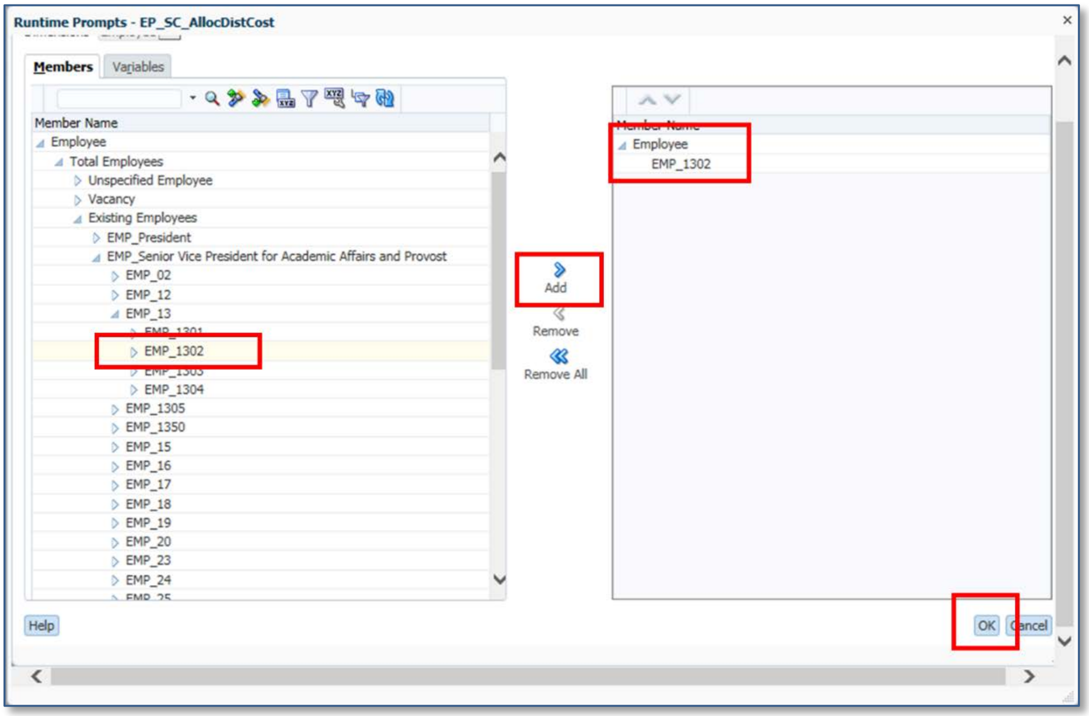
The following steps show you how to make selections for Instance 1. You can follow these steps to make selections for instances 2 and 3 as well.

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

12. Navigate along the branches to select employee branch for your organization.

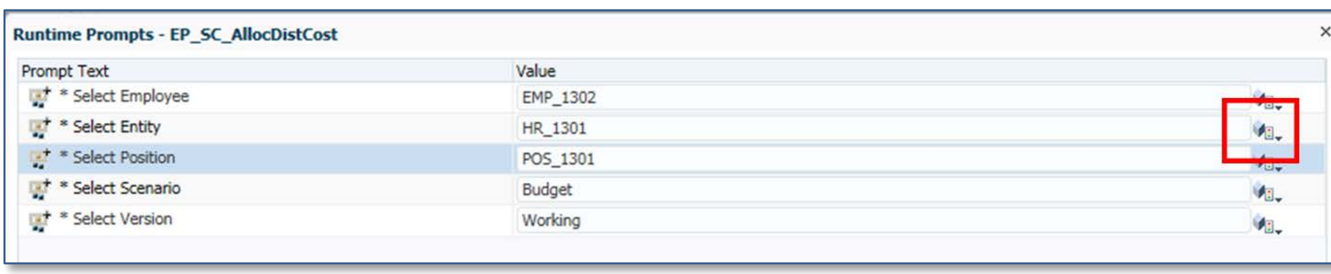
13. Click the **right arrow** to move it into the right side of the window.

14. Click the **OK** button.



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

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

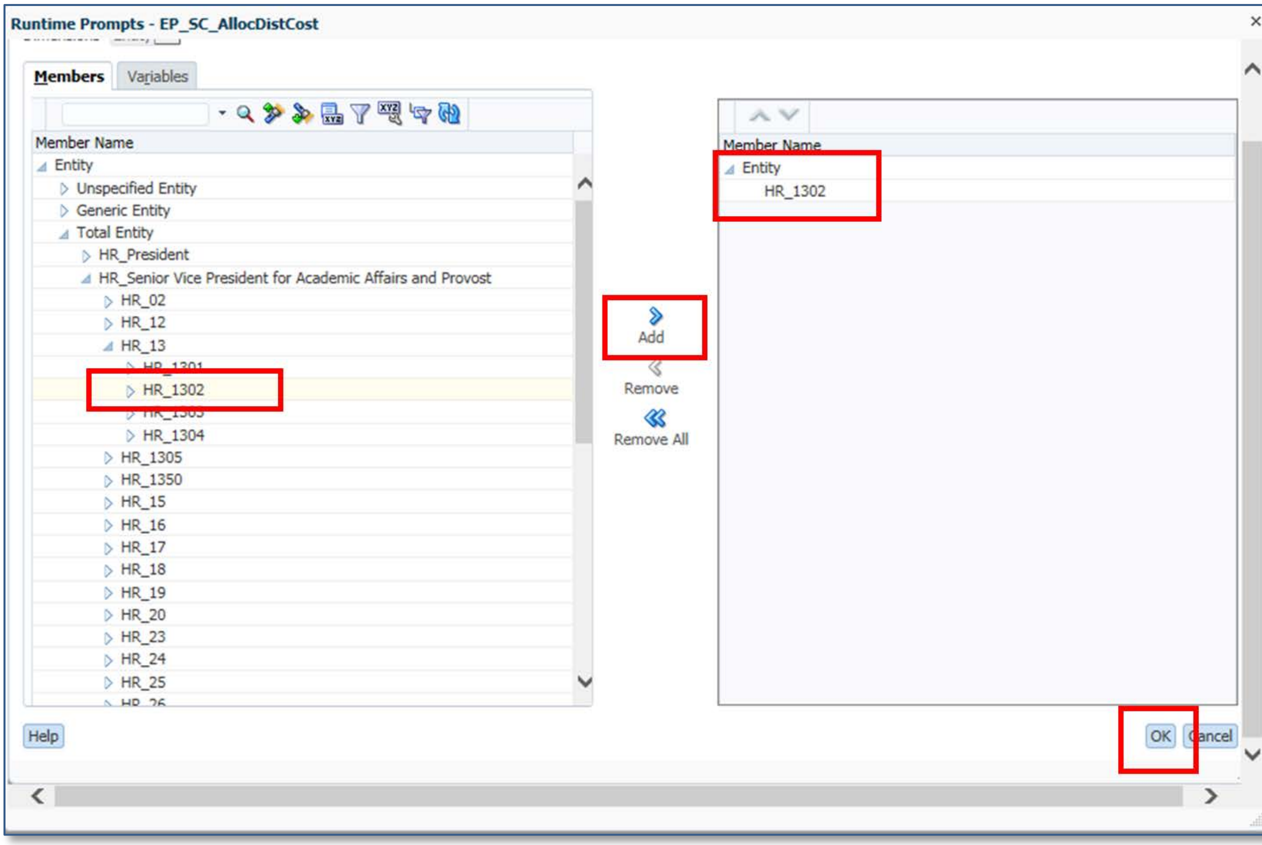


16. Click the **+** button next to your **Department**.

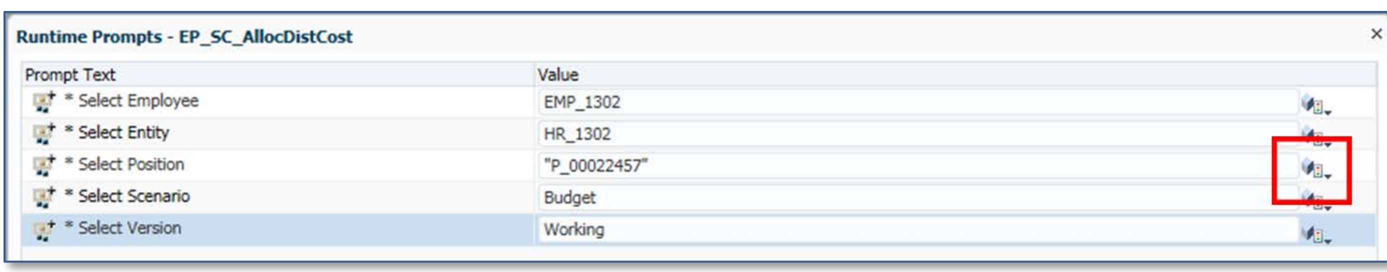
17. Select the **Department**.

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

19. Click the **OK** button.



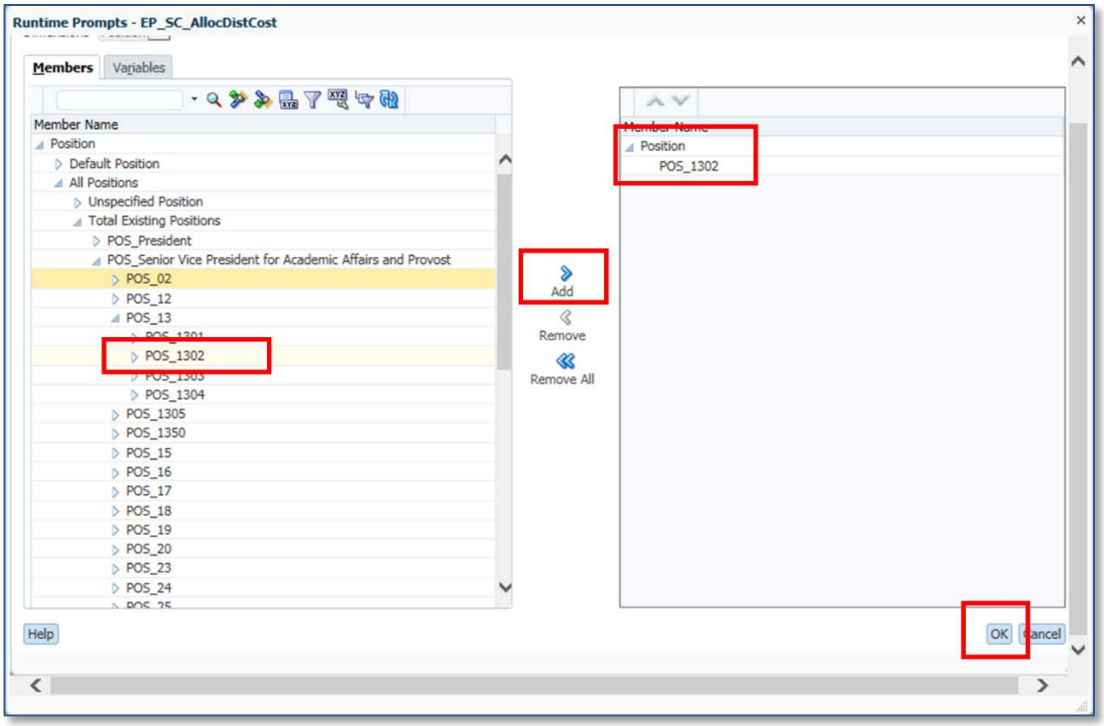
To change the position selection, click the **Search** button next to the Select Position box.



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

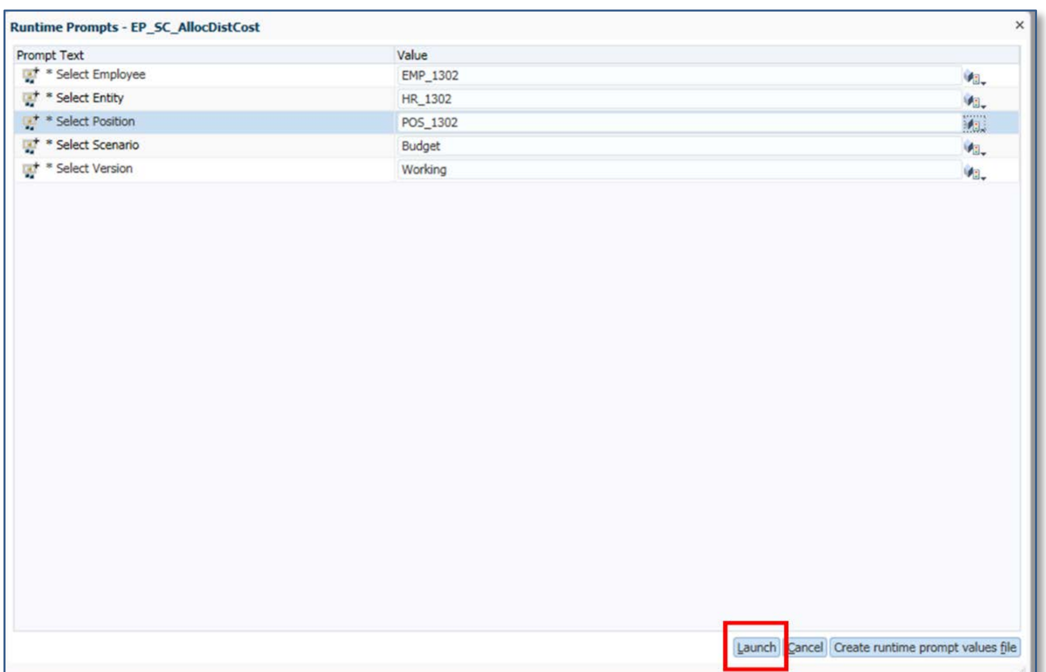
21. Click the **right arrow** to move it to the right side of the screen.

22. Click the **OK** button.



23. Confirm ***Scenario*** and ***Version*** fields display **Budget** and **Working**.

24. Click the **Launch** button.



Repeat these steps to make selections for *Instances 2 and 3* if needed.

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

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

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

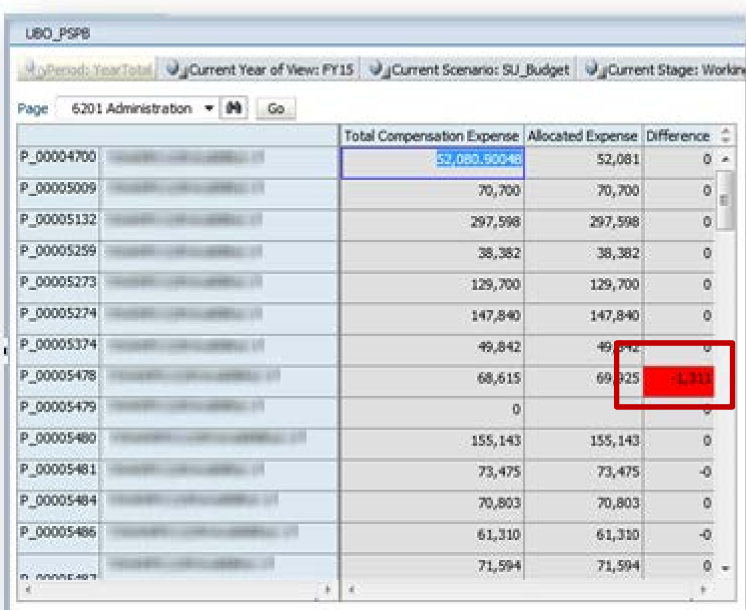
Review Allocation Results

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.



