PST954 Hyperion Budgeting

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

March 2014

UF UNIVERSITY of FLORIDA
The Foundation for The Gator Nation

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Hyperion Overview

Overview

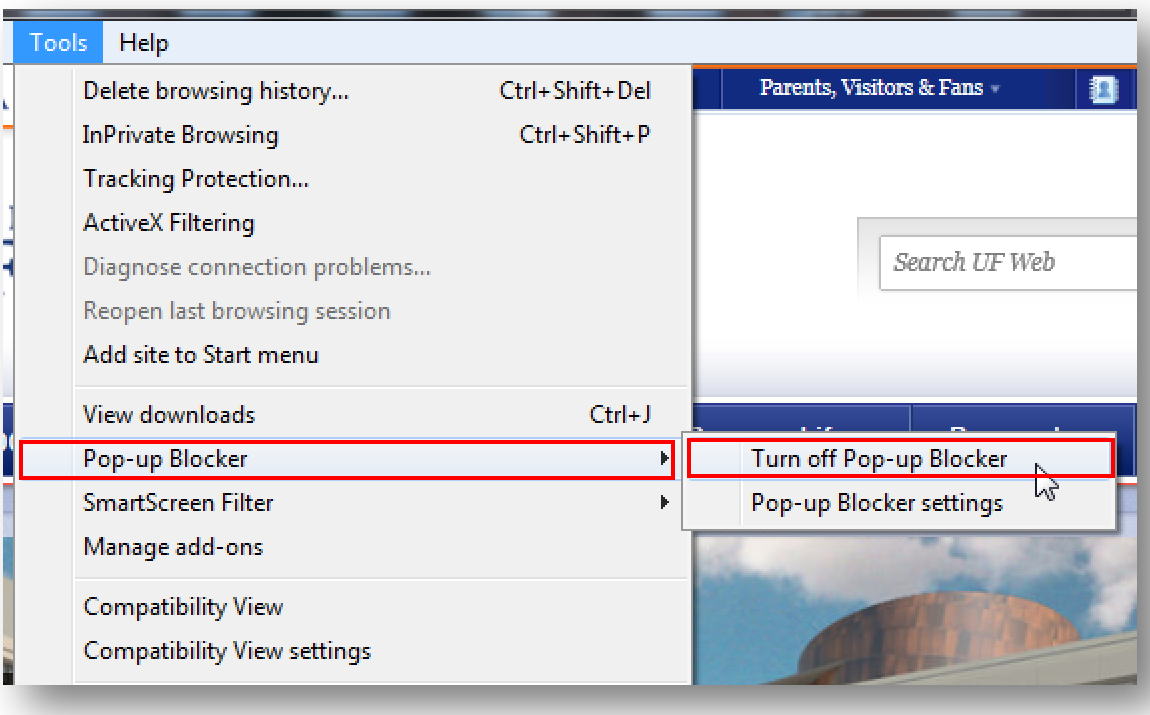
Hyperion is a centralized, Excel and Web-based planning, budgeting and forecasting solution that integrates financial and operational fiscal processes and improves business predictability. Support Units and Responsibility Centers enter budget data through web forms using a web browser. Current year budget 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.

Internet Option Setting

Before you login to Hyperion, you need to change some Internet Option settings to smooth the access of Hyperion applications through the browser. ***IE 8 or 9 is the recommended browser. Internet Explorer 10 will not work.***

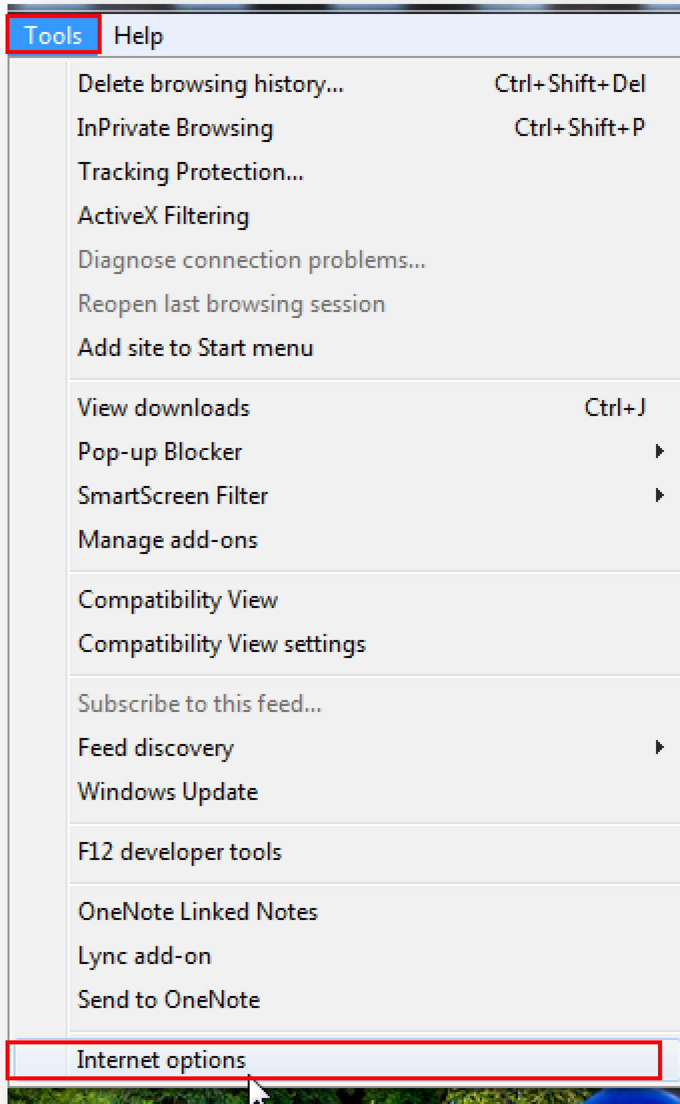
Pop-up Blocker

1. Go to **Tools**>**Pop-up Blocker**>**Turn Off Pop-up Blocker**:

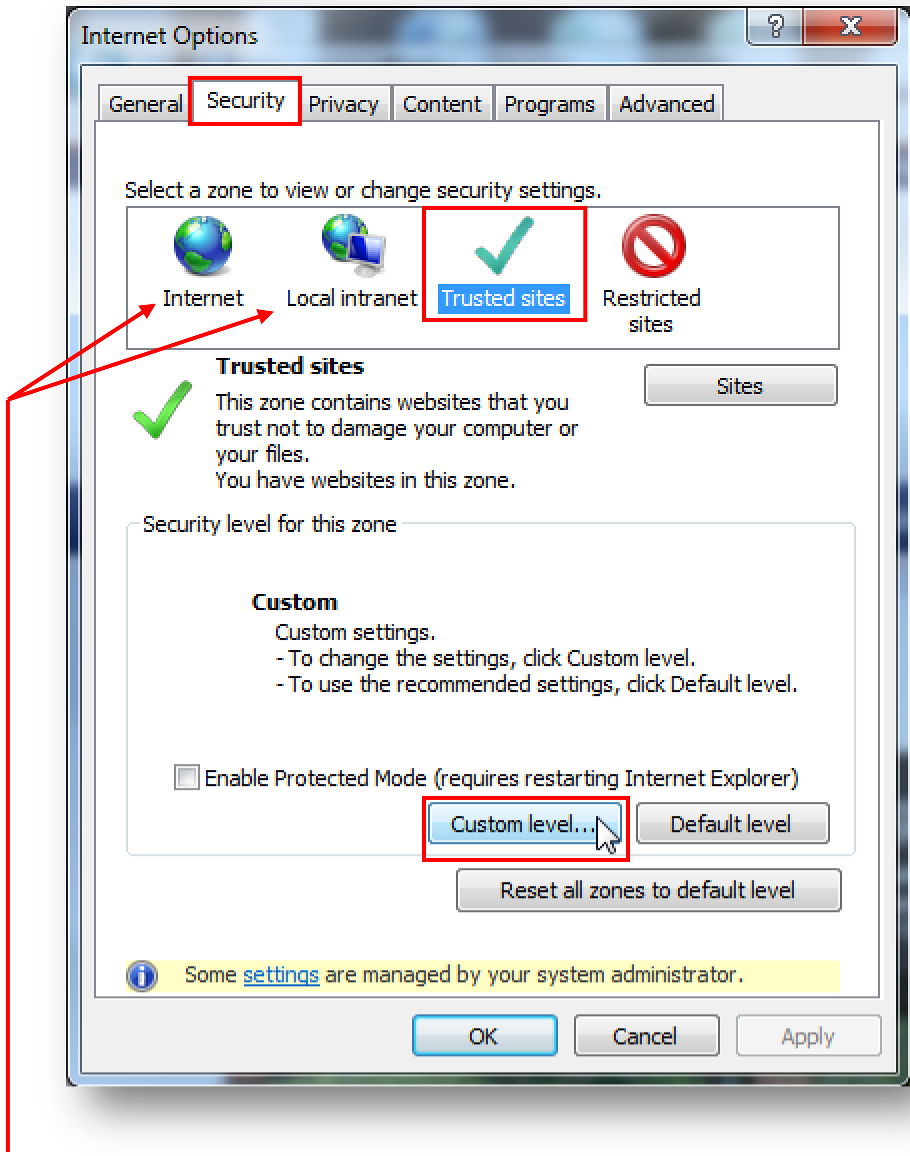


Change the custom level of Trusted Sites

2. Go to **Tools**>**Internet Options**.



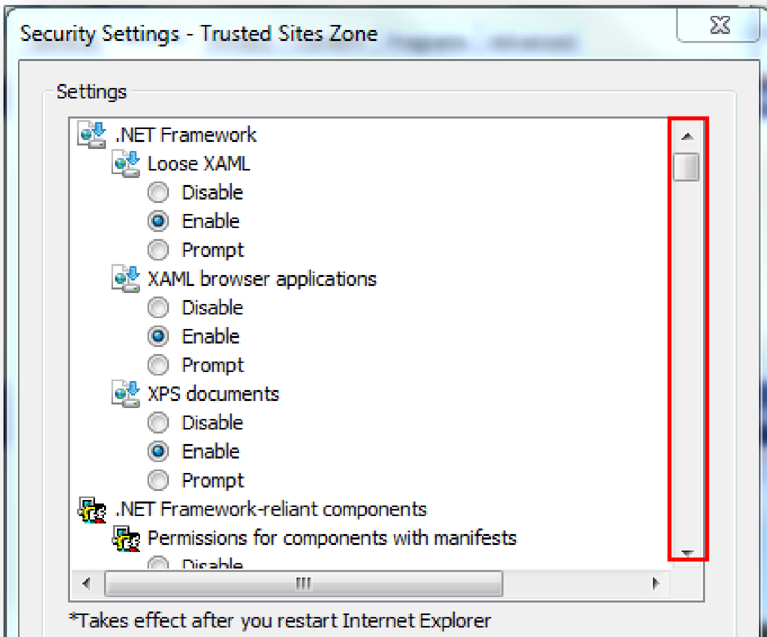
3. Go to **Security**>**Trusted Sites**>**Custom level**.



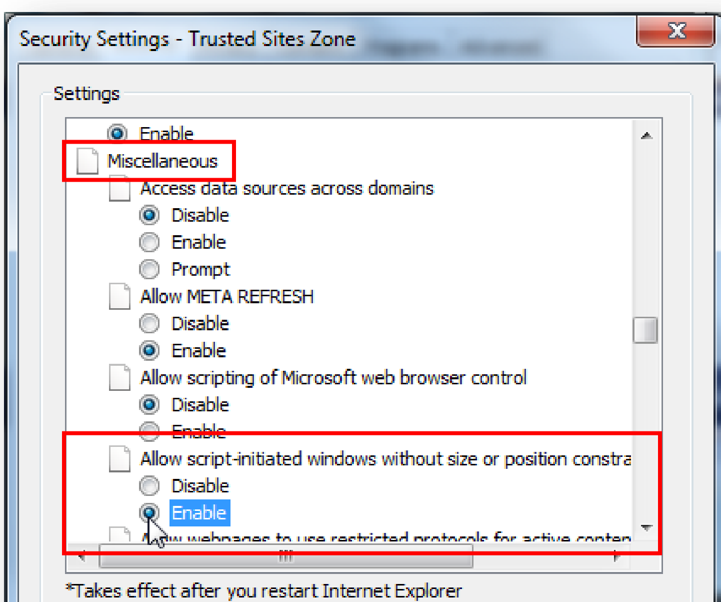
IMPORTANT You need to repeat these steps for both Internet and Local intranet zones.

The Security Settings – Trusted Sites Zone window will popup.

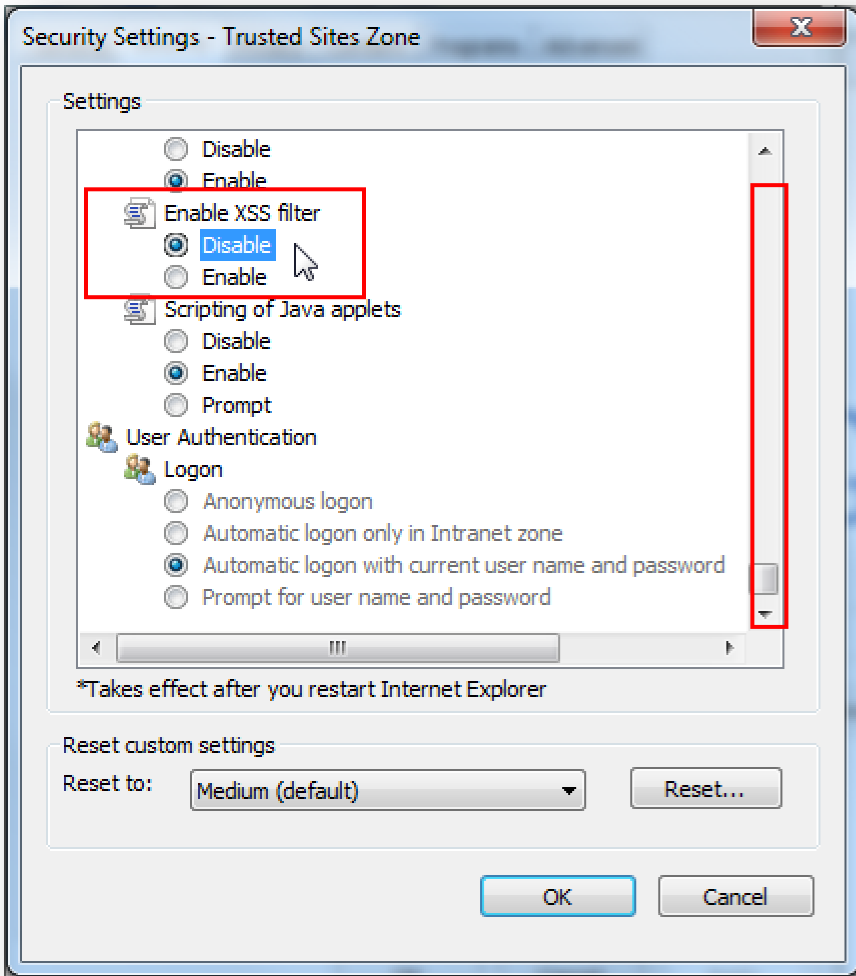
4. Scroll down to the **Miscellaneous** section.



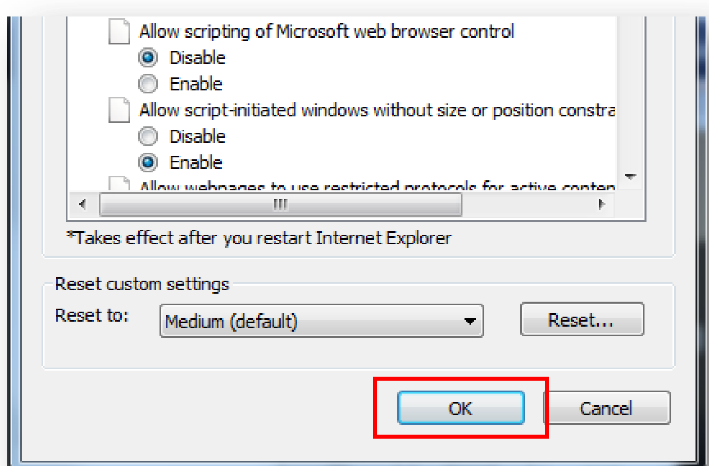
5. In the Miscellaneous section, **enable** Allow script-initiated windows without size or position constraints.



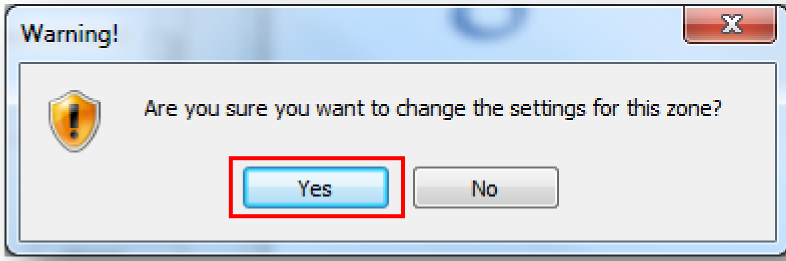
6. Continue scrolling down to the bottom, **disable** Enable XSS Filter.



7. Click **OK**.



8. If a warning message displays, click **Yes**.



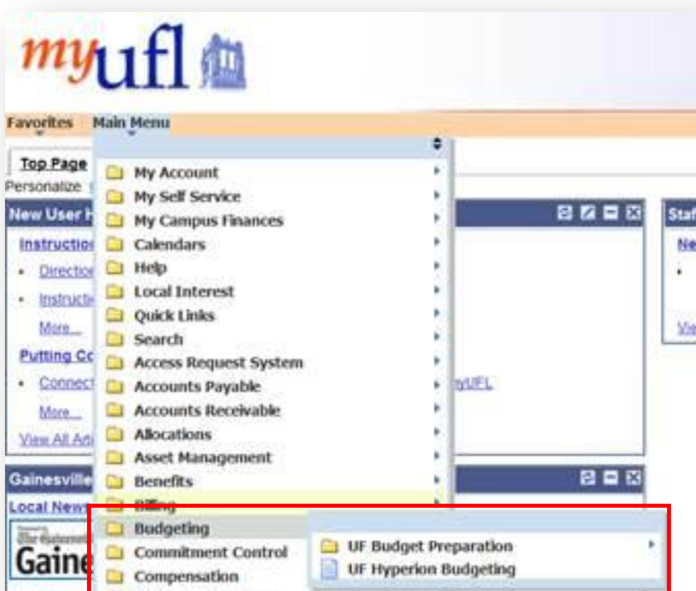
9. Click **OK** again.

IMPORTANT
Remember, you need to repeat these steps for both Internet and Local intranet zones.

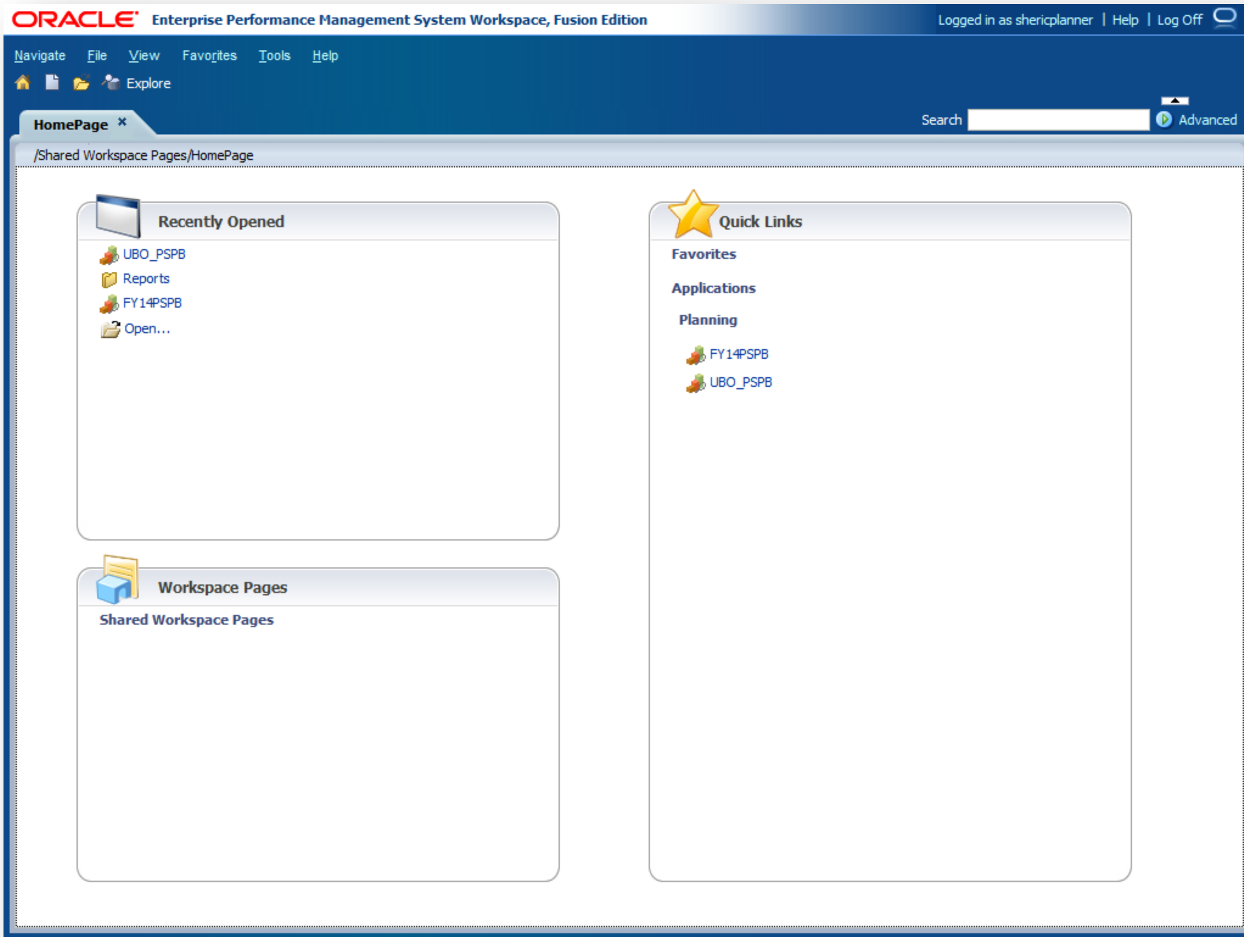
10. Close and re-open your browser.

Logging In

The Hyperion budget submission application is incorporated to myUFL portal. After logging into myUFL, navigate to Budgeting > UF Hyperion Budgeting.



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.

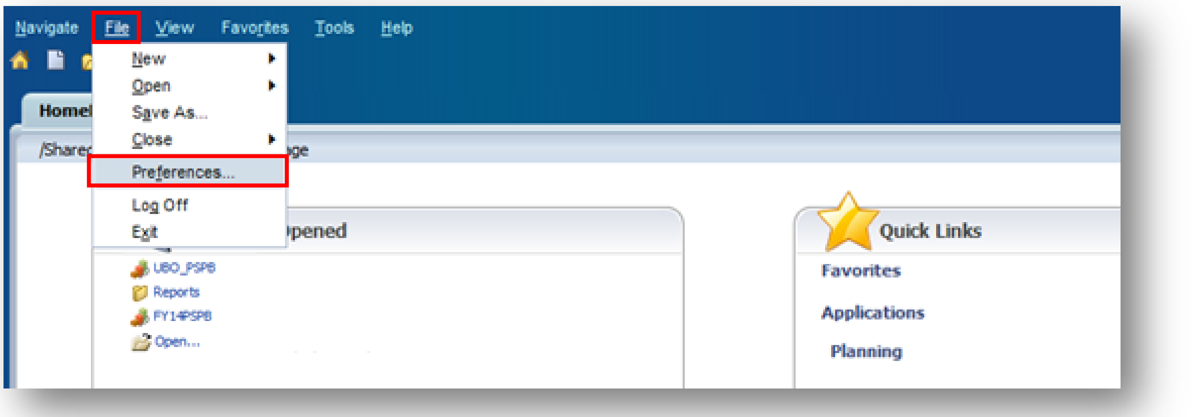
NOTE:
Also note that previous fiscal year data will appear on the HomePage. For example, above you can see FY14PSPB. As the years pass, you will see FY15PSPB, FY16PSPB, etc. These applications are the view only data that was entered for that fiscal years submissions.

Setting Hyperion User Preferences

Let's look at how to setup user preferences before we begin using the application to prep and submit UF budgets. Setting user preferences allows you to define the default content that will display when you login to Hyperion (optional). It also allows you to define formatting, page options and additional options (mandatory).

Changing Default Opening Page (This is an optional setting change)

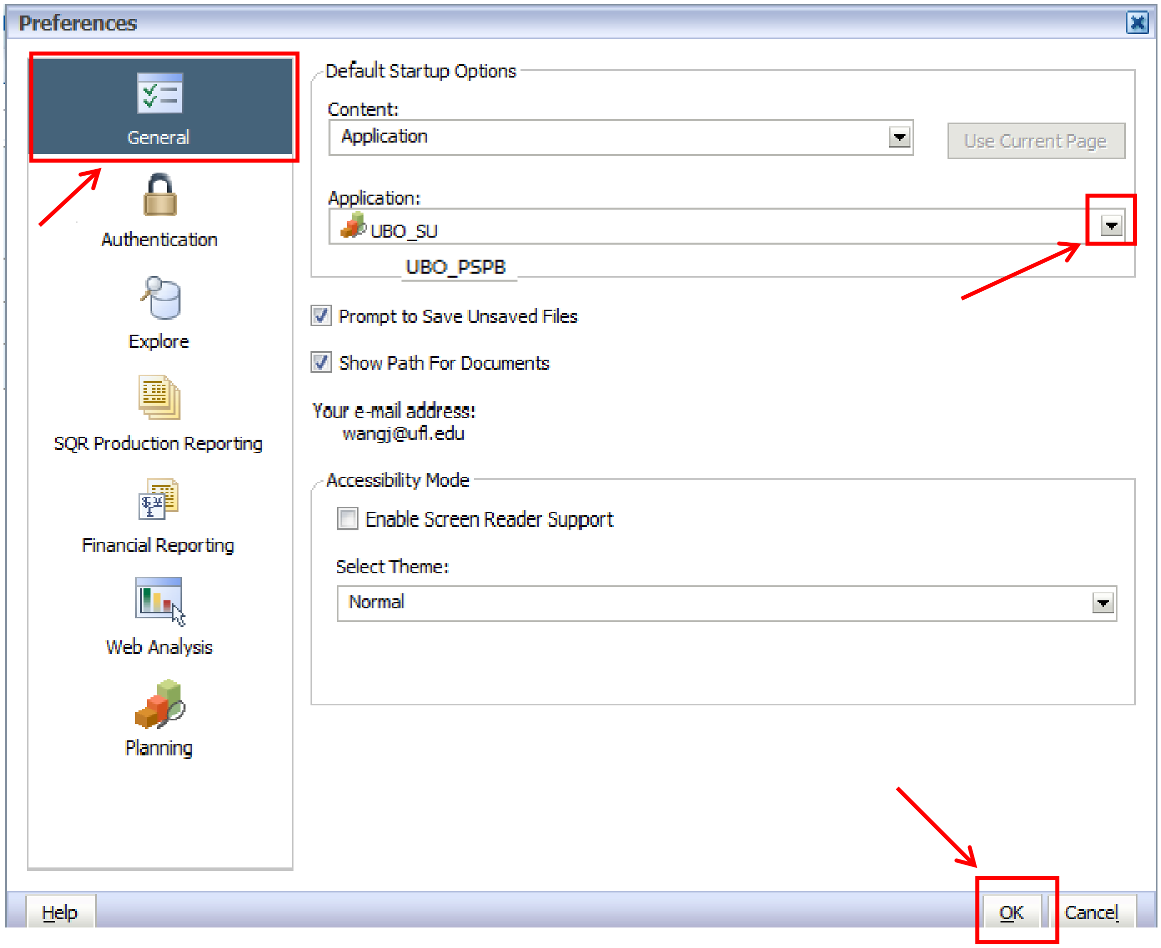
1. From the Hyperion application window, go to **File** > **Preferences**.



2. If not already selected, select the **General** option in the list of options on the left side of the screen. This will allow you to select how the default content will display when you login to Hyperion.

3. Click the **Application** drop down icon and select **UBO_PSPB** from the Planning list.

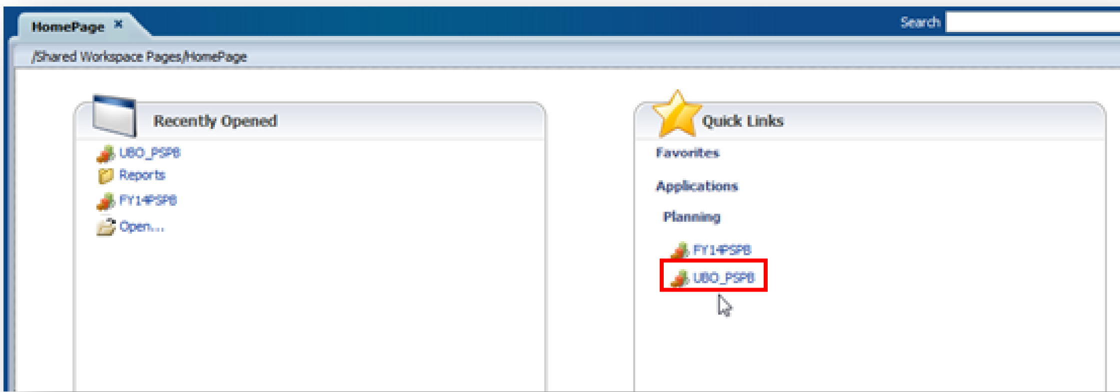
4. Click **OK**.


Preferences
General
Authentication
Explore
SQR Production Reporting
Financial Reporting
Web Analysis
Planning
Default Startup Options
Content:
Application
Use Current Page
Application:
UBO_SU
UBO_PSPB
Prompt to Save Unsaved Files
Show Path For Documents
Your e-mail address:
wangj@ufl.edu
Accessibility Mode
Enable Screen Reader Support
Select Theme:
Normal
Help
OK
Cancel

Changing Hyperion Display Settings

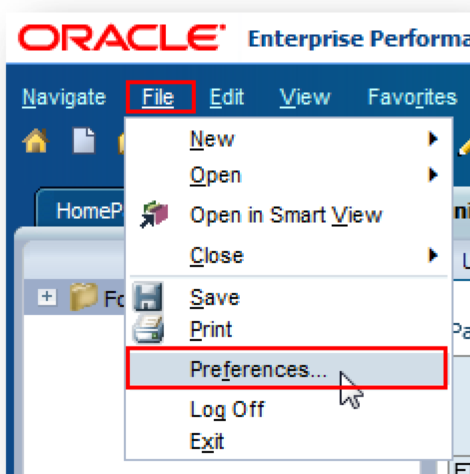
To change the display settings, you must first open the UBO_PSPB application. The display options must be established prior to using the Hyperion application for requesting UF budgets.

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



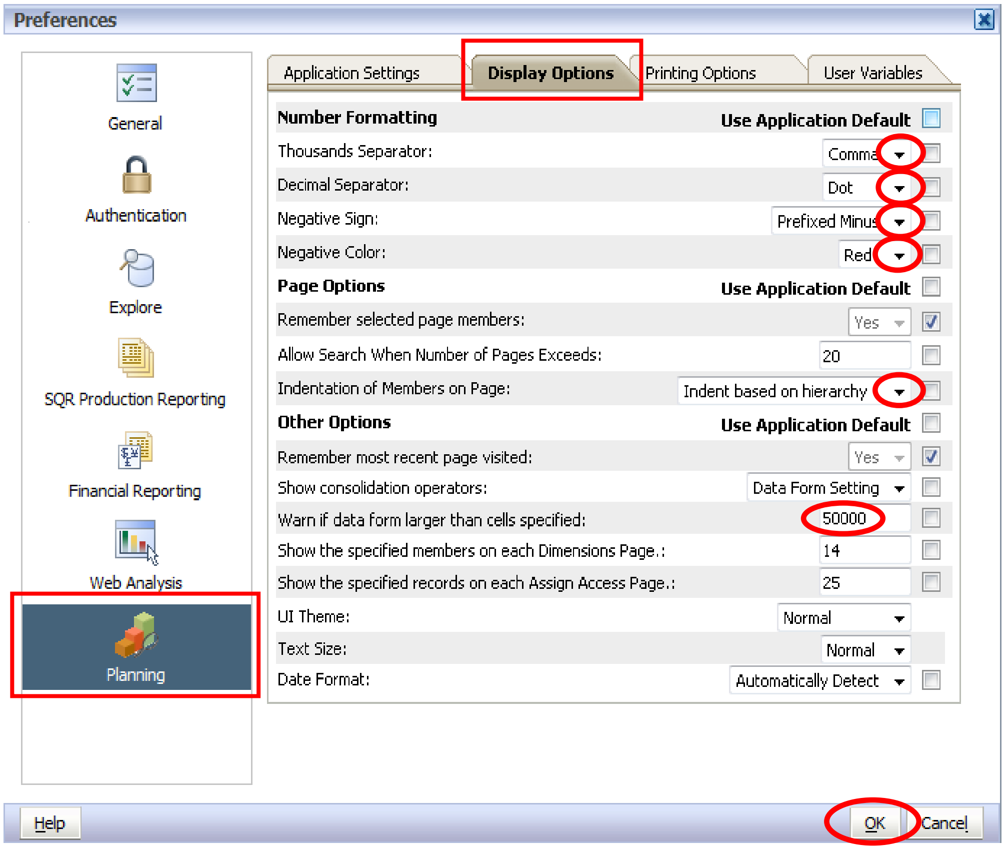
NOTE:
If you have previously opened the UBO_PSPB application, you can open it again from the Recently Opened section on the HomePage, if displayed.

2. Choose **File** > **Preferences** from the Menu bar.



3. From the Preferences window, select the **Planning** option in the list of options on the left side of the screen.

4. Select the **Display Options** tab at the top of the screen.



5. Select your desired options.

You are welcome to customize your desired Display Options settings as you see fit. Some suggested default settings include:

Number Formatting

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

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.

