

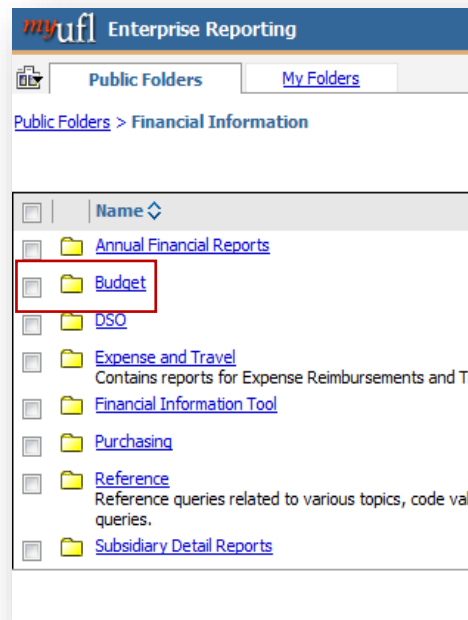
Running Hyperion Reports

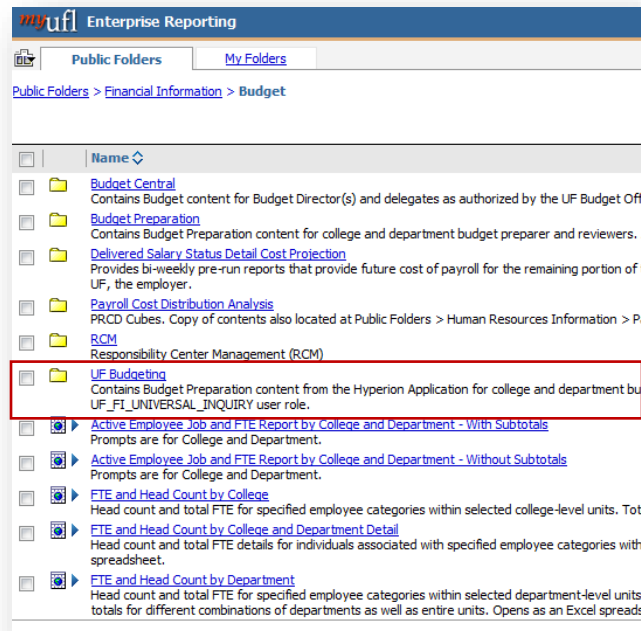
Please keep in mind that the reports will not be updated until after the push has occurred in Hyperion. The push runs every two hours starting at 7am and ending at 7pm Monday thru Friday. On Saturday and Sunday the push will run every two hours starting at 11am and ending at 7pm.

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.

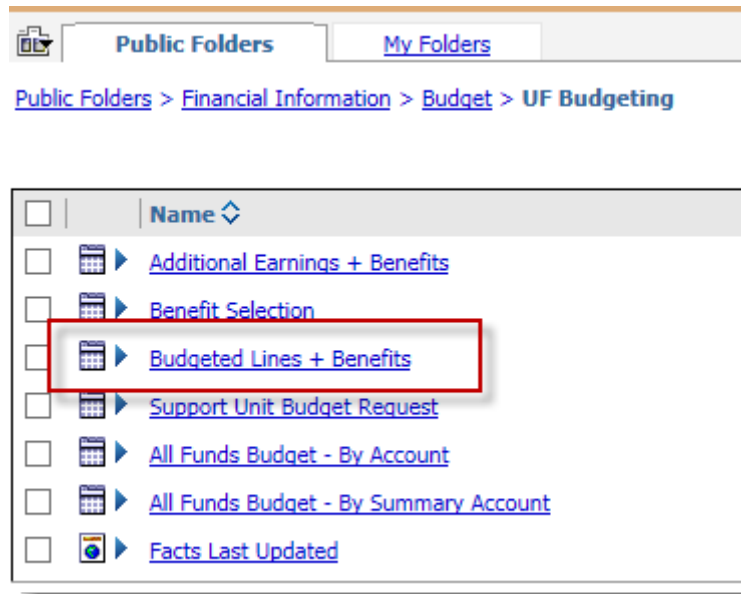




Budgeted Lines + Benefits Report

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.

Year: * FY17 **AND Scenario:** * Budget **AND Version:** * Working

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.

Budgeted Lines + Benefits

Year: * FY17 AND Scenario: * Budget AND Version: * Working Finish

OR

Keywords:
Type one or more keywords separated by spaces.