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%

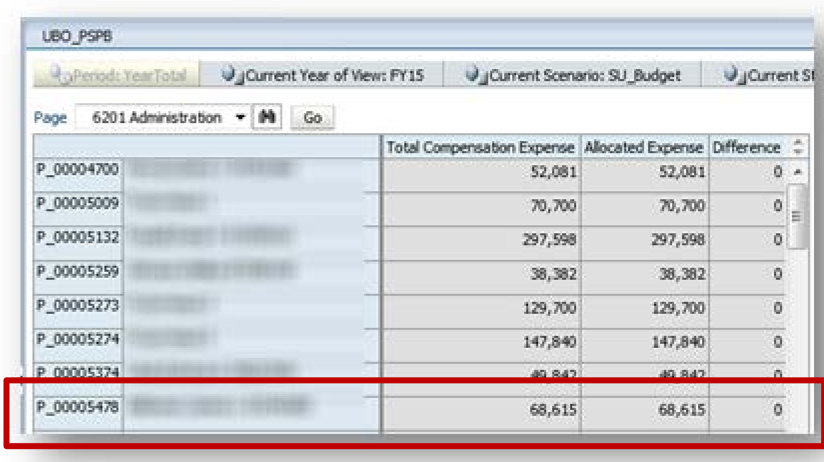
1. From the **Review Allocations Results** report, **right click** on employee name.

2. Choose **Edit Employee Details**.

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.

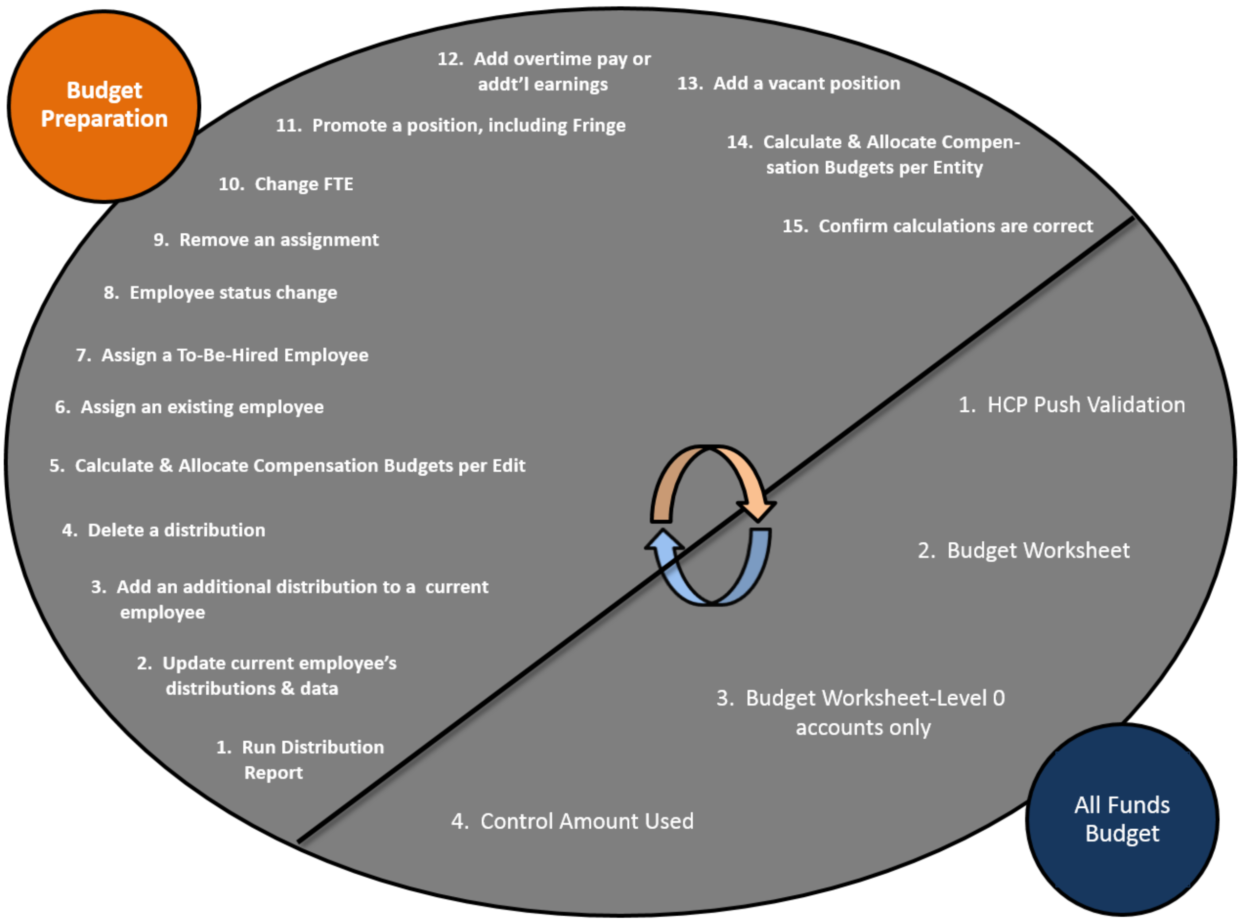
5. Confirm the error has been fixed.



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

Prior to submitting your requested budgets, the Push has to occur. This will occur every 2 hours from 7 AM – 7 PM, Monday – Friday. On Saturday & Sunday, the push will occur every 2 hours from 11 AM – 7 PM

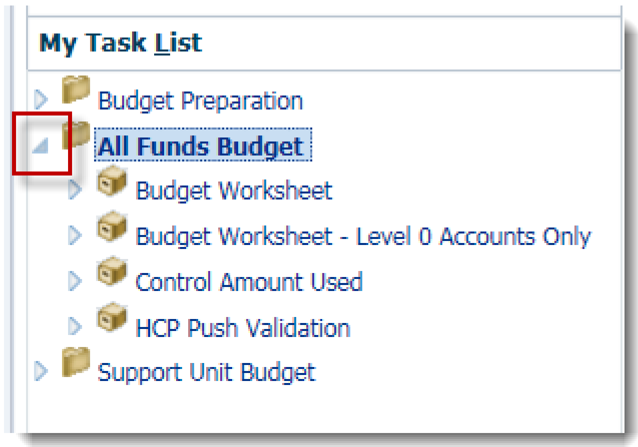
All Funds Budget Submission



Forms for Budget Submission

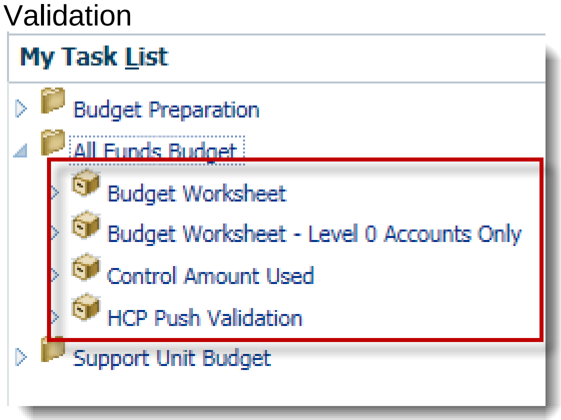
Accessing Forms

1. In My Task List, click the All Funds Budget expand arrow



2. You should see four forms.

    - Budget Worksheet
    - Budget Worksheet-Level 0 Accounts Only
    - Control Amount Used
    - HCP Push Validation

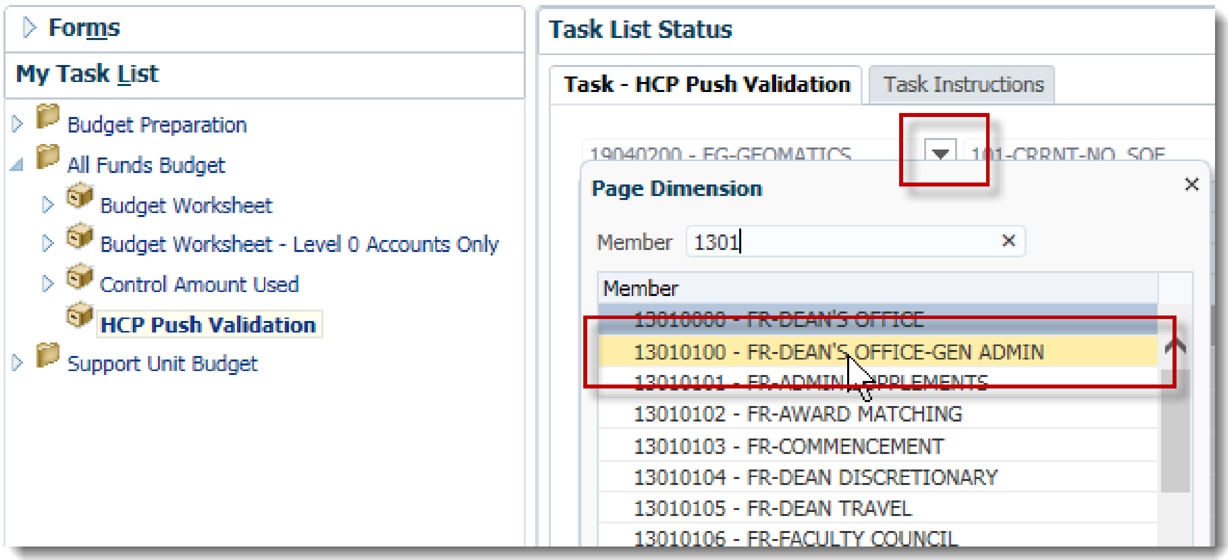


HCP Push Validation

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 **HCP Push Validation** form.

2. Choose your **Entity** from the Entity dropdown field.
   NOTE: You may need to search for the appropriate Entity.

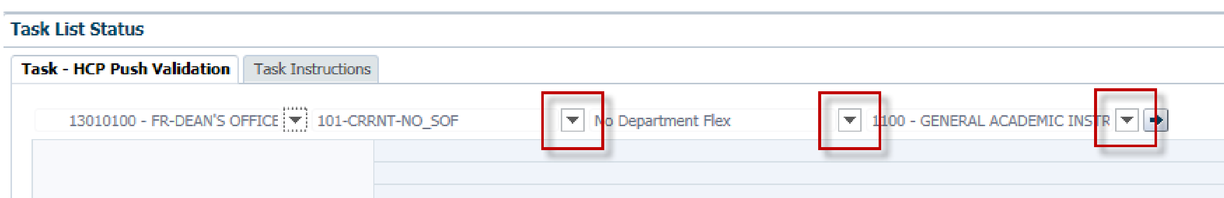


3. Choose your **FundBudRefSOF** from the FundBudRefSOF drop down field.

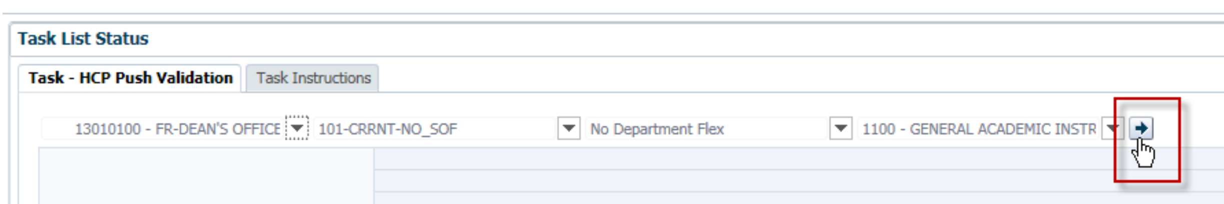
4. Choose your **Dept Flex** from the Dept Flex drop down field.

NOTE: If your ChartField string does not include Departmental Flex, this field must display “No Department Flex”. Type in “no depart” into the search field, then choose No Department Flex from result list.

5. Choose the **appropriate program** from the Program drop down field.



6. Click the **arrow** button.



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.

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 Budget Worksheet – Level 0 Account Only form can be used to input budget. Both forms do the same thing they just have a different view.

This form provides two years of actual expenditures, partial expenditures for the current fiscal year, and current year final approved budget. The actual data include your expenditures only.
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. Your State Appropriation funds will be released at whatever level you budget here so please make sure you budget at whatever level you want your State Appropriations released at for the next fiscal year.

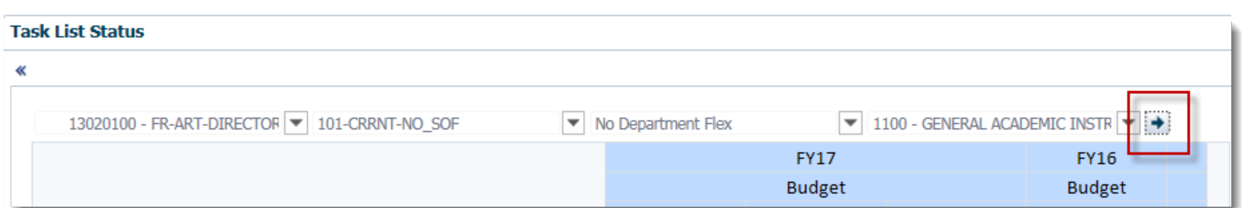
If you plan to budget at a higher level, you also need to select one 8 digit DeptID. For example Enrollment Management, if you plan to budget at Office of Admission, Office of Registrar's Office and VP of Enrollment Management areas, you can select DeptID 03020000 for Office of Admission, DeptID 03030000 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". We will release State Appropriations at the 600000 650000 and 700000 categories as we have in the past.

1. Go to **All Funds Budget > Budget Worksheet**. Select your **Department** from the Entity drop down field (if needed).

2. Select the appropriate **FundBudRefSOF, Dept Flex** (if needed) and **Program**.

3. Then click the **arrow** button.



NOTE: The upcoming fiscal year appears first in the workspace, following by the previous 3 fiscal years.

The upcoming fiscal year will display 3 budget columns:

- **Control** – this is the initial budget the Budget Office inputs for the new fiscal year

- **Working** – this is your working budget. This is where you amake your plans for spending for the fiscal year.
- **Final** – this is your final, confirmed budget for the fiscal year and the Budget Office will populate this column once everything has been finalized.

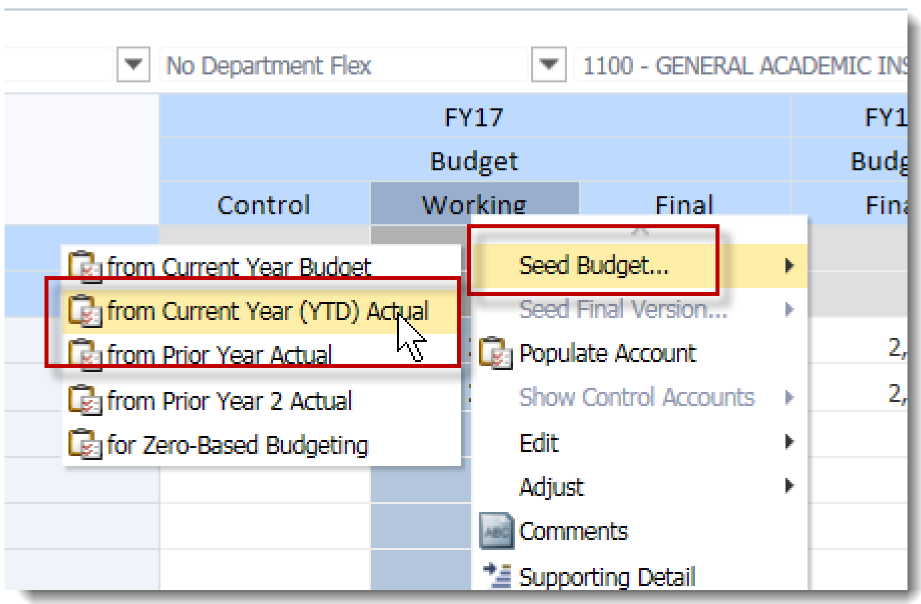
Seeding Budgets

Seeding budgets allows you to take budget data from current or previous fiscal year(s) and populate your Working budget for the upcoming year. This process allows you to quickly add data to use as a starting point for budgeting without having to manually enter large amounts of budget data. You can only seed at the 8 digit entity level, but you can seed at the rollup level for fund, program and deptflex.