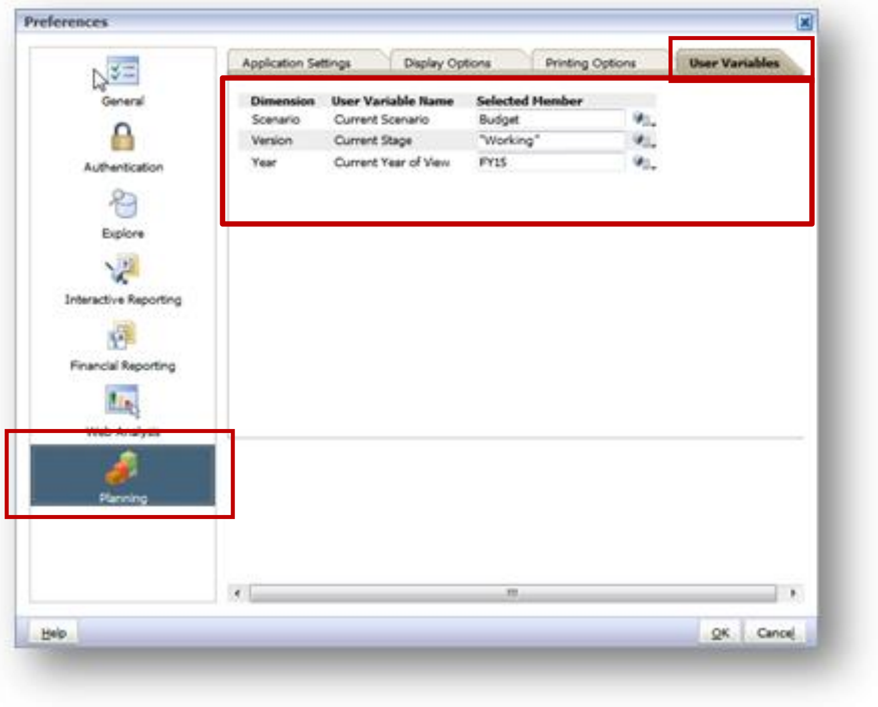
Other Options

- Warn if data form larger than cells specified – enter 50,000.
  This option will give you a warning message if the number of cells in the web form reaches the limit. Raising this value to a fairly high number ensures lower limit breaches.

Changing Hyperion User Variable Settings

As part of the Hyperion preference setup, you will indicate three User Variable settings These settings will not need to be changed again until the next fiscal year cycle.

- Scenario: Budget
- Version: Working
- Year: FY15

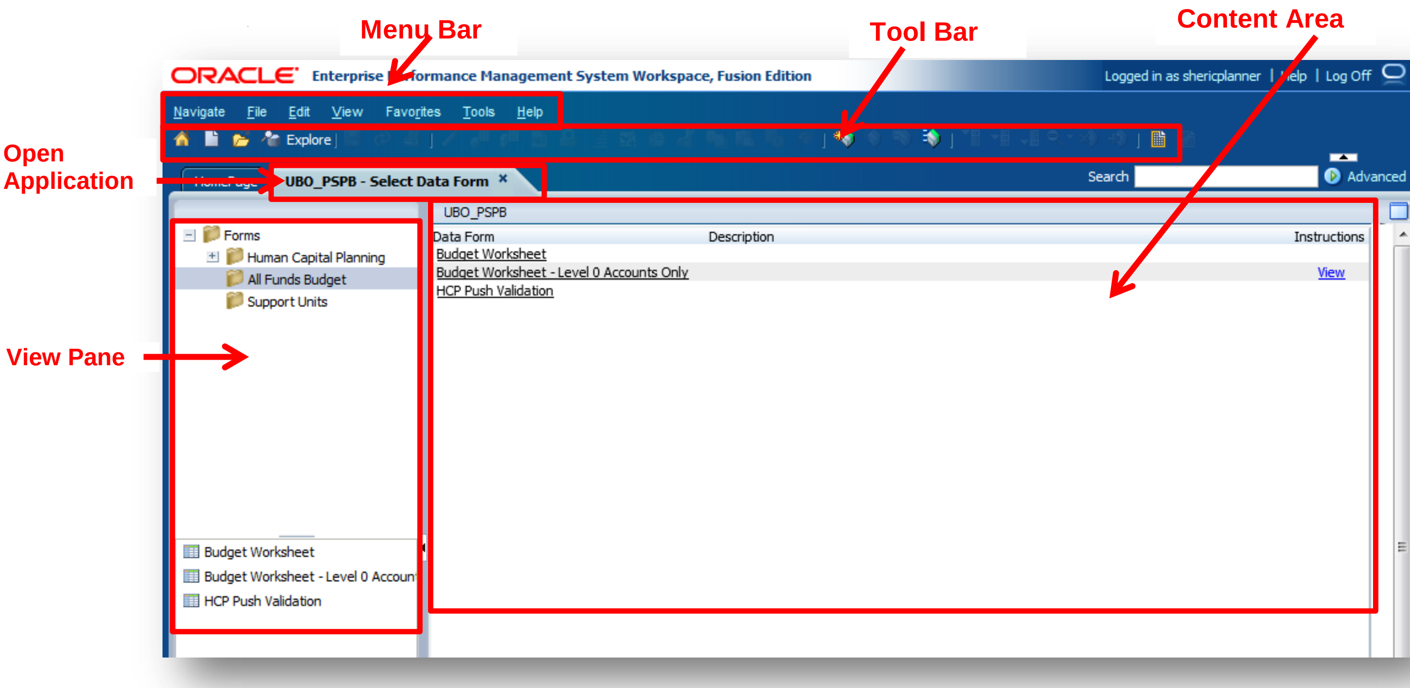


6. Click **OK**.

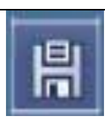
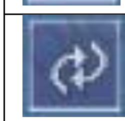
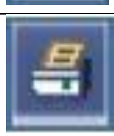
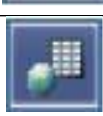
You are now ready to navigate through the application.

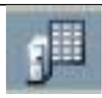
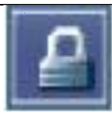
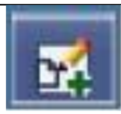
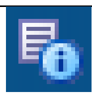
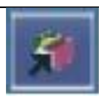
Workspace

Hyperion Navigation

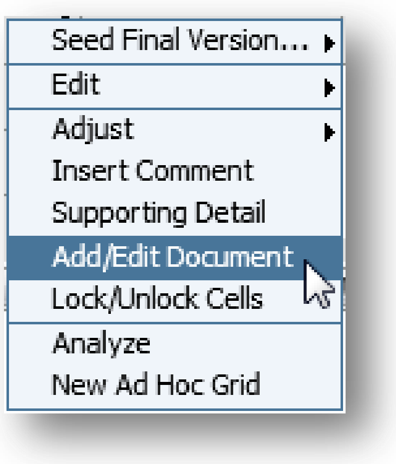


Toolbar Icons

	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.**
	**Open Document**	**Open the attached document 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.)*

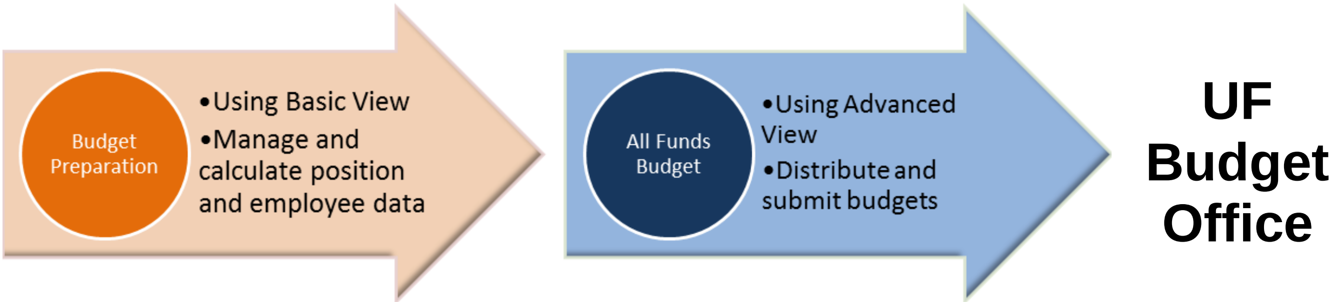
Some tools can be accessed by right-clicking on the desired area of the form and displaying the shortcut menu.



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



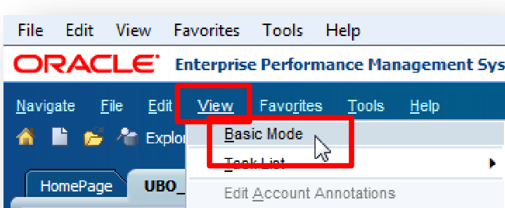
View Modes

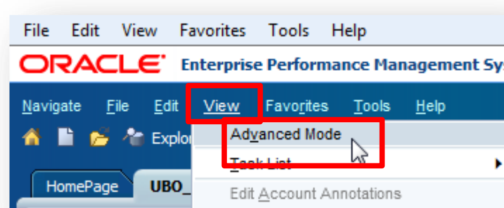
You will use Hyperion to prepare your budget by managing and calculating position and employee data first, and then to submit your budgets to the University Budget Office. You will use two separate Views within the Hyperion application to do this.

View Mode	Purpose
1. Basic	To manage and calculate position and employee data, including salary
2. Advanced	To submit your All Funds Budget to the University Budget Office

To Change View Modes:

1. Choose **View** from Menu bar.
2. Choose either **Basic** or **Advanced** as needed.





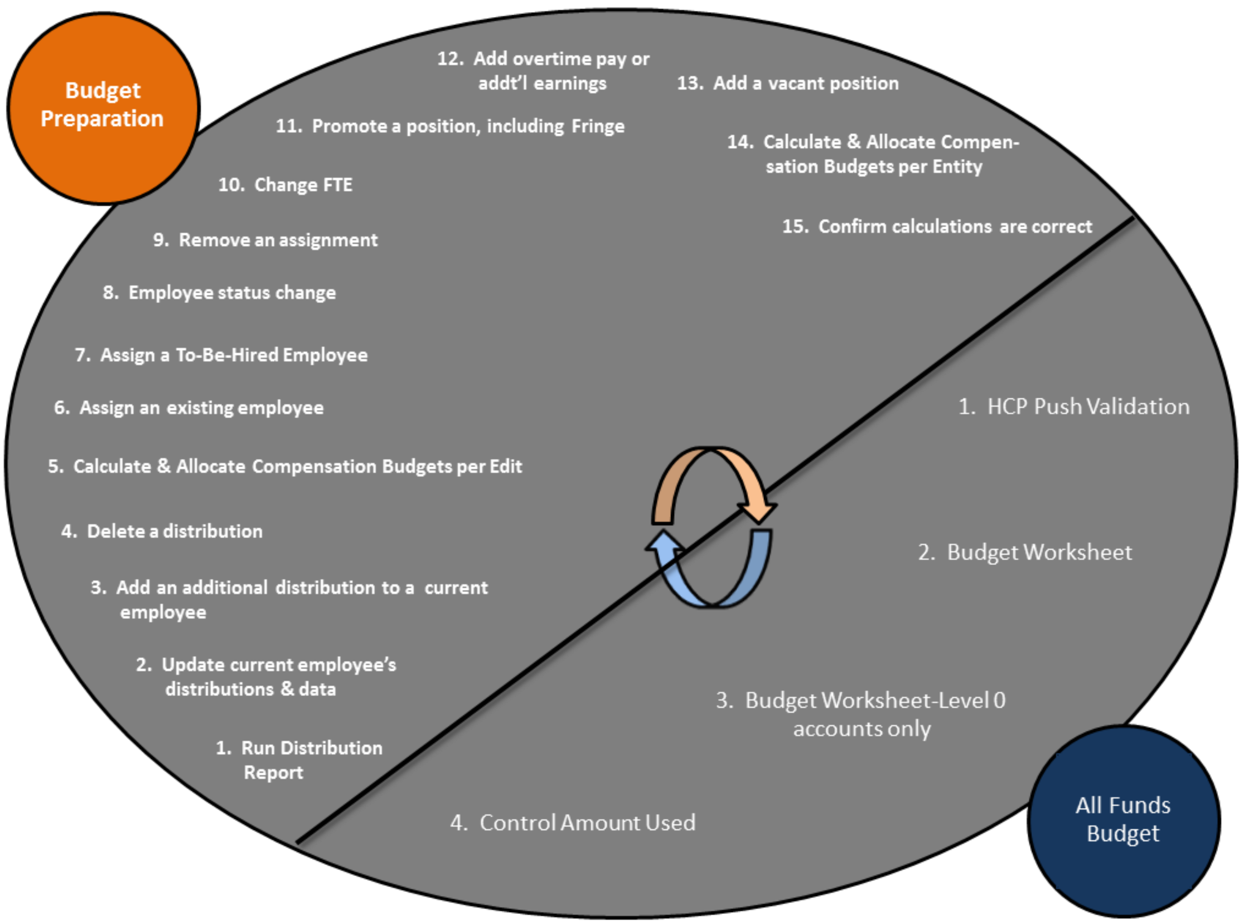
Budget Preparation

NOTE: Choose **File** > **Basic** from Menu bar if needed.

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.



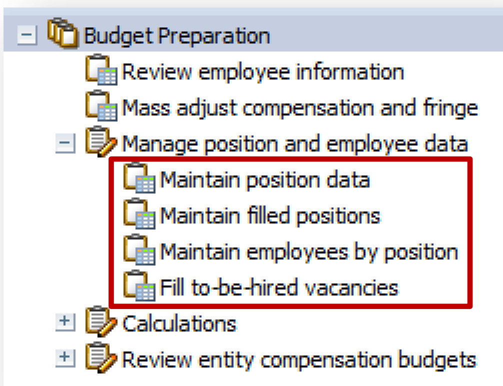
Manage Position and Employee Data Forms

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
Fill to-be-hired vacancies can be used to display all to-be-hired positions for one entity and serves as a convenient location to see all of your to-be-hired positions. Use of this form for its original intended purpose will not be covered in this course. This functionality does not currently work correctly as Hyperion is currently being used at UF.



Running Hyperion Reports

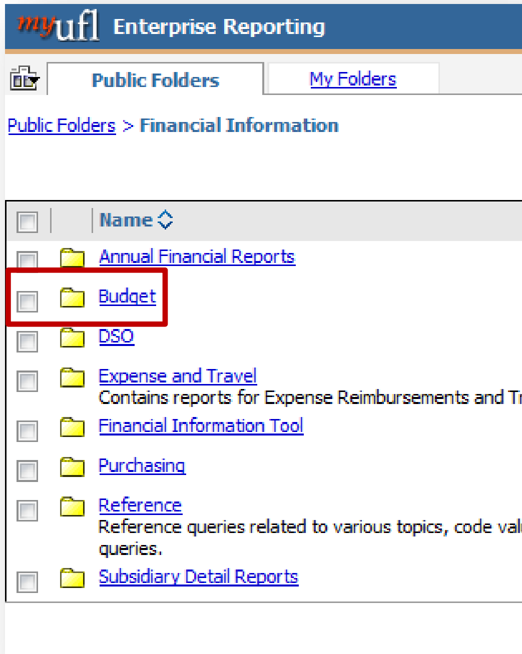
Please keep in mind that the reports will not be updated until after the push has occurred in Hyperion. The push runs every two hours starting at 7am and ending at 7pm Monday thru Friday. On Saturday and Sunday the push will run every two hours starting at 11am and ending at 7pm.

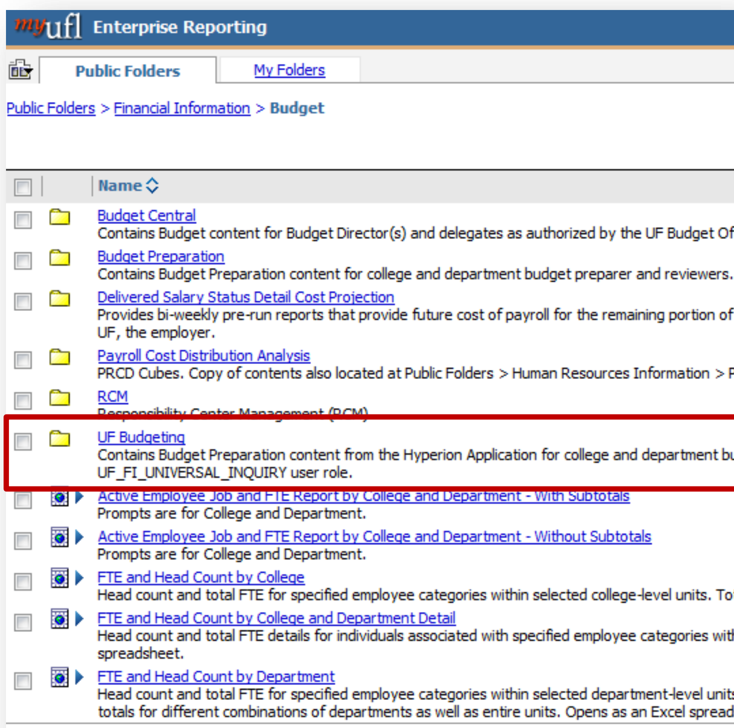
We have found that the push typically takes 1 hr to run. We recommend you run the reports an hour after the push times (8am, 10am, et al.) to see any changes that were made before the push occurred.

Navigation to all reports

1. Log into myUFL and navigate through **Main Menu** > **Enterprise Reporting** > **Access Reporting**.

2. Select **Budget > UF Budgeting.**
   Once inside you will choose the report you want to run from the list provided.



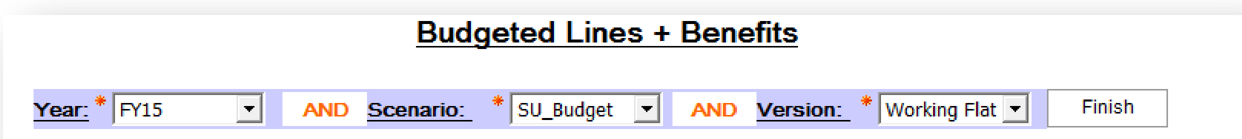


Budgeted Lines + Benefits Report

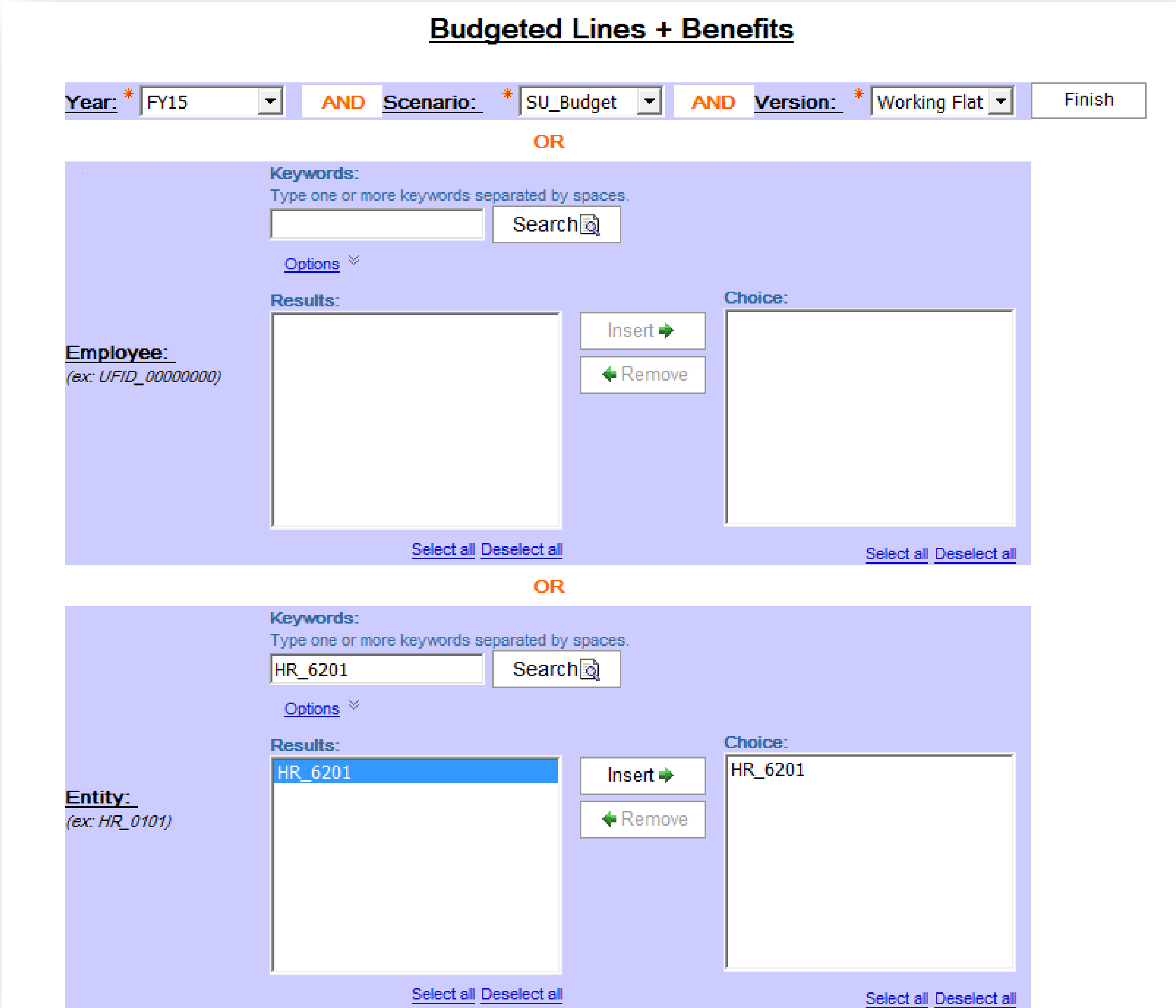
The Budgeted Lines + Benefits Report gives you a list of where all employees are currently budgeted and their benefits within Hyperion. This report can be run by the following additional search criteria Employee, Entity (Home Department), Comp Entity (Earnings Department), and Filled or Vacant. Please 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**

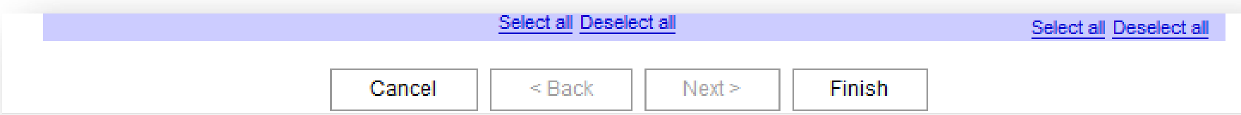
2. Choose your required search criteria.



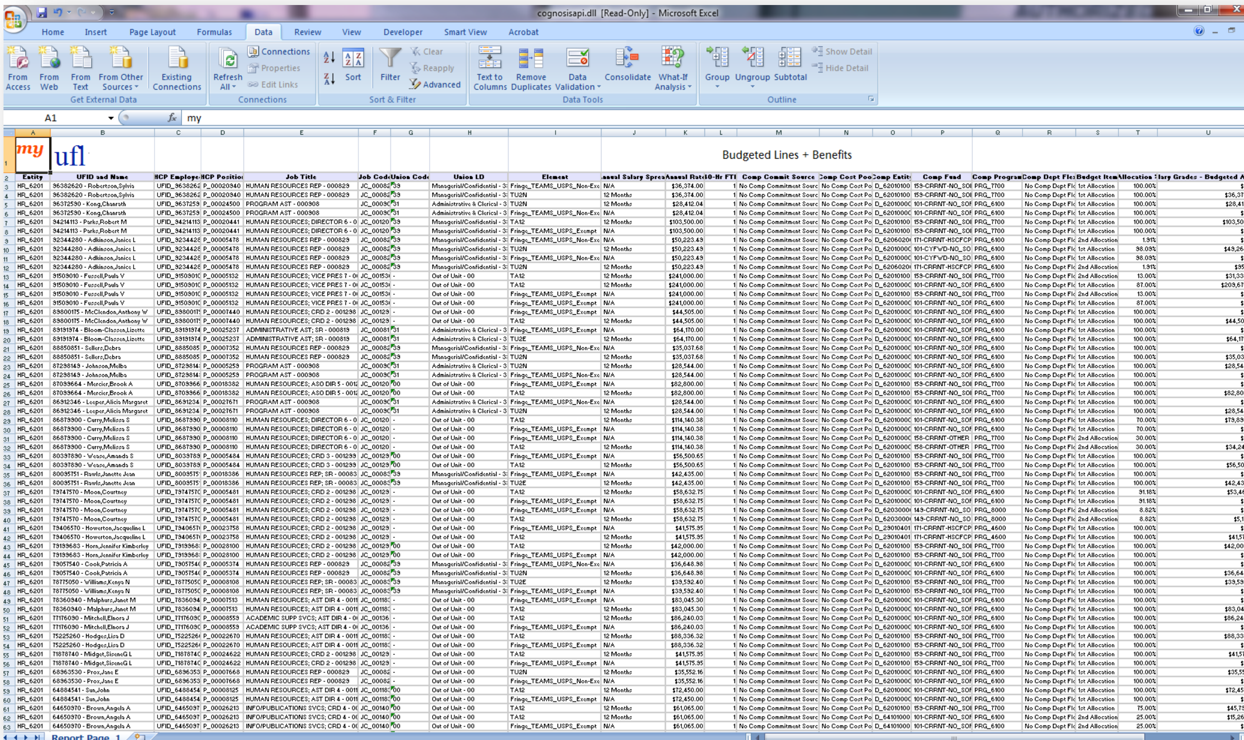
3. Choose your additional search criteria. In this example, we will use HR_6201 data. After entering scroll to bottom of form or top of the form.



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



5. **Review** your report.

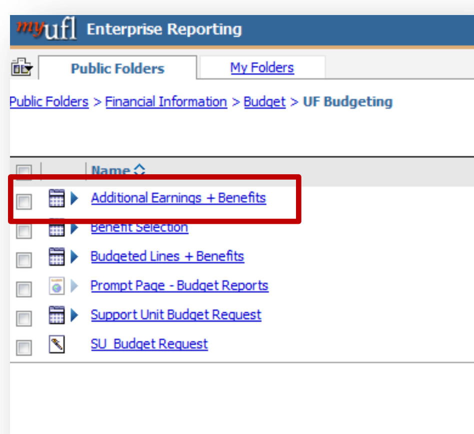


NOTE: At this time each person has at least two rows of data. The one row of data is the salary expense data line and the one row is the benefit data line.

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.

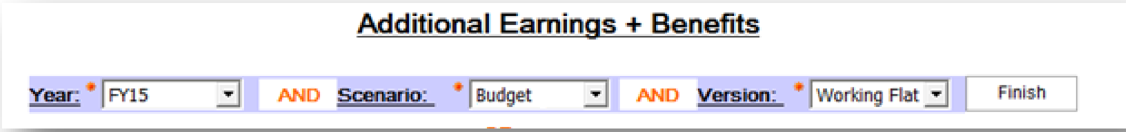
Additional Earnings + Benefits

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.

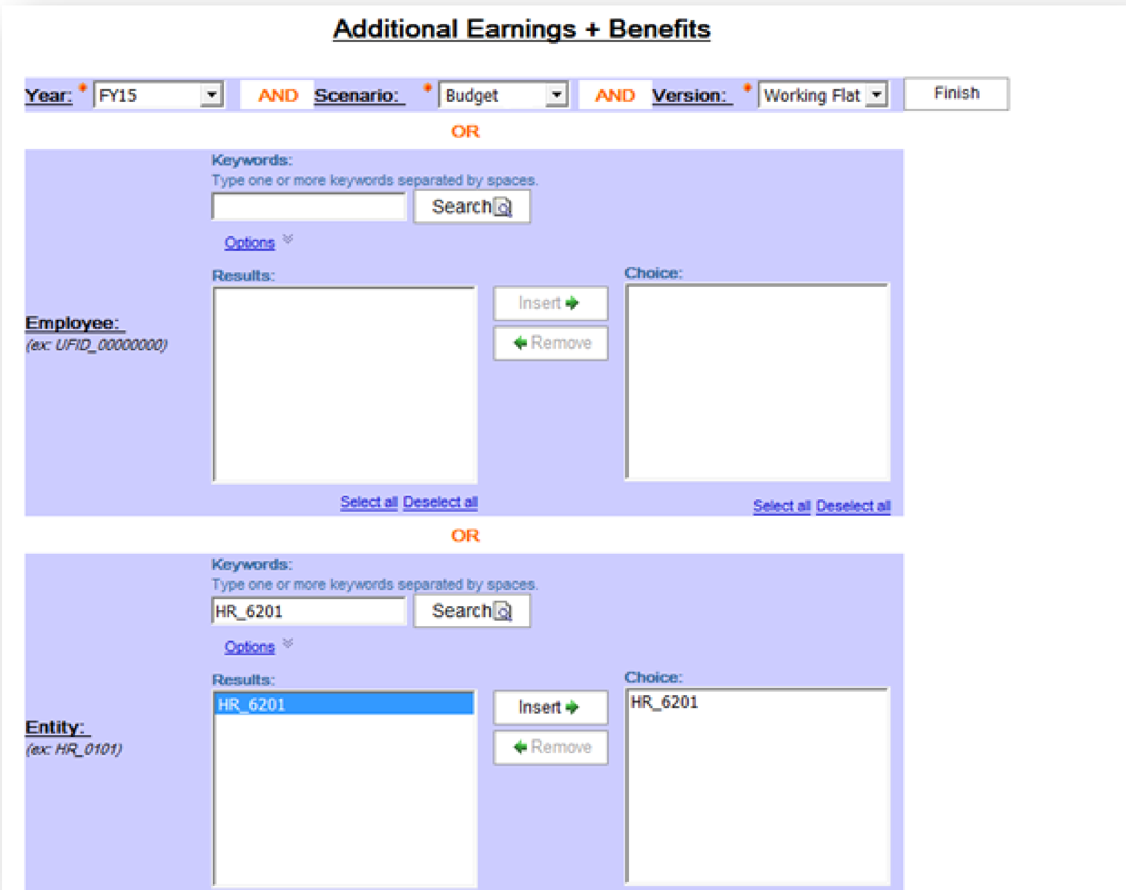


1. Select **Additional Earnings + Benefits**

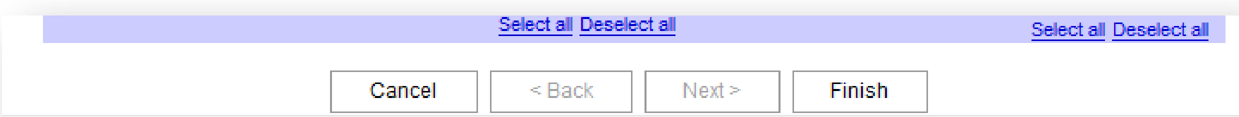
2. Choose your required search criteria.



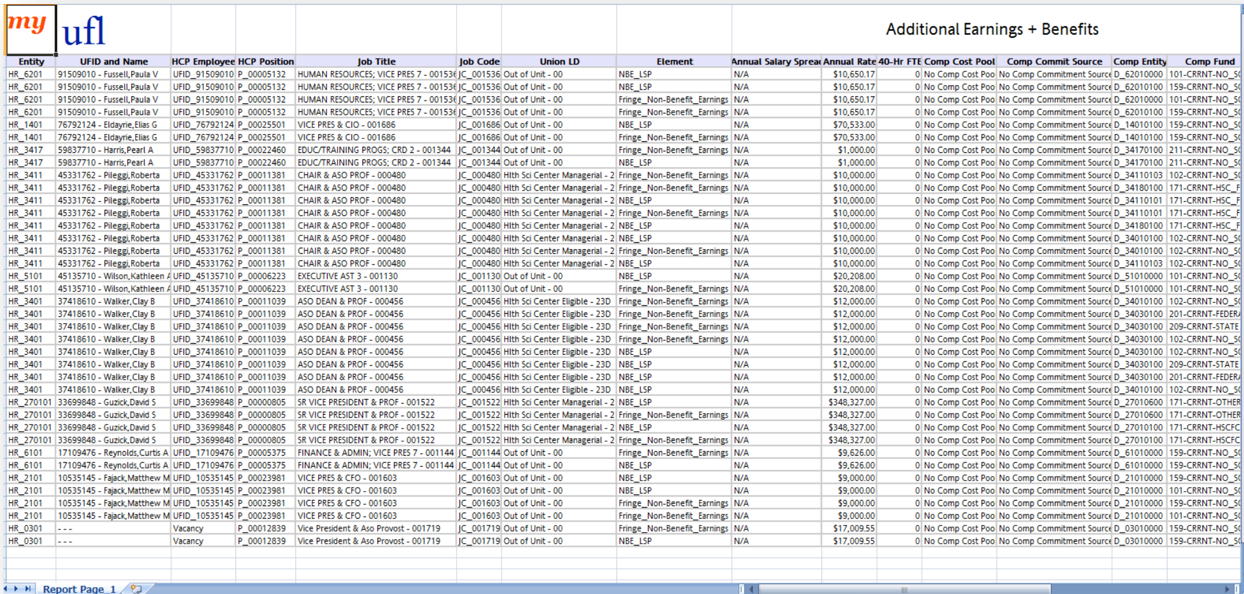
3. Choose your additional search criteria. In this example, we will use HR_6201 data. After entering scroll to bottom of form or top of the form.



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



5. **Review** your report.