Search

Options ▾

Results:

Employee:
(ex: UFID_00000000)

Insert →
← Remove

Select all Deselect all

OR

Keywords:
Type one or more keywords separated by spaces.

HR_3201 Search

Options ▾

Results:

Entity:
(ex: HR_0101)

HR_3201

Insert →
← Remove

Select all Deselect all

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.

The screenshot shows a search interface with two identical sections. The top section is labeled "Entity" with the example "HR_0101". The bottom section is labeled "Comp Entity" with the example "D_01010000". Both sections have a "Keywords:" field with the instruction "Type one or more keywords separated by spaces." and a "Search" button. Below the search field are "Options" and "Results:" panes. The "Results:" pane has "Select all" and "Deselect all" buttons. The "Choice:" pane has "Insert" and "Remove" buttons. An "OR" label is centered between the two sections.

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

The screenshot shows a navigation bar with buttons for "Cancel", "< Back", "Next >", and "Finish". Above the buttons are "Select all" and "Deselect all" links.

5. Review your report.

Enter	UFID and Name	ICP Employee ICP Position	Job Title	Job Code	Union I.D.	Element	Annual Salary Base	Annual Flat-Rate FTE	Comes	Commit	Source	Some	Cost	PoC				
3	HR_2401	UFID: 3939644 P 00024573	OFFICE MANAGER - 000828	JC 00082	Administrative & Clerical - 21	TUJN	12 Months	\$49,263.41	1	No	Comes	Commitment	Some	No	Cost	Ph	D	
4	HR_2401	UFID: 3939644 P 00024573	OFFICE MANAGER - 000828	JC 00082	Administrative & Clerical - 21	FINN	TEAMS USPS Non-Ex Ann	\$49,263.41	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
5	HR_2401	UFID: 3939620 P 00019321	GRANTS SPECIALIST - 000883	JC 00088	Managerial/Confidential - 28	FINN	TEAMS USPS Non-Ex Ann	\$54,447.54	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
6	HR_2401	UFID: 3939620 P 00019321	GRANTS SPECIALIST - 000883	JC 00088	Managerial/Confidential - 28	TUJN	12 Months	\$54,447.54	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
7	HR_2401	UFID: 3779523 P 00062396	Administrative Support ASST I - 000793	JC 00079	Out of Unit - 08	FINN	TEAMS USPS Non-Ex Ann	\$25,773.87	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
8	HR_2401	UFID: 3779523 P 00062396	Administrative Support ASST I - 000793	JC 00079	Out of Unit - 08	TUJN	12 Months	\$25,773.87	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
9	HR_2401	UFID: 3640260 P 00019042	ASST DEAN & ASST PROF - 000497	JC 00049	HR So Center Managerial - FINN	Faculty	Ann	\$200,534.95	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
10	HR_2401	UFID: 3640260 P 00019042	ASST DEAN & ASST PROF - 000497	JC 00049	HR So Center Managerial - FINN	Faculty	12 Months	\$200,534.95	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
11	HR_2401	UFID: 3640260 P 00019042	ASST DEAN & ASST PROF - 000497	JC 00049	HR So Center Managerial - FINN	Faculty	Ann	\$200,534.95	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D
12	HR_2401	UFID: 3640260 P 00019042	ASST DEAN & ASST PROF - 000497	JC 00049	HR So Center Managerial - FINN	Faculty	12 Months	\$200,534.95	1	No	Comes	Commitment	Some	No	Cost	Coar	Ph	D

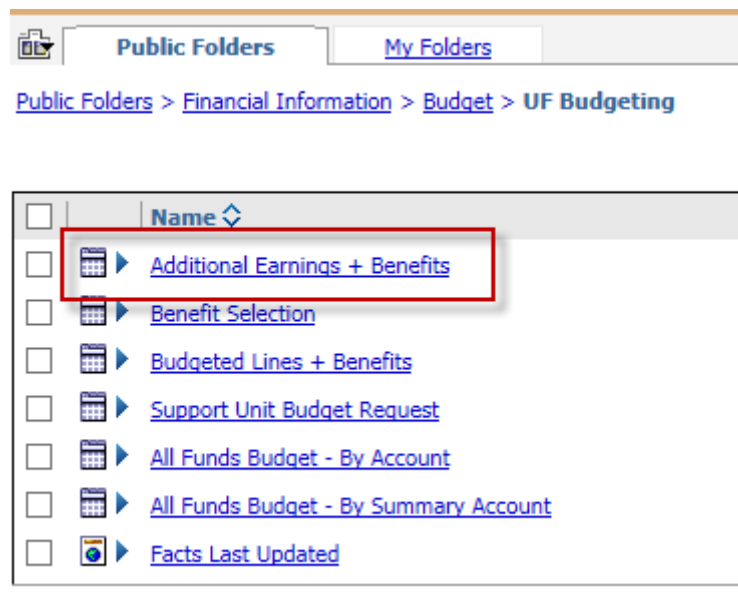
NOTE: At this time each person has at least two rows of data. The one row of data is the salary expense data line and the one row is the benefit data line.