1. **Right-click** the upcoming fiscal year **Working** budget column header.

2. Point to **Seed Budget…**from menu.

3. Click from Current **year (YTD) Actual**.



4. **Scroll down** to confirm non-salary accounts have seeded correctly.
   NOTE: you will notice that Salary account (600's) do NOT reflect the data from the current year Actual. Salary data is pushed over from Budget Prep and is not editable in All Funds Budget (Budget Submission). If you wish to make a change to salary data, you must return to Budget Preparation and make the change there.

   OPS and Operating Cost account should display the seeded data from the chosen fiscal year.

NOTE: Data may be entered manually into any white cell, instead of seeding, if desired.

Budget Worksheet-Level 0 Accounts Only

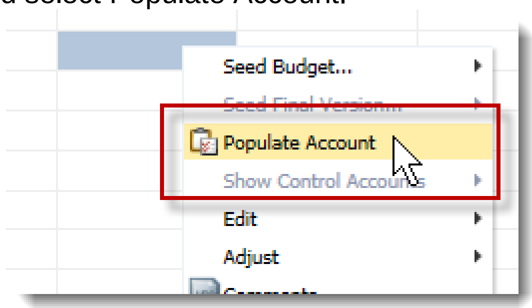
Salary data and fringe will be automatically be populated from the Budget Prep push.

This form only displays level 0 accounts and the accounts don't expand (roll up). You will also not see totals at bottom of columns. Please note either the Budget Worksheet form or this form can be used to input budget. Both forms do the same thing they just have a different view.

Populating Accounts

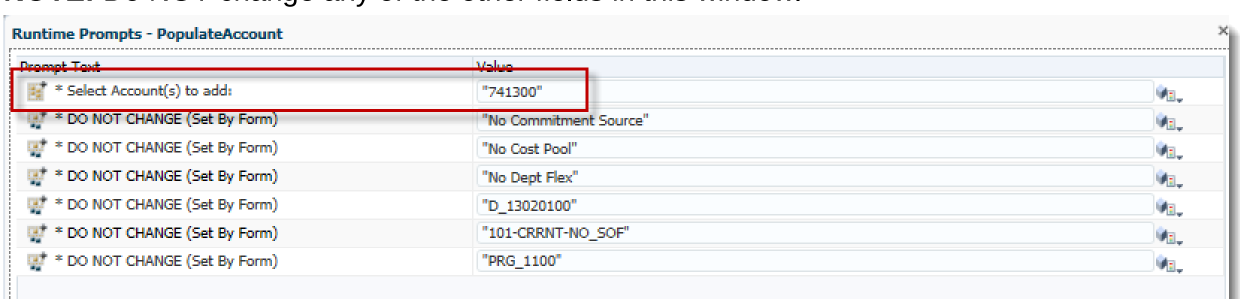
The populating accounts procedure allows you to add accounts that were not previously used but will be needed and used in the future.

1. From either the Budget Worksheet or Budget Worksheet – Level 0 Accounts Only, right-click on the form and select Populate Account.



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

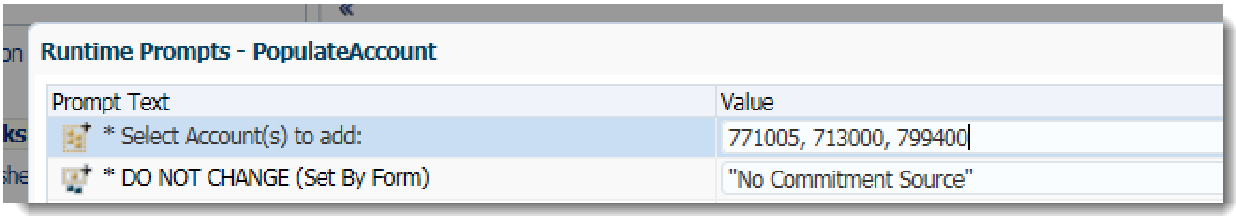
NOTE: Do NOT change any of the other fields in this window.



3. Click the **Account Select Members** button.

You will drill-down and locate the account you wish to add within the left Member Name column. You can also type in the GL accounts directly into this field if you know which account(s) to add.

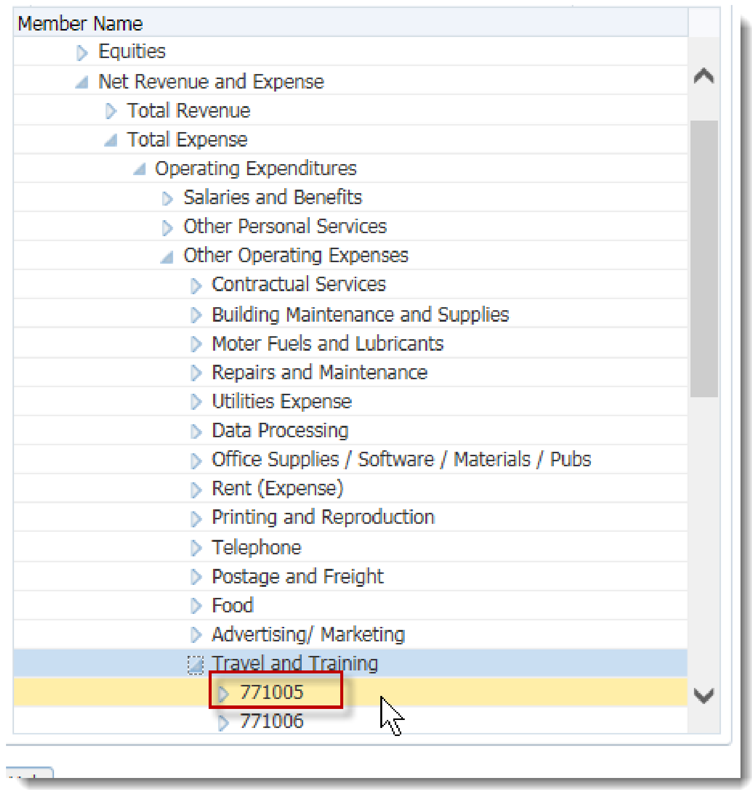
If you add multiple accounts at once, separate each account with a comma.



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.

4. Click the **Total Accounts Expand** icon.
5. Click the **Net Revenue and Expense Expand** icon.
6. Click the **Total Expense Expand** icon.
7. Click the **Operating Expenditures** Expand icon
8. Click the **Other Operating Expenses** Expand icon
   NOTE: Scroll down, as needed.
9. Click the **Travel and Training Expand** icon.
10. Click the **771005** object.

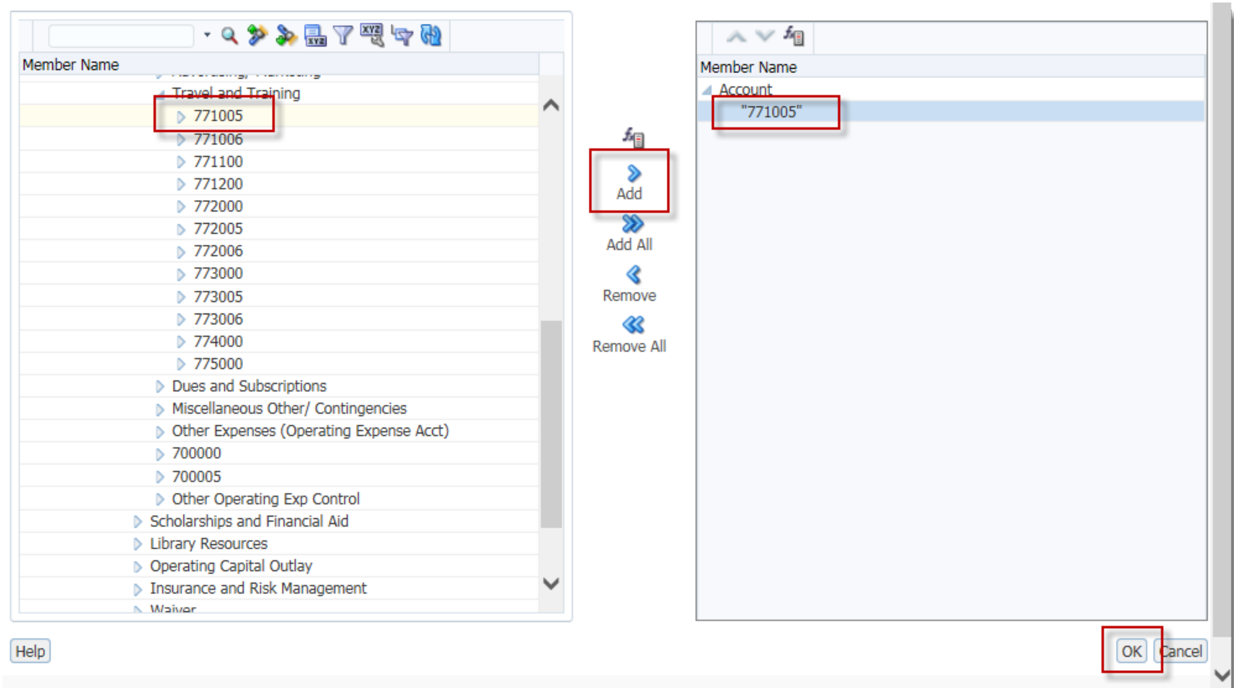


Once you have located the desired account, you will move it to the right side Member Name Column. Only the accounts listed on the right side will appear in your worksheet.

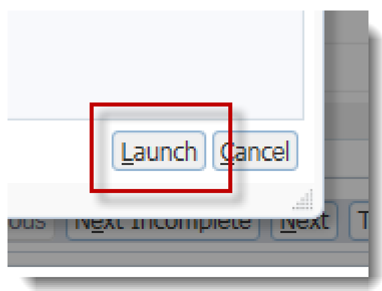
11. Click the **Right-pointing Select arrow**.

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

13. Click the **OK** button.

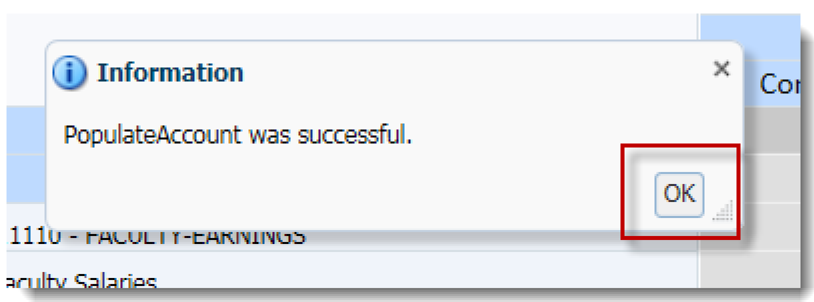


14. Click the **Launch** button.



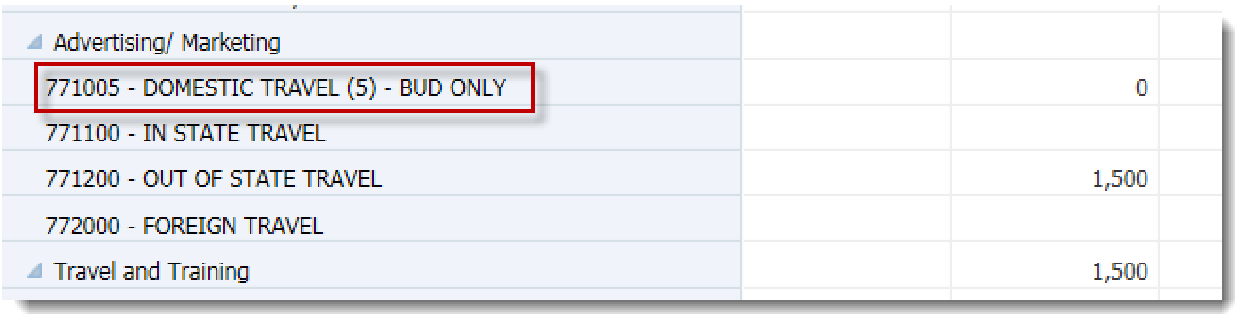
15. After launching the rule, you will receive a confirmation message.

16. Click the **OK** button.



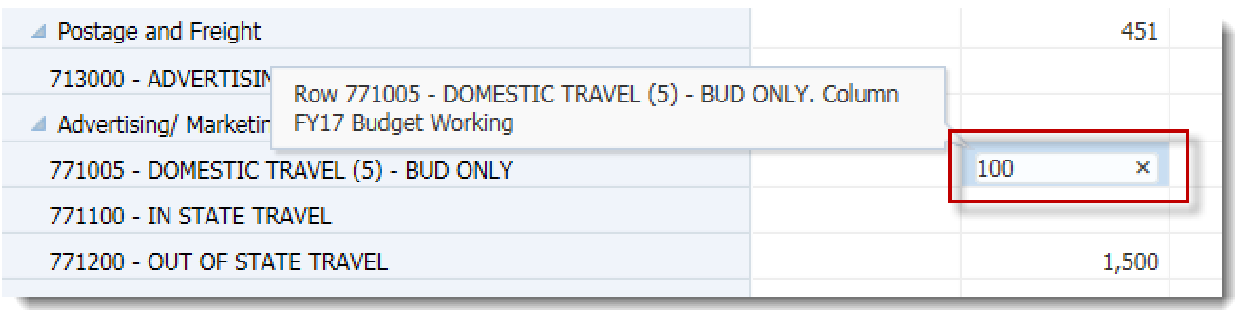
17. Scroll down to verify the new account has appeared in your worksheet.

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



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

20. Enter the amount you wish to budget for that acount. For this example, enter “100”.



21. 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.

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.