Additional Earnings + Benefits

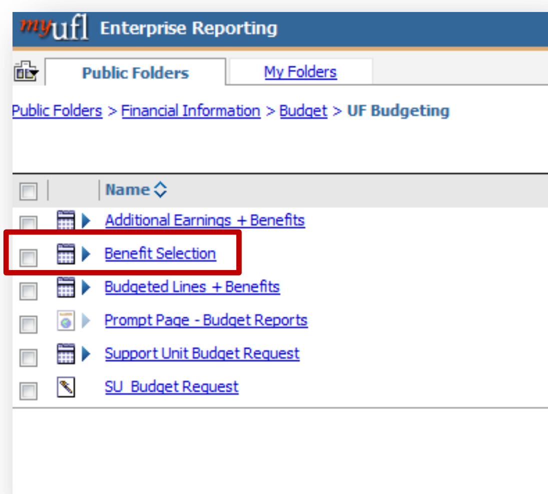
Entity	UFID and Name	HCP Employee	HCP Position	Job Title	Job Code	Union LD	Element	Annual Salary Sprea	Annual Rate	40-Hr FTE	Comp Cost Pool	Comp Commit Source	Comp Entity	Comp Fund
HR_6201	91509010 - Fussell,Paula V	UFID_91509010	P_00005132	HUMAN RESOURCES; VICE PRES 7 - 00153	JC_001536	Out of Unit - 00	NBE_LSP	N/A	$10,650.17	0	No Comp Cost Poo	No Comp Commitment Source	D_62010000	101-CRRNT-NO_S
HR_6201	91509010 - Fussell,Paula V	UFID_91509010	P_00005132	HUMAN RESOURCES; VICE PRES 7 - 00153	JC_001536	Out of Unit - 00	NBE_LSP	N/A	$10,650.17	0	No Comp Cost Poo	No Comp Commitment Source	D_62010100	159-CRRNT-NO_S
HR_6201	91509010 - Fussell,Paula V	UFID_91509010	P_00005132	HUMAN RESOURCES; VICE PRES 7 - 00153	JC_001536	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$10,650.17	0	No Comp Cost Poo	No Comp Commitment Source	D_62010000	101-CRRNT-NO_S
HR_6201	91509010 - Fussell,Paula V	UFID_91509010	P_00005132	HUMAN RESOURCES; VICE PRES 7 - 00153	JC_001536	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$10,650.17	0	No Comp Cost Poo	No Comp Commitment Source	D_62010100	159-CRRNT-NO_S
HR_1401	76792124 - Eldayrie,Elias G	UFID_76792124	P_00025501	VICE PRES & CIO - 001686	JC_001686	Out of Unit - 00	NBE_LSP	N/A	$70,533.00	0	No Comp Cost Poo	No Comp Commitment Source	D_14010100	159-CRRNT-NO_S
HR_1401	76792124 - Eldayrie,Elias G	UFID_76792124	P_00025501	VICE PRES & CIO - 001686	JC_001686	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$70,533.00	0	No Comp Cost Poo	No Comp Commitment Source	D_14010100	159-CRRNT-NO_S
HR_3417	59837710 - Harris,Pearl A	UFID_59837710	P_00022460	EDUC/TRAINING PROGS; CRD 2 - 001344	JC_001344	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$1,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34170100	211-CRRNT-NO_S
HR_3417	59837710 - Harris,Pearl A	UFID_59837710	P_00022460	EDUC/TRAINING PROGS; CRD 2 - 001344	JC_001344	Out of Unit - 00	NBE_LSP	N/A	$1,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34170100	211-CRRNT-NO_S
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	Fringe_Non-Benefit_Earnings	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34110103	102-CRRNT-NO_S
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	Fringe_Non-Benefit_Earnings	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34180100	171-CRRNT-HSC_F
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	NBE_LSP	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34110101	171-CRRNT-HSC_F
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	Fringe_Non-Benefit_Earnings	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34110101	171-CRRNT-HSC_F
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	NBE_LSP	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34180100	171-CRRNT-HSC_F
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	NBE_LSP	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34010100	102-CRRNT-NO_S
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	Fringe_Non-Benefit_Earnings	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34010100	102-CRRNT-NO_S
HR_3411	45331762 - Pileggi,Roberta	UFID_45331762	P_00011381	CHAIR & ASO PROF - 000480	JC_000480	Hlth Sci Center Managerial - 2	NBE_LSP	N/A	$10,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34110103	102-CRRNT-NO_S
HR_5101	45135710 - Wilson,Kathleen	UFID_45135710	P_00006223	EXECUTIVE AST 3 - 001130	JC_001130	Out of Unit - 00	NBE_LSP	N/A	$20,208.00	0	No Comp Cost Poo	No Comp Commitment Source	D_51010000	101-CRRNT-NO_S
HR_5101	45135710 - Wilson,Kathleen	UFID_45135710	P_00006223	EXECUTIVE AST 3 - 001130	JC_001130	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$20,208.00	0	No Comp Cost Poo	No Comp Commitment Source	D_51010000	101-CRRNT-NO_S
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	Fringe_Non-Benefit_Earnings	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34010100	102-CRRNT-NO_S
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	Fringe_Non-Benefit_Earnings	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34030100	201-CRRNT-FEDER
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	Fringe_Non-Benefit_Earnings	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34030100	209-CRRNT-STATE
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	Fringe_Non-Benefit_Earnings	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34030100	102-CRRNT-NO_S
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	NBE_LSP	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34030100	102-CRRNT-NO_S
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	NBE_LSP	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34030100	209-CRRNT-STATE
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	NBE_LSP	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34030100	201-CRRNT-FEDER
HR_3401	37418610 - Walker,Clay B	UFID_37418610	P_00011039	ASO DEAN & PROF - 000456	JC_000456	Hlth Sci Center Eligible - 23D	NBE_LSP	N/A	$12,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_34010100	102-CRRNT-NO_S
HR_270101	33699848 - Guzick,David S	UFID_33699848	P_00000805	SR VICE PRESIDENT & PROF - 001522	JC_001522	Hlth Sci Center Managerial - 2	NBE_LSP	N/A	$348,327.00	0	No Comp Cost Poo	No Comp Commitment Source	D_27010600	171-CRRNT-OTHER
HR_270101	33699848 - Guzick,David S	UFID_33699848	P_00000805	SR VICE PRESIDENT & PROF - 001522	JC_001522	Hlth Sci Center Managerial - 2	Fringe_Non-Benefit_Earnings	N/A	$348,327.00	0	No Comp Cost Poo	No Comp Commitment Source	D_27010600	171-CRRNT-OTHER
HR_270101	33699848 - Guzick,David S	UFID_33699848	P_00000805	SR VICE PRESIDENT & PROF - 001522	JC_001522	Hlth Sci Center Managerial - 2	NBE_LSP	N/A	$348,327.00	0	No Comp Cost Poo	No Comp Commitment Source	D_27010100	171-CRRNT-HSCFC
HR_270101	33699848 - Guzick,David S	UFID_33699848	P_00000805	SR VICE PRESIDENT & PROF - 001522	JC_001522	Hlth Sci Center Managerial - 2	Fringe_Non-Benefit_Earnings	N/A	$348,327.00	0	No Comp Cost Poo	No Comp Commitment Source	D_27010100	171-CRRNT-HSCFC
HR_6101	17109476 - Reynolds,Curtis A	UFID_17109476	P_00005375	FINANCE & ADMIN; VICE PRES 7 - 001144	JC_001144	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$9,626.00	0	No Comp Cost Poo	No Comp Commitment Source	D_61010000	159-CRRNT-NO_S
HR_6101	17109476 - Reynolds,Curtis A	UFID_17109476	P_00005375	FINANCE & ADMIN; VICE PRES 7 - 001144	JC_001144	Out of Unit - 00	NBE_LSP	N/A	$9,626.00	0	No Comp Cost Poo	No Comp Commitment Source	D_61010000	159-CRRNT-NO_S
HR_2101	10535145 - Fajack,Matthew M	UFID_10535145	P_00023981	VICE PRES & CFO - 001603	JC_001603	Out of Unit - 00	NBE_LSP	N/A	$9,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_21010000	159-CRRNT-NO_S
HR_2101	10535145 - Fajack,Matthew M	UFID_10535145	P_00023981	VICE PRES & CFO - 001603	JC_001603	Out of Unit - 00	NBE_LSP	N/A	$9,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_21010000	101-CRRNT-NO_S
HR_2101	10535145 - Fajack,Matthew M	UFID_10535145	P_00023981	VICE PRES & CFO - 001603	JC_001603	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$9,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_21010000	159-CRRNT-NO_S
HR_2101	10535145 - Fajack,Matthew M	UFID_10535145	P_00023981	VICE PRES & CFO - 001603	JC_001603	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$9,000.00	0	No Comp Cost Poo	No Comp Commitment Source	D_21010000	101-CRRNT-NO_S
HR_0301	- - -	Vacancy	P_00012839	Vice President & Aso Provost - 001719	JC_001719	Out of Unit - 00	Fringe_Non-Benefit_Earnings	N/A	$17,009.55	0	No Comp Cost Poo	No Comp Commitment Source	D_03010000	159-CRRNT-NO_S
HR_0301	- - -	Vacancy	P_00012839	Vice President & Aso Provost - 001719	JC_001719	Out of Unit - 00	NBE_LSP	N/A	$17,009.55	0	No Comp Cost Poo	No Comp Commitment Source	D_03010000	159-CRRNT-NO_S

Report Page_1

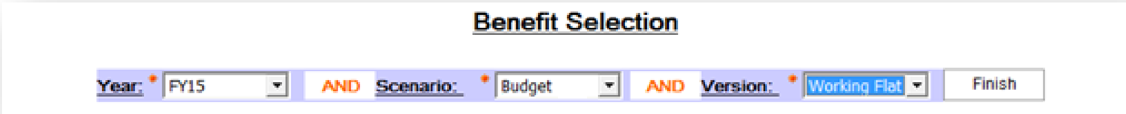
Benefit Selection

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

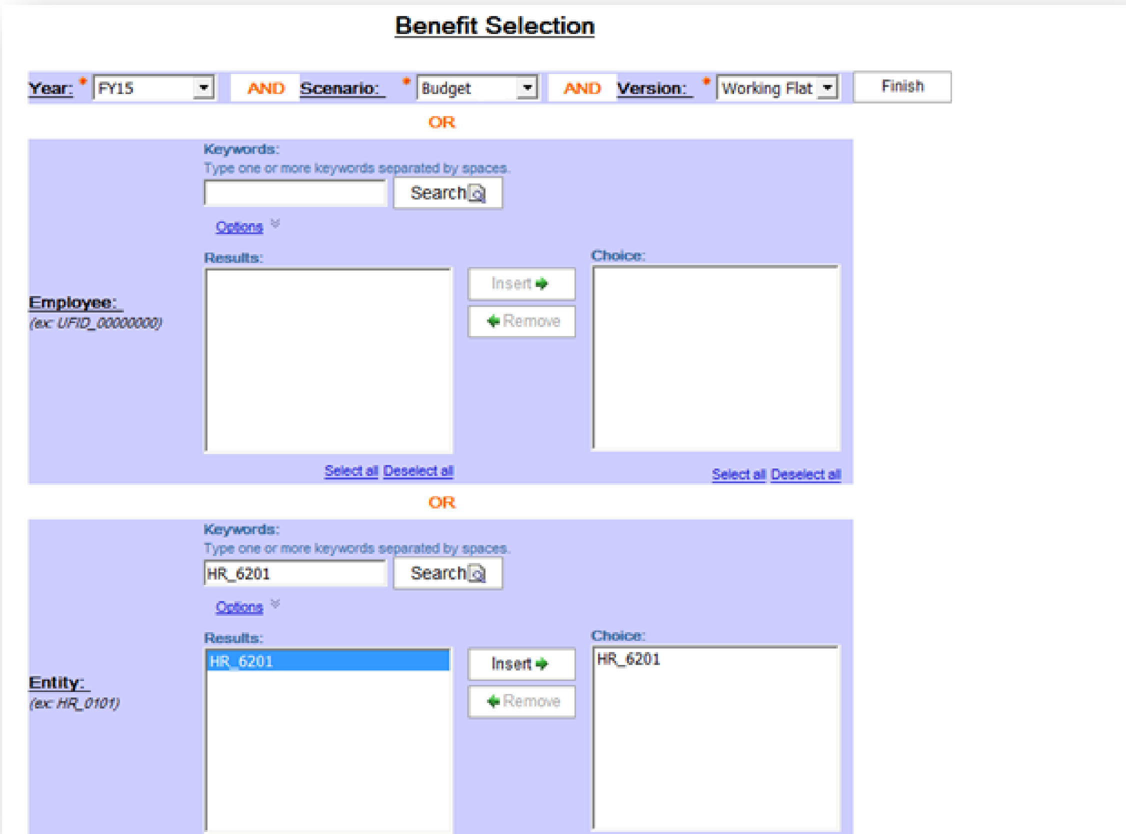
1. Select **Benefit Selection**



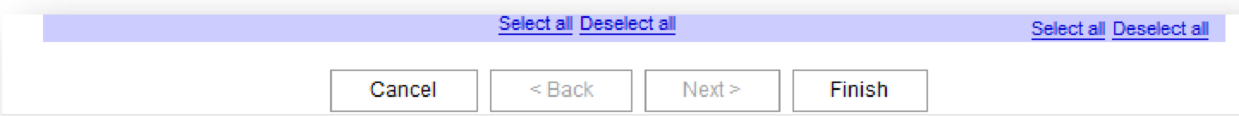
2. Choose your required search criteria.



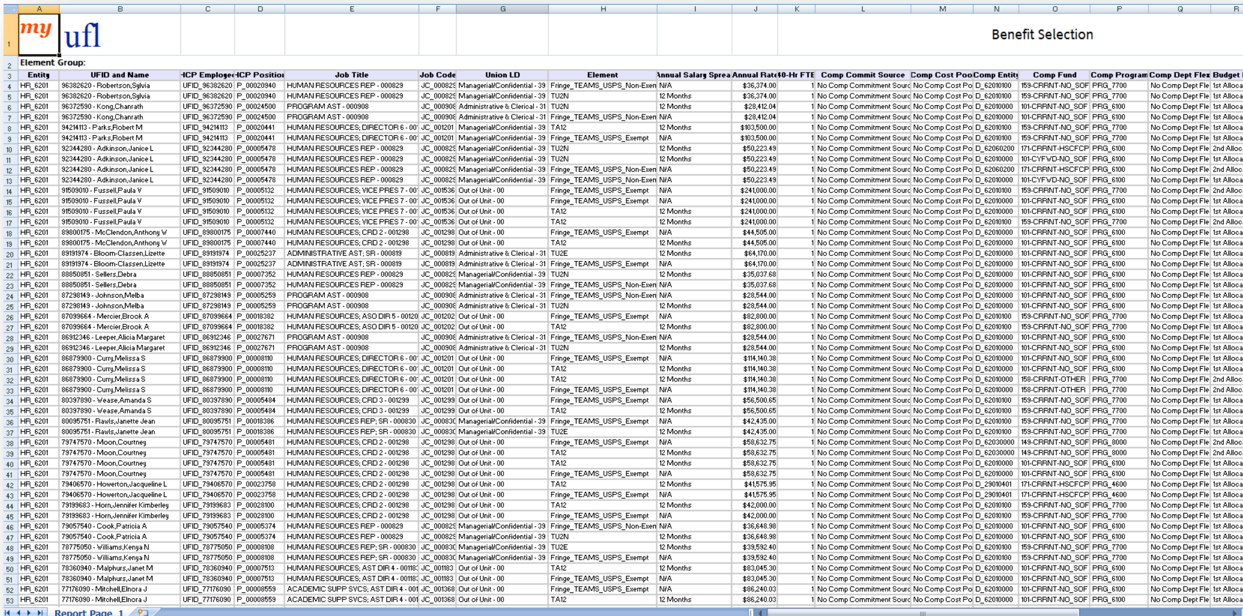
3. Choose your additional search criteria. In this example, we will use HR_6201 data. After entering scroll to bottom of form or top of the form.



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



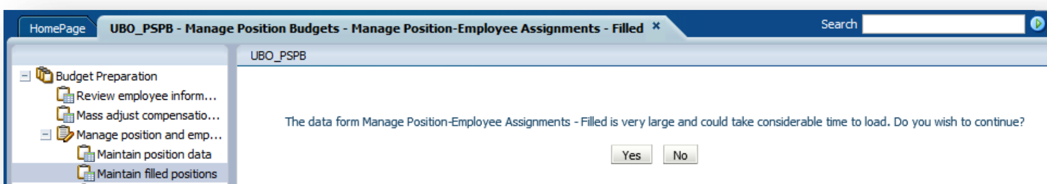
5. **Review** your report.



Update Current Employees' Distributions & Data

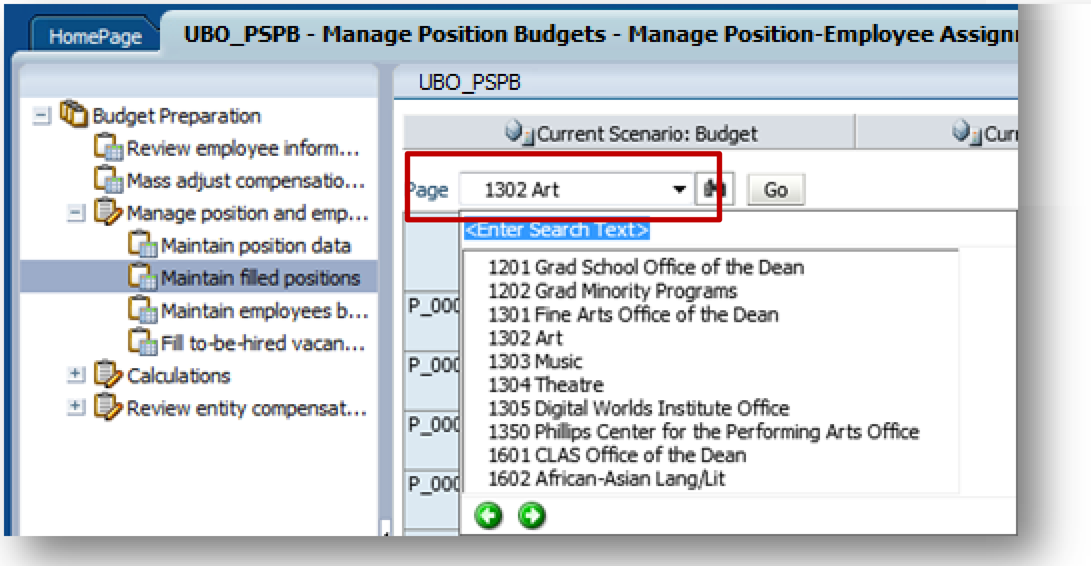
NOTE: This procedure was formerly known as "Adjusting a Distribution".

NOTE: Depending on your department size, you may get a large data warning. Simply click Yes.

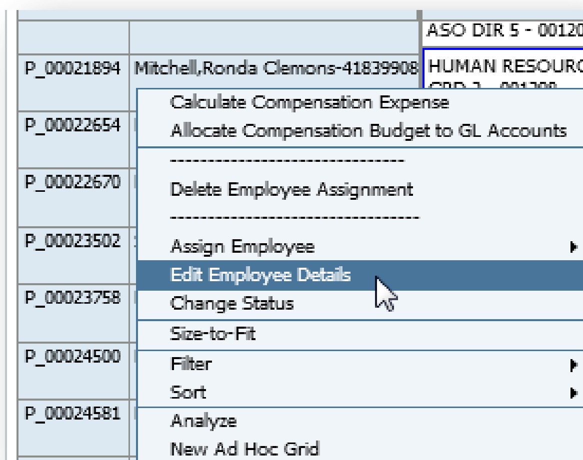


This procedure is used to make changes to particular parameters of an employee's distribution, such as changing an employee's Entity.

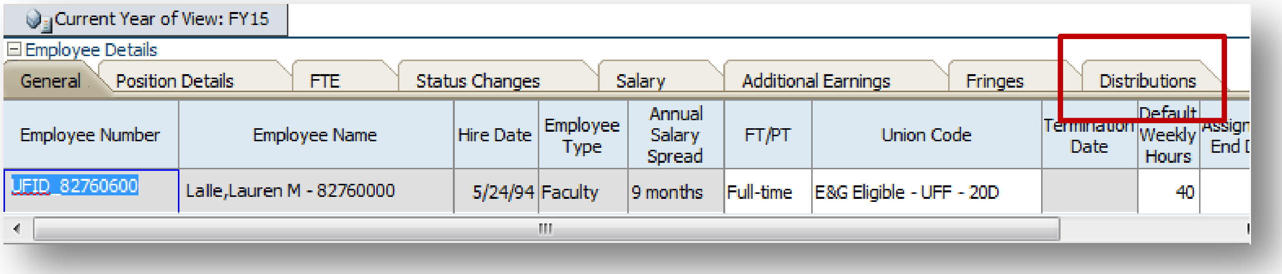
1. From the **Maintain filled positions form**, choose your desired **Entity** from the Entity drop down field.



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



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

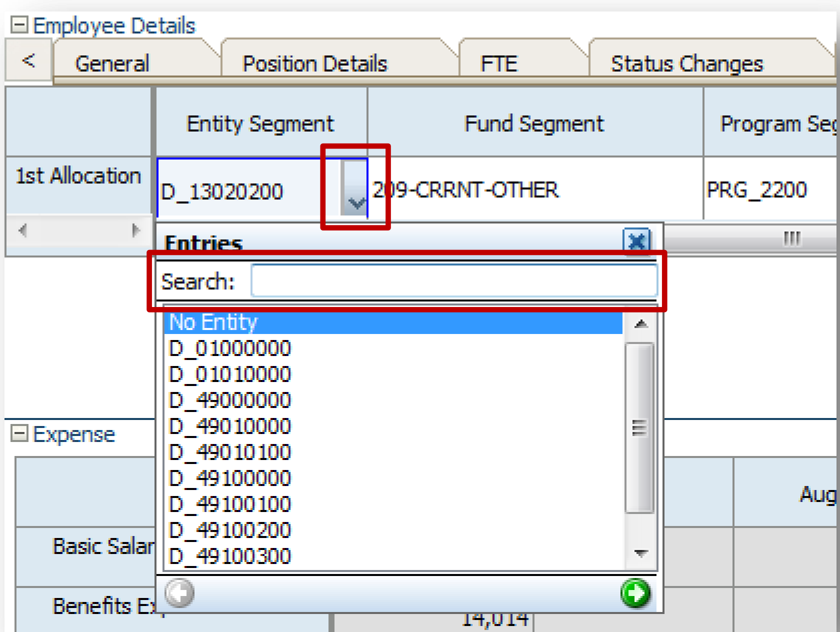


In this example, we will be changing the employee's Entity and assigning the appropriate Chartfield String. If any data is missing addressing these segments will clear the red cell color.

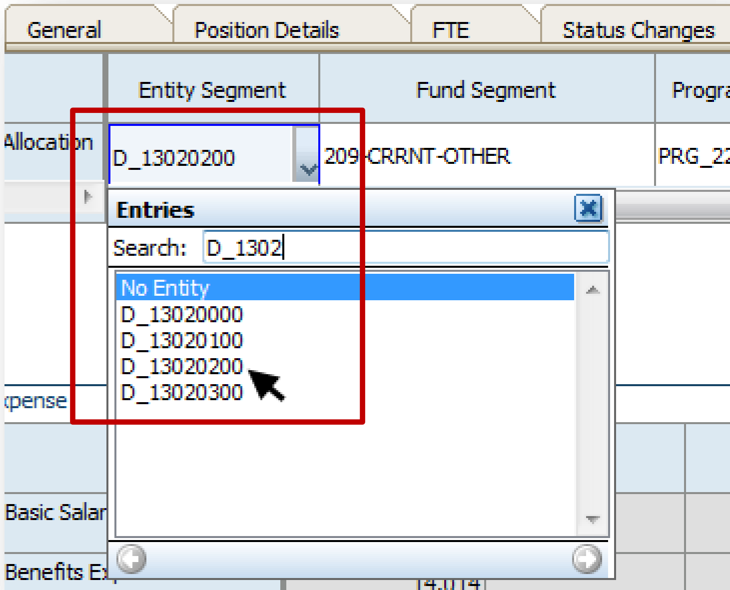
4. Click the **Entity Segment** drop down field.

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 1302 and the list should automatically move to the correct options. You may also choose to scroll to the appropriate list item by using the green left and right arrows (see above).

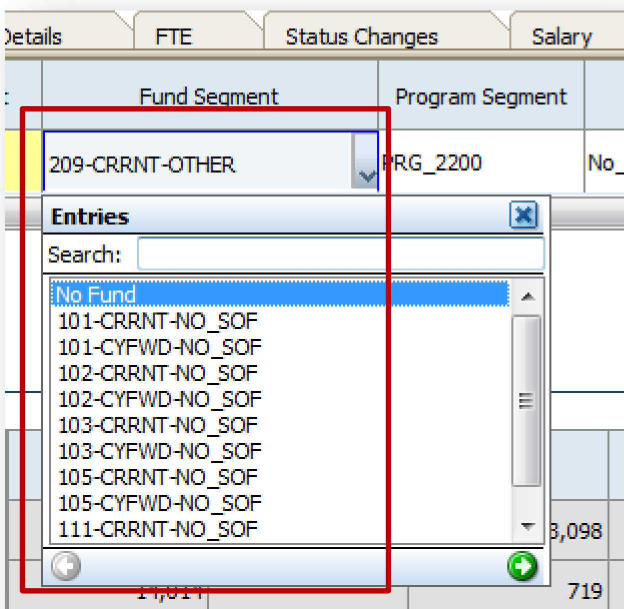


5. Click the new desired **Entity**.



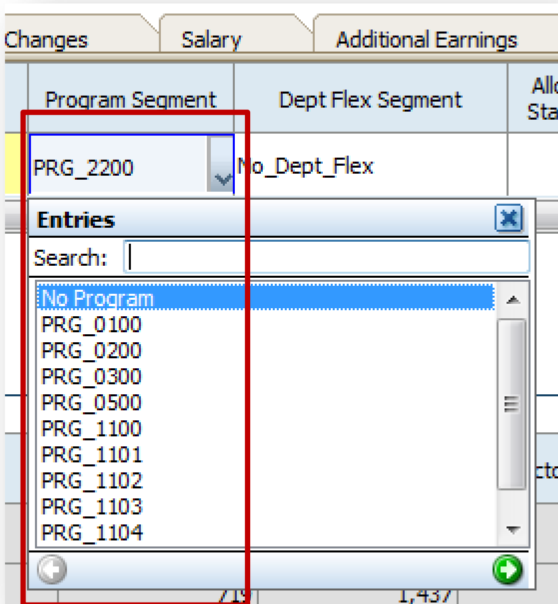
6. Click the **Fund Segment** drop down field.

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.

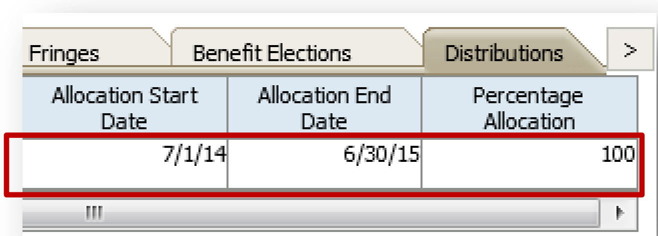
9. Click the desired **Program** option (e.g., **PRG_1100**).



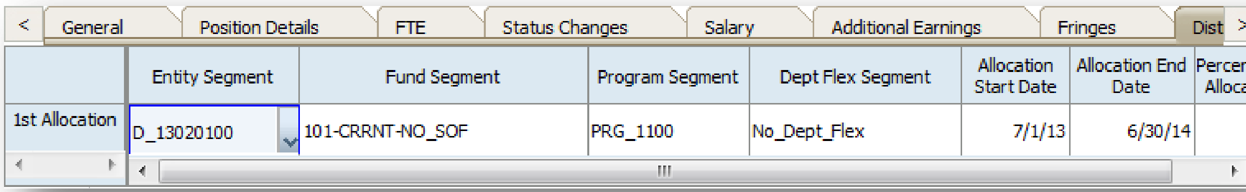
10. If needed, click the Dept Flex Segment drop down field and select the appropriate Dept Flex option or choose/type No_Dept_Flex.

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.



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

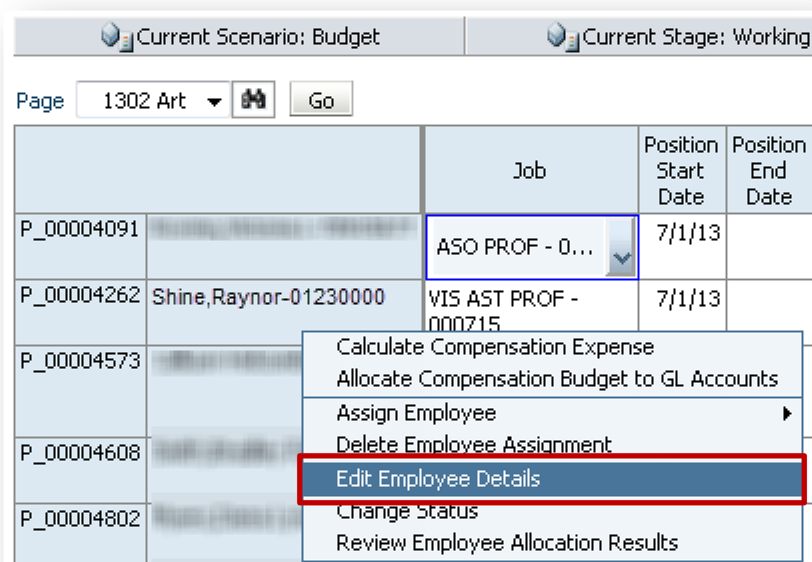


Add an Additional Distribution for the same Employee

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

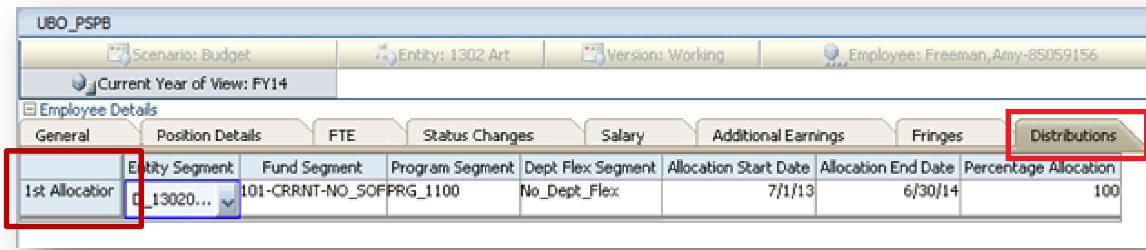
1. From the **Maintain filled positions** form, choose your desired **Entity** from the Entity drop down field, if needed.

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

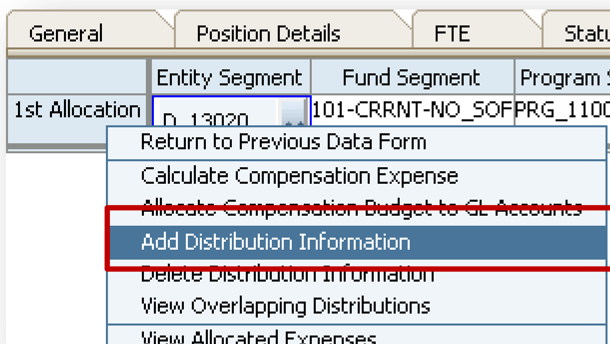


3. Click the **Distributions** tab.
   NOTE: You may have to scroll to the right to view the Distributions tab.

4. Right-click the **1st Allocation** label.

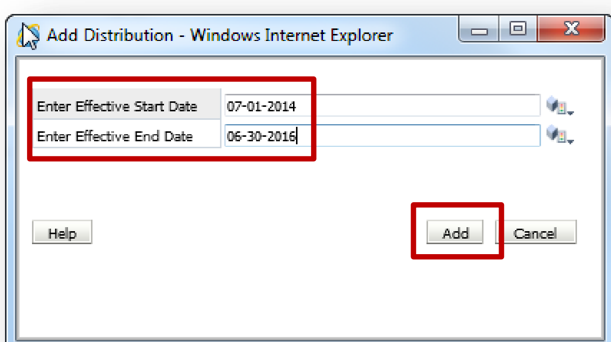


5. Click the **Add Distribution Information** link.



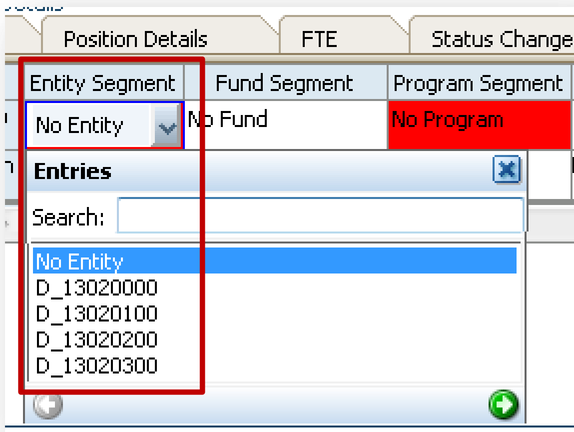
6. Enter the **Effective Start or End Date** if it's different.

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.

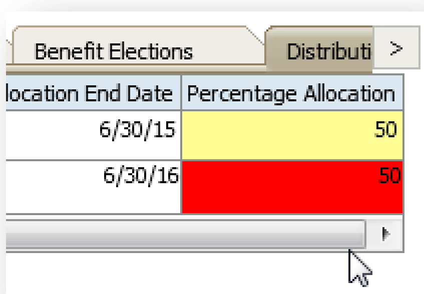
   NOTE: Red cells indicate required data that is currently missing.



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.

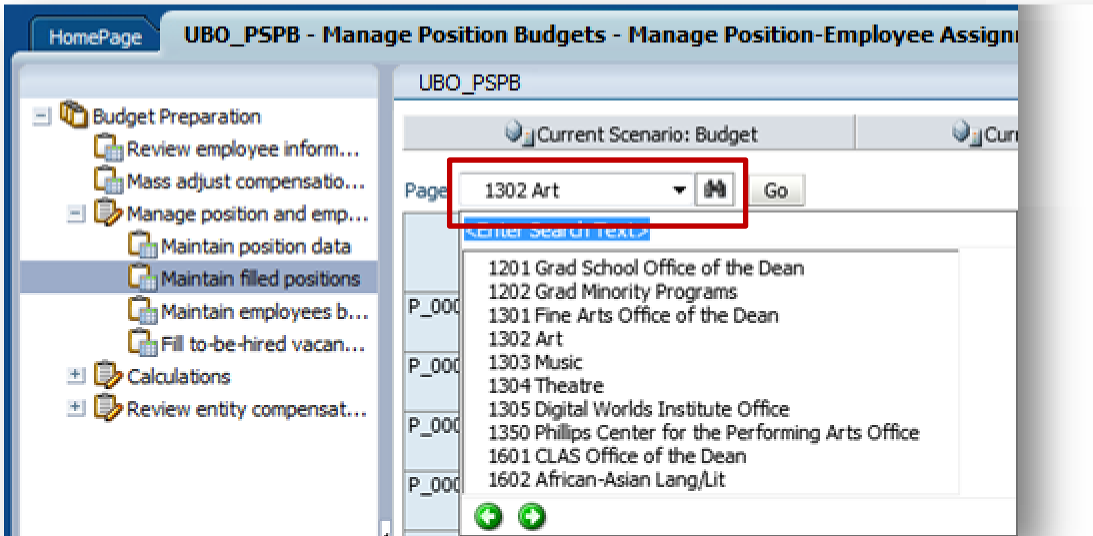
    NOTE: Keep in mind, the combination of all distribution lines must equal 100% allocation. Please do not leave any 0% distribution lines. If it is not needed delete the distribution allocation.