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.

Additional Earnings + Benefits

Year: * FY17 **AND** **Scenario:** * Budget **AND** **Version:** * Working

- 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.

Additional Earnings + Benefits

Year: * FY17 AND Scenario: * Budget AND Version: * Working

OR

Keywords:
Type one or more keywords separated by spaces.

[Options](#)

Results:

Employee:
(ex: UFID_00000000)

[Select all](#) [Deselect all](#)

OR

Keywords:
Type one or more keywords separated by spaces.

HR_3201

[Options](#)

Results:

Entity:
(ex: HR_0101)

HR_3201

[Select all](#) [Deselect all](#)

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

[Select all](#) [Deselect all](#)
[Select all](#) [Deselect all](#)

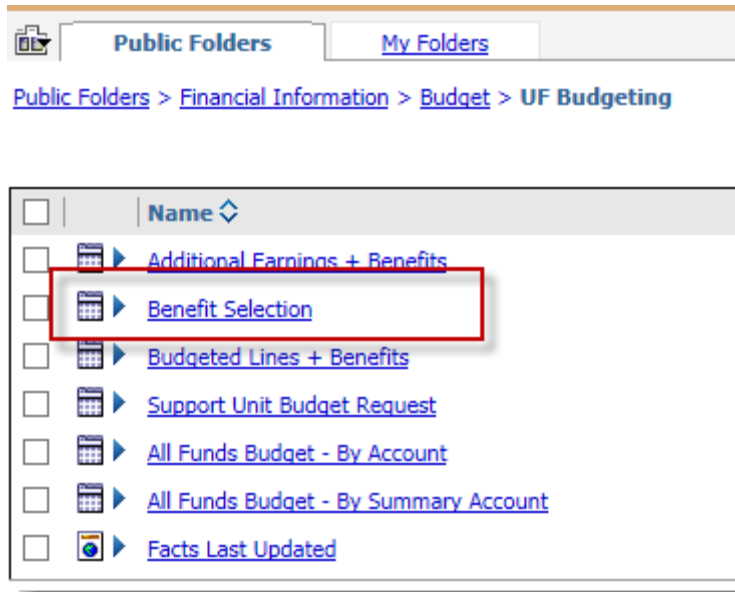
5. **Review** your report.

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	Hth 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	Hth 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.

Benefit Selection

Year: * FY17 AND Scenario: * Budget AND Version: * Working

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.

Benefit Selection

Year: * FY17 AND Scenario: * Budget AND Version: * Working Finish

OR

Employee:
(ex: UFID_00000000)

Keywords:
Type one or more keywords separated by spaces.

Search

Options

Results:

Choice:

Insert

Remove

Select all Deselect all

OR

Entity:
(ex: HR_0101)

Keywords:
Type one or more keywords separated by spaces.

HR_3201 Search

Options

Results:

Choice:

HR_3201

Insert

Remove

Select all Deselect all

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

Select all Deselect all

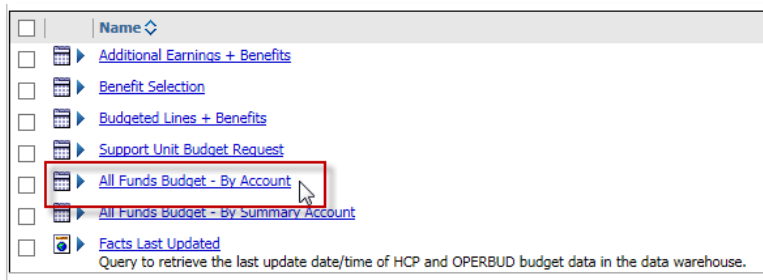
Select all Deselect all

- Review** your report.

All Funds Budget - By Account

The All Funds Budget - By Account Report gives you the salary/fringe details, OPS and Other expenditure by GL accounts that have been input into Hyperion. This report can be run by the following additional search criteria Entity, Fund, Program, and Dept Flex.