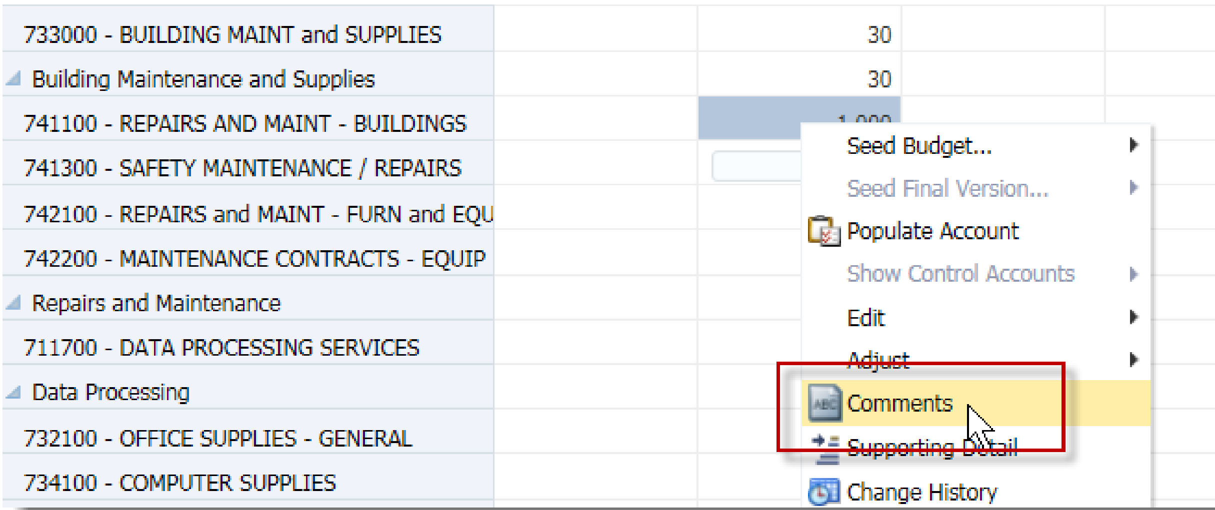
Comments and Supporting Details

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

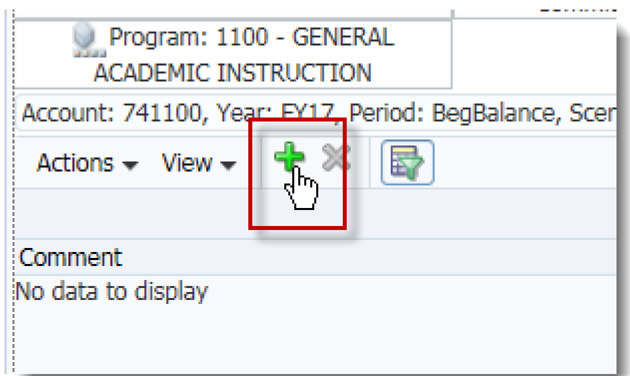
Adding Comments
Comments can be added to Level 0 or rollup accounts in both Budget Preparation forms and All Funds Budget forms.

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

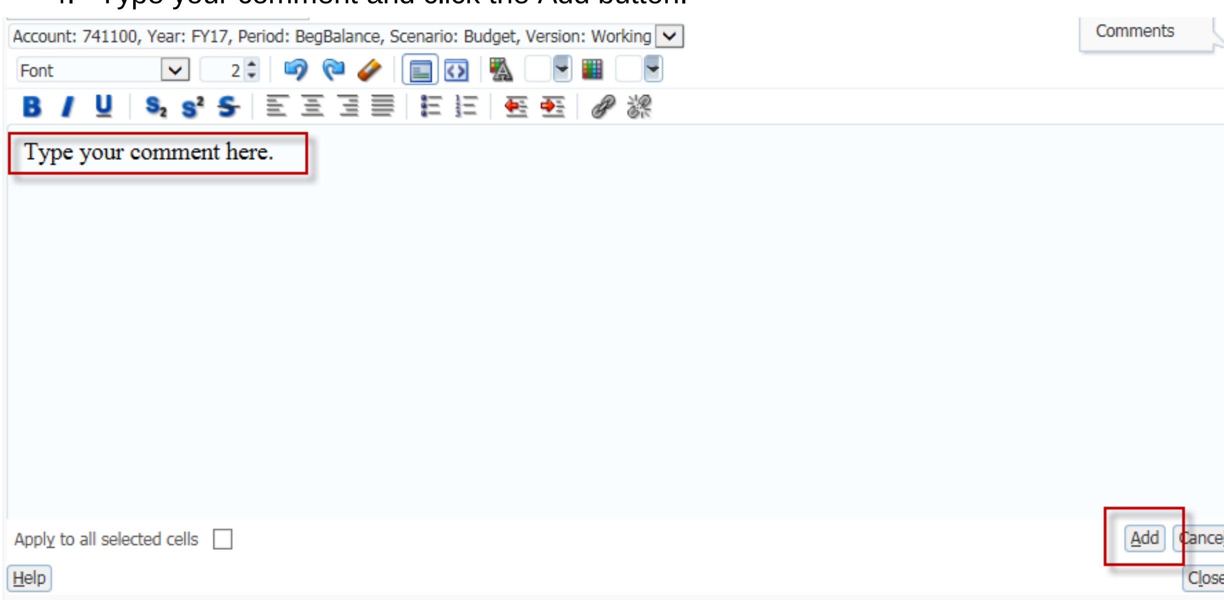
2. Choose **Comments**.



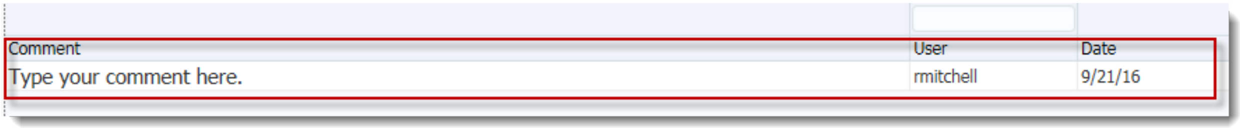
3. Click Plus-Sign to add a comment.



4. Type your comment and click the Add button.

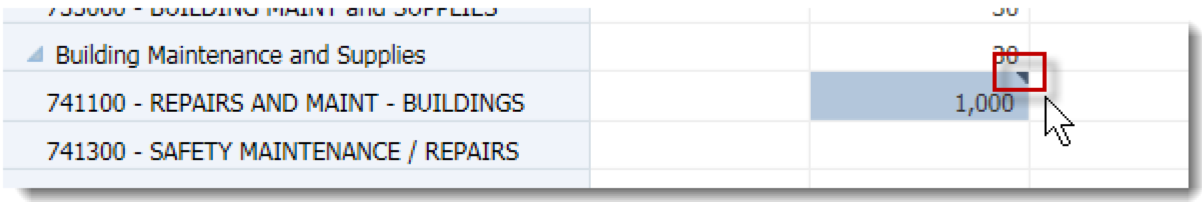


5. Notice you can see your lists of comments, who entered them and the date.



6. Click the Close button.

7. 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 of all comments.

Deleting Comments

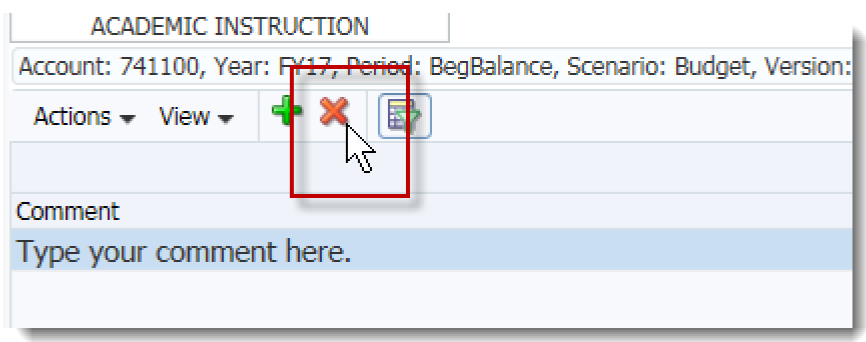
1. **Right-click** the cell that has a comment.

2. Click the **Comments** option.

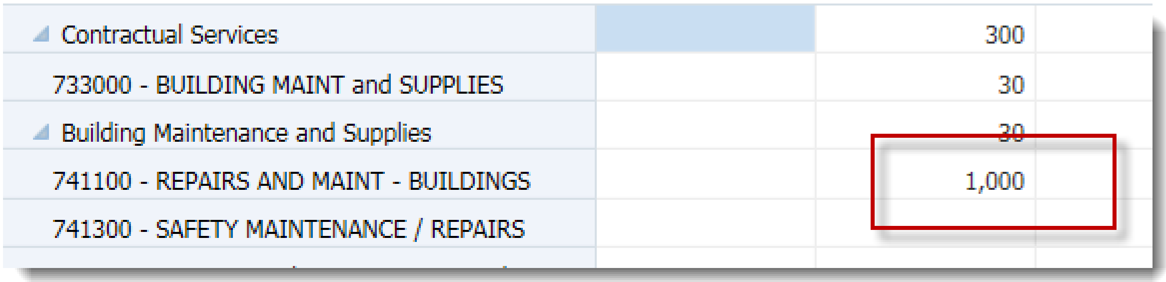
3. Select the comment you wish to delete

4. Click **Delete**.

5. Click **Close**.



6. **Scroll down** (if needed) 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.

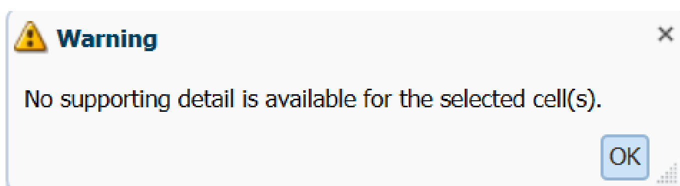
Supporting Details

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

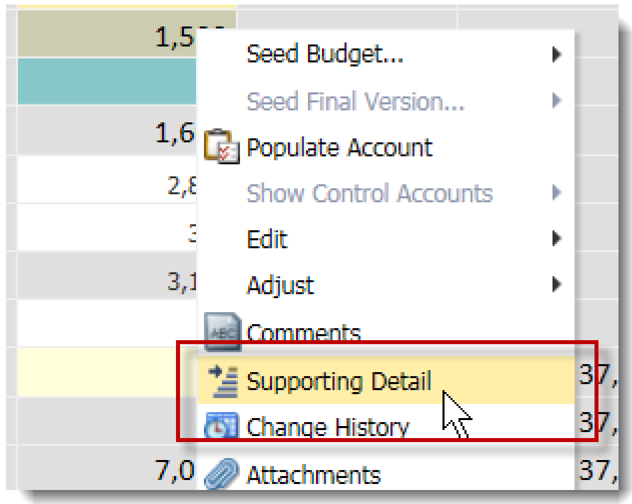
- Supporting details allows you to add in specifics of a cell's entry. For example, if travel expenses are expected to be higher than normal, you can use Supporting Details to explain everything that goes into that value.

  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.

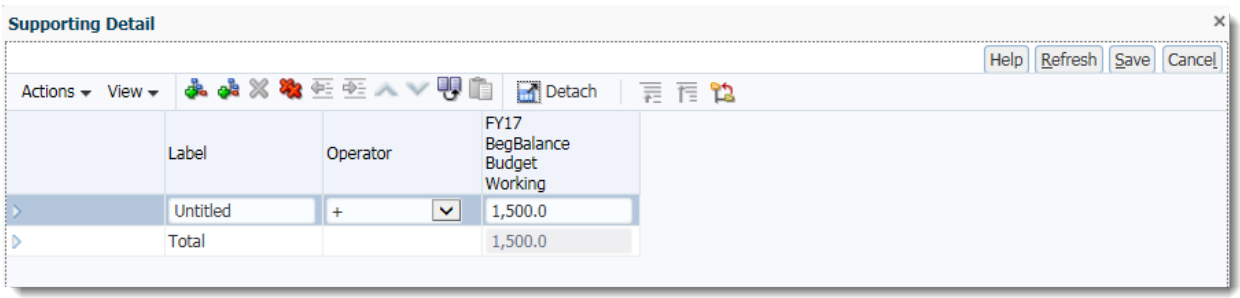


Adding Supporting Details

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



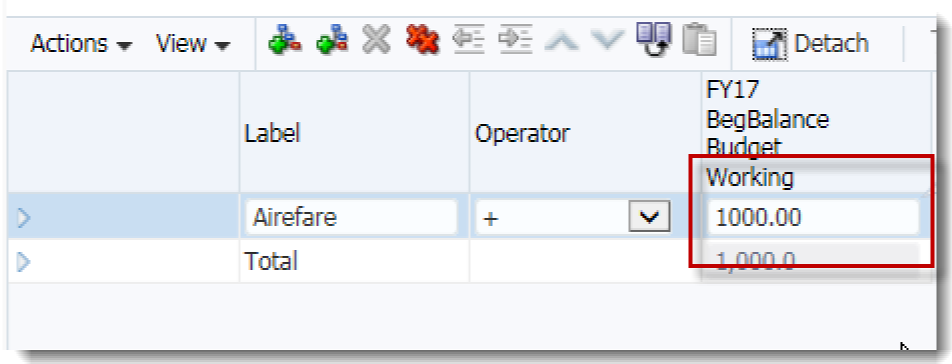
The Supporting Detail window will pop up for you to enter the supporting detail.



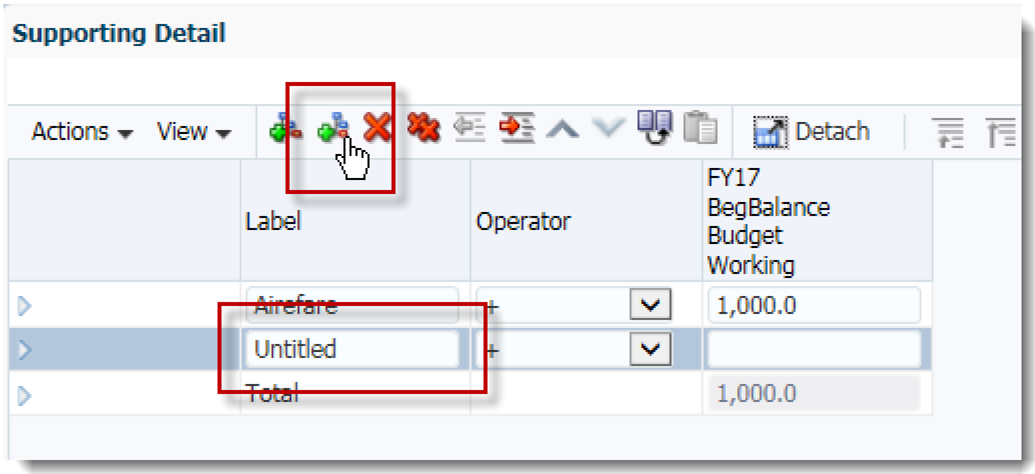
You can add as many detail lines as needed. In this example, we will add Airfare and Hotel costs.

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.

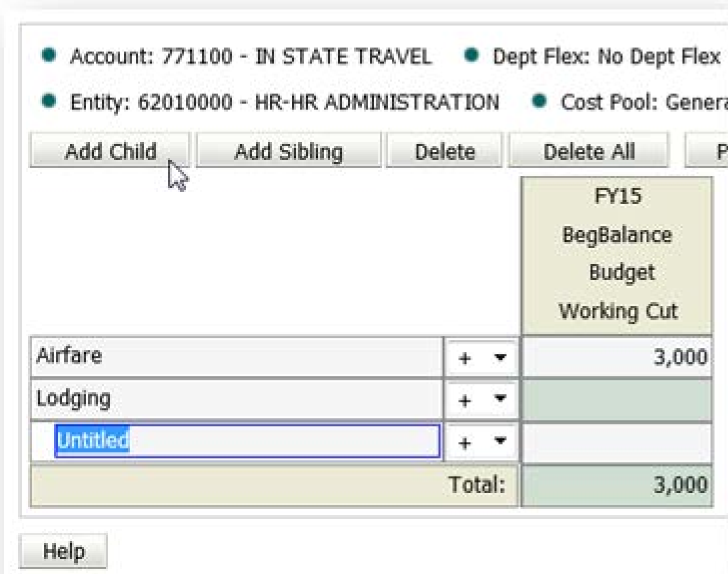


5. To add an additional line on the same level, choose the **Add Sibling** button.



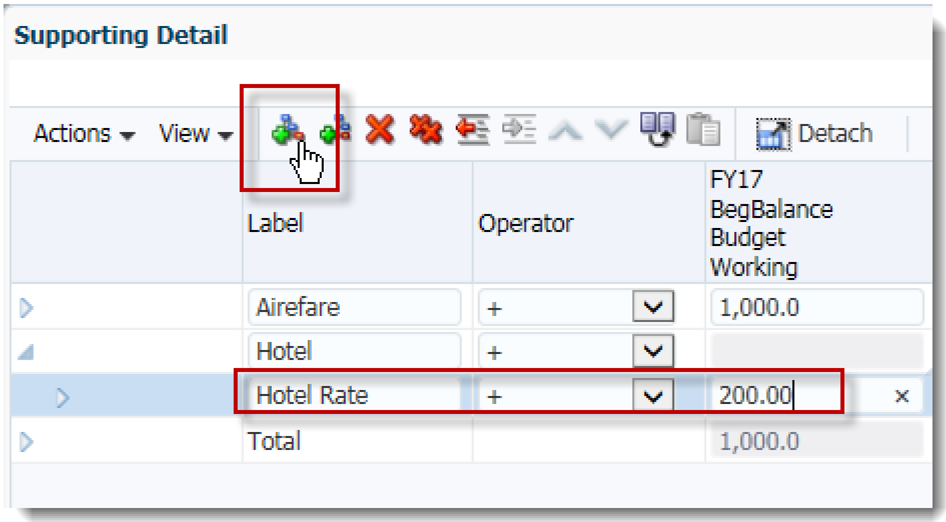
6. **Type** in a description for the second detail line.