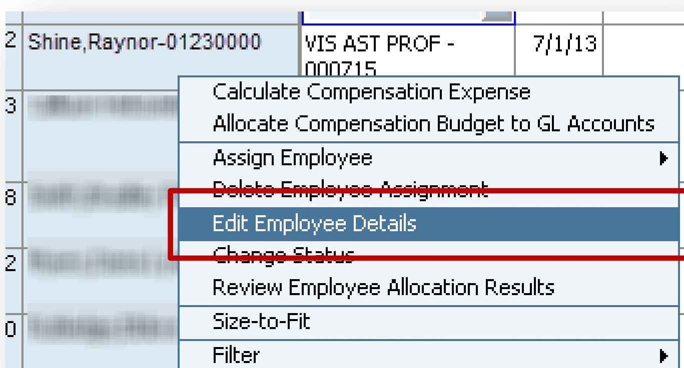
11. Click the **Save** button.
    NOTE: Remember any red or yellow cells should clear after saving.

Delete a Distribution

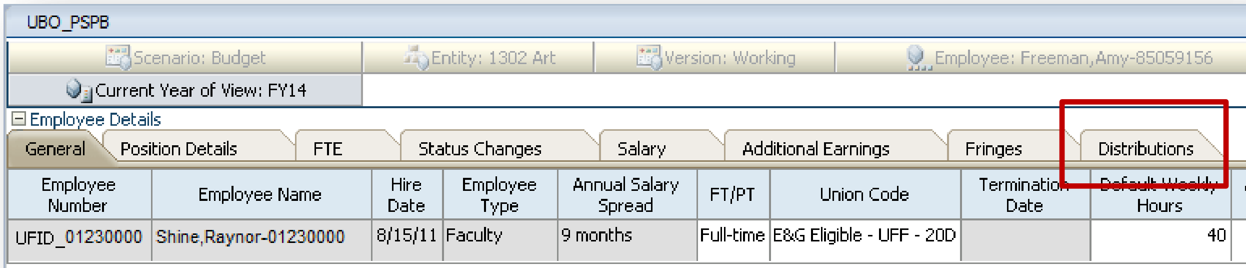
1. From the **Maintain filled positions** form, choose your desired **entity** from the Entity drop down field, if needed.



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

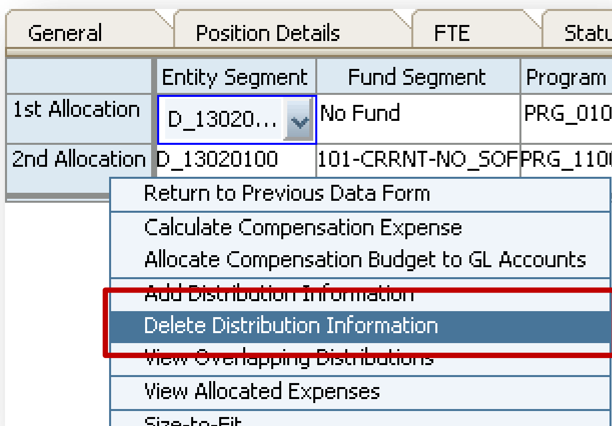


3. Click the **Distributions** tab.
NOTE: You may have to scroll to the right to view the Distributions tab.



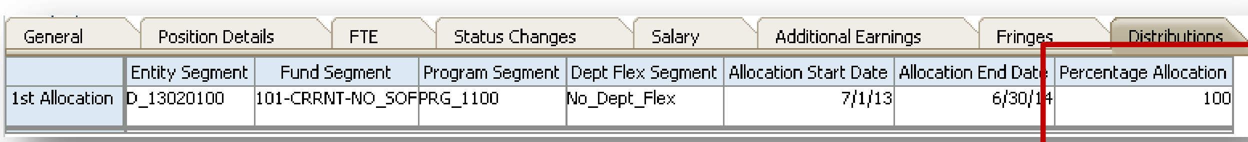
4. Right-click the **Allocation** label you wish to delete.

5. Select **Delete Distribution Information**.



6. Click in the **Percentage Allocation** field of the remaining allocation.

7. Enter "100".
NOTE: Remember, the lines must add up to 100.



8. Click the **Save** button.

Calculate and Allocate Compensation Budgets per Edit

After each edit you make, you may choose to calculate and allocate. These procedures will process all needed calculations and allocate the updated data to the Budgets Submission mode within Hyperion.

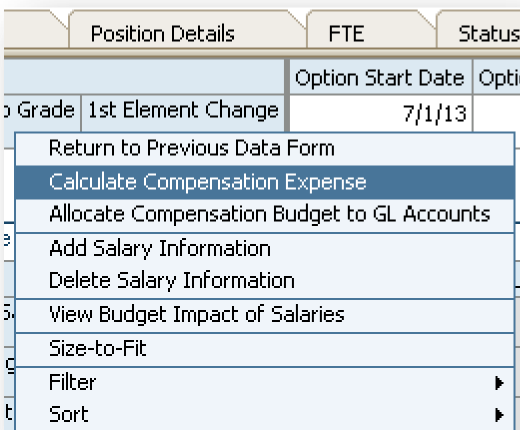
These procedures can take a long time depending on your area and number of employees. As such the University Budget Office recommends you run these procedures from the Budget Prep panel once all edits/updates are done.

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.

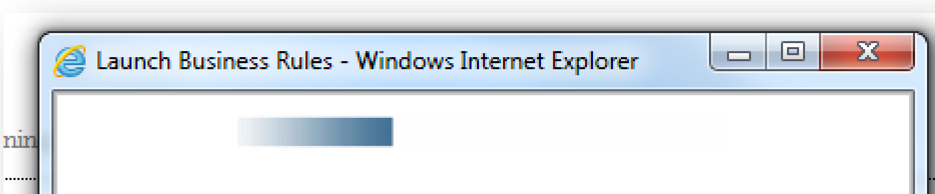
For example, if you are on the main Maintain position data or Maintain filled positions forms, you must right-click on the exact position row you just edited for the calculate and allocate procedures to run successfully. Otherwise, the edited data may not calculate and allocate correctly.

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.

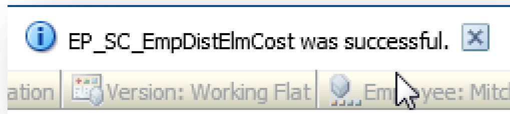
1. Right click in the **correct area** of the edited position.
2. Click **Calculate Compensation Expense**.



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

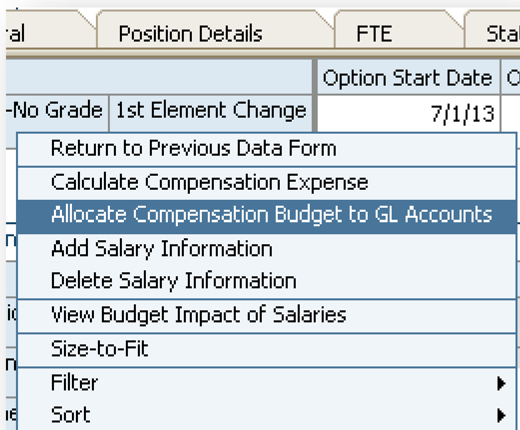


3. Confirm the calculation procedure was successful by noting the message that appears at the top of the window.



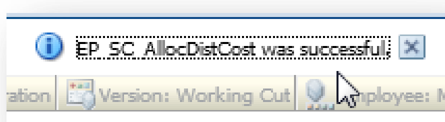
4. After the Launch Business Rules window closes, **right click** within the same cell on the form again.

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



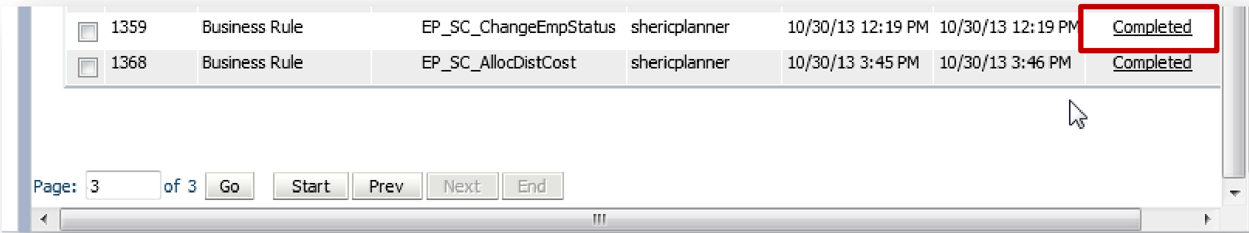
NOTE: The Launch Business Rules window will display again until the procedure completes.

6. Confirm the procedures have completed successfully by noting the message that appears at the top of 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 needed, scroll to the bottom of the window and click the End button.

If the last column says "Completed", the procedure has run successfully. If not completed, you can click the Prev button and then click the End button again until the status changes to Completed.



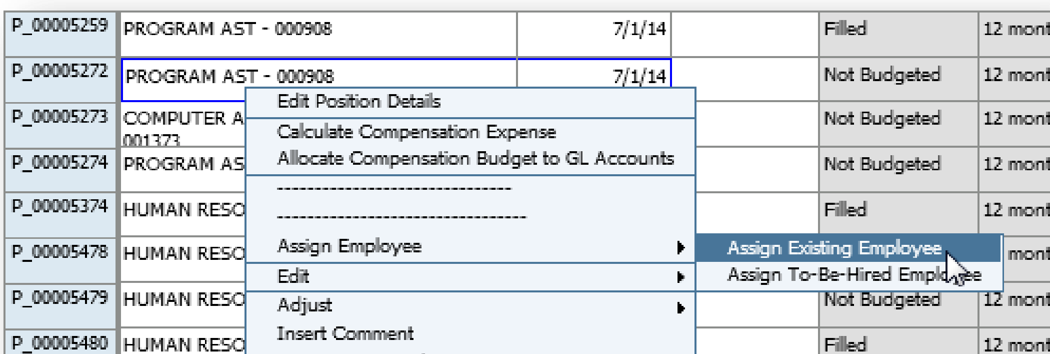
Assigning an Existing Employee

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.

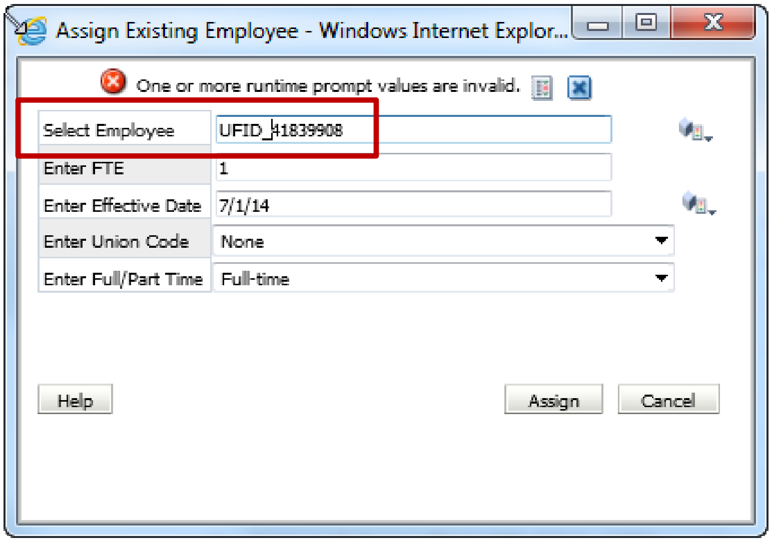
NOTE: The snap shot is the status of the data in PeopleSoft on a particular date that is then loaded into Hyperion as the base data.

1. From the **Maintain position data** form, right click the line of the position for which you want to assign an existing UF employee. The available lines will say either Not Budgeted or Vacant.

2. Hover over the **Assign Employee** option and click the **Assign Existing Employee**.



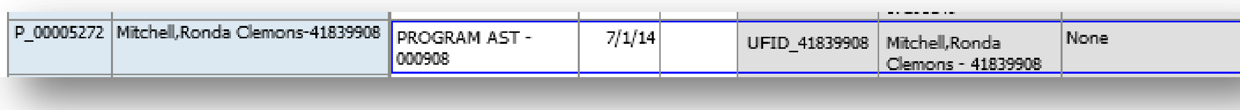
3. Click in the **Select Employee** field, delete any default text and enter the **UFID** of the appropriate employee.
   NOTE: the UFID must start with UFID_.



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.

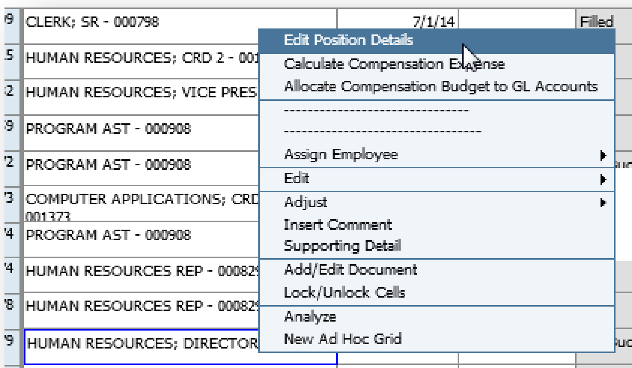
Assigning a To-Be-Hired Employee

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.

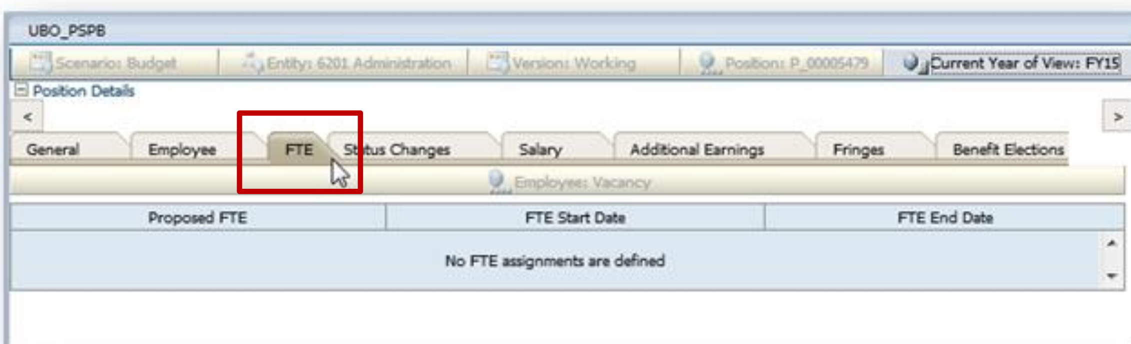
1. From the Maintain position data form, locate the position for which you wish to assign a To-Be-Hired employee.

2. Notice the Occupancy Status for this position will indicate “Not Budgeted” or “Vacant”.

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

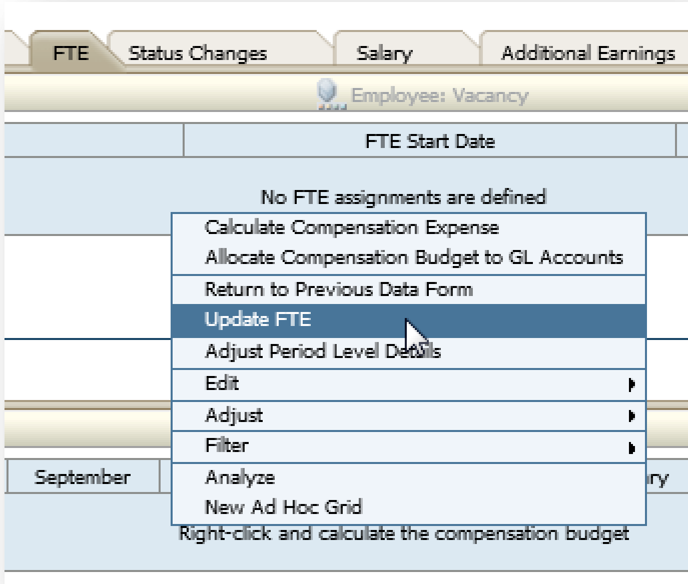


4. Click the **FTE** tab.



5. Right-click anywhere in the blue area of the screen that states “No FTE assignments are defined”.

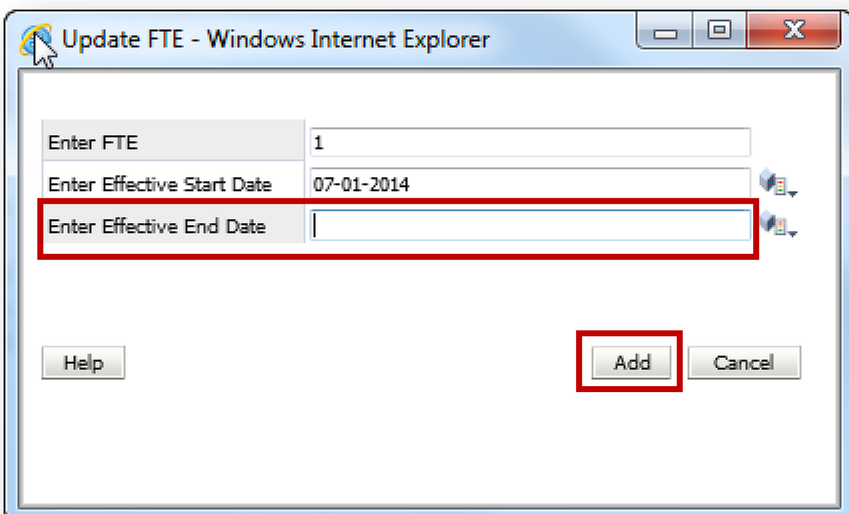
6. Choose **Update FTE**.



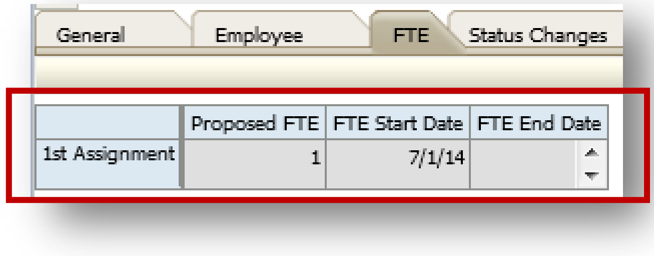
7. Input the FTE for this position.

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**.

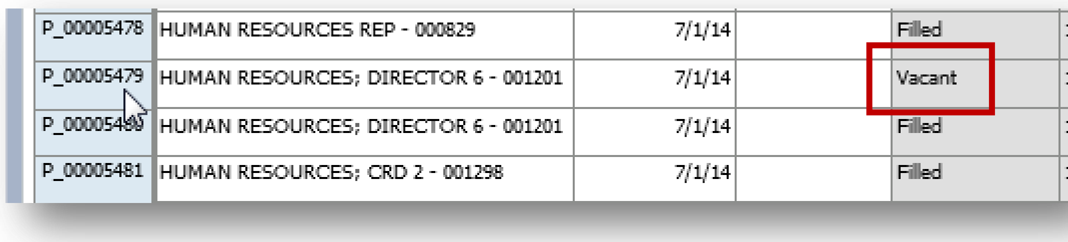


10. Confirm the assignment appears under the FTE tab.



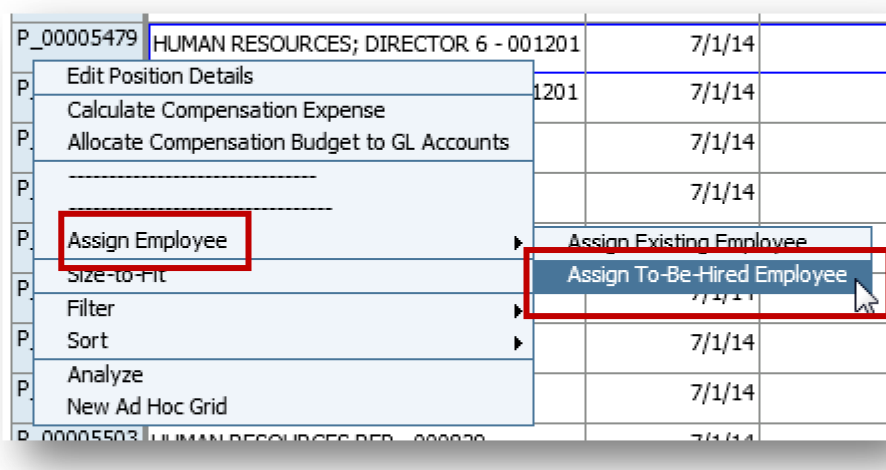
11. Click the **Maintain position data form** again and notice your position should now read Vacant in the Occupancy Status field.

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



13. Point to the **Assign Employee** on the pop-up menu.

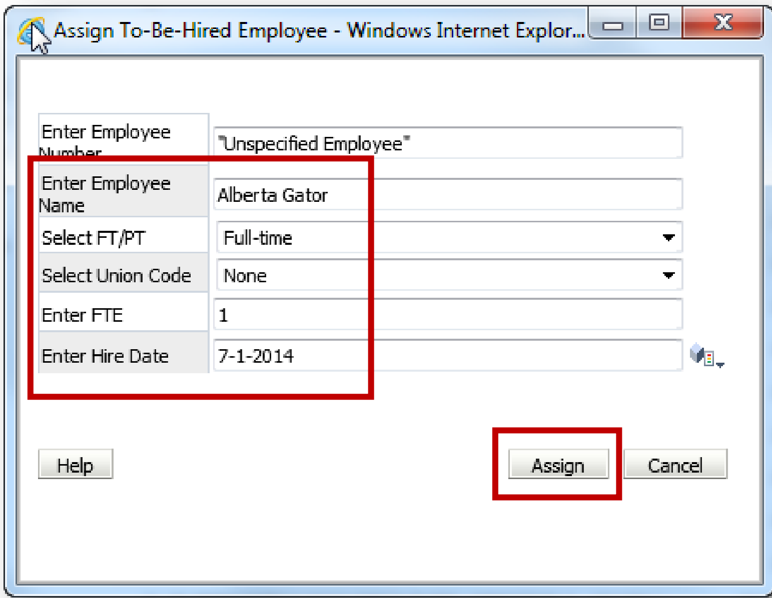
14. Click the **Assign To-Be-Hired Employee** option.



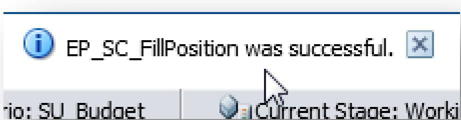
15. Enter the name of the new employee or a placeholder name or description if unknown. **NOTE**: If you know the UFID and want to input it best practice is to input it as UFID_XXXXXXXX otherwise if you input a number only the system will treat it as a dollar figure and add a decimal and cents.

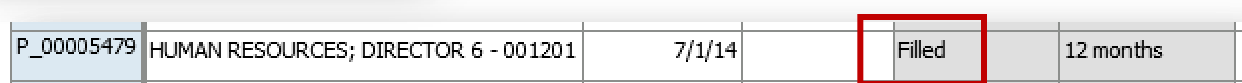
16. Be sure to indicate the correct Full/Part Time status, Union Code, FTE and Effective Date, if different from default.

17. Click the **Assign** button.



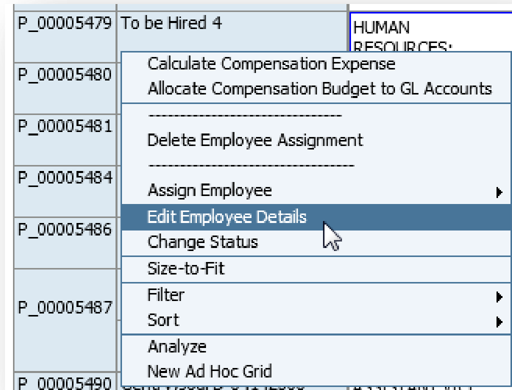
18. Note the message at the top of the window indicating the Position was filled successfully and the Occupancy Status of the position is now "Filled."



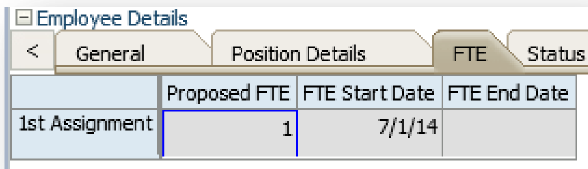


19. Click on the **Maintain filled positions** form and find the To-Be-Hired employee just assigned.

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. (See Procedure #2 above).

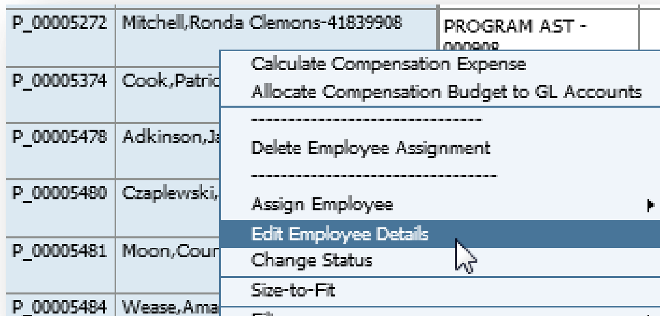
25. Run both the Calculate and Allocate procedures.

Employee Status Change

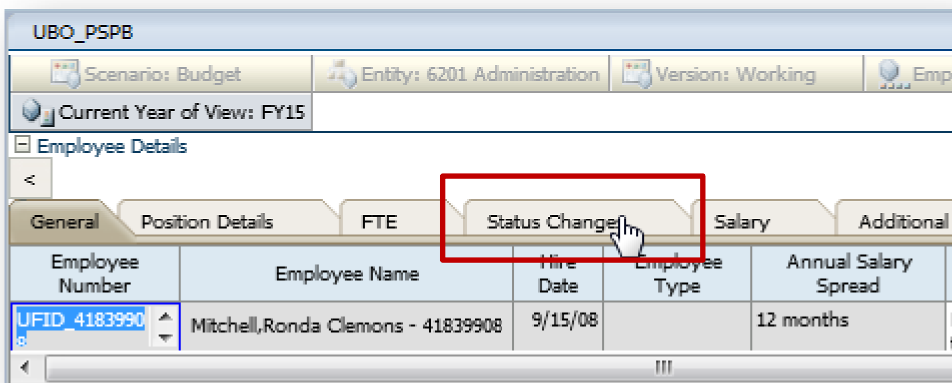
Common status changes are to inactive (due to maternity leave, military leave, retirement part way through the fiscal year, etc.)

1. From Maintain filled positions form, **right-click** the relevant employee for which you are changing status.

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

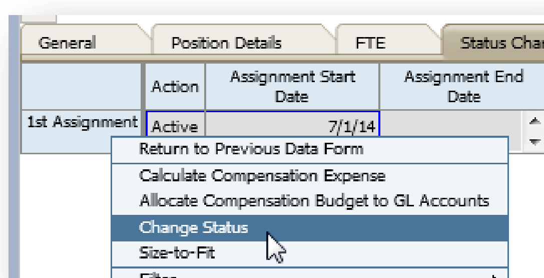


3. Click the **Status Change** tab.

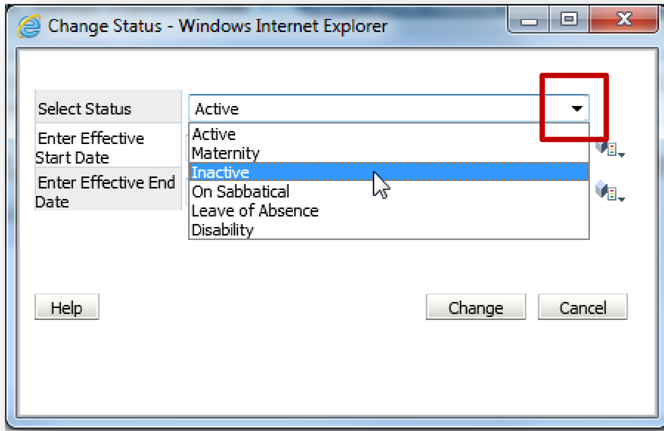


4. **Right-click** the blue assignment label of the assignment you wish to change.

5. Click the **Change Status** option.



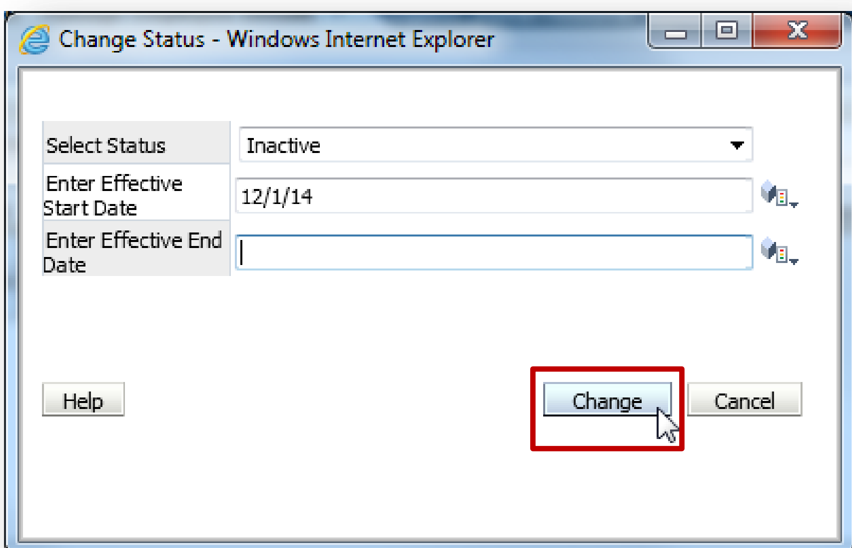
6. Click the **Select Status** drop down field.



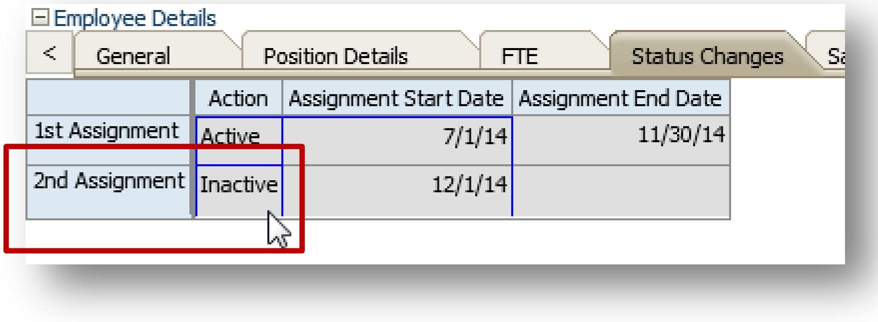
7. Click the appropriate status (e.g., **Maternity**, **Inactive, On Sabbatical, etc.**).

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

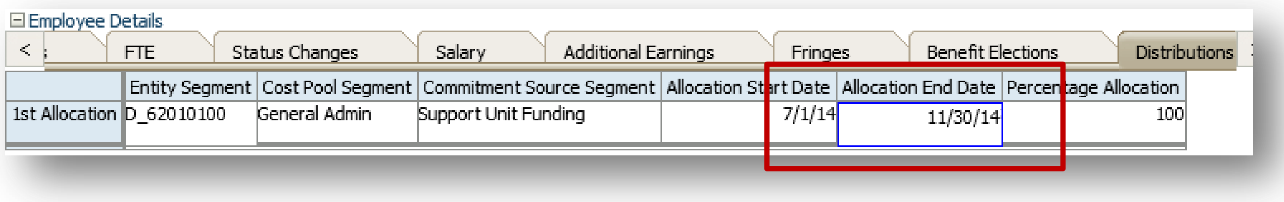
9. Click the **Change** button.



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



11. Go to **Distribution** tab and change the appropriate **Allocation End Date** to 11/30/14 to reduce the amount of salary expense being charged for this individual to the appropriate time period.



12. Click the **Save** button.

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

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

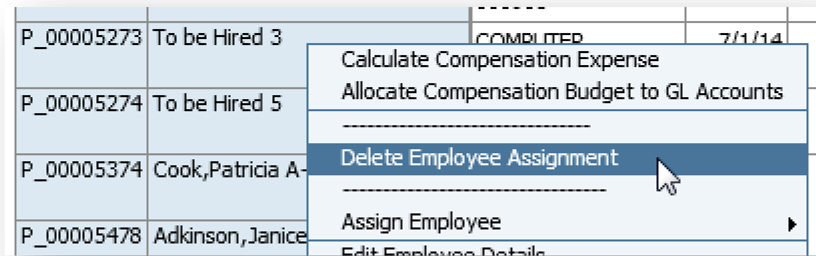
13. **Right-click** within any form cell to access the pop-up menu.

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

Removing an Assignment

NOTE: This procedure previously referred to as Deleting an Employee.

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**.



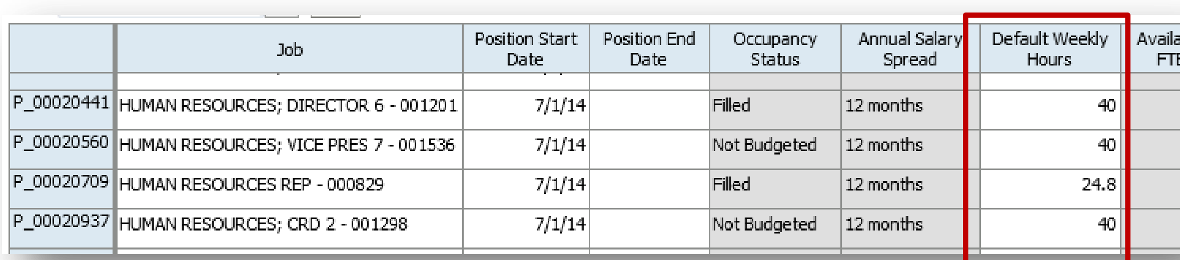
4. Once the process has run you will now notice that the employee is no longer listed in the Maintain filled positions form.

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: The example displayed in this procedure was previously referred to as Change FTE from 1 to .5.

NOTE: Prior to completing the Change FTE procedure, please check the Default Weekly Hours cell to ensure you are adjusting your FTE correctly. Default Weekly Hours listed as 40 is equivalent to 1.0 FTE. Be aware that some employees have default weekly hours of 20 (not 40). The equivalent FTE for this would still be 1.0, not 0.5. If you inputted 0.5, that would be equivalent to 10 hours, not 20.



