Running Calculate and Allocate Compensation Budgets Rules per Entity

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

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

BEST PRACTICE

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

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

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

▷ For <u>m</u> s	Task List Status	
My Task List	Task - Calculate compensation budgets	Task Instruction
 Budget Preparation Review employee information Mass adjust compensation and fringe Manage position and employee data Calculations Calculate compensation budgets Allocate compensation budgets Review entity compensation budgets All Funds Budget Support Unit Budget 	Launch Business Rules Plan Type HCP Business Rule EP_SC_EmpDistElmCost_All Launch	

- 3. To change the entity, make sure the **Version** is **Working** and the **Scenario** is **Budget**.
- 4. Select the appropriate Entity.

Runtime Prompts - EP_SC_EmpDistElmCost_All		×
Prompt Text	Value	
* Select Version	Working	WI.
🐨 * Select Scenario	"Budget"	¥.
📑 * Select Entity	HR_1302	VI.

- 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.

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Members Variables C <lic< li=""> C C C</lic<>	^	Add Remove Remove All	Member Name MR_1302	
> HR_1350 > HR_1350 > HR_15 > HR_16 > HR_17 > HR_18 > HR_19 > HR_20 > HR_23 > HR_25 > HR_25 > HR_25	>			

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.

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



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

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

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

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

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



Runtime Prompts - EP_SC_AllocDistCost		X
Prompt Text	Value	
* Select Employee	EMP_1302	Ŵ.
* Select Entity	HR_1302	
* Select Position	PO5_1302	ŵ.
👷 * Select Scenario	"Budget"	VI.
📑 * Select Version	Working	

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

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

Runtime Prompts - EP_SC_AllocDistCost		×
Prompt Text	Value	
* Select Employee	"New Employees"	91
🐺 * Select Entity	HR_1302	
* Select Position	PO5_1302	Vi.
🐺 * Select Scenario	"Budget"	
* Select Version	Working	∭ vi,
		Launch Create runtime prompt values file

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.



Runtime Prompts - EP_SC_AllocDistCost		×
Prompt Text	Value	
* Select Employee	"New Employees"	V.,
* Select Entity	HR_1302	9 ₁
* Select Position	"Total New Positions"	9 ₁
* Select Scenario	"Budget"	9 ₁
* Select Version	Working	W _E
		Launch Create runtime prompt values file

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.

Runtime Prompts - EP_SC_AllocDistCost			×
Prompt Text	Value		
🙀 * Select Employee	UFID_1112#04539		Ve.
🐺 * Select Entity	HR_1302		V. bo
🐺 * Select Position	"All Positions"		¥.
👷 * Select Scenario	"Budget"		Ŵ.,
🐺 * Select Version	"Stage 1"		Ŵ.,
	(Launch Cancel Create runtime promp	t values <u>f</u> ile
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12. Navigate along the branches to select employee branch for your organization.

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lember Name			Hender Name	
Employee			∡ Employee	
⊿ Total Employees	^		EMP_1302	
Unspecified Employee				
Vacancy				
Existing Employees				
EMP_President				
EMP_Senior Vice President for Academic Affairs and Provost		-	1	
> EMP_02		2		
EMP_12		Add		
EMP_13		~		
> EMD_1201		Remove		
EMP_1302		32		
0 EMP_1303		Remove All		
EMP_1304				
EMP_1305				
EMP_1350				
EMP_15				
EMP_16				
EMP_17				
EMP_18				
EMP_19				
EMP_20				
> EMP_23				
EMP_24	Y			
N FMD 25	100			

- 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.

tuntine Prompts - EP_SC_AnocoistCost		
Prompt Text	Value	
* Select Employee	EMP_1302	
* Select Entity	HR_1301	Ø.
📑 * Select Position	PO5_1301	
📑 * Select Scenario	Budget	V.,
* Select Version	Working	ýa.

- 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.



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Member Name		Member Name	
A Entity		⊿ Entity	
Unspecified Entity	^	HR_1302	
Generic Entity			
⊿ Total Entity			
HR_President			
HR_Senior Vice President for Academic Affairs and Provost			
> HR_02			
HR_12		»	
⊿ HR_13	Ad		
N HP 1201		3	
> HR_1302	Ren	love	
0 HK_1000	4	8	
HR_1304	Remo	ve All	
> HR_1305			
HR_1350			
> HR_15			
> HR_16			
> HR_17			
> HR_18			
▶ HR_19			
> HR_20			
> HR_23			
> HR_24			
> HR_25	~		
A HD DE			
Help			OK Cancel

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

Runtime Prompts - EP_SC_AllocDistCost		×
Prompt Text	Value	
Select Employee	EMP_1302	¥3.,
* Select Entity	HR_1302	10 and
* Select Position	"P_00022457"	W ₂
📑 * Select Scenario	Budget	100 million
📑 * Select Version	Working	Ve.

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

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



23. Click the **OK** button.

Members Variables				
- 9 🏞 🎥 🌡 🦓 🍘			AV	
Member Name			at a standard in the standard in t	
Position			A Position	
Default Position	^		POS 1302	
All Positions	10			
Unspecified Position				
Total Existing Positions				
POS_President				
POS_Senior Vice President for Academic Affairs and Provost				
> POS_02		>		
PO5_12		Add		
PO5_13		8		
DO5_1201		Remove		
POS_1302		3		
9 POS_1303	- 11	Remove All		
PO5_1304				
POS_1305				
POS_1350				
PO5_15				
PO5_16				
POS_17				
PO5_18				
> POS_19				
> POS_20				
> PUS_23				
> PO5_24	~			
n set in Th				
ielp				OK Cancel

- 24. Confirm *Scenario* and *Version* fields display **Budget** and **Working**.
- 25. Click the Launch button.

intime Prompts - EP_SC_AllocDistCost		
rompt Text	Value	
* Select Employee	EMP_1302	93.
* Select Entity	HR_1302	· · · · · · · · · · · · · · · · · · ·
* Select Position	PO5_1302	140.
* Select Scenario	Budget	Va.
* Select Version	Working	V3.
		_

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



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

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

Remember the BEST PRACTICE

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

If you need help with...

- Technical issues, contact the UF Help Desk:
 - o 392-HELP(4357)
 - o helpdesk@ufl.edu
- Policies and Directives, contact the UF Budget Office:
 - o **392-2402**
 - o http://cfo.ufl.edu/administrative-units/budget/