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.



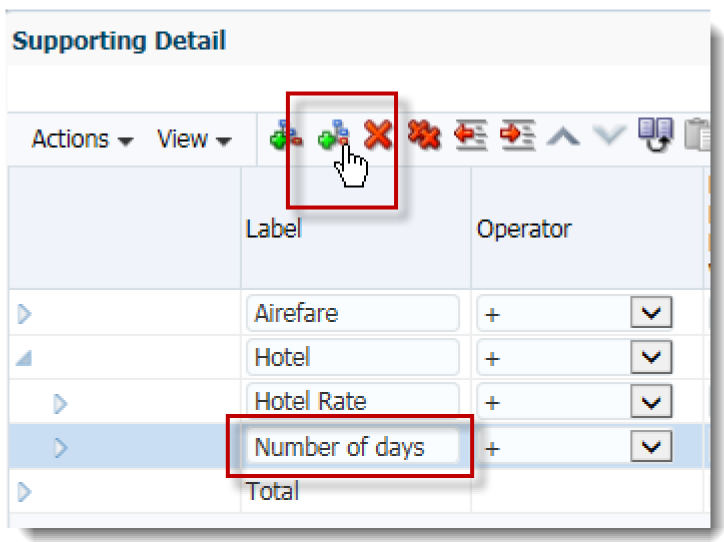
NOTE: A child detail line will appear slightly indented from the previous parent line.

8. **Type** in the description of the child line.
   NOTE: In this example, we are calculating 32 days of lodging at $125 per night.

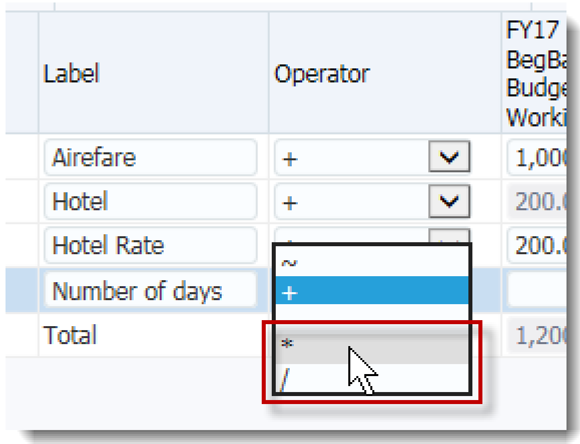


9. Click the **Add Sibling** button to add an additional detail line directly below Hotel Rate.

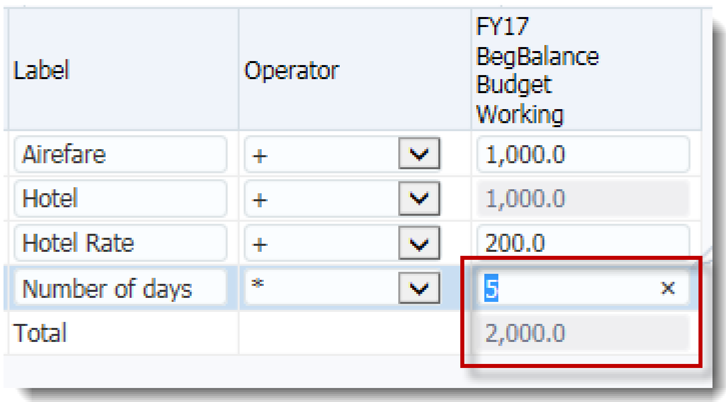
10. **Add** the appropriate description for the new detail line.



11. **Double click** the appropriate **operator field** and choose the correct the calculation symbol.
    NOTE: In this example, we will be multiplying the Number of Days by the Hotel Rate to determine the expected In-State travel expenses.

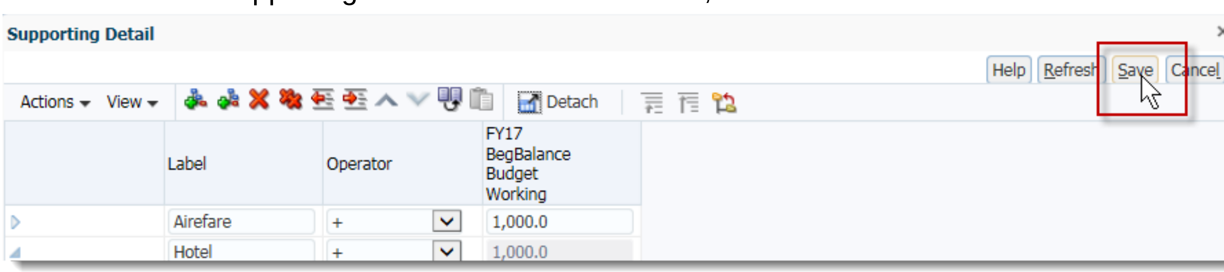


12. **Enter** the appropriate number of expected travel days.

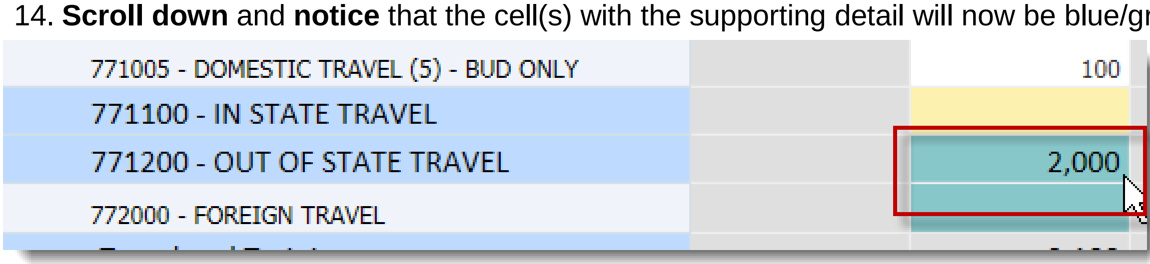


NOTE: The Total field will automatically calculate.

13. When all supporting details have been entered, click the **Save** button.



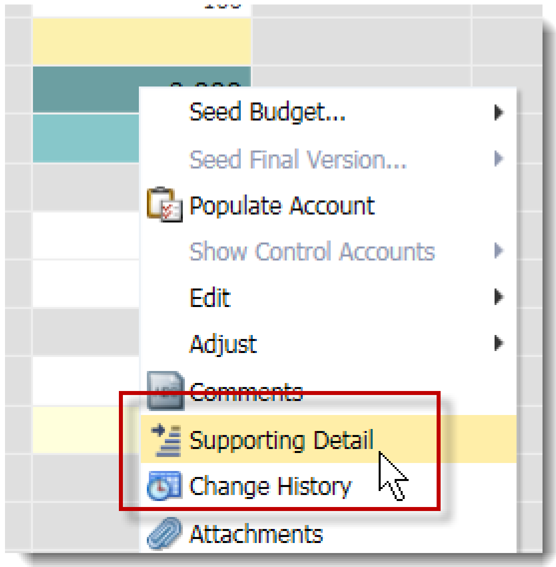
14. **Scroll down** and **notice** that the cell(s) with the supporting detail will now be blue/green.



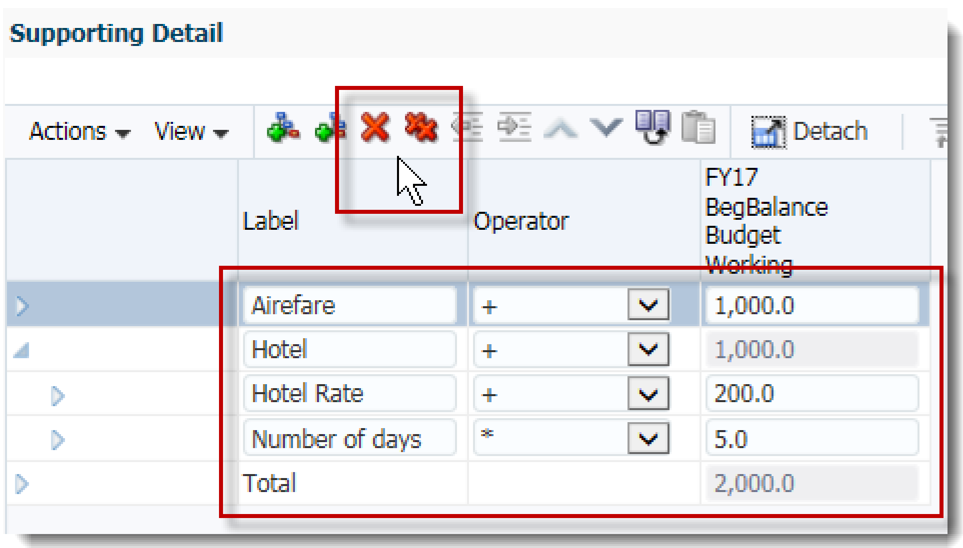
Editing/Deleting Supporting Details

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. Click the expand arrow and edit the values as needed or click the appropriate **Delete button** (Delete or Delete All).

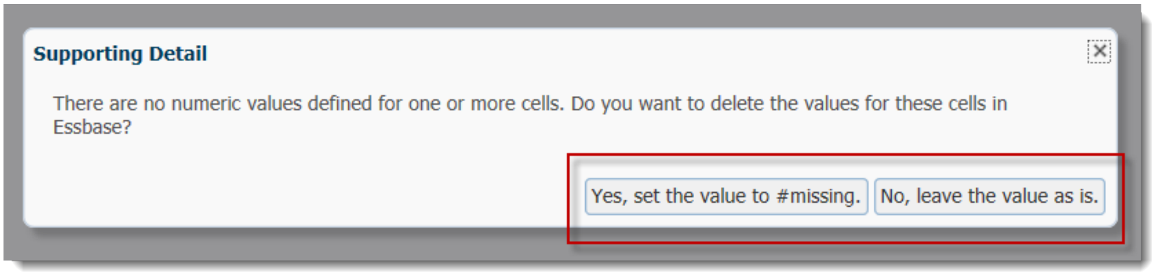


NOTE: Clicking Delete All will remove all Supporting Details from the cell.

4. Click the **Save** button.

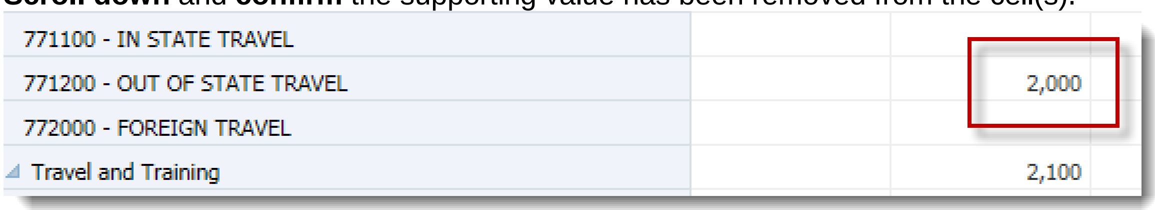
After saving, you will determine whether you wish to remove the value and the supporting details from the cell on the main screen, or just delete the supporting details.

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



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

5. **Scroll down** and **confirm** the supporting value has been removed from the cell(s).



Control Amount Used

This form is used to confirm that the total expense lines for both the Control and Working budgets equal. After spreading budget dollars and before sending to CFO, you should confirm both budgets balance.

Page Fine Arts 101-CRRNT Go

	FY14		
	Budget		
	Control	Working	Final
Salaries and Benefits	11,367,879	11,367,879	
Other Personal Services	1,436,216	1,436,216	
Other Operating Expenses	194,021	194,021	
Scholarships and Financial Aid		0	
Library Resources			
Operating Capital Outlay			
Insurance and Risk Management		0	
Waiver			
⊟Operating Expenditures	12,998,116	12,998,116	
Debt Service			
Transfers (Expense)			
Overhead Charge			
⊟Non-Operating Expenditures			
⊟Total Expense	12,998,116	12,998,116	

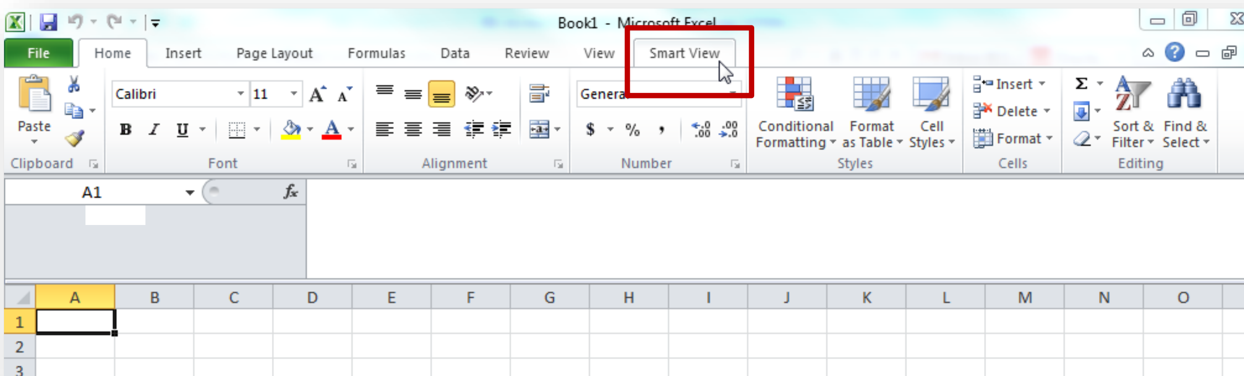
If they do not equal, adjustments will need to be made prior to submitting to CFO.

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 or if you haven't upgraded Smart View to 11.1.2.5.

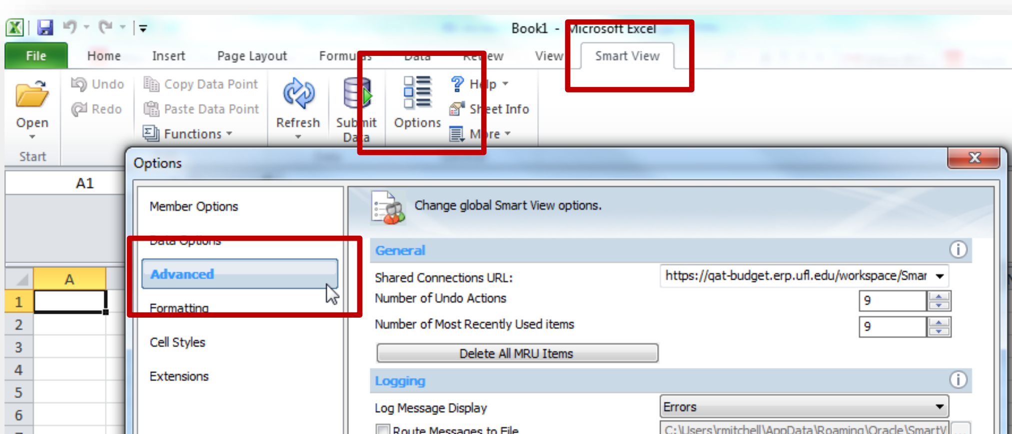
1. Open Excel and verify you can see a **Smart View** tab at the top of the application window.