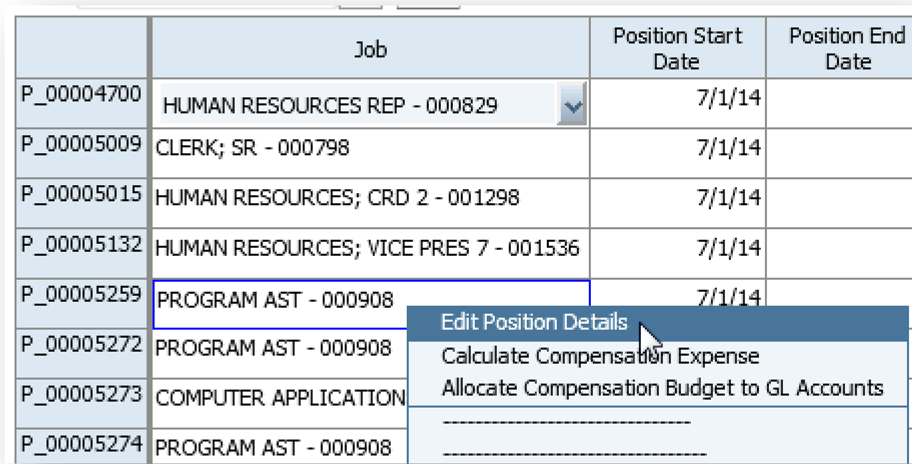
	Job	Position Start Date	Position End Date	Occupancy Status	Annual Salary Spread	Default Weekly Hours	Availa FTE
P_00020441	HUMAN RESOURCES; DIRECTOR 6 - 001201	7/1/14		Filled	12 months	40	
P_00020560	HUMAN RESOURCES; VICE PRES 7 - 001536	7/1/14		Not Budgeted	12 months	40	
P_00020709	HUMAN RESOURCES REP - 000829	7/1/14		Filled	12 months	24.8	
P_00020937	HUMAN RESOURCES; CRD 2 - 001298	7/1/14		Not Budgeted	12 months	40	

FTE may be changed either per position or per employee.

To change the position FTE only.

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

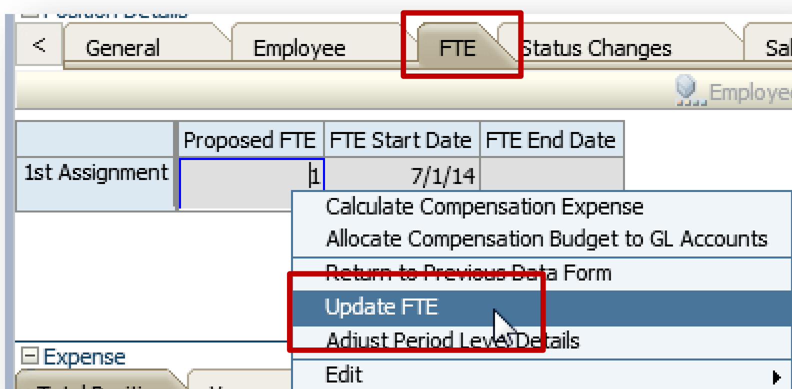
2. Click the **Edit Position Details** option.



3. Click the **FTE** tab.

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

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



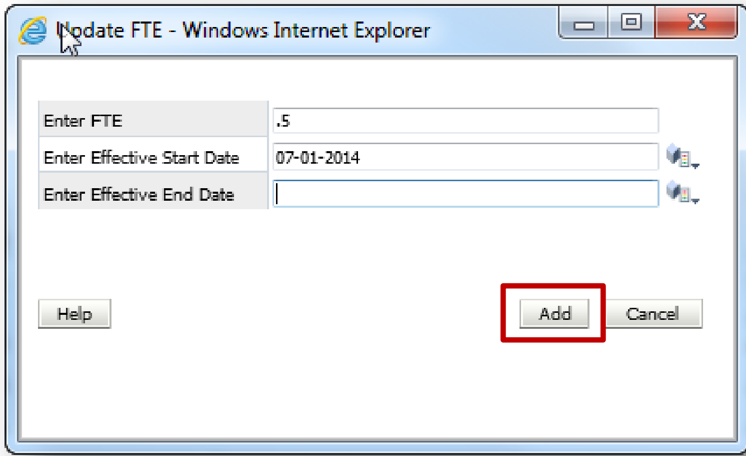
In this example, we are changing the position from a 1.0 FTE to a 0.5 FTE.

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

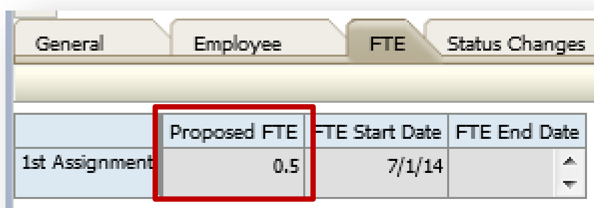
7. Select the default data in the **Effective End Date** field.

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

9. Click the **Add** button.



10. Confirm the assignment updates correctly.



To change the FTE for an employee.

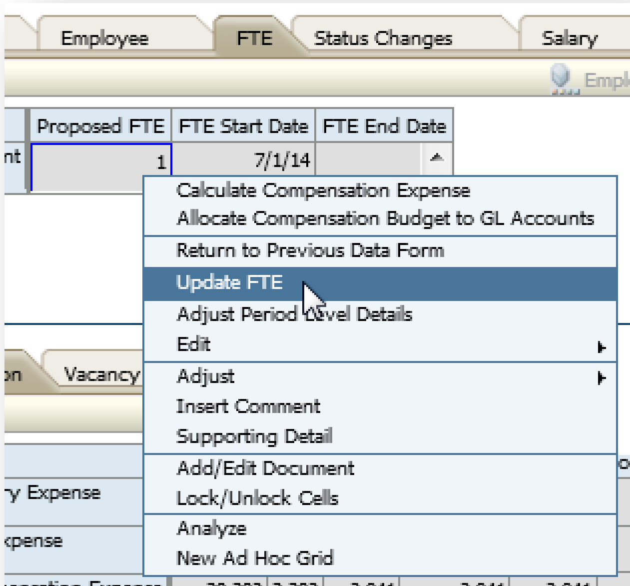
1. From the **Maintain filled positions**, right click on the name of the individual you wish to change the FTE.

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.



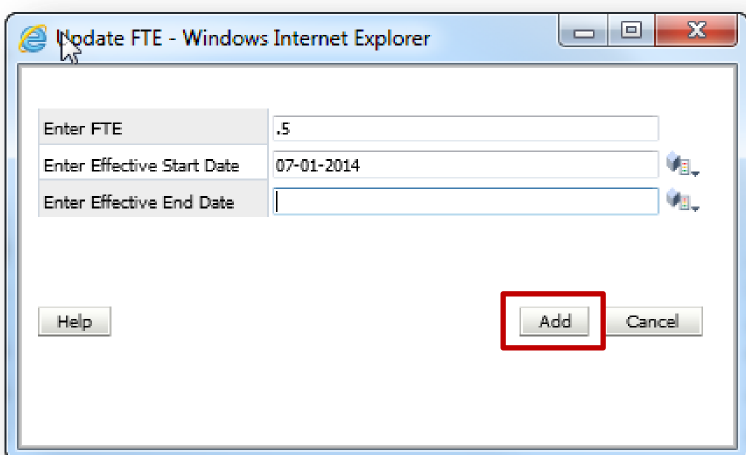
In this example, we are changing the position from a 1.0 FTE to a 0.5 FTE.

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

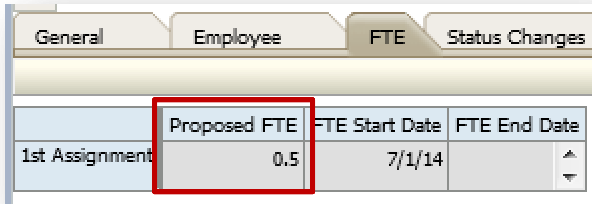
7. Select the default data in the **Effective End Date** field.

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

9. Click the **Add** button.



10. Confirm the assignment updates correctly.



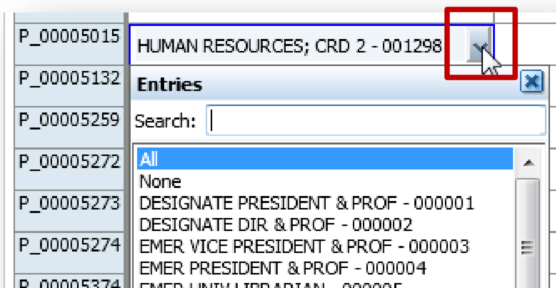
Promote a Position and employee, including Fringe Benefit changes

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.

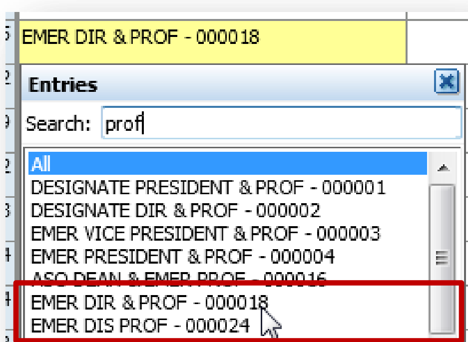
2. Click on the job name cell.

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.

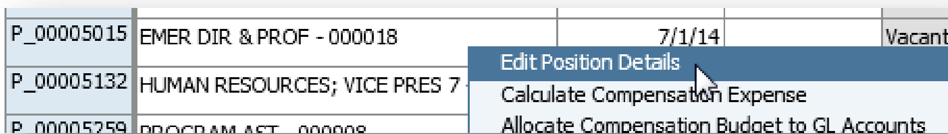
7. If no additional changes are needed to this position, skip to step 24.

In this example, we need to change the benefits from a TEAMS rate to a Faculty rate.

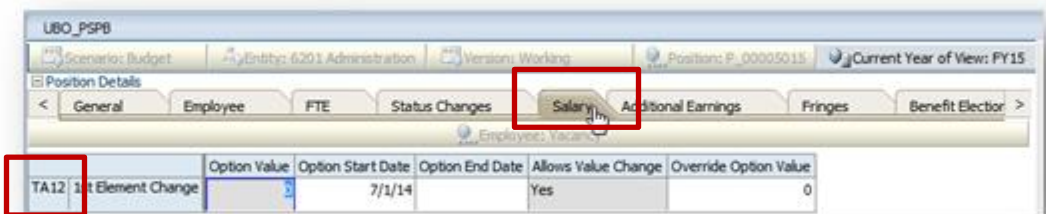
Change the Salary Admin Plan

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

9. Choose **Edit Position Details**.



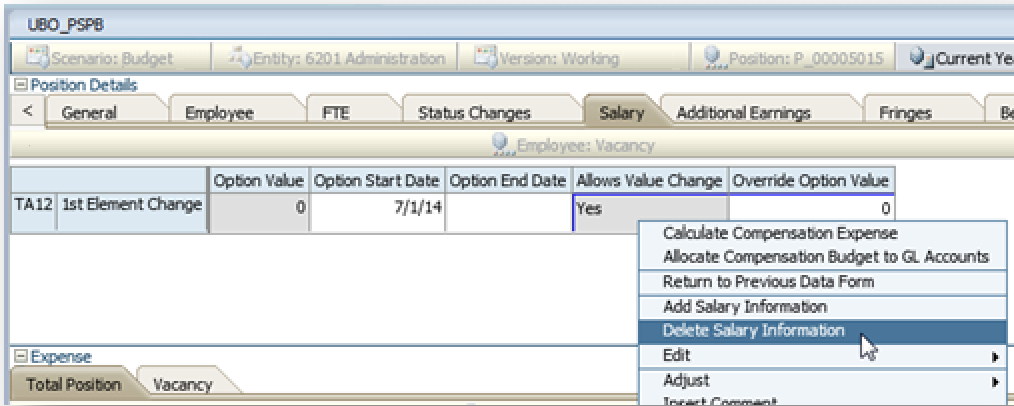
10. Click the **Salary** tab. Notice the Salary Admin Plan still says TA12 which is a TEAMS salary admin plan.



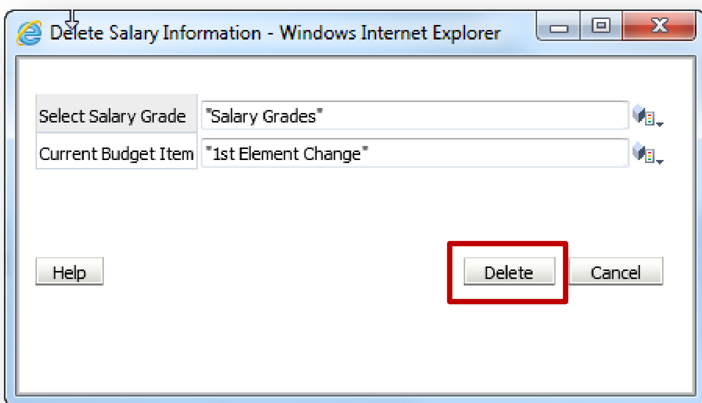
11. Click the **Fringes** tab and notice the fringes are Teams fringe rates.

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

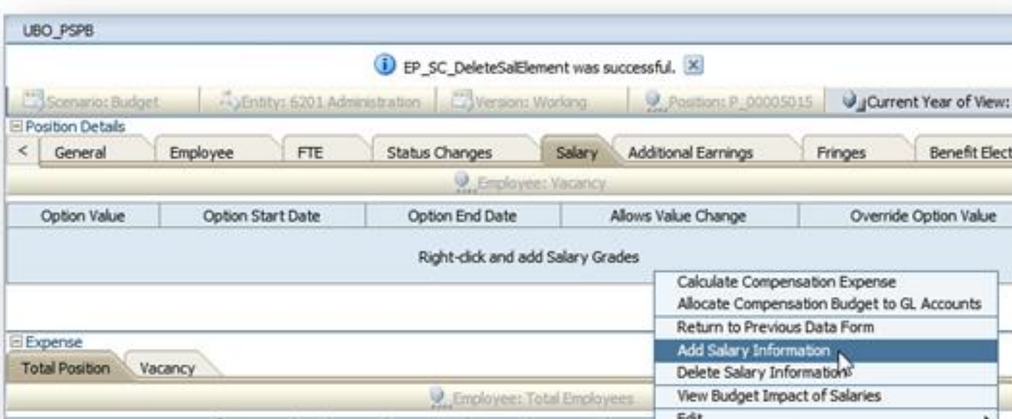
13. Click **Delete Salary Information**.



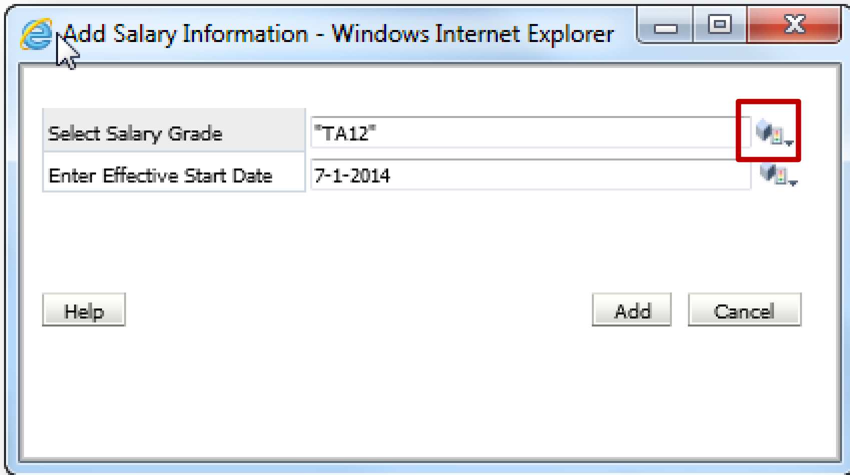
14. Click the **Delete** button from the Delete Salary Information pop up window.



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



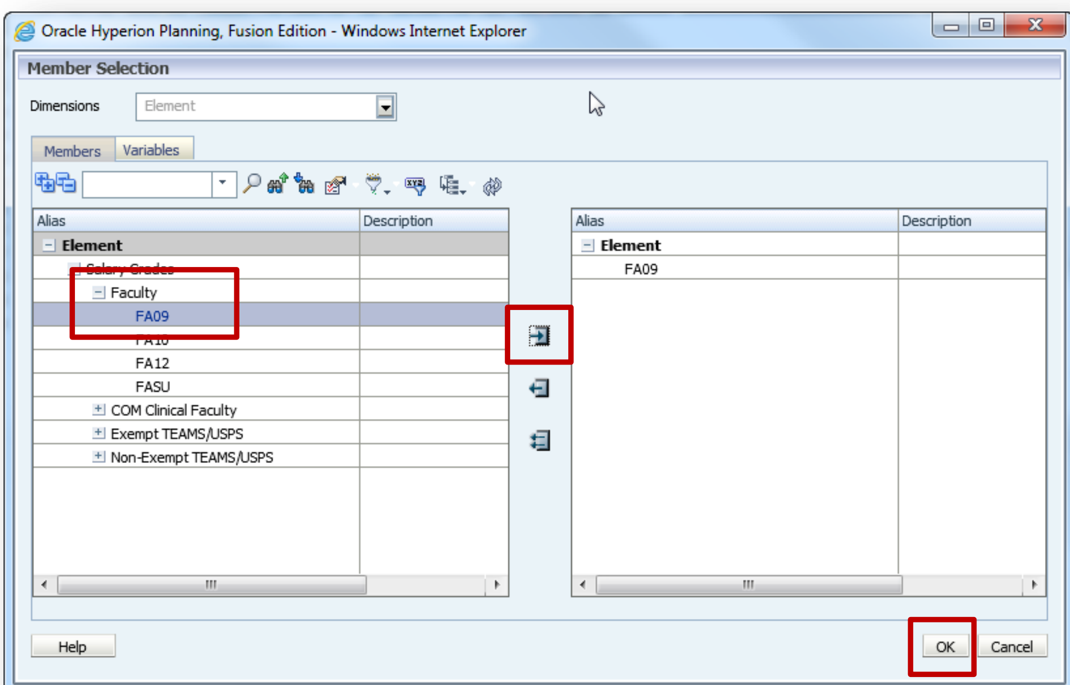
16. Click the **Salary Grade Select Members** icons to search for and locate the appropriate salary grade for this position.



In this example, we will choose FA09, which is a 9 month faculty Salary Admin Plan.

17. Expand the Salary Grades and Faculty categories, and then click FA09.

18. Once FA09 is chosen click the right arrow to send it over to the Element area on the right hand side and then click OK.

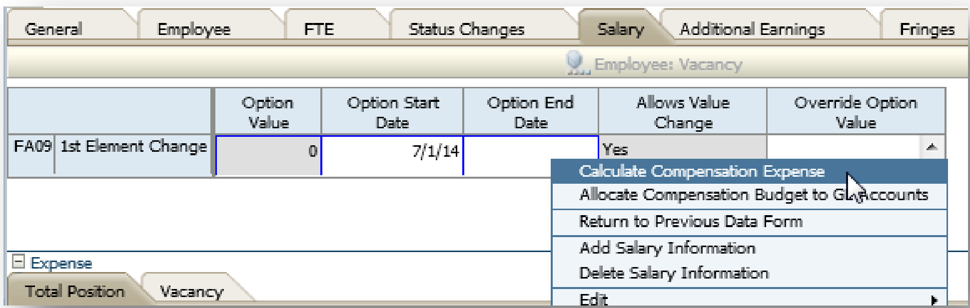


19. From the Add Salary Information window, adjust your Effective Start Date if needed. In this example, we will leave it at 7-1-2014.

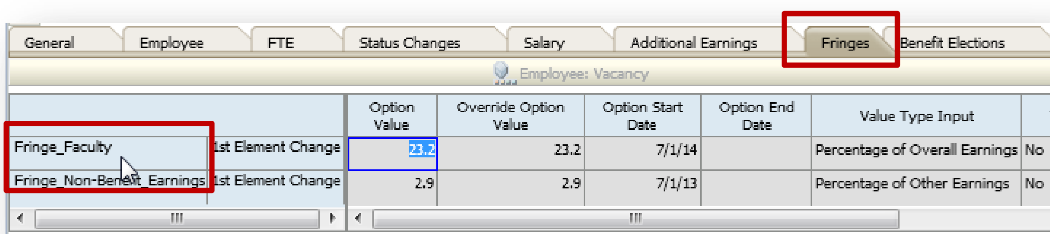
20. Click the **Add** button.

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

21. **Right-click** on any cell in the **Position Details** section and choose **Calculate Compensation Expense**.



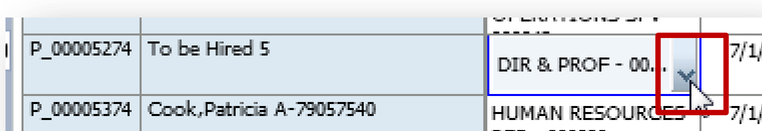
22. Go to the **Fringes** tab and notice the fringes are now Faculty fringes.



Promote an Individual

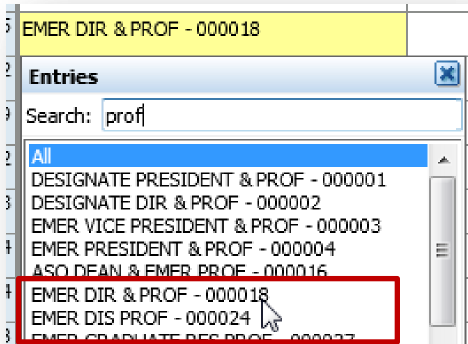
23. Click **Maintain filled positions** from the Budget Prep panel.

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



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

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



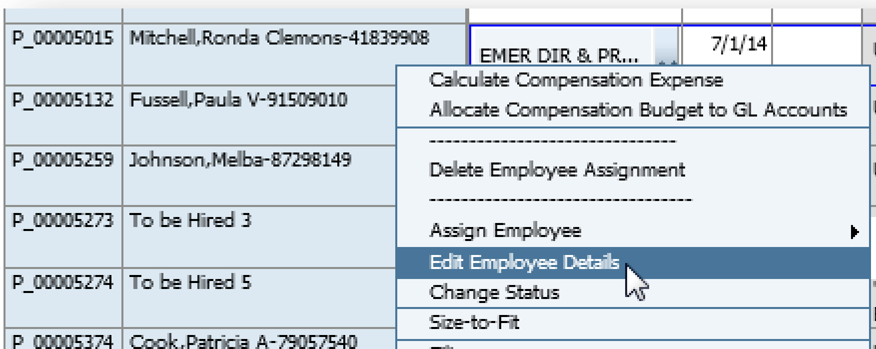
NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.

27. Click the **Save** button.

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

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

29. Choose **Edit Employee Details**.



30. Repeat steps 10 – 22 above as needed.

31. Click the **Save** button.

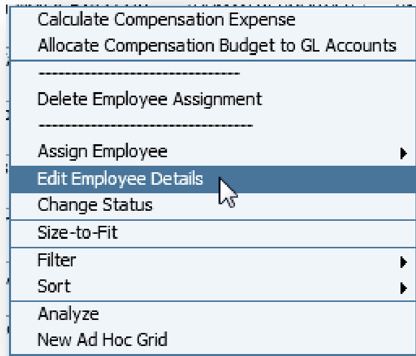
32. **Run** Calculate compensation budgets and Allocate compensation to general ledger accounts as needed.

Add Overtime Pay or Additional Earnings

This procedure allows you to apply overtime or additional earnings to an employee's salary information. Examples of when overtime or additional earnings would be if you have a person that will need to work overtime, SPI, or is a Sr. Level manager and has additional earnings they receive.

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

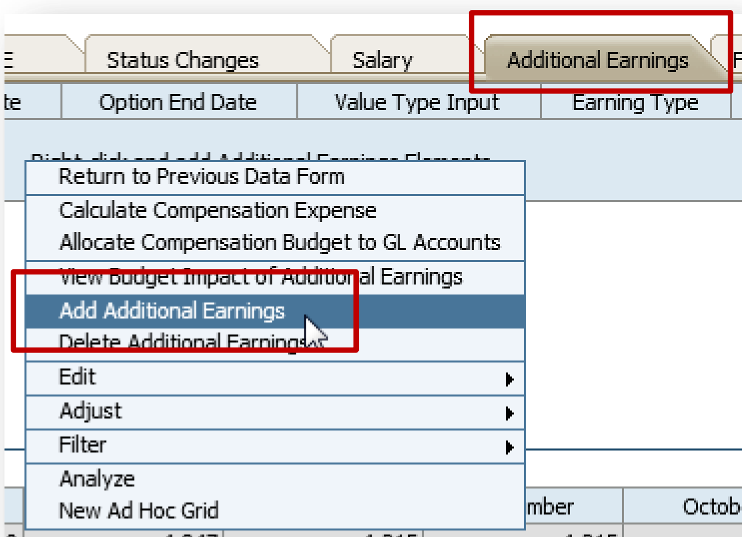
2. Click the **Edit Employee Details** option.



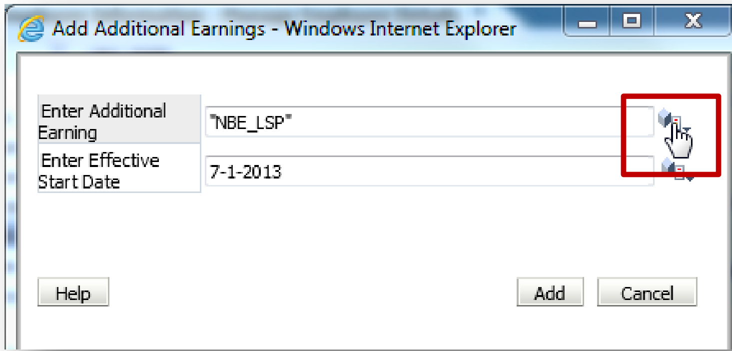
3. Click the **Additional Earnings** tab.

4. **Right-click** on the blue section that states "Right-click and add Additional Earnings Elements portion of the screen."

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

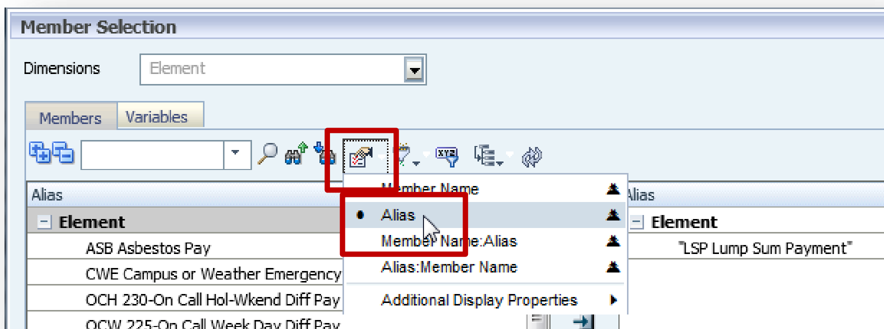


6. Click the **Enter Additional Earning Select Members** drop down icon.



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

8. Click the **Alias** menu.

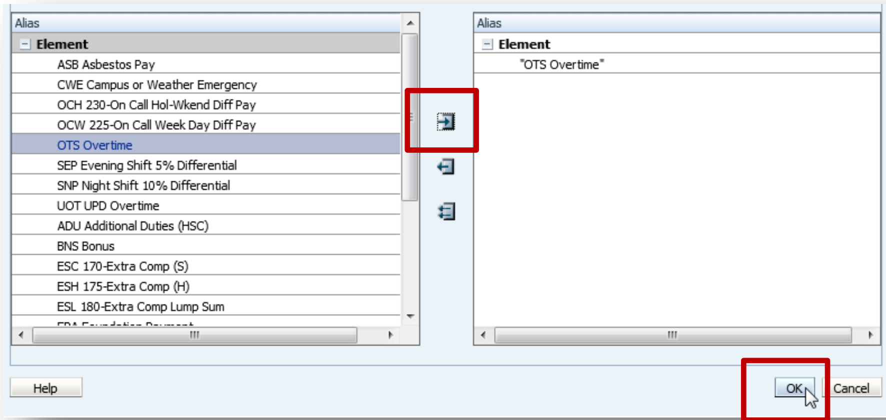


9. Select **OTS Overtime**.

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

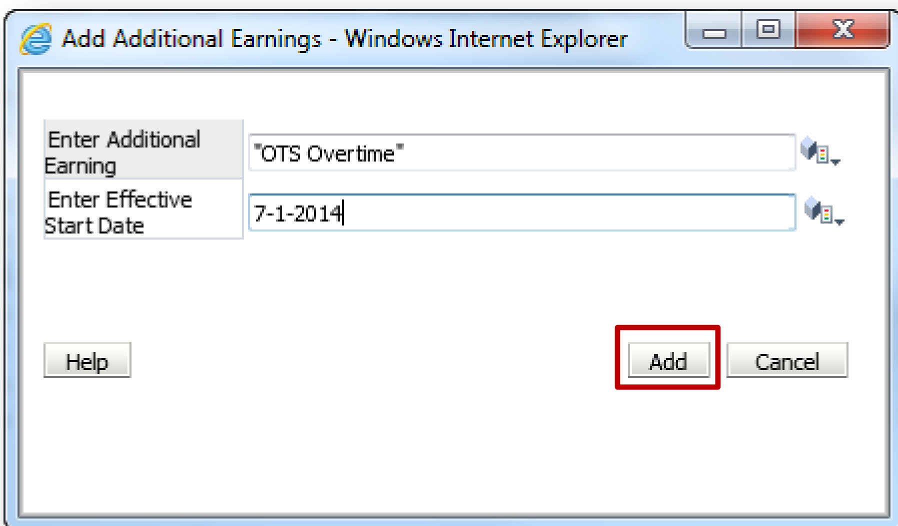
10. Click the **right arrow** to move the item to the right side.

11. Click the **OK** button.

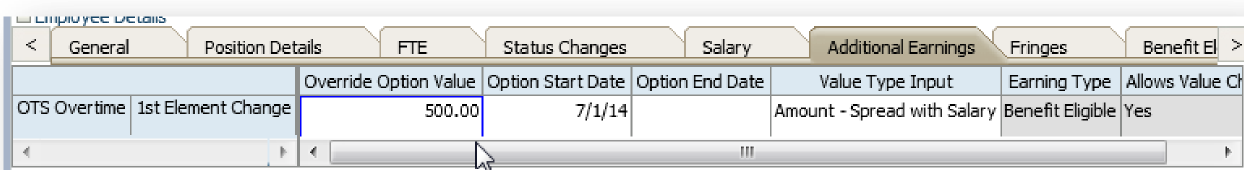


12. If you want to make this effective as of July 1, 2014, click inside the **Effective Start Date** field. For example, change the date to "7-1-2014".

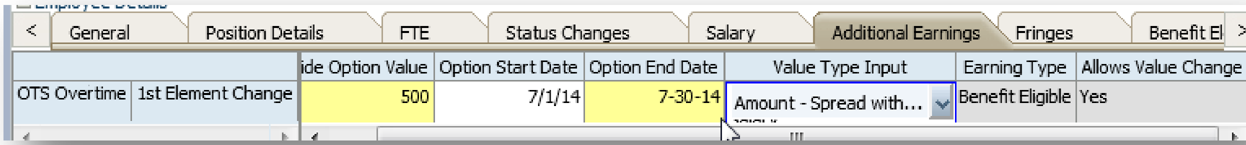
13. Click the **Add** button.



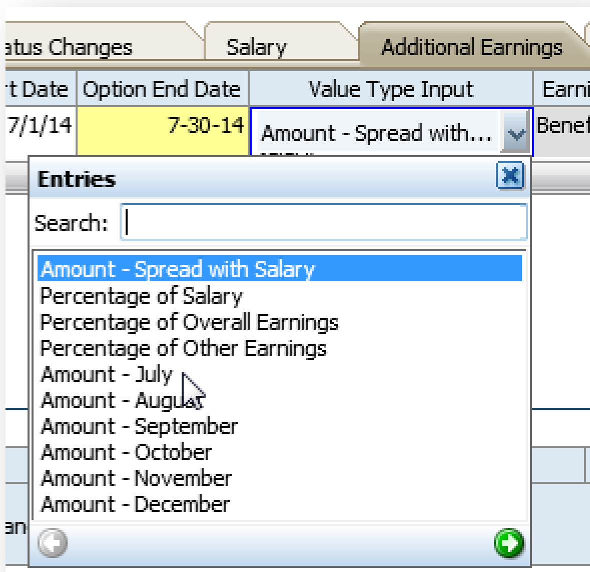
14. Click in the **Override Option Value** field and enter the Amount of the additional earnings. For example, enter "500.00".



15. Click the **Option End Date** field and enter the date this option amount will end. For example, enter "7-30-14".



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



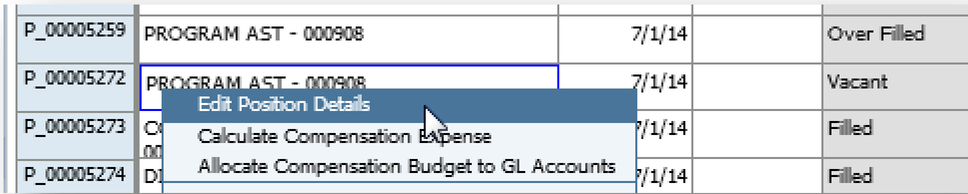
17. Click the **Save** button.

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**.

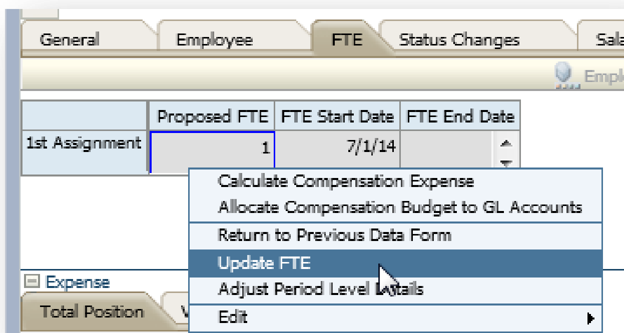


3. Click the **FTE** tab and verify the correct FTE is listed.

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:

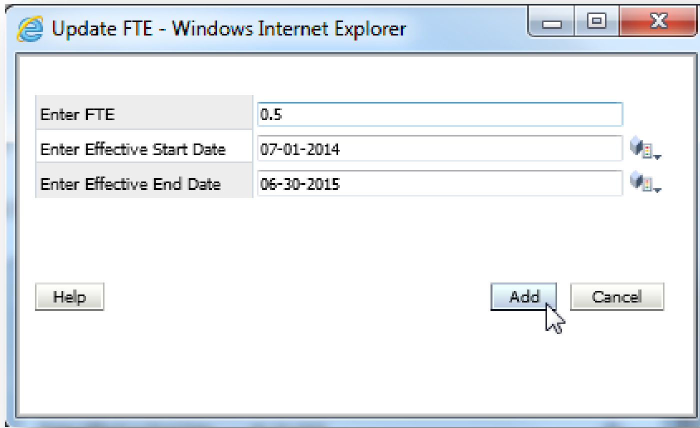
a. **Right-click** anywhere on the assignment line.

b. Choose **Update FTE**.



c. Enter the appropriate FTE.