1. Select **All Funds Budget - By Account**



2. Choose your required search criteria.

All Funds Budget - By Account

Year: * FY17 AND Scenario: * Budget AND Version: * Working Finish

OR

3. Choose your additional search criteria. In this example, we will use D_3201 data. After entering scroll to bottom of form or top of the form.

Keywords:
Type one or more keywords separated by spaces.
d_3201 Search

Options

Entity:
(ex: D_0101)

Results:

- D_32010200
- D_32010300
- D_32010400
- D_32010500
- D_32010600
- D_32010700
- D_32010900
- D_32011000
- D_32011100

Choice:

- D_32010200
- D_32010300
- D_32010400
- D_32010500
- D_32010600
- D_32010700
- D_32010900
- D_32011000
- D_32011100

Insert Remove

Select all Deselect all

OR

Fund:
(ex: 101-CRRNT-NO_SOF)

- 101-CRRNT-FEDERAL
- 101-CRRNT-HSC_FAI
- 101-CRRNT-HSCFCPA
- 101-CRRNT-HSCFHFA
- 101-CRRNT-NO_SOF
- 101-CRRNT-OTHER
- 101-CRRNT-STATE
- 101-CRRNT-UF_Foundation
- 101-CYFWD-FEDERAL
- 101-CYFWD-HSCFCPA
- 101-CYFWD-HSCFHFA

Select all Deselect all

OR

Program:
(ex: PRG_0100)

- No Program
- PRG_0100
- PRG_0200
- PRG_0300
- PRG_0500
- PRG_1100
- PRG_1101
- PRG_1102
- PRG_1103
- PRG_1104
- PRG_1105

Select all Deselect all

OR

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

Options

Dept Flex:
(ex: No Comp Dept Flex)

Results:

Choice:

Insert Remove

Select all Deselect all

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

Select all Deselect all

Cancel < Back Next > Finish

5. Review your report.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	All Funds Budget - By Account																
2	Piscal	Version	Scenario	Entity	Fund	Program	Department Flex	Acct - Level I Desc	Acct - Level II Desc	Account	Account Desc	Beginning Balance	July Allocation	August Allocation	September Allocation	October Allocation	November Allocation
3	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_1100	No Dept Flex	Operating Expenditures	SALARIES AND BENEFITS	81110	FACULTY-EARNINGS	150,892	42,896.7	42,896.7	42,896.7	42,896.7	42,896.7
4	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_1100	No Dept Flex	Operating Expenditures	SALARIES AND BENEFITS	81110	FACULTY-EARNINGS FRINGE POOL	150,587	11,539.23	11,539.23	11,539.23	11,539.23	11,539.23
5	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	SALARIES AND BENEFITS	82110	EXEMPT TEAMS/USPS-EARNINGS	88,476	6,779.77	6,779.77	6,779.77	6,779.77	6,779.77
6	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	SALARIES AND BENEFITS	82110	EX TEAMS/USPS-EARN FRING POOL	32,648	2,501.76	2,501.76	2,501.76	2,501.76	2,501.76
7	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	SALARIES AND BENEFITS	83110	NONEXEMPT TEAMS/USPS EARNINGS	320,360	24,548.66	24,548.66	24,548.66	24,548.66	24,548.66
8	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	SALARIES AND BENEFITS	83110	NONEXEMPT TEAMS/USPS EARN FRING POOL	143,521	10,997.78	10,997.78	10,997.78	10,997.78	10,997.78
9	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	OTHER PERSONAL SERVICES	89110	OTHER OPS EARNINGS	29,820	2,468.33	2,468.33	2,468.33	2,468.33	2,468.33
10	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	OTHER PERSONAL SERVICES	89120	OTHER OPS FRINGE POOL	2,751	188	188	188	188	188
11	FY17	Working	Budget	D_32010000	101-CRRNT-NO_SOF	PRG_4600	No Dept Flex	Operating Expenditures	EXPENSES (Expense Acct)	799900	MISCELLANEOUS OPERATING EXP	445,000	37,083.33	37,083.33	37,083.33	37,083.33	37,083.33
12	FY17	Working	Budget	D_32010000	143-CRRNT-NO_SOF	PRG_7800	DP_520SPHARM	Operating Expenditures	SALARIES AND BENEFITS	82110	EXEMPT TEAMS/USPS-EARNINGS	52,456	4,019.62	4,019.62	4,019.62	4,019.62	4,019.62

The All Funds Budget - By Summary Account is similar to this report. It doesn't go down to the GL account level. It gives you all the financial data in roll up level.

If you need help with...

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

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