Setting up Smart View Shared Connections URL

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

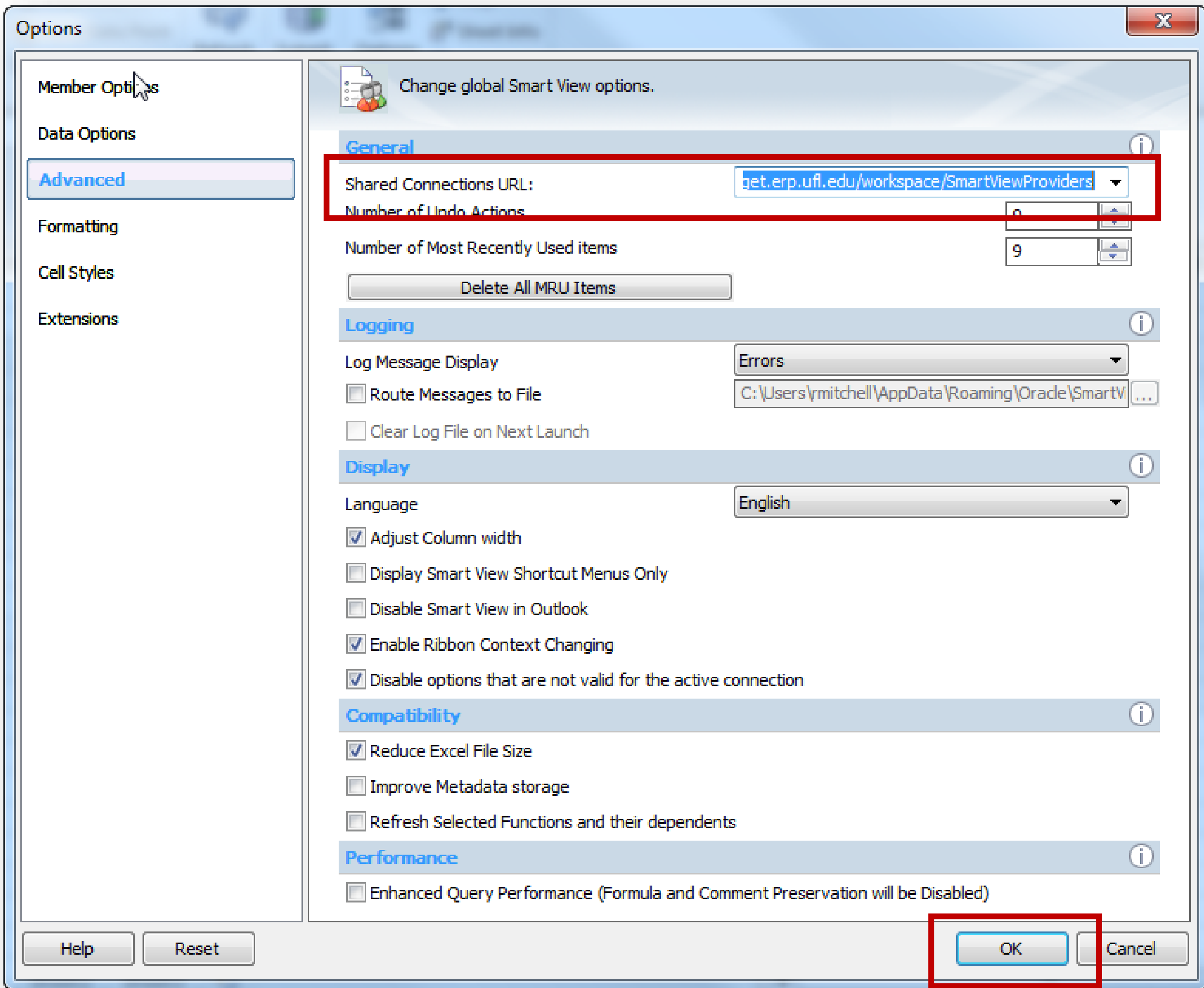
1. Click the **Smart View** tab, click the **Options** button and then select **Advanced**.



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

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

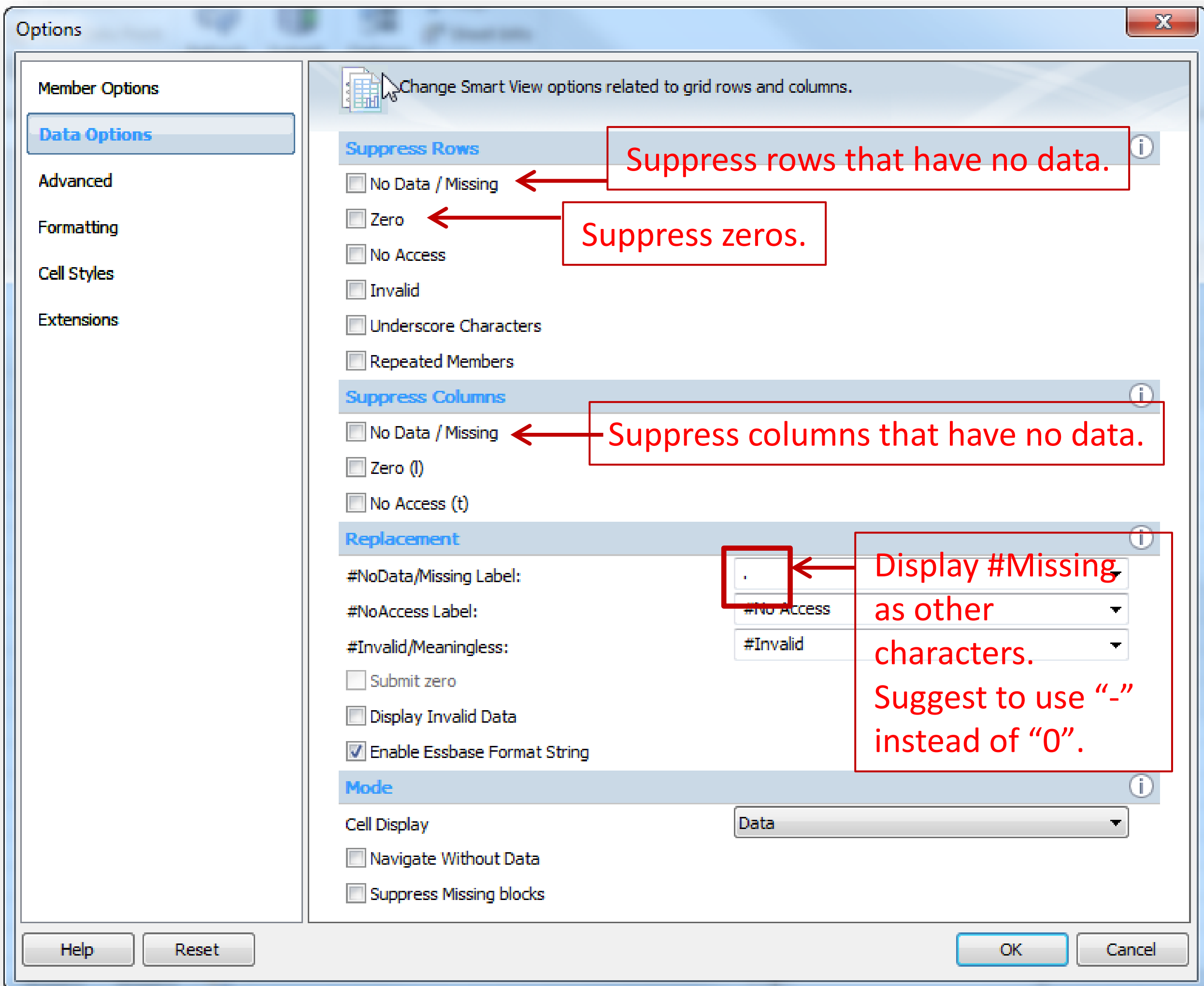
3. Click **OK**.



Smart View Option Settings

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

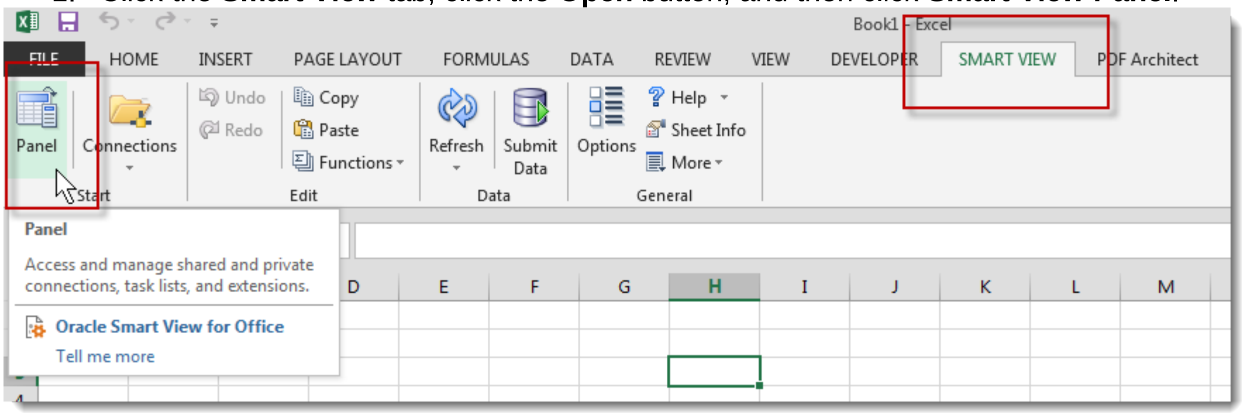
1. Click the **Smart View** tab, select **Options**, and select **Data Options**.



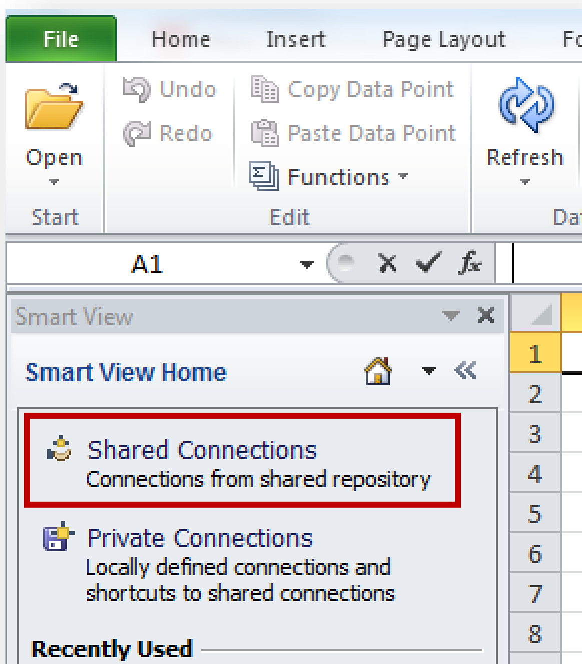
Connecting to Hyperion in Smart View

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

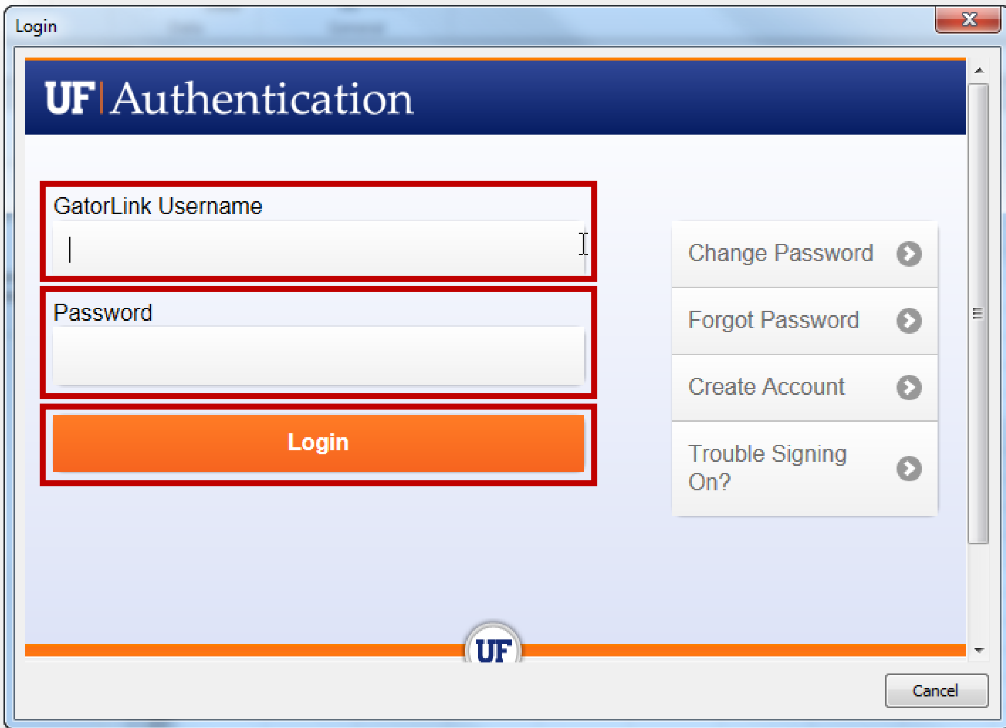
1. Click the **Smart View** tab, click the **Open** button, and then click **Smart View Panel**.



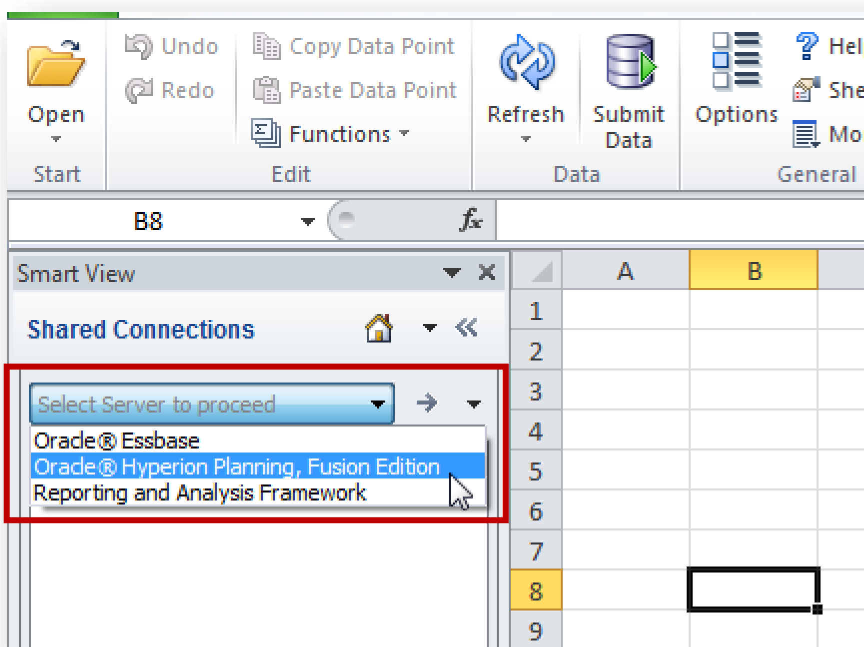
2. Select the **Shared Connections** option from the Smart View Home panel.