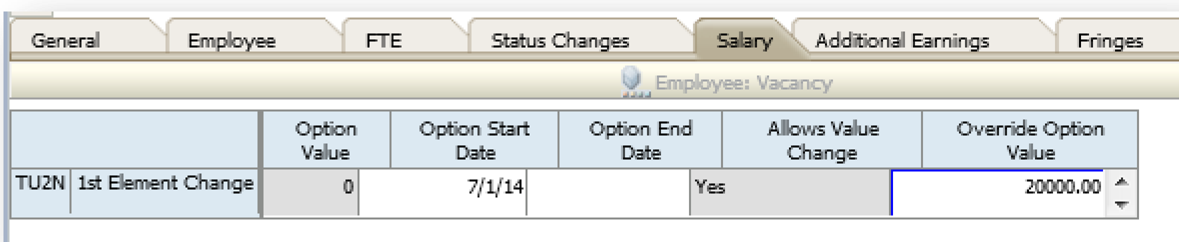
d. Click the **Add** button.



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.

7. Go to the **Distribution** tab and input your distribution information and save. (See Procedure #2 above).

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 edit or once all edits have been completed. It's recommended that the last procedures you complete as part of the Budget Prep process is to run the Calculate compensation budgets and Allocate compensation to general ledger accounts procedures.

After all edits are complete, from the Budget Prep panel:

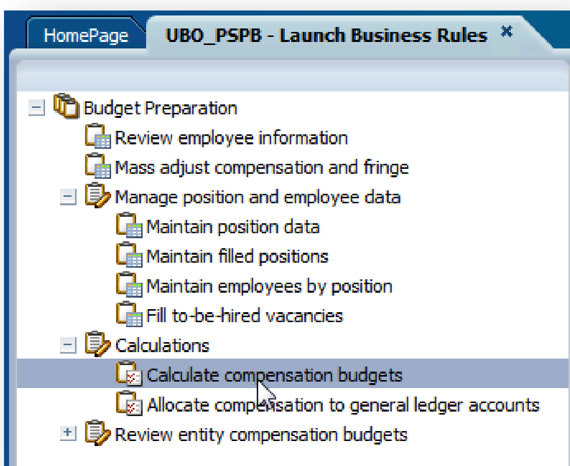
1. Run Calculate compensation budgets once
2. Run Allocate compensation to general ledger accounts as many times as needed depending on the number of edits that involved Filled, Vacant or To-be-filled employees or positions.

For example, let's say you made 10 edits of which 4 were filled positions, 2 were to-be-hired positions and 2 were vacant positions. You would run the Calculate compensation budgets once to run all needed calculations of those 10 edits. You would run the Allocate compensation to general ledger accounts *three times* – one for each type of edit to employees or positions made.

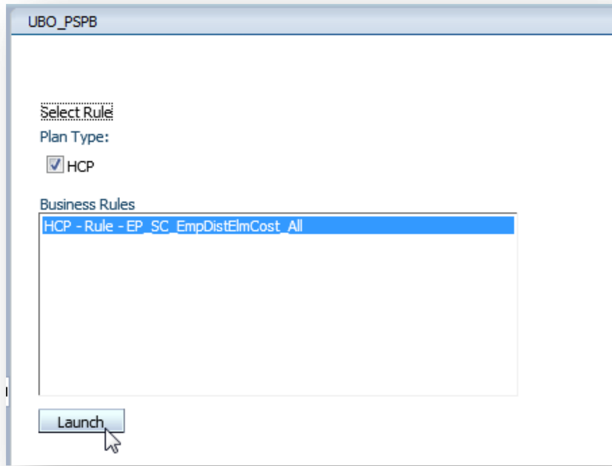
BEST PRACTICE

Because of the amount of time it takes for the system to complete the running of these options, UBO recommends running this at the end of your edits, rather than after each edit. The amount of time the calculations require will depend on the number of employees that you have in your department or college. The larger the department or college, the longer the calculations will take.

1. Under the **Calculations** menu item, select **Calculate compensation budgets** menu item.



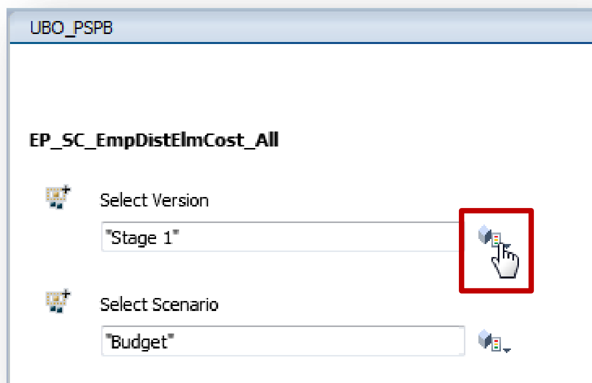
2. Click the **Launch** button.



In this example, we show calculating and allocating the Working budget.

3. Make sure **Version** is set to Working.

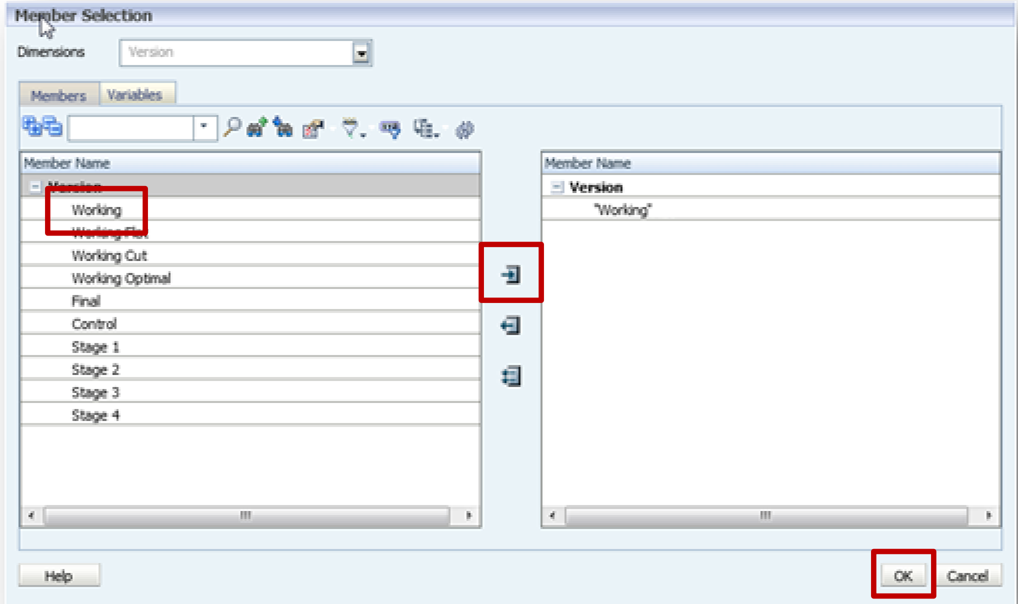
   a. Select the **Version Select Members** icon.



   b. Select **Working** from left Member Name list.

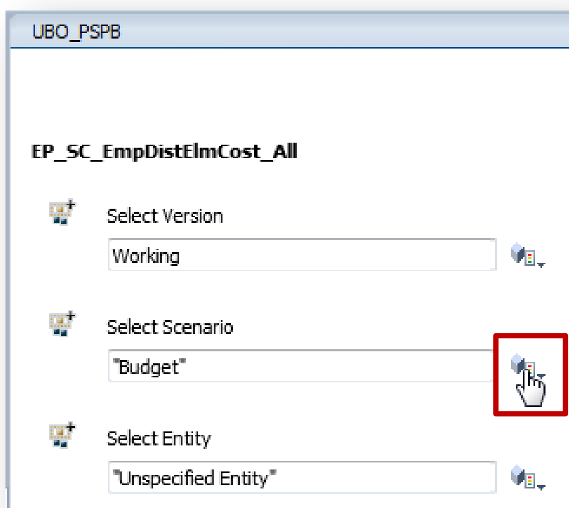
   c. Click the **right-pointing Select arrow** to move the Working version to the right side Member Name list.

d. Click **OK**.



4. Make sure **Scenario** is set to "Budget."

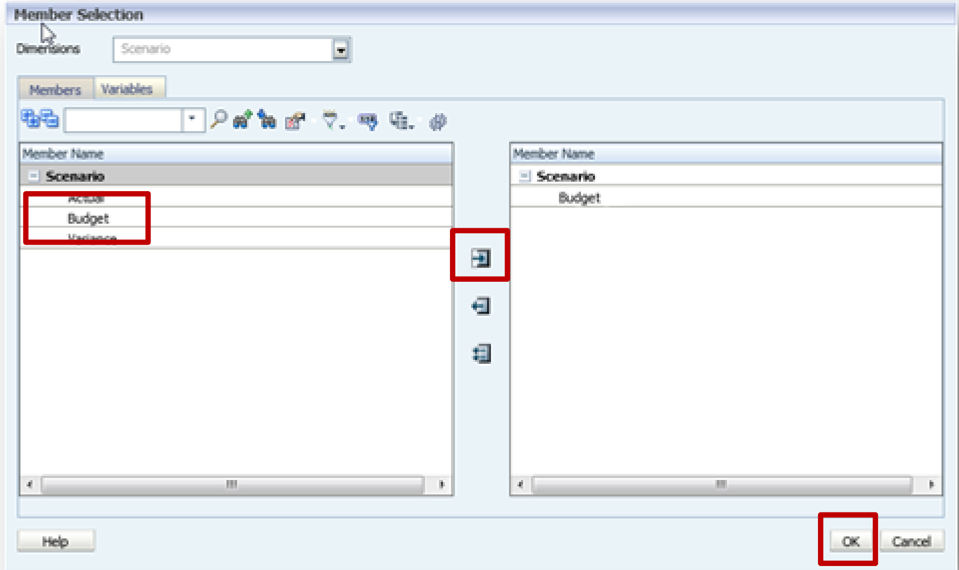
   a. Select the **Scenario Select Members** icon.



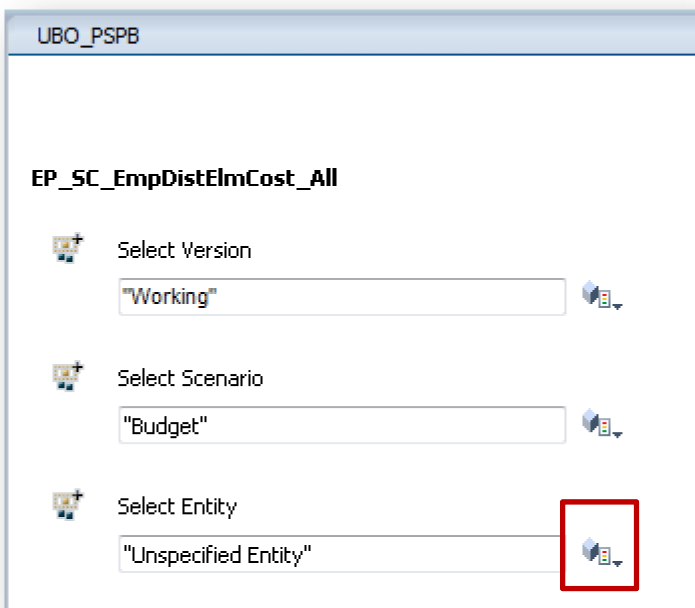
   b. Select **Budget** from the left Scenario list.

   c. Click the **right-pointing arrow** to move the Budget scenario to the right Scenario list.

d. Click **OK**.



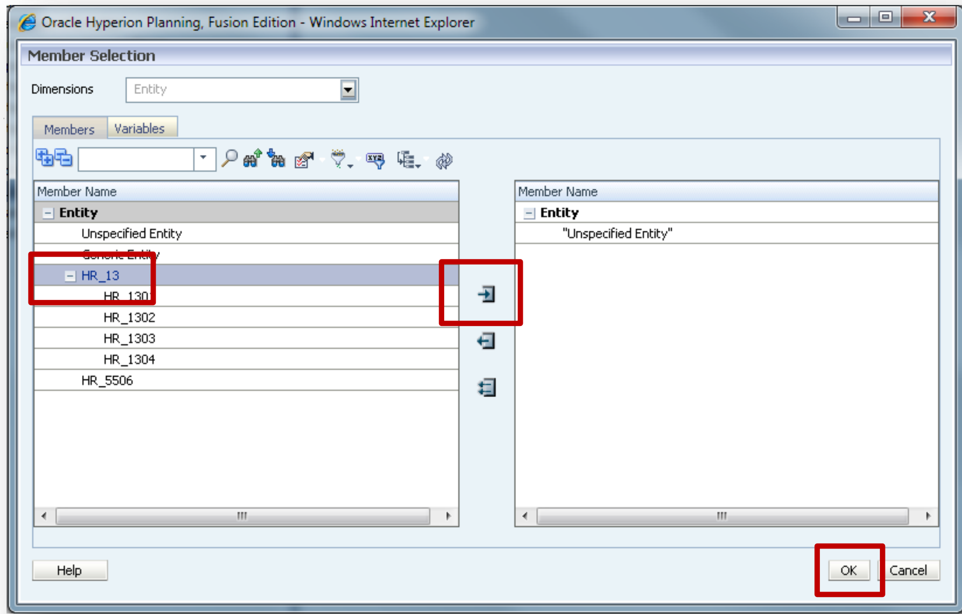
5. Select the appropriate **Entity Select Members** icon.



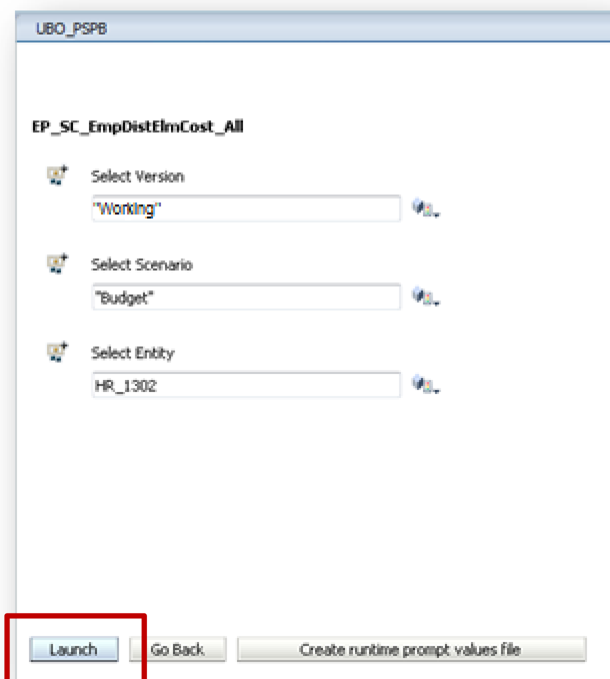
a. Click your **Department or College** to select it.

b. Click the **right arrow** to place it on the right side of the screen.

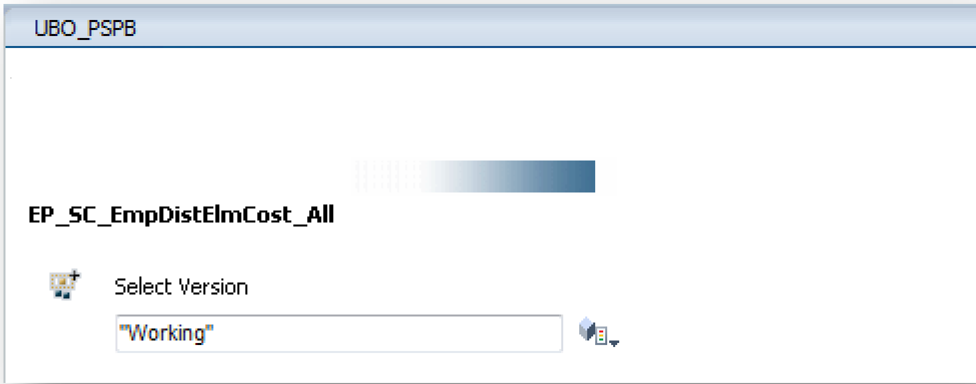
c. Click the **OK** button.



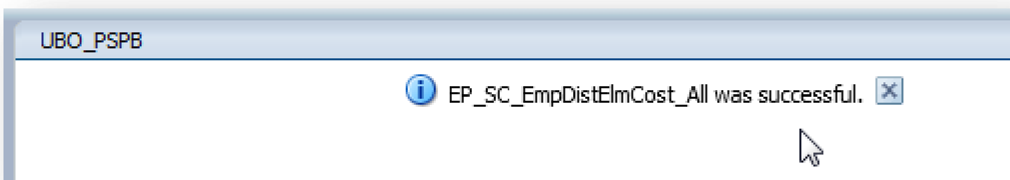
6. Click the **Launch** button.



NOTE: The blue line across the time will ping-pong back and forth until the process is done. This many take several minutes to process.

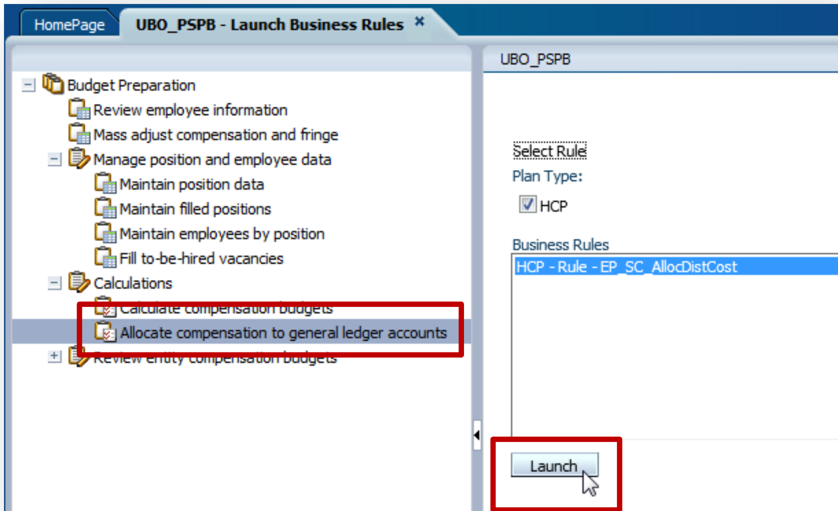


NOTE: A message displays at the top of the window to indicate the process was successfully run.



6. Once you see the rule was run successfully, click the **Allocate compensation to general ledger accounts** option in the left panel.

7. Click the **Launch** button.



The Allocate compensation to general ledger accounts procedure makes all edits available to the general ledger and after “the push” will be available for Budget Request Submission procedures.

IMPORTANT!
You will run this procedure multiple times depending on the types of edits you’ve made to the positions in the Maintain position data form and the Maintain filled positions data form.

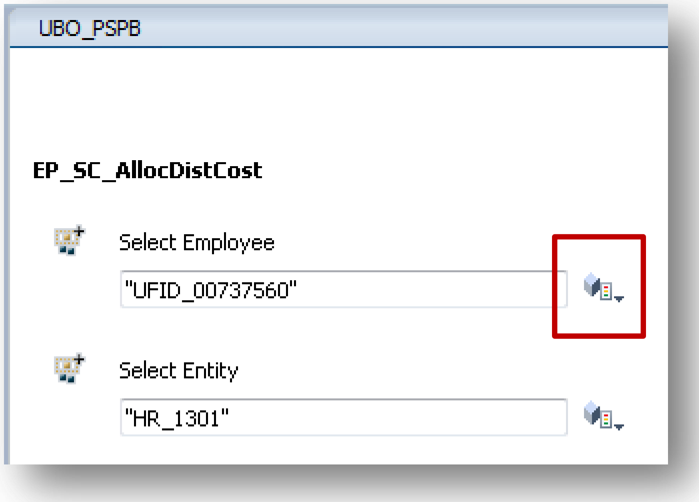
The type of edits you completed during the Budget Prep process will determine how many times you will need to run the Allocate compensation to general ledger accurate procedure.

For example, if you made 3 edits to the positions/employees that were filled, to-be-hired, and vacancy, respectively; you will run the Allocate compensation to general ledger accounts procedure three times to allocate all position edits to those three types of positions.

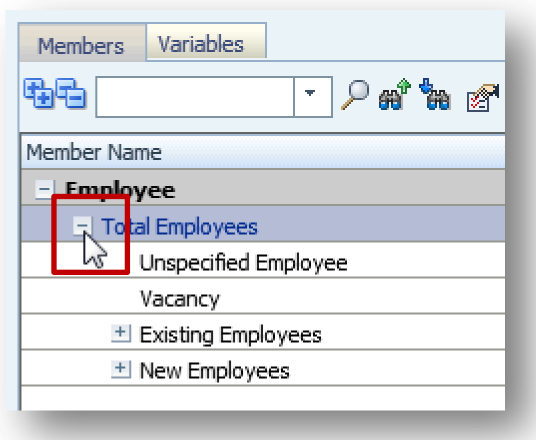
To Allocate To-Be-Hired Positions

8. Select the appropriate employee.

    a. Click the **Employee Select Members** button.



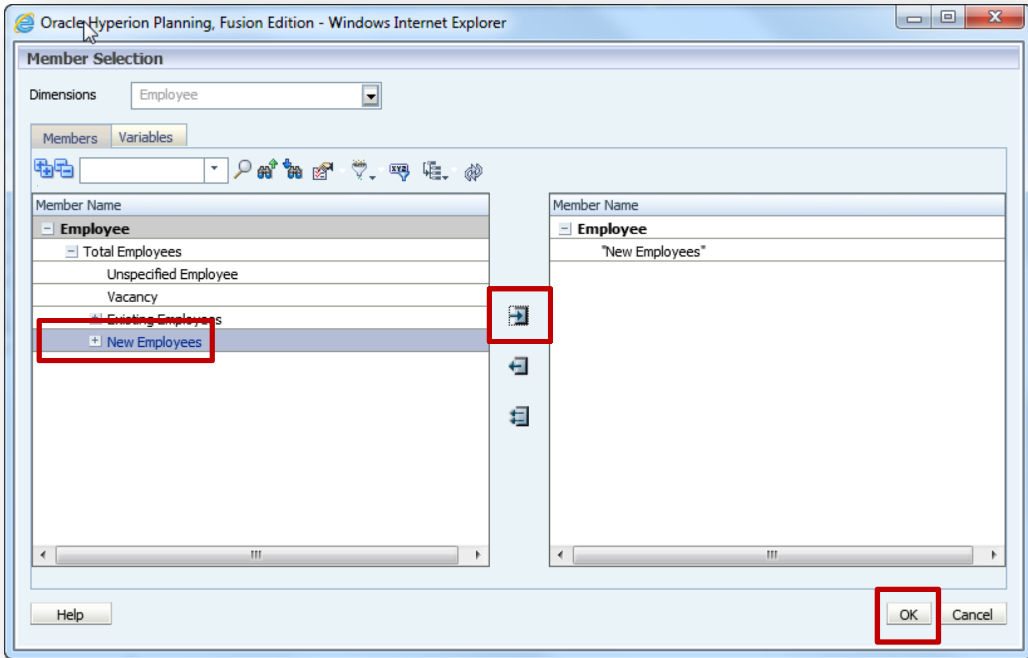
    b. Click the **Total Employees expand icon** to expand the list, if needed.



    c. Select **New Employees** from the left Employee Member Name list.

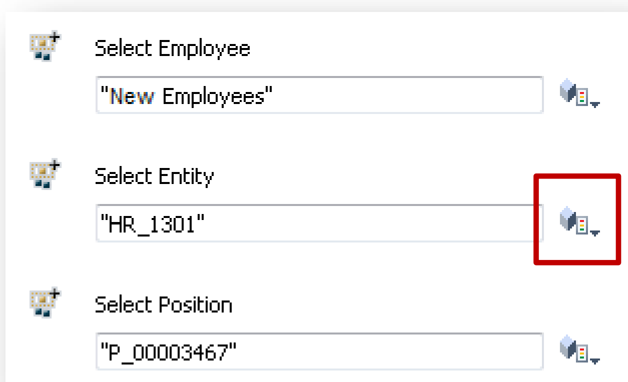
    d. Click the **right-pointing Select arrow** to move it into the right side of the window.

    e. Click the **OK** button.

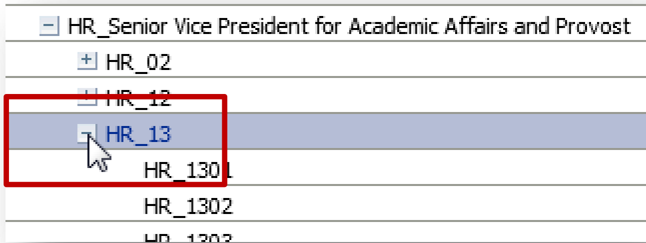


9. Select the appropriate entity.

   a. Click the **Entity Select Member** icon.



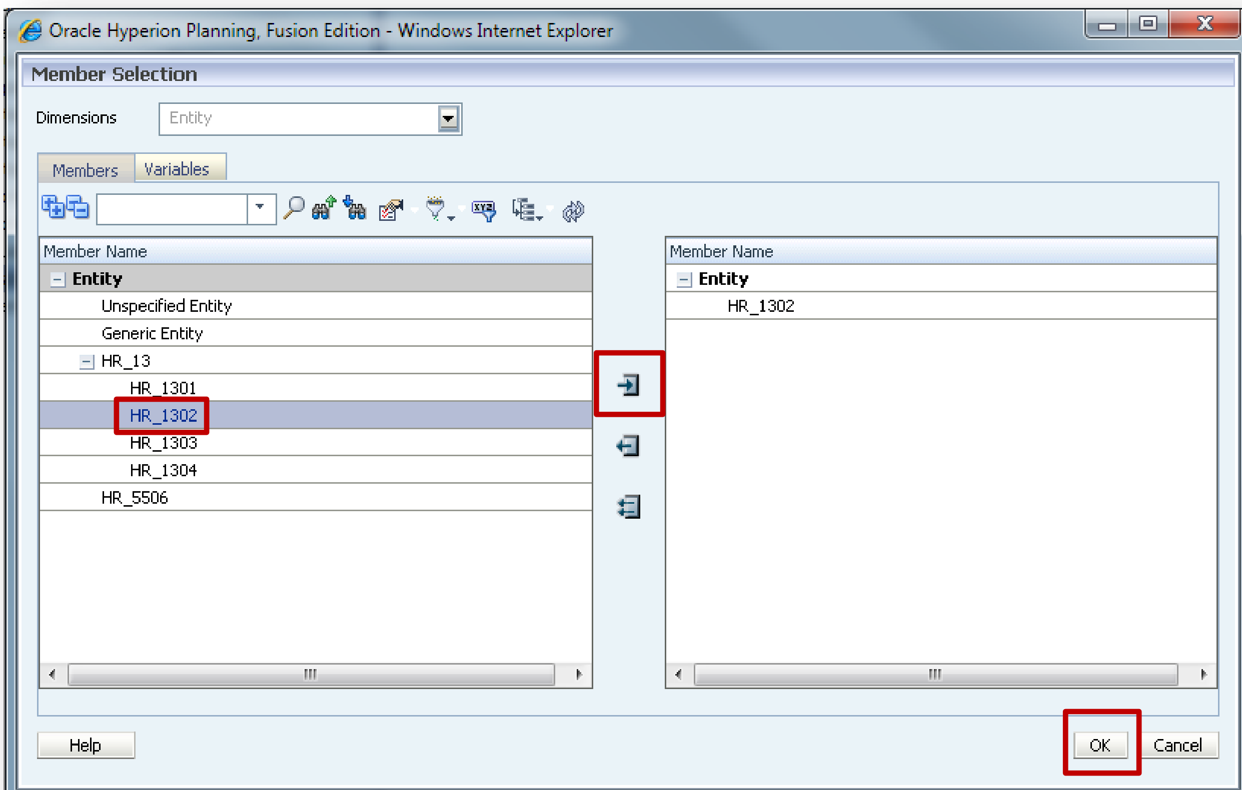
   b. Click the **Expand** icon next to the appropriate Entity category.



c. Select the appropriate **Entity**.

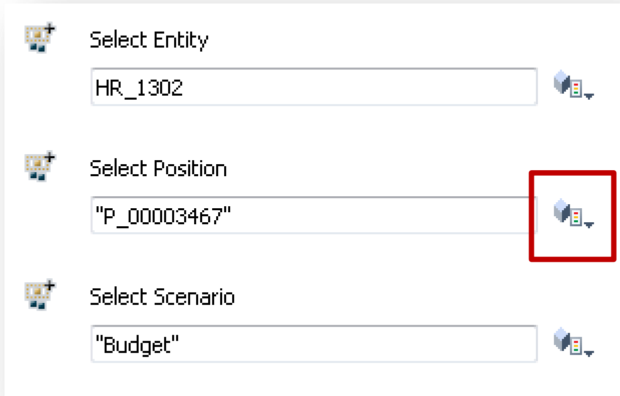
d. Click the **right-pointing Select arrow** to put it in the right side of the window.

e. Click the **OK** button.



10. Make sure All Positions is chosen.

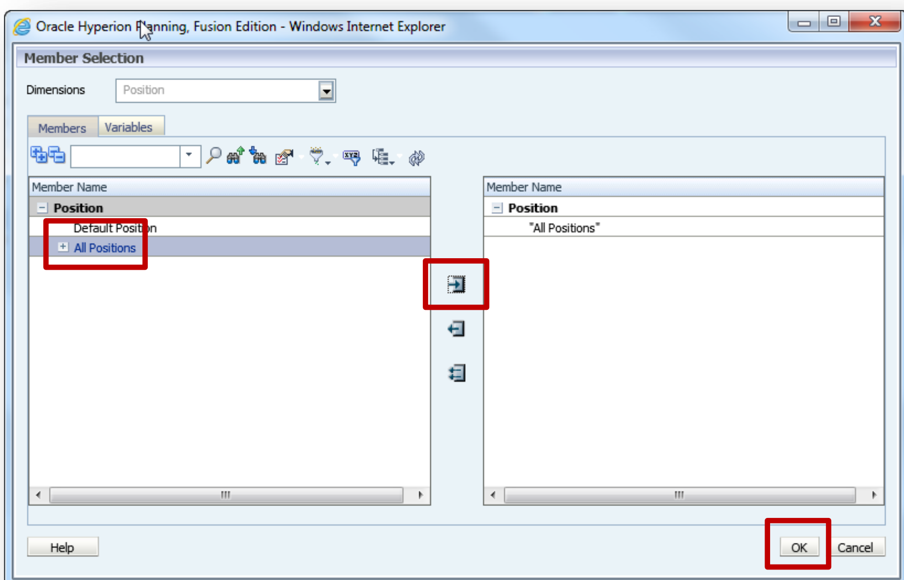
a. Click the **Position Select** Members icon.



b. Select **All Positions** from the left Positions list.

c. Click the **right-pointing Select arrow** to move it to the right side of the screen.

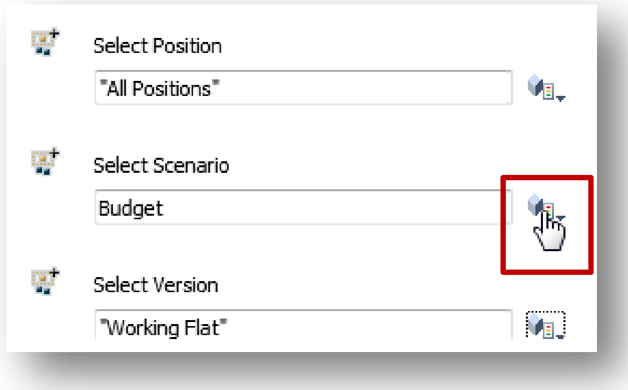
d. Click the **OK** button.



NOTE: It's important to choose All Positions. If you leave the default Position # or indicate a specific position, only that position data will allocate.

11. Make sure to choose Budget.

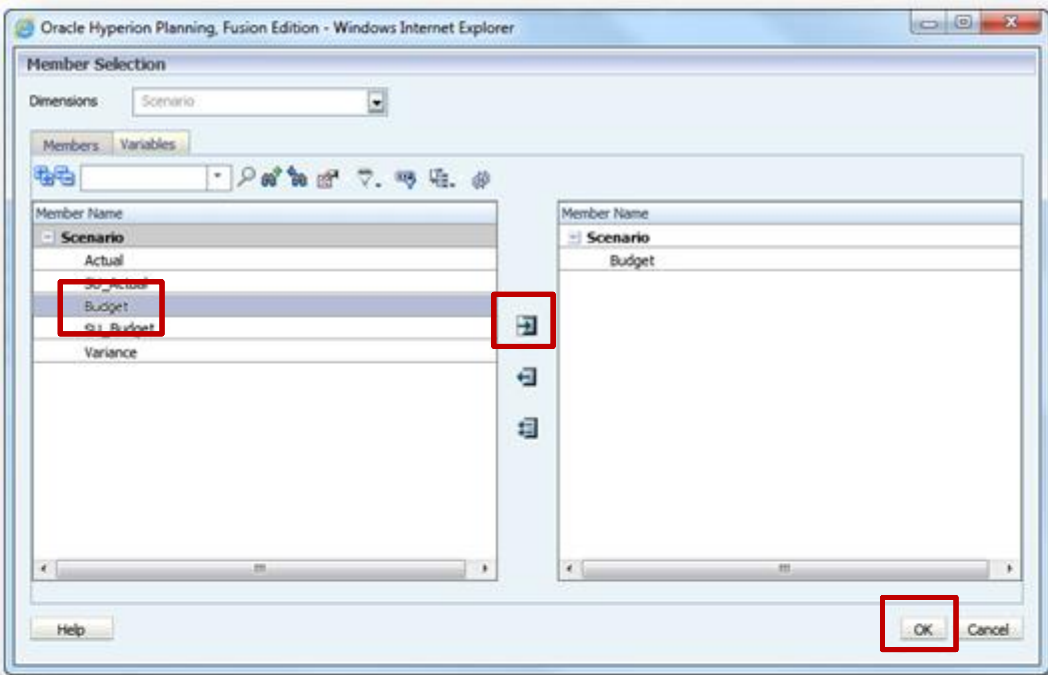
a. Select the **Scenario Select Members** icon.



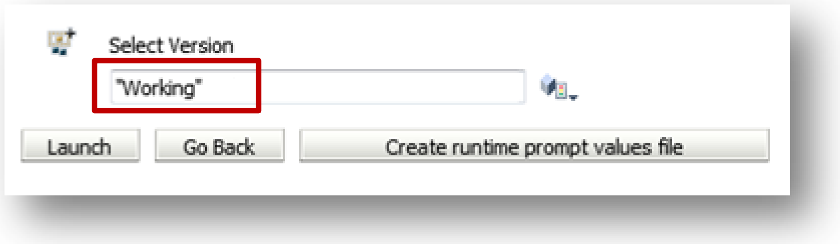
b. Select **Budget** from the left Scenario list.

c. Click the **right-pointing Select arrow** to move it to the right side of the screen.

