

## View Forms

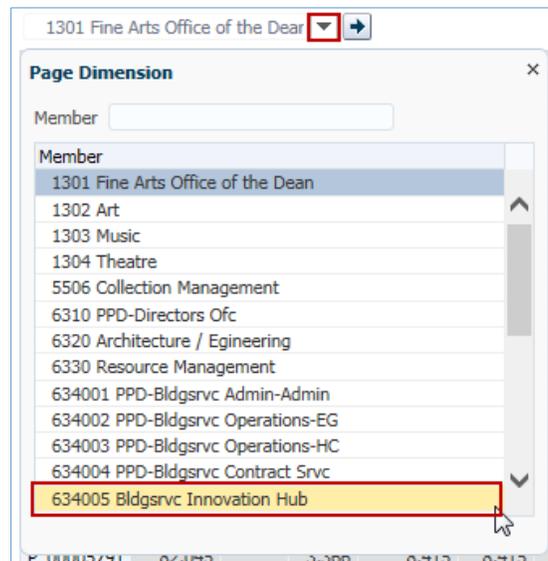
There are seven additional forms that you can use to view UF Hyperion Budgeting data.

After logging in and accessing Budget Preparation, you can access the desired form from the Review entity compensation budgets task list. For each form you access, you must choose the appropriate entity from the Entity drop down field.

1. The **Review position budgets** form displays budgets for all filled and vacant positions by year and month.



2. Click the Entity drop down field.
3. Choose the desired entity.



- Click **Go**.  
You can see each position's earnings for the year and per month.



- The **Review employee budgets** form displays the earnings of all assigned employees by year and by month.

	YearTotal	July	August	September	October	November	December	January	February	March	April	May	June
...	37,288	2,850	2,850	2,850	2,850	2,850	4,276	2,850	2,850	2,850	2,850	2,850	4,418
...	29,967	3,063	3,063	3,063	3,063	3,063	4,594	3,063	3,063	3,063	3,063	3,063	4,747
...	37,475	2,872	2,872	2,872	2,872	2,872	4,308	2,872	2,872	2,872	2,872	2,872	4,451
...	42,820	3,281	3,281	3,281	3,281	3,281	4,922	3,281	3,281	3,281	3,281	3,281	5,086

- The **Review element budgets** form displays a list of positions and employees with yearly and monthly compensation amounts.

	YearTotal	July	August	September	October	November	December	January	February	March	April	May	June
P_0000 TA12	88,006	6,744	6,744	6,744	6,744	6,744	10,116	6,744	6,744	6,744	6,744	6,744	10,453
Exempt TEAMS/USPS	88,006												
Salary Grades	88,006												
Fringe_TEAMS_USPS_Exempt	32,474												
Benefits	32,474												

- The **Review FTE Assignments - filled** form displays FTE information per employee.

	Status	Total FTE	40-Hour FTE	Assigned FTE	Available FTE
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	0.5		
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	0.5		
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	1		
P_00	Active	1	1		
Total		20	20	20	

- The **Review FTE and Headcount** form displays the FTEs of all positions and associated headcounts.

	Status	Total FTE	40-Hour FTE	Assigned FTE	Available FTE	Headcount
P_000	Active	1	1	1	0	1
P_000	Active	1	1			
P_000	Active	1	1	1	0	1
P_000	Active	1	1			
P_000	Active	1	1	1	0	1
P_000	Active	1	1			

9. The **Manage element budgets** form displays the total compensation amounts for each assigned employee. This form is NOT read-only and as such you can edit position and employee details, change a status and review employee allocation results.

	Total Compensation Expenses
P_00	69,000
P_00	49,000
P_00	69,000
P_00	55,000
P_00	80,000
P_00	69,000

10. Click the **Expand** button in the **Total Compensation Expenses** column. Notice the new columns that have expanded.

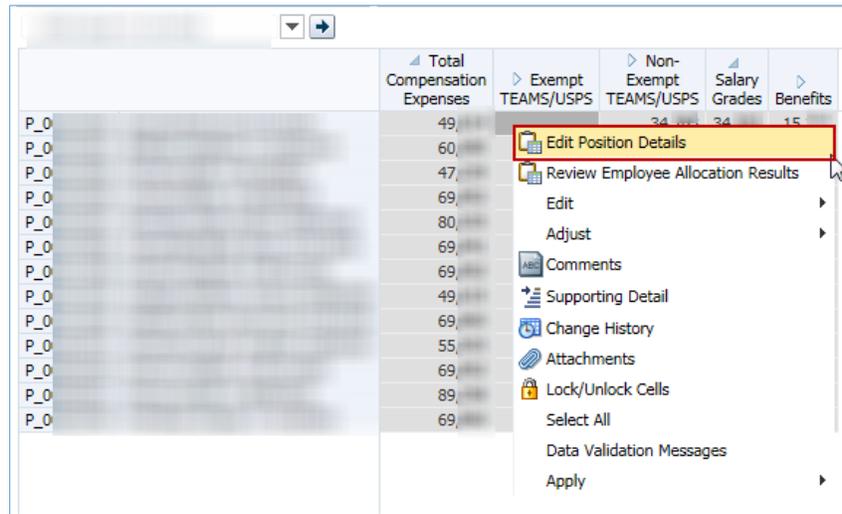
	Total Compensation Expenses	Salary Grades	Benefits
P_00	69,000	48,000	21,000
P_00	49,000	34,000	15,000
P_00	69,000	48,000	21,000
P_00	55,000	38,000	17,000
P_00	69,000	48,000	21,000
P_00	69,000	48,000	21,000

11. Click the **Expand** button for the **Salary Grades** column. Notice additional columns have now expanded. You can also edit position data from this form.

	Total Compensation Expenses	Exempt TEAMS/USPS	Non-Exempt TEAMS/USPS	Salary Grades	Benefits
P_00	69,000		48,000	48,000	21,000
P_00	49,000		34,000	34,000	15,000
P_00	69,000		48,000	48,000	21,000
P_00	55,000		38,000	38,000	17,000
P_00	69,000		48,000	48,000	21,000

12. **Right-click** in any cell.

13. You can click the **Edit Position Details** option to access position details. This will take you to the Maintain filled positions task data where you can make any needed changes.



14. Click the **Review Allocation Results** form.

This view form displays any errors such as GL allocation non-completions or lack of distributions. If you notice an error with one of the positions, you must return to Budget Preparation and correct your data there.

	Total Compensation Expense	Allocated Expense	Difference
P_0	69,000	69,000	0
P_0	49,000	49,000	0
P_0	69,000	69,000	0
P_0	55,000	55,000	-0
P_0	69,000	69,000	0

15. Right-click the **Employee Name** that has the error.

16. Click the **Edit Employee Details** object.

17. Check the **FTE** and **Distribution** tabs to check for any errors.

18. Run the Calculate and Allocate processes again, if needed.

19. Go back to the **Review Allocation Results** object.

Confirm the error has been fixed. Red cell shading should be gone.

	Total Compensation Expense	Allocated Expense	Difference
P_0	69,000	69,000	0
P_0	49,000	49,000	0
P_0	69,000	69,000	0
P_0	55,000	55,000	0
P_0	69,000	69,000	0

If you need help with...

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