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



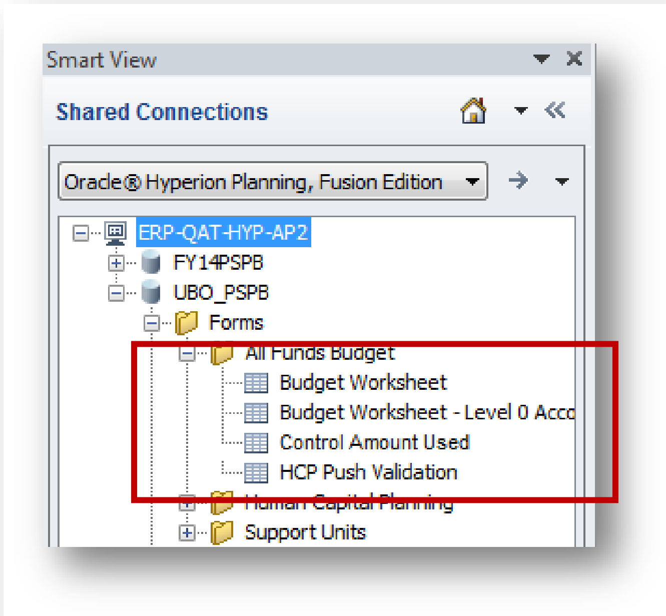
4. Select "**Oracle Hyperion Planning, Fusion Edition**" from the Shared Connections Select Server drop down field.



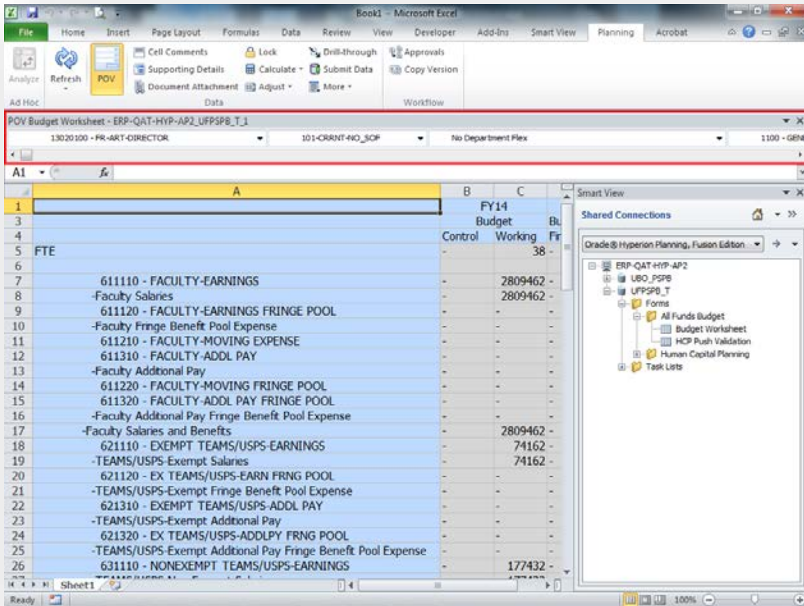
You should see the Hyperion server at the top of the Shared Connections panel.

5. Expand each level as follows: **UBO_PSPB** > **Forms** > **All Funds Budget**. Click **Open Form** on the bottom.

6. **Confirm** you can see four All Fund Budget forms: Budget Worksheet, Budget Worksheet-Level 0 Account, Control Amount Used and HCP Push Validation.



7. Select your **Entity**, **FundBudRefSOF, Dept Flex** (if needed) and **Program** from the Point of View (POV) bar at top of screen, if not already displayed.

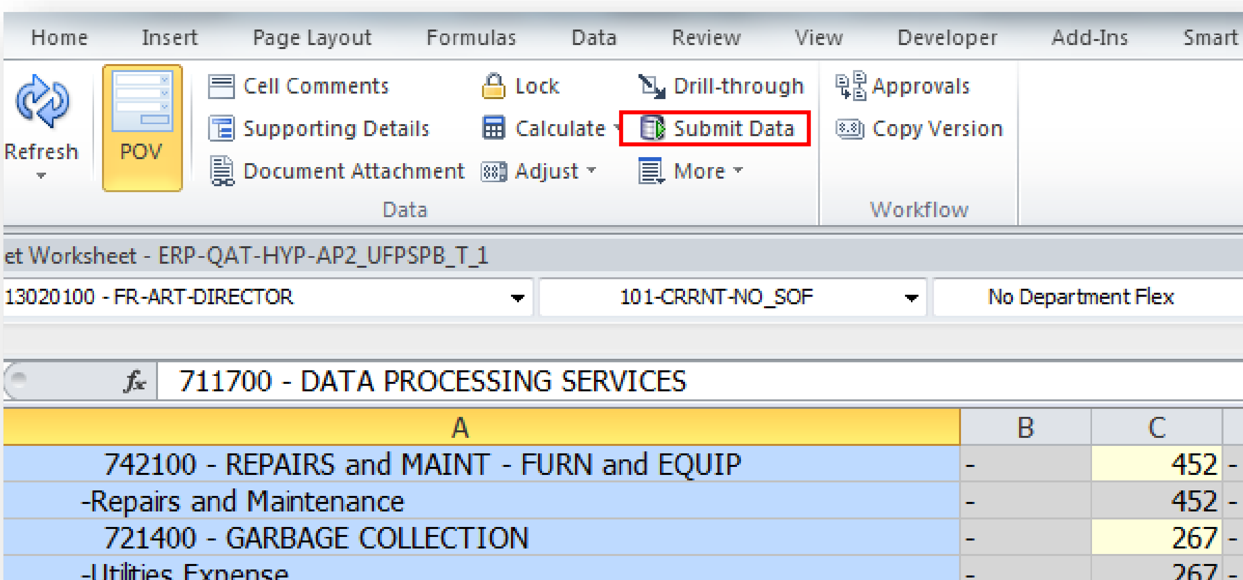


8. You are encouraged to use the Smart View forms in the same order as you did in Hyperion. Please refer to procedures [HCP Push Validation](), [Budget Worksheet]() or [Budget Worksheet-Level 0 Accounts]() as needed.

Input and Save Budget Data in Smart View

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

1. Once you have entered data, click **Submit Data** button to save and submit the data.



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

Copy, Paste and Cut

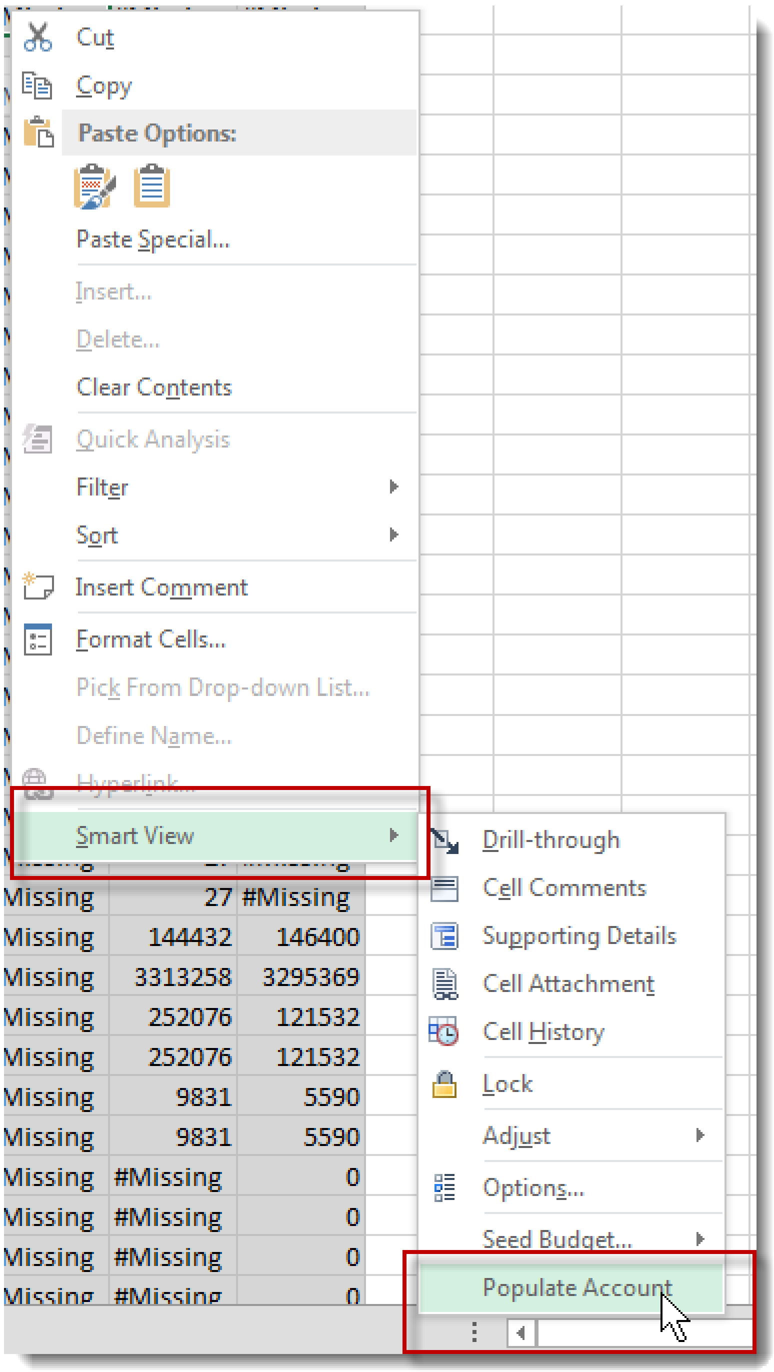
The copy, paste and cut function are the same as those in Excel.

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.

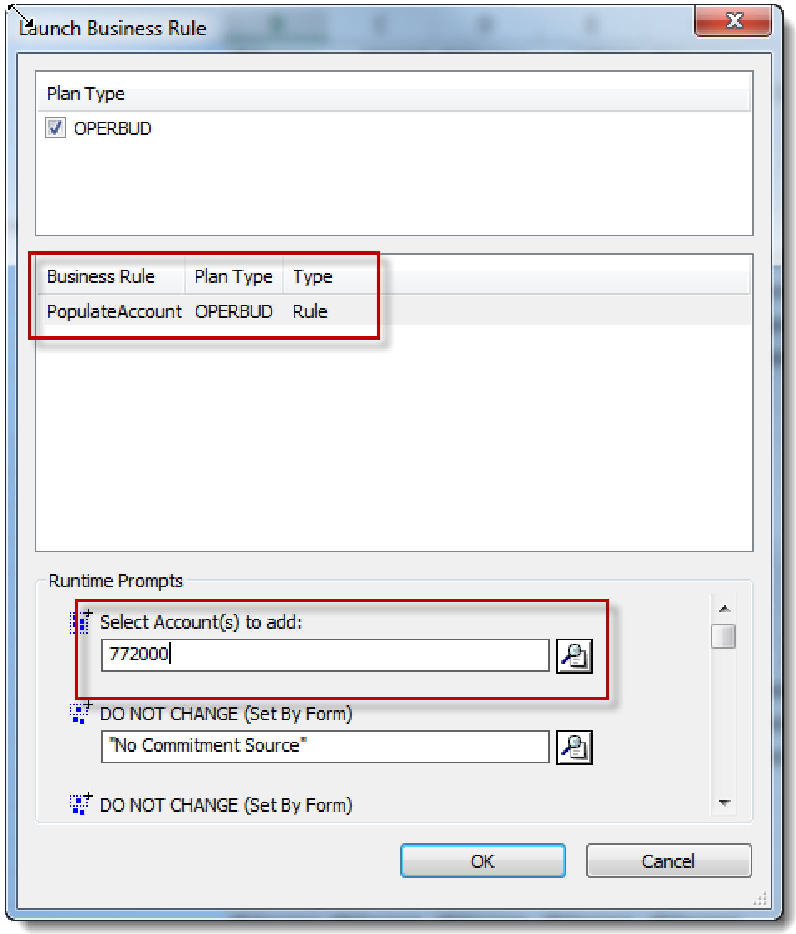
1. From the **Planning** tab, **right-click** on the form.

2. Click **Smart View** > **Populate Account**



In this example, we will use Account Code 772000.

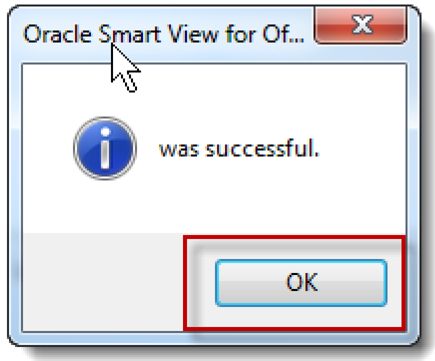
3. Enter the appropriate Account code in the Select Account(s) to add: field.



4. Click the **OK** button.

5. **Note** the “was successful” message that appears within the pop-up window..

6. Once this message appears, click the **OK** button.



7. Confirm the account displays in the worksheet.

You can now begin budgeting for this account.

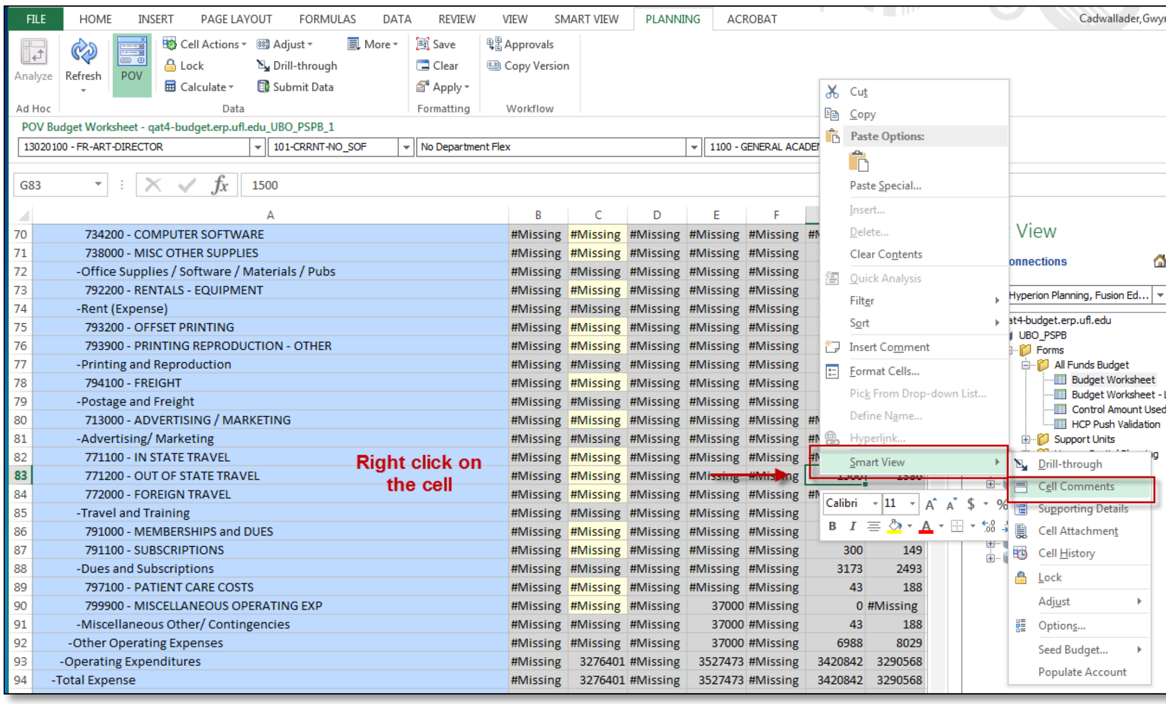
NOTE: If you decide you don’t need/want to budget for this account, you can clear the cell of all data and save the worksheet. The account will no longer appear. Or, if you enter a “0” into the cell the account will remain visible (as long as you did not suppress zeros in your user preferences) for the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

Adding Comments

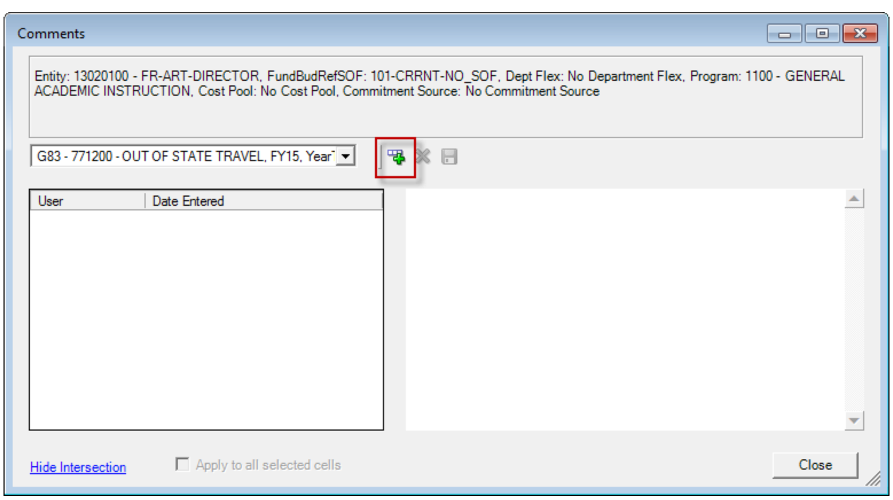
You can add **Comments** to cells in Smart View. Adding **Comments** is a simple, non-calculating way to elaborate on the content of a cell.