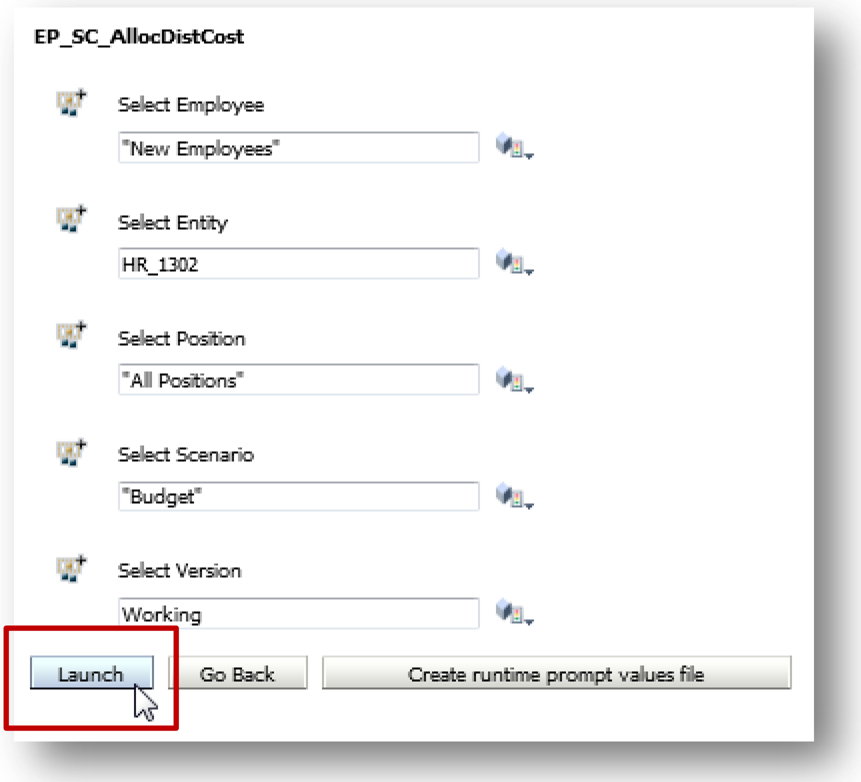
d. Click **OK**.



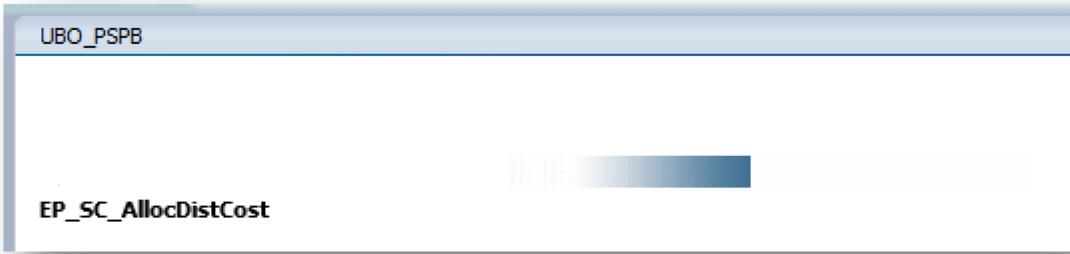
12. Confirm you are working on the correct budget Version.
    NOTE: Change to appropriate version if needed.



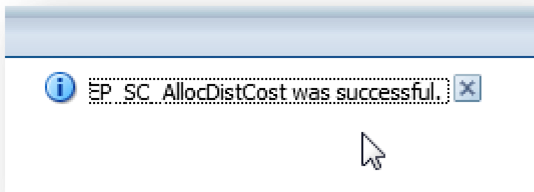
13. Click the **Launch** button.



14. The blue bar will continue to ping-pong back and forth while the process is running.



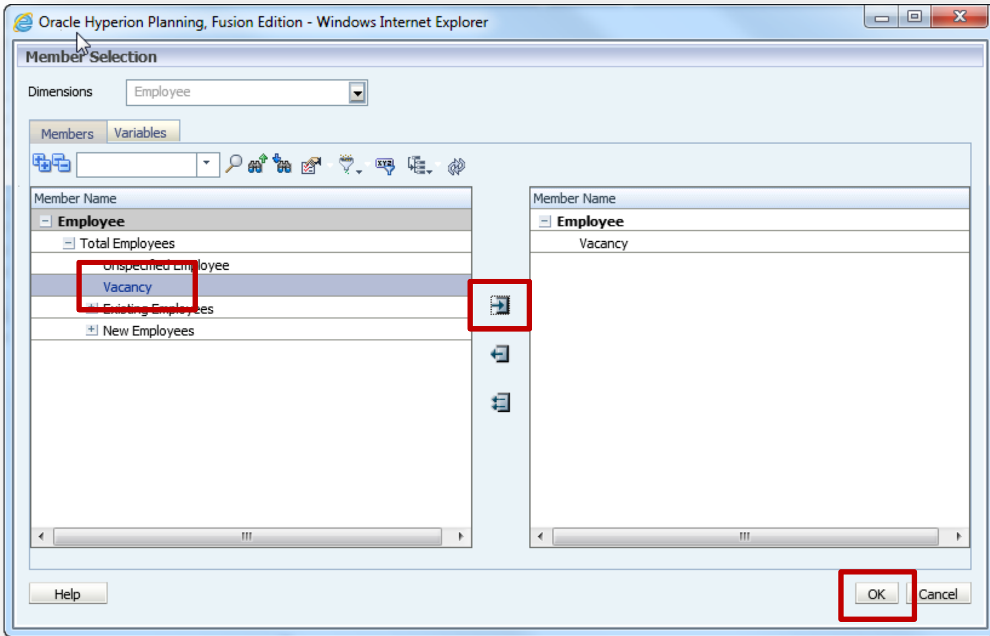
15. Confirm the process runs successfully by noted the message that appears at the top of the window.



If you have edited positions with Vacancy or To Be Filled, you will need to run the Allocate compensation to general ledger accounts procedure for each category.

To Allocate Vacancy Positions

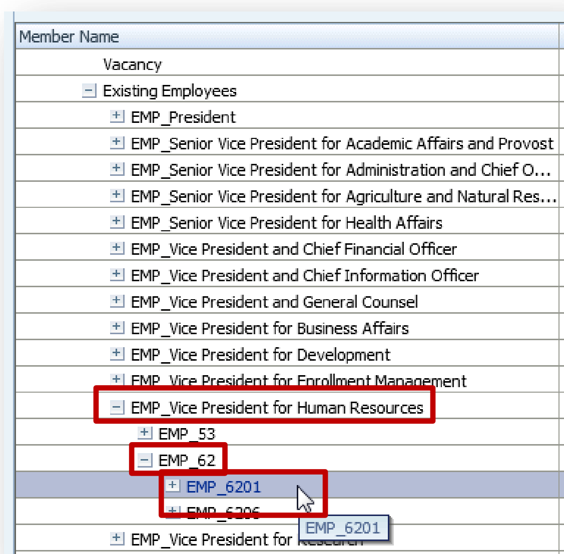
1. Complete steps 10 - 13 from the above procedure.
2. Select **Vacancy** from the left Employee list.
3. Click the **right-pointing Select arrow** to move it to the right side of the window.
4. Click the **OK** button.



5. Complete steps 10 – 15 of the **To Allocate To-Be-Hired Positions** process starting on page 75.

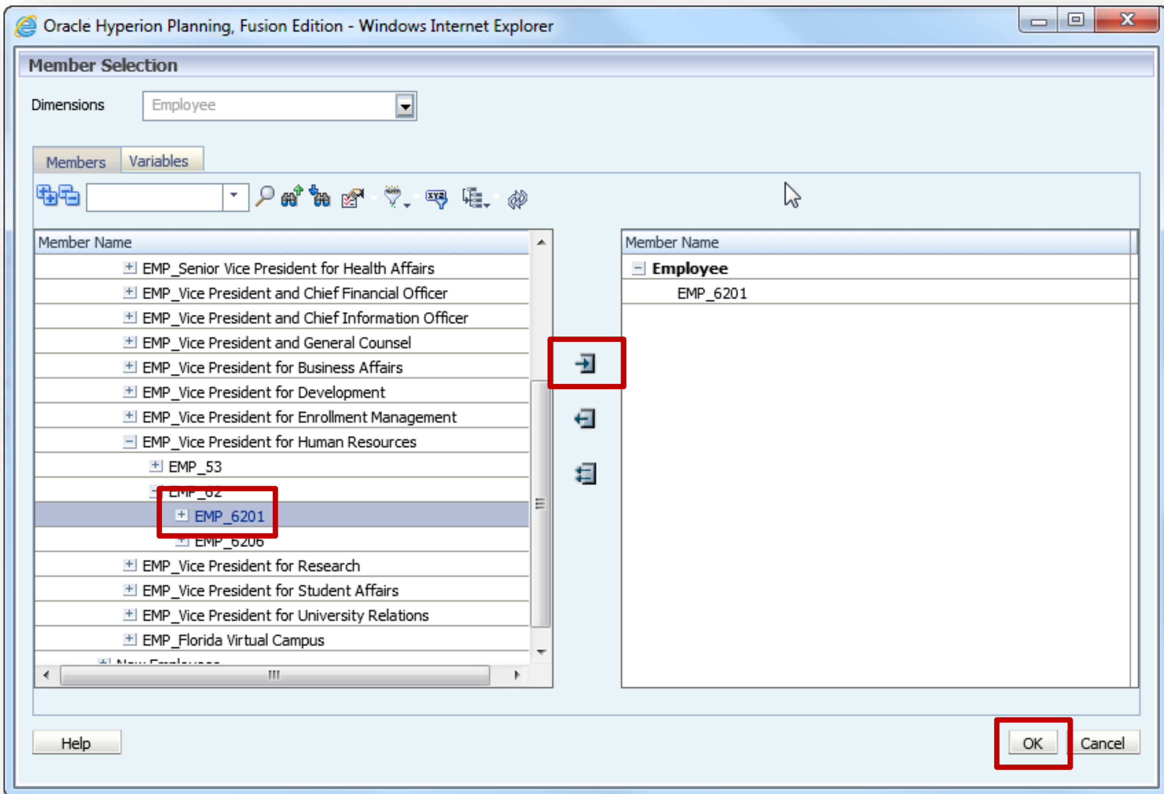
To Allocate Filled Positions

1. Complete steps 10 - 13 from the above procedure.
2. Click the **Existing Employees expand arrow** from the left Employee list.
3. Click the **appropriate Sr. VP or VP** your area falls under and choose the expand arrow.
4. Click the **appropriate College or Unit grouping expand arrow**.
5. Select the **appropriate department sub-group**.



6. Click the **right-pointing Select arrow** to move it to the right side of the window.

7. Click the **OK** button.



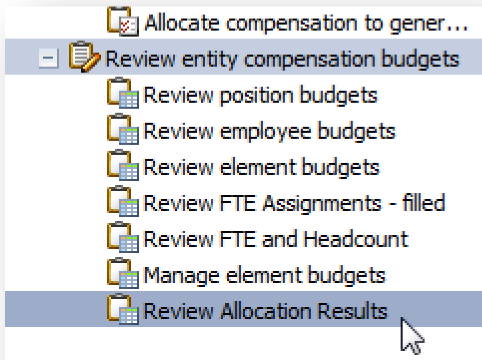
8. Complete steps 10 – 15 of the **To Allocate To-Be-Hired Positions** process starting on page 75.

Review Allocation Results

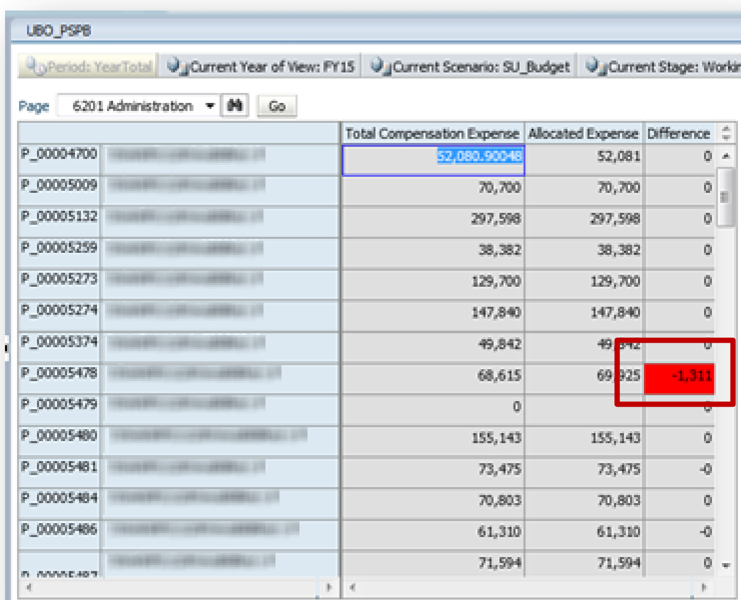
To confirm the data has been processed successfully, you'll review a report to show you what was processed.

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

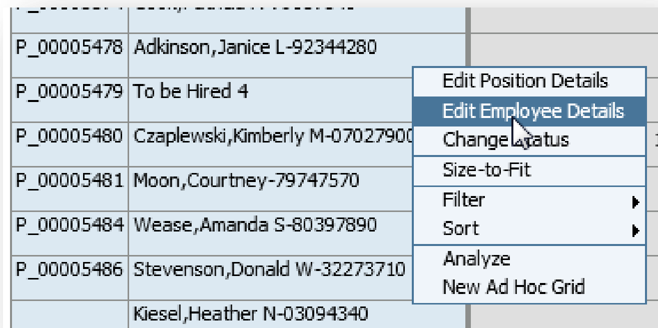
Whenever you see red cells in the Review Allocation Results report, that means you have an error somewhere with this person/position.

Common errors are:

- Allocate compensation to general ledger accounts procedure was not run
- FTE not assigned
- No distribution assigned
- Distribution does not equal 100%
- Earlier than accepted Distribution End Date

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

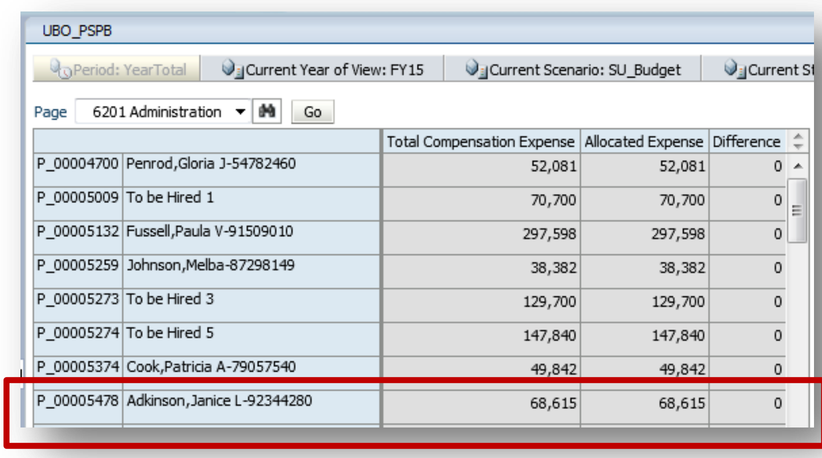
2. Choose **Edit Employee Details**.



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.

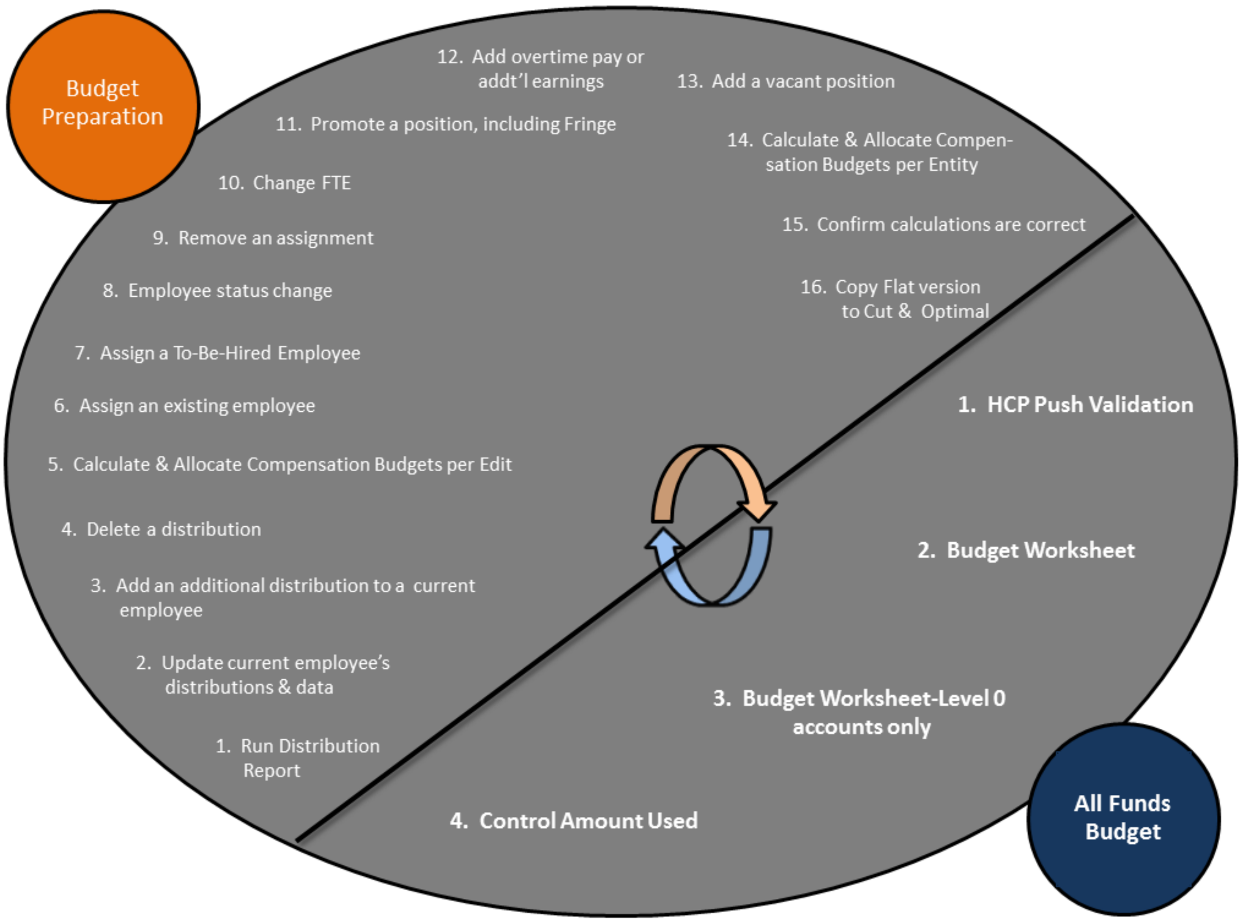


NOTE: Position number P_00005478 no longer displays the red cell.

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

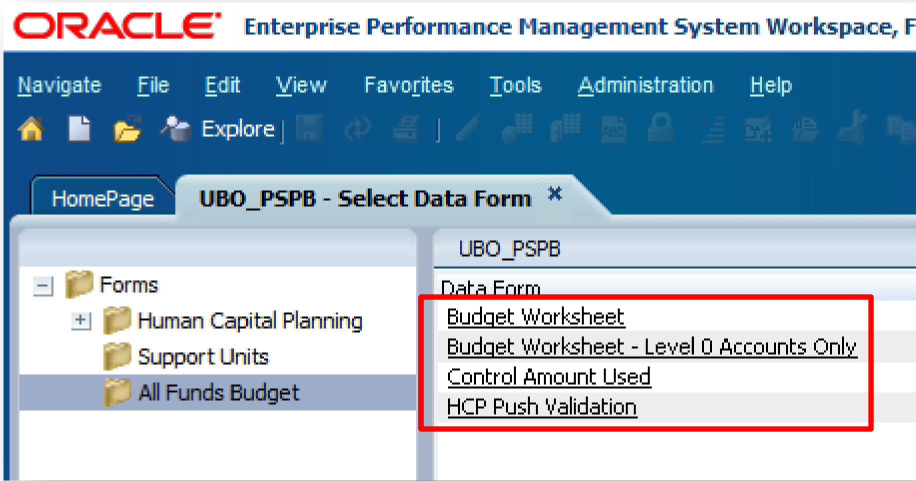
NOTE: You must be in Advanced Mode to work on the All Funds Budget Submission. After the Push has occurred, Choose File > Advanced from Menu bar if needed.



Forms for Budget Submission

Accessing Forms

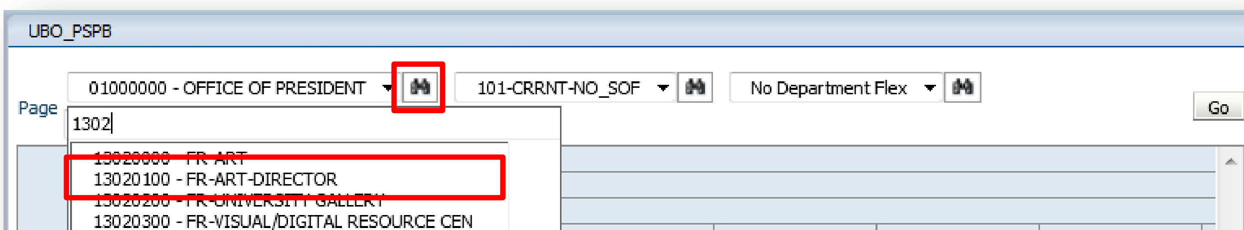
1. Click on the "**+**" on the left hand side of **Forms** folder to expand.
2. Click on the **All Funds Budget**.
3. In the content area, you should see four forms.
    - Budget Worksheet
    - Budget Worksheet-Level 0 Accounts Only
    - Control Amount Used
    - HCP Push Validation



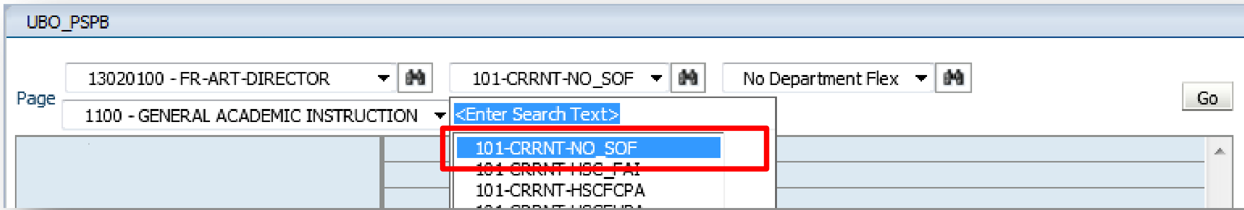
HCP Push Validation

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.

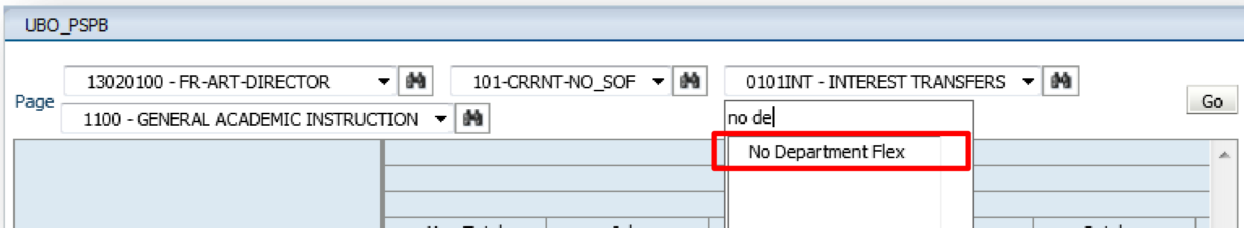
1. Select **HCP Push Validation** form.
2. Choose your **Entity** from the Entity dropdown field.
   NOTE: You may need to search for the appropriate Entity.



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

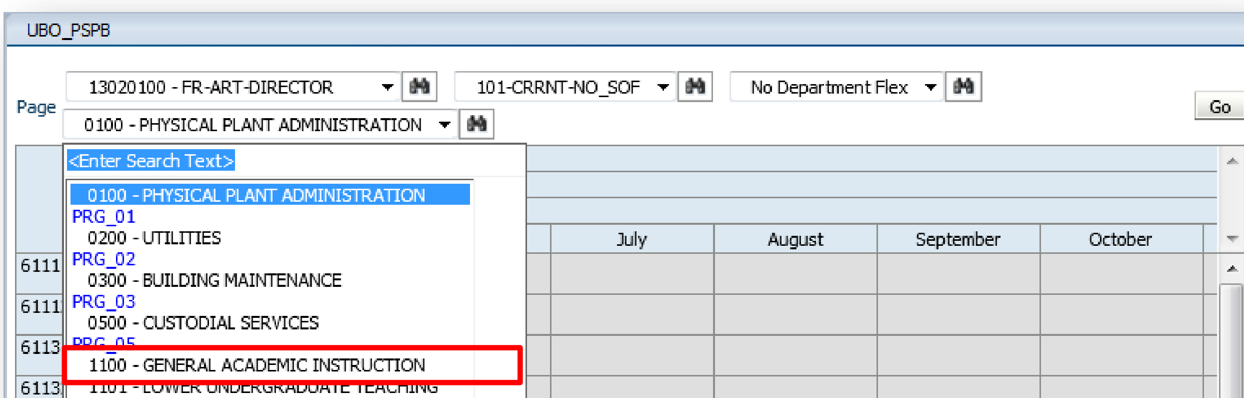


4. Choose your **Dept Flex** from the Dept Flex drop down field.

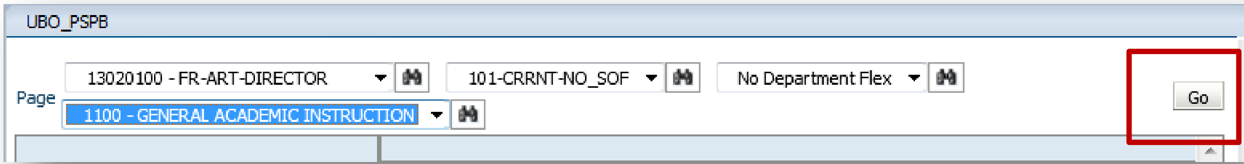


NOTE: If your ChartField string does not include Departmental Flex, this field must display “No Department Flex”. Type in “no de” into the search field, then choose No Departmentl Flex from result list.

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



6. Click **Go** 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 Basic Mode and 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.

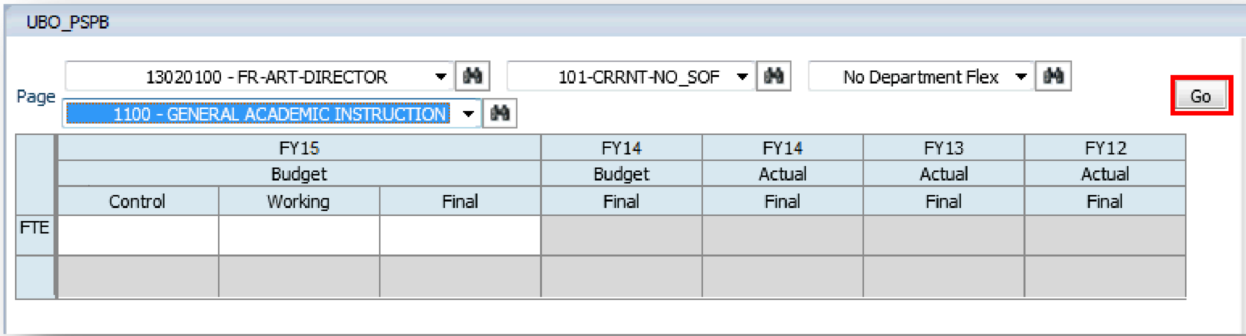
If you plan to budget at a higher level, you also need to select one 8 digit DeptID. For example Enrollment Management, if you plan to budget at Office of Admission, Office of Registrar's Office and VP of Enrollment Management areas, you can select DeptID 03020000 for Office of Admission, DeptID 03030000 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. 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 **Go** 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:

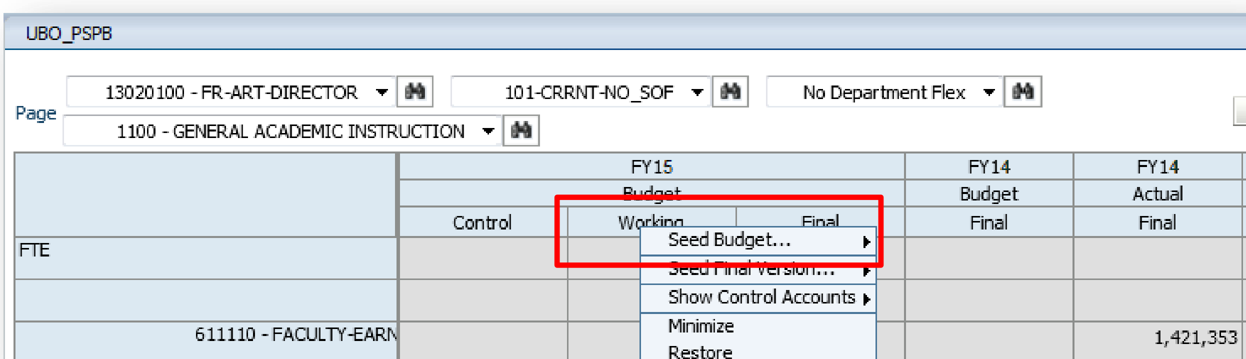
- **Control –** this is the initial budget the Budget Office inputs for the new fiscal year
- **Working –** this is your working budget. This is where you amake your plans for spending for the fiscal year.
- **Final** – this is your final, confirmed budget for the fiscal year and the Budget Office will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

Seeding Budgets

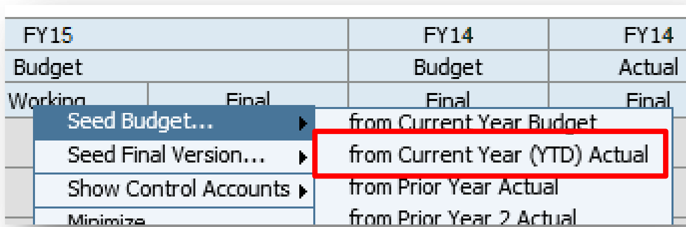
Seeding budgets allows you to take budget data from current or previous fiscal year(s) and populate your Working budget for the upcoming year. This process allows you to quickly add data to use as a starting point for budgeting without having to manually enter large amounts of budget data.

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

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



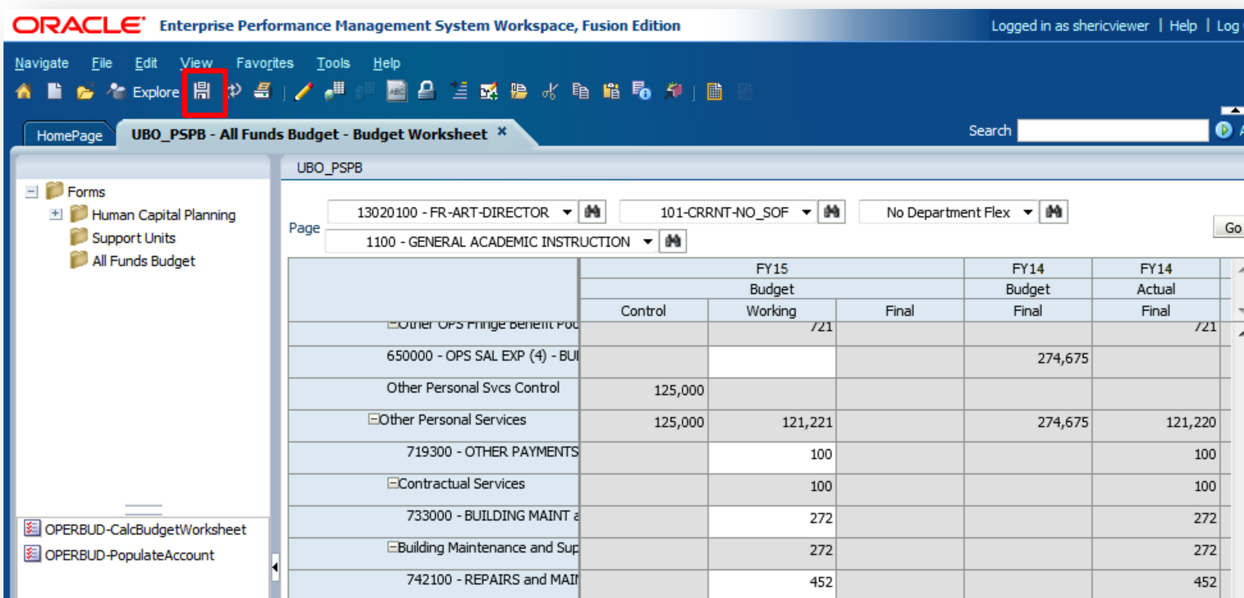
3. Click from Current **year (YTD) Actual**.



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.

5. After confirming your Working column has been seeded correctly, click the **Save** button.



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 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.

This form provides two years of actual expenditures, partial expenditures for the current fiscal year, and current year final approved budget. The data in this form is read-only. The final approved current year budget data is based on your budget in Budget Prep (salary portion) and All Funds Budget (OPS and other expenditure portion).

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.

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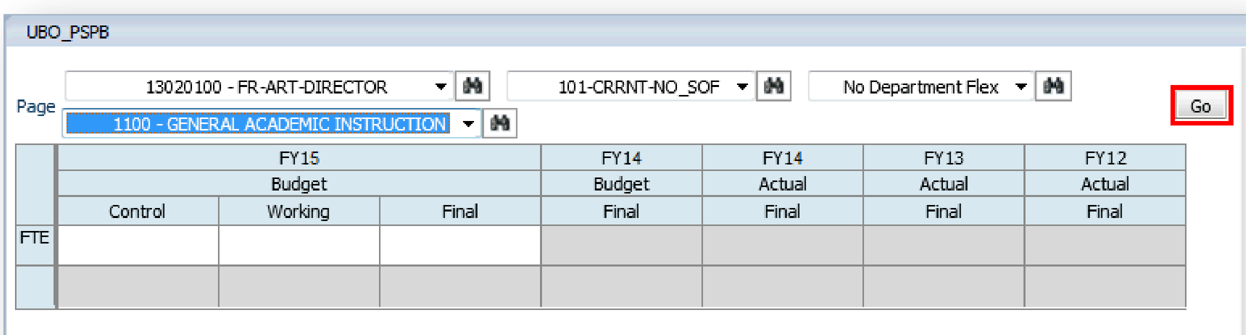
1. Select your **Department** from the Entity drop down field (if needed).