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

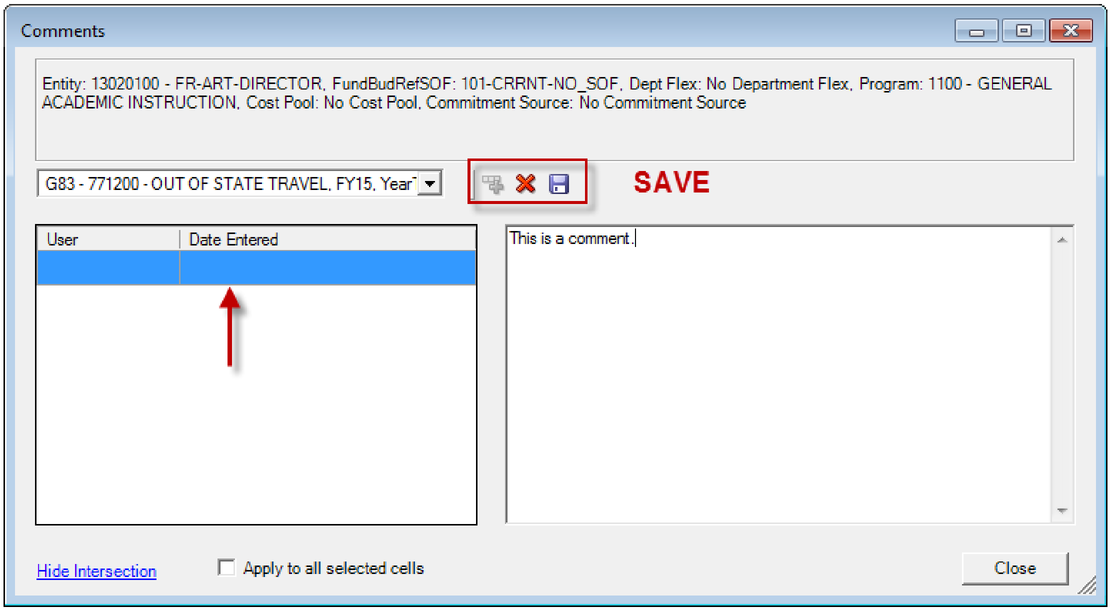
26. Hover over the **Smart View** menu item and select **Cell Comments**.



27. Click Add Comment button.

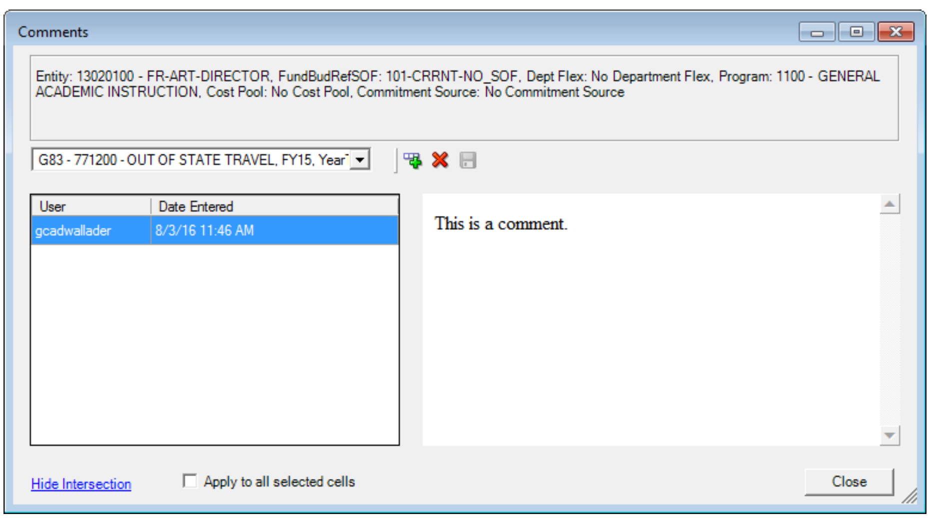


28. On the right side box, enter "**This is a comment.**"



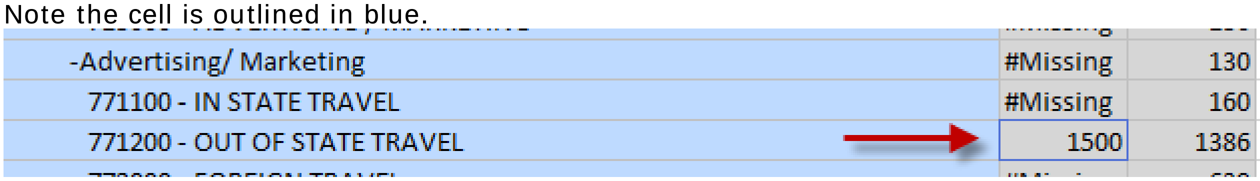
Adding a Comment offers a history record feature that keeps track of changes made to the comment. You cannot edit a comment but when you add a new comment you will be able to see the prior versions.

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



30. Click Close.

31. Note the cell is outlined in blue.

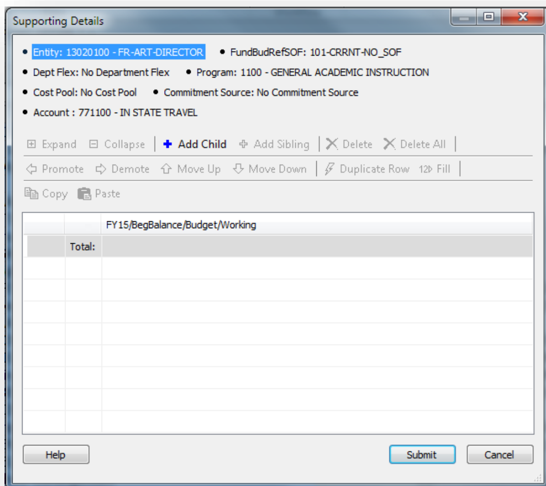


Adding Supporting Details

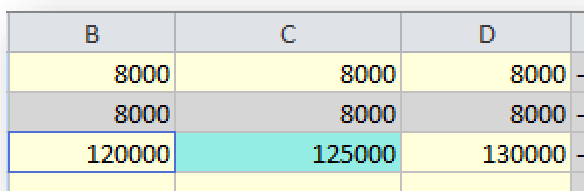
1. Right-click the cell to which you wish to add supporting details.

2. Hover over the Smart View menu option and click **Supporting Details** button from the secondary menu.

3. You will see similar menu items as those when you work in Hyperion. Please refer to Supporting Details section for steps to add, modify or delete supporting details.



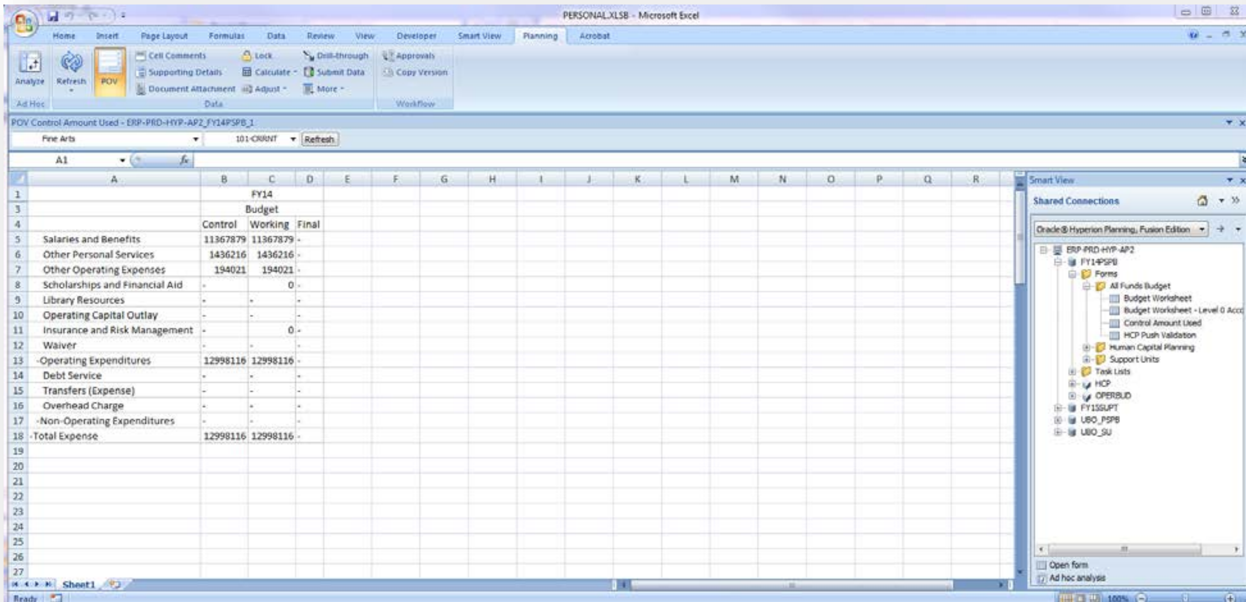
4. **Confirm** the cell contains the supporting details. The cell will be highlighted blue/green.



B	C	D
8000	8000	8000
8000	8000	8000
120000	125000	130000

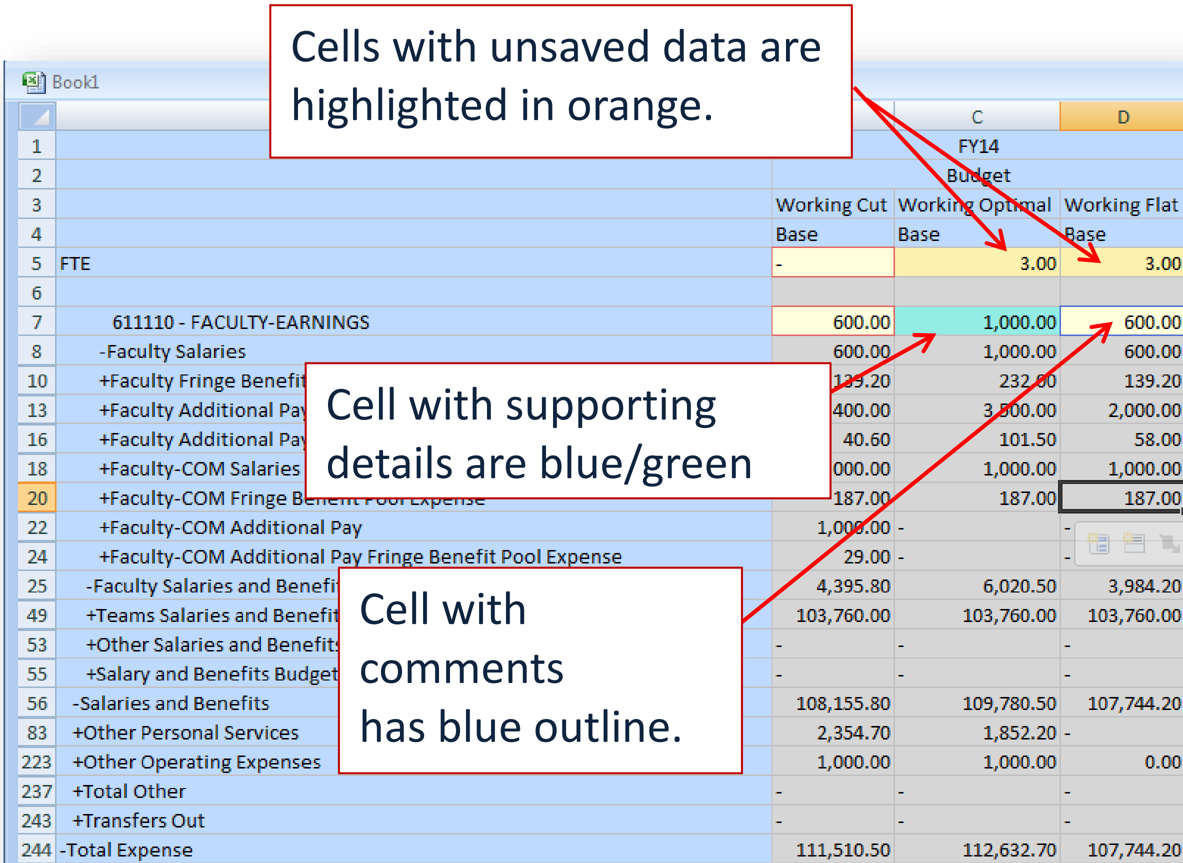
Control Amount Used

This form is used to confirm that the total expense lines for both the Control and Working budgets equal. After spreading budget dollars and before sending to CFO, you should confirm both budgets balance.



If they do not equal, adjustments will need to be made prior to submitting to CFO.

Below screenshot shows the color coding for cells with comments, supporting details, and unsaved data.



Security

The following myUFL security roles are created for 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.

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 All Funds Budget Application Overview

Dimensions represent the key components of the application. The UBO_PSPB All Funds Budget application contains the following dimensions:

- Account
- Entity
- Fund/Budget Reference/Source of 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 one of the three forms. 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.

Fund / Budget Reference / Source of Fund

This dimension should reflect your fund budget reference and source of fund combination for your expenditures.

Program

This dimension should reflect your program.

Dept Flex

This dimension should reflect your department flex if used.

Scenario

This dimension shows the data is for Budget.

Version

This dimension shows whether you are working on and should always be Working.

Year

This dimension shows the fiscal year.

Periods

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