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

3. Then click the **Go** 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:

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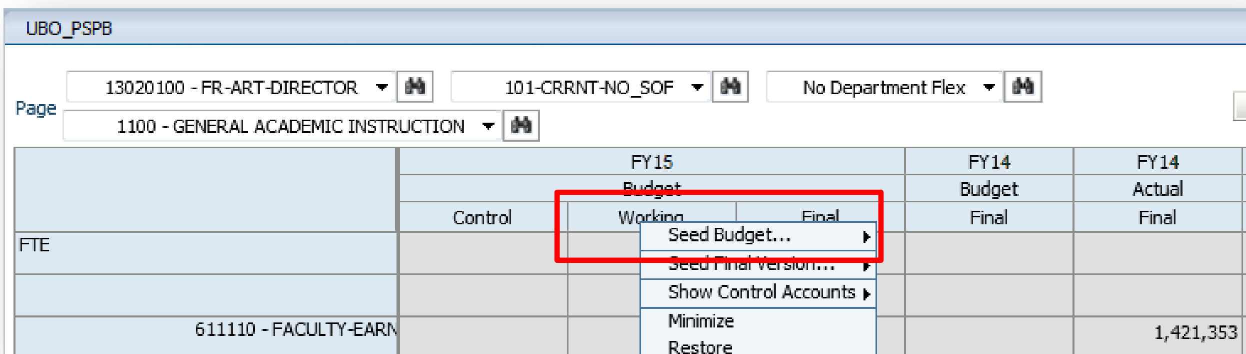
Seeding Budgets

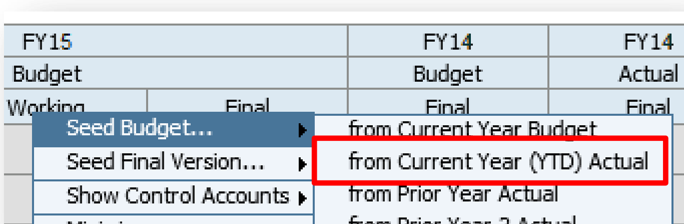
Seeding budgets allows you to take budget data from current or previous fiscal year(s) and populate your Working budget for the upcoming year. This process allows you to quickly add data to use as a starting point for budgeting without having to manually enter large amounts of budget data.

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

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



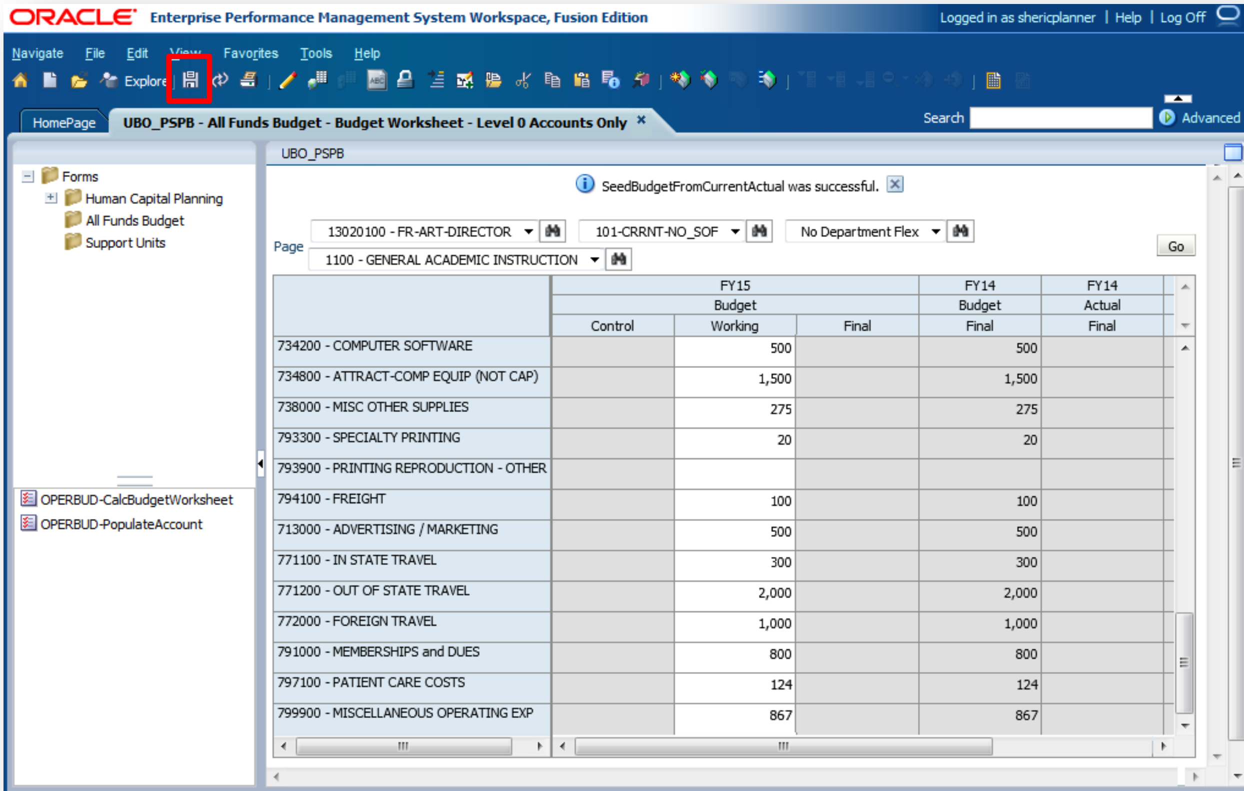
3. Click from Current **year (YTD) Actual**.



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.

5. After confirming your Working column has been seeded correctly, click the **Save** button.

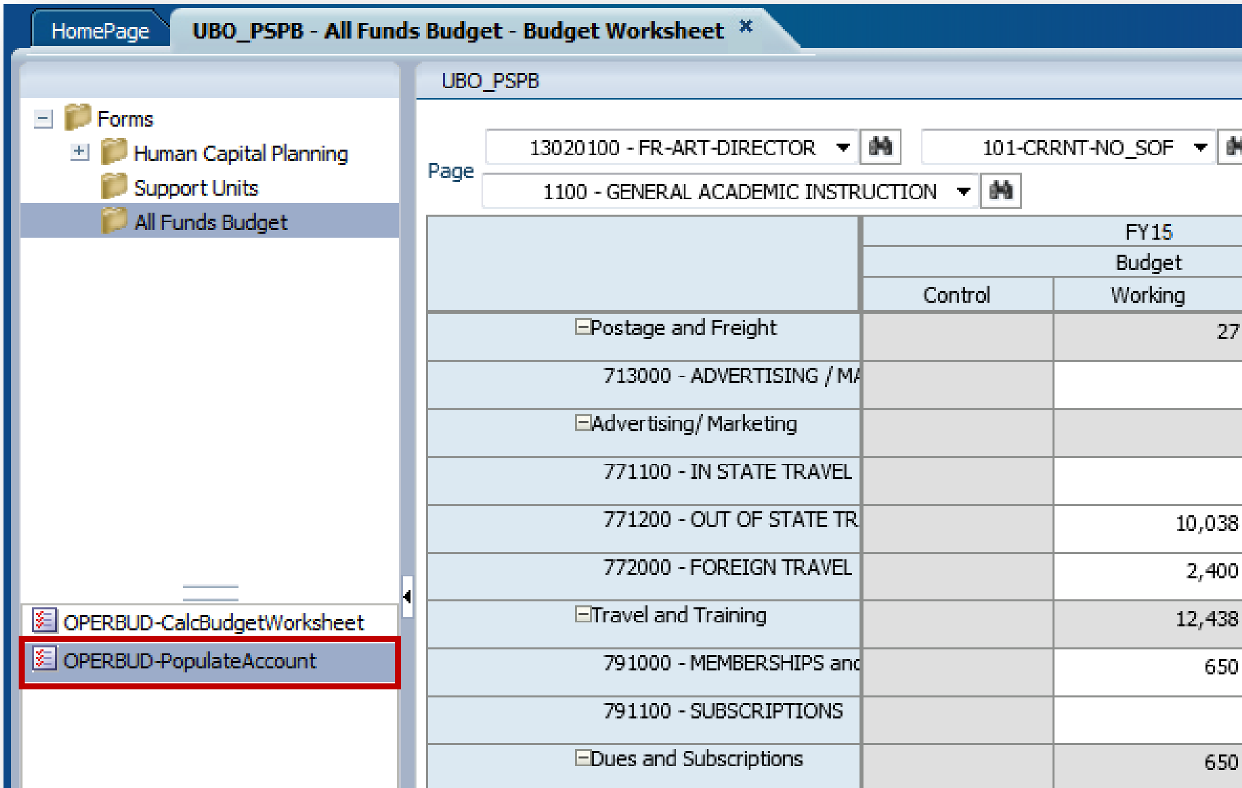


NOTE: Data may be entered manually into any white cell, instead of seeding, if desired.

Adding Missing Accounts

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

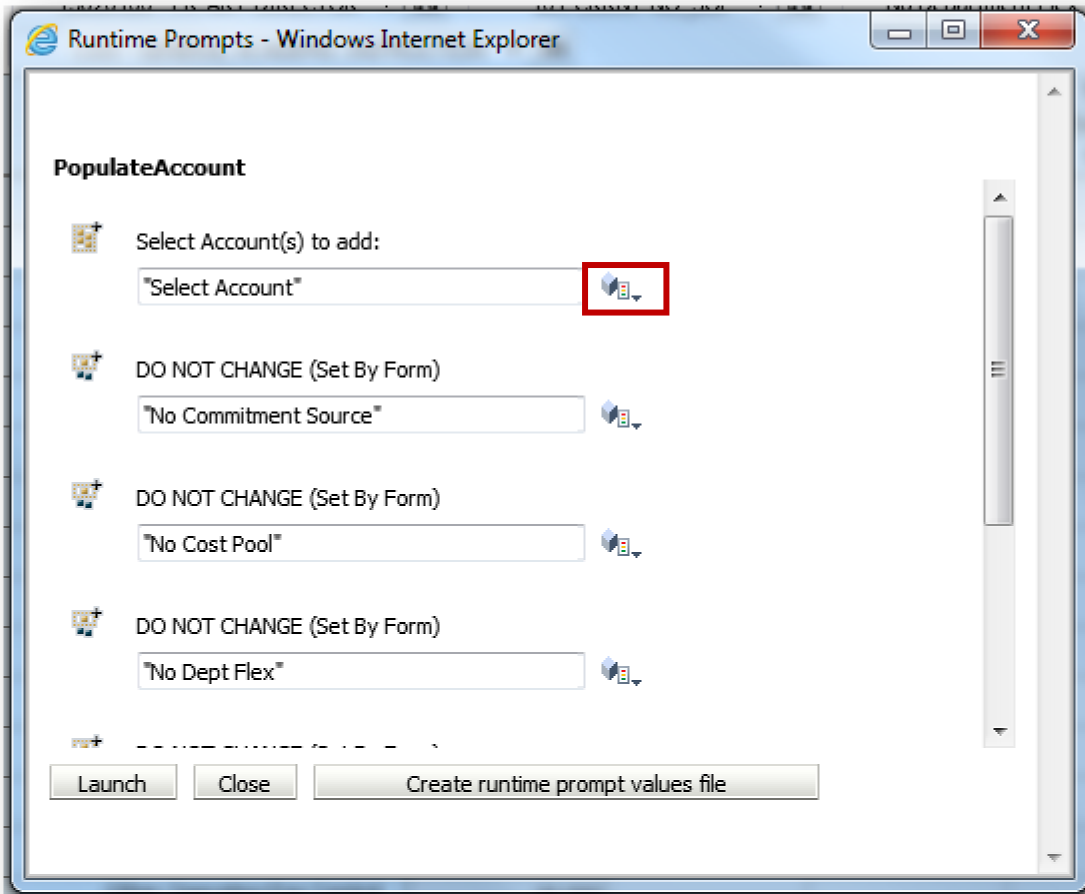
1. Within the Content Pane on the left side of your screen, you will see a rule labeled **OPERBUD- PopulateAccount**.



2. Double-click the **OPERBUD-PopulateAccount** rule.

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. **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.

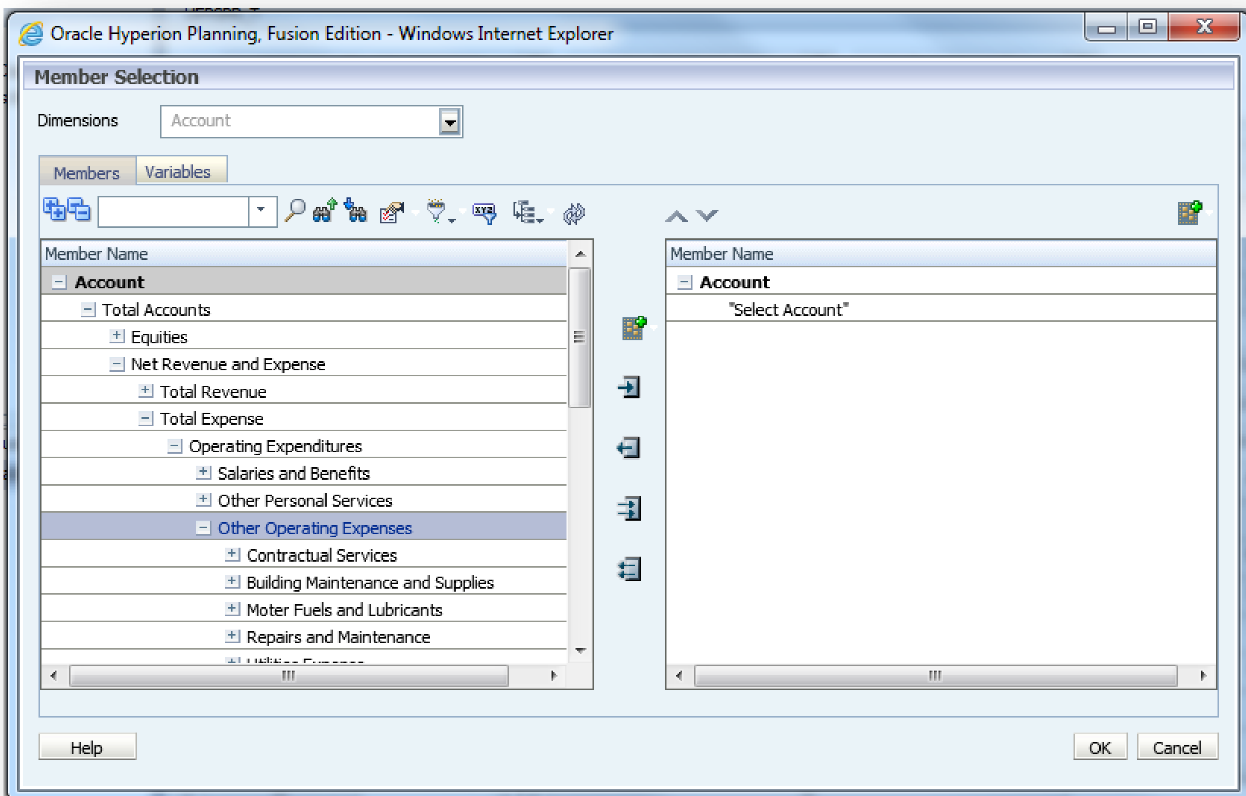
4. Click the **Total Accounts Expand** icon.

5. Click the **Net Revenue and Expense Expand** icon.

6. Click the **Total Expense Expand** icon.

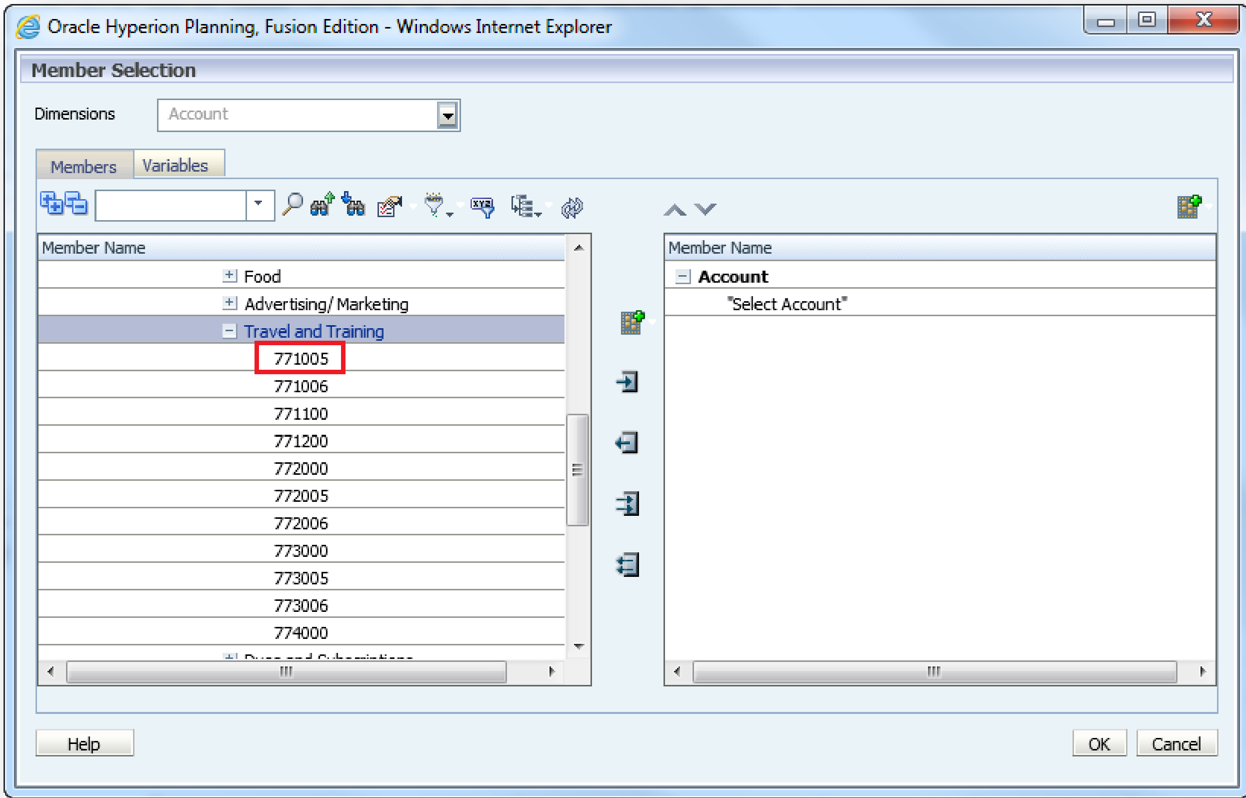
7. Click the **Operating Expenditures** Expand icon

8. Click the **Other Operating Expenses** Expand icon



9. Scroll down, as needed.

10. Click the **Travel and Training Expand** icon.
11. Click the **771005** object.



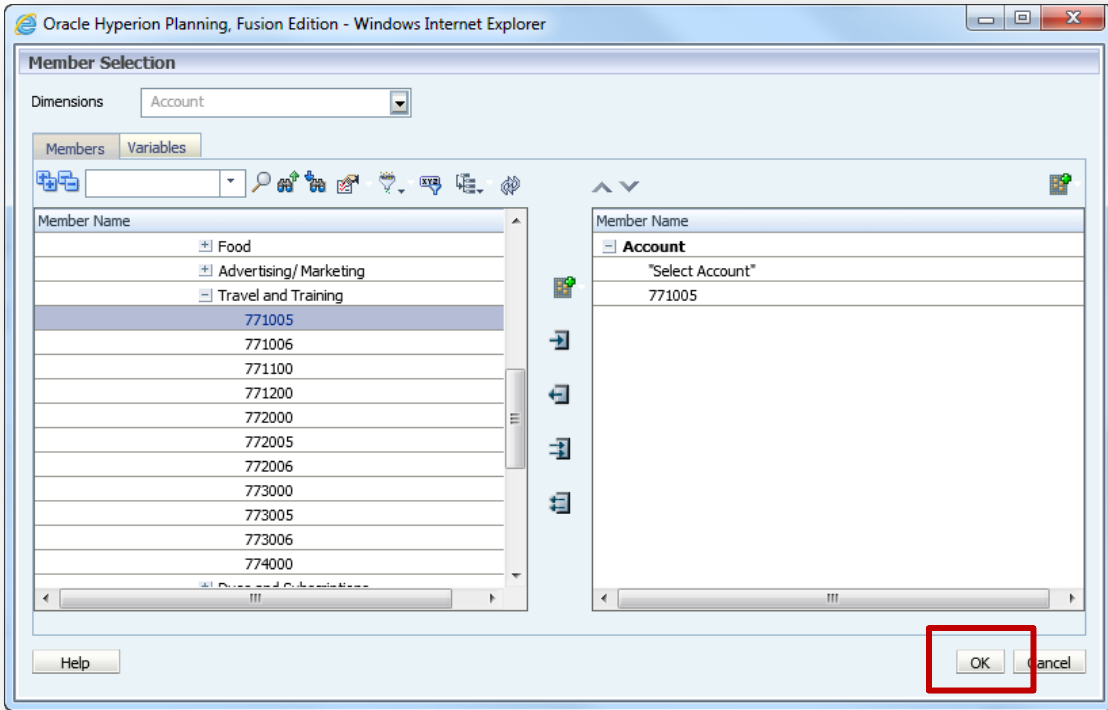
12. Once you have located the desired account, you will move it to the right side Member Name Column.

13. Only the accounts listed on the right side will appear in your worksheet.

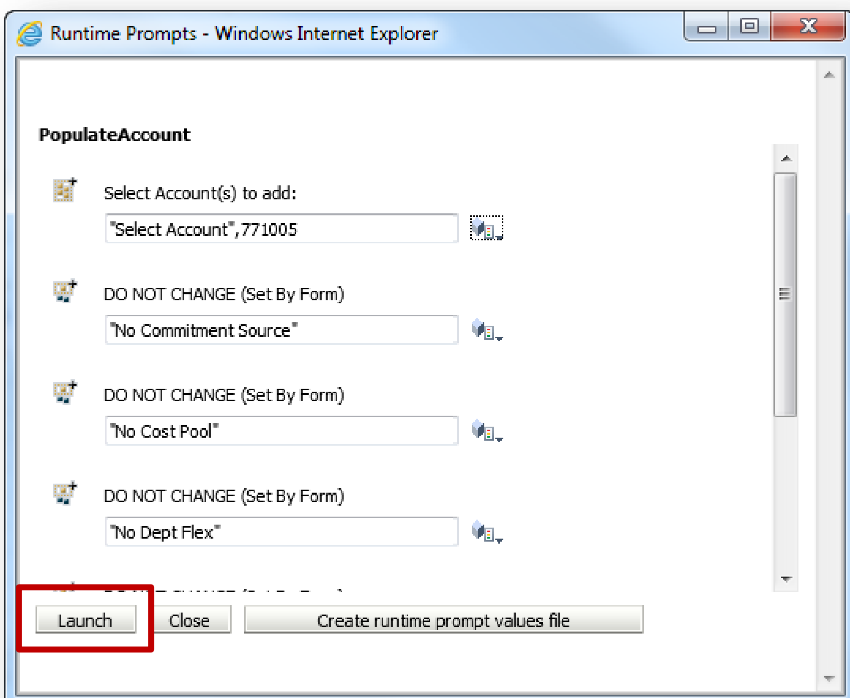
14. Click the **Right-pointing Select arrow**.

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

16. Click the **OK** button.

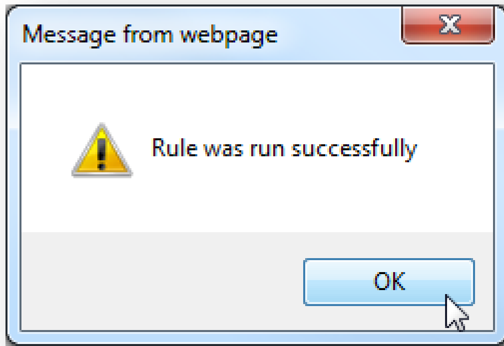


17. Click the **Launch** button.

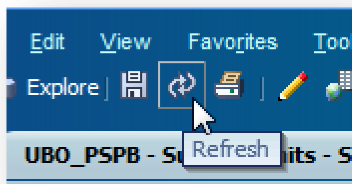


18. After launching the rule, you will receive a confirmation message.

19. Click the **OK** button.

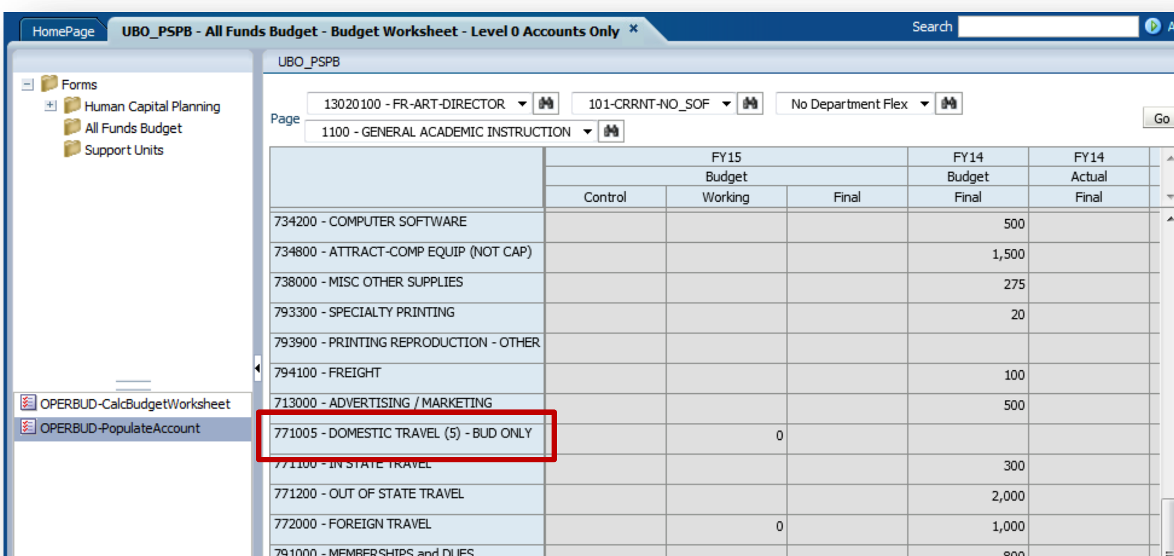


20. Click the **Refresh** button from toolbar.



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

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



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

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

25. 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.

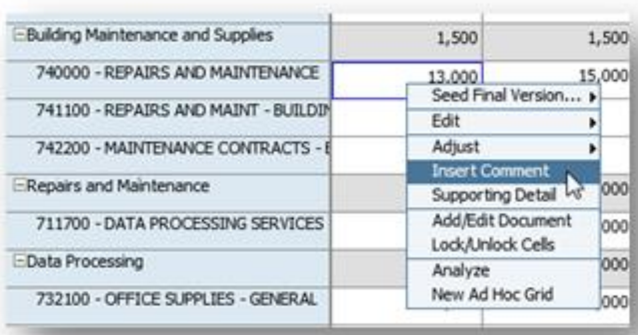
Comments, Supporting Details and Documents

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

Adding Comments

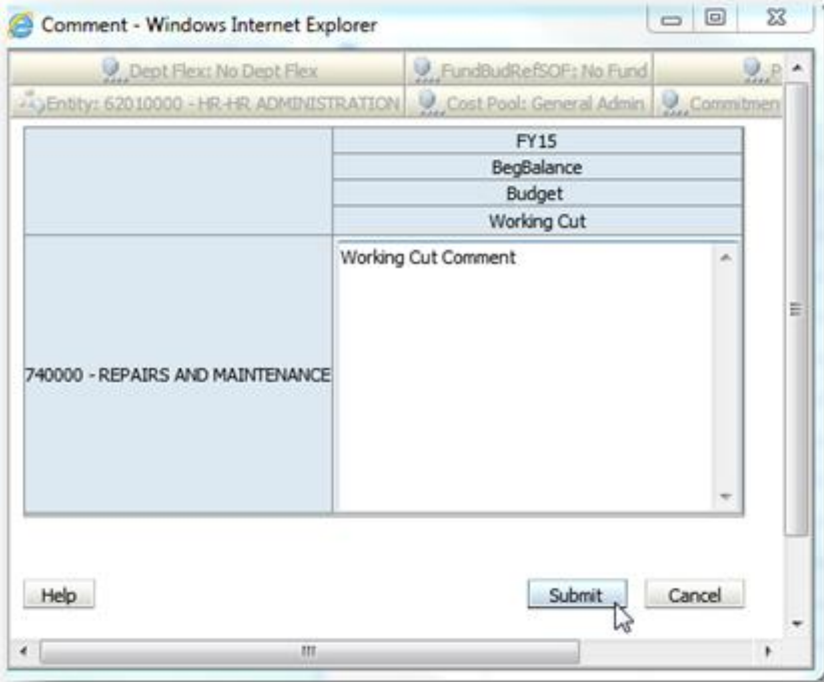
1. **Right click** on the cell to which you wish to add a comment.

2. Choose **Insert Comment**.

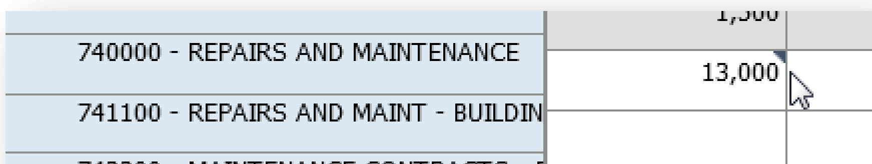


3. Type in the desired comment.

4. Click the **Submit** button.



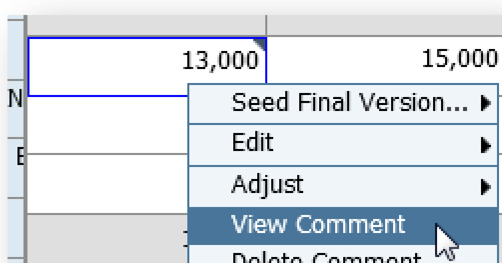
You can tell a cell has a comment attached by noted the icon that appears in the upper, right corner of the cell.



Editing Comments

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

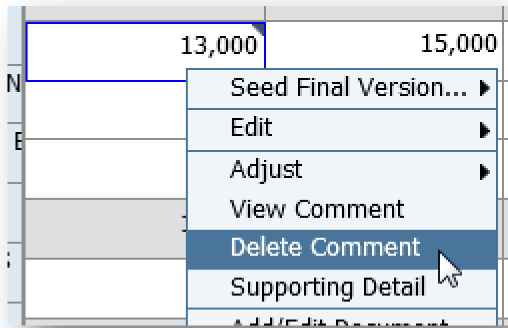
2. Click the **View Comment** option.



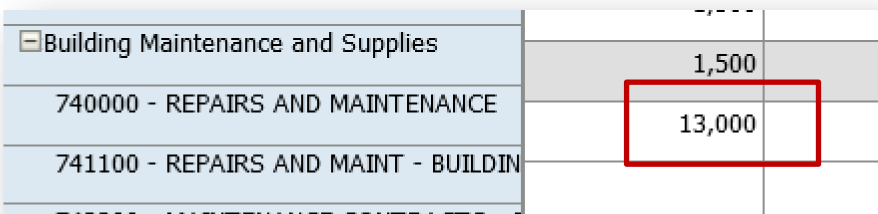
3. Change your comment as needed.
4. Click the **Submit** button.

Deleting Comments

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



3. **Scroll down** to confirm the cell no longer displays the icon in the upper, right corner.



NOTE: Comments can be added to a level 0 member or parent member.

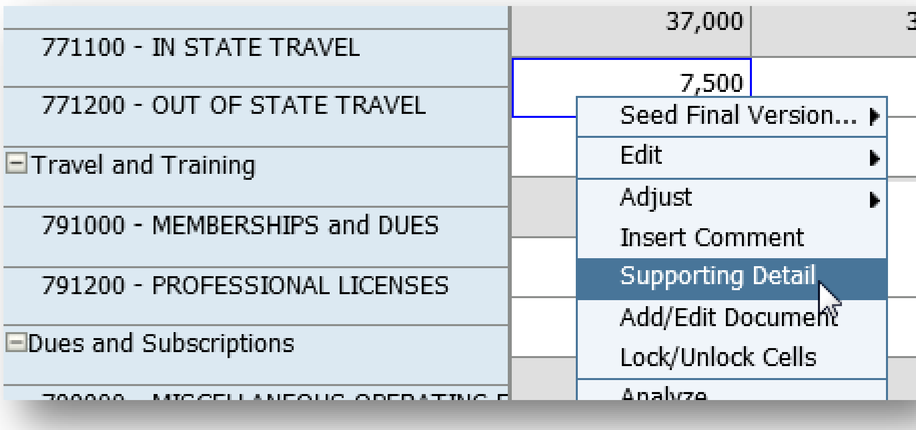
Supporting Details

This function allows you to add calculations or aggregate lines to your budget cells. For example Travel and Training, you can add the airfare cost, lodge, meals etc. to the cell as supporting details.

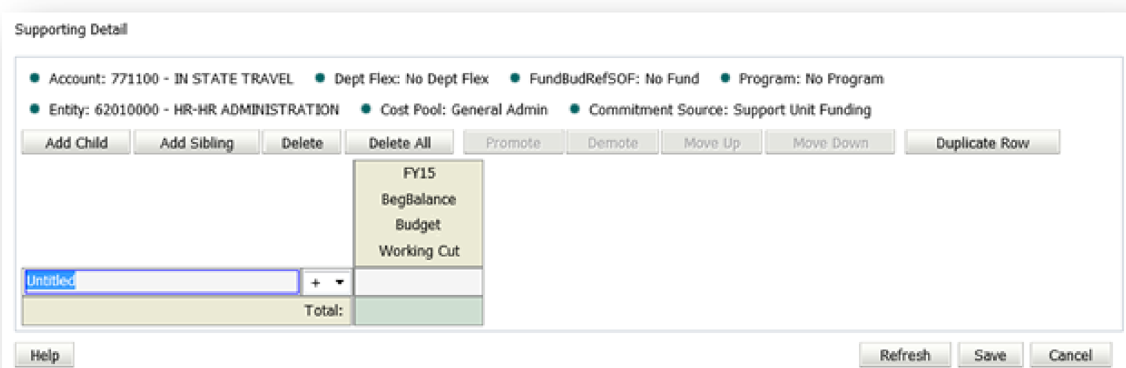
Adding Supporting Details

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

2. Select the **Supporting Detail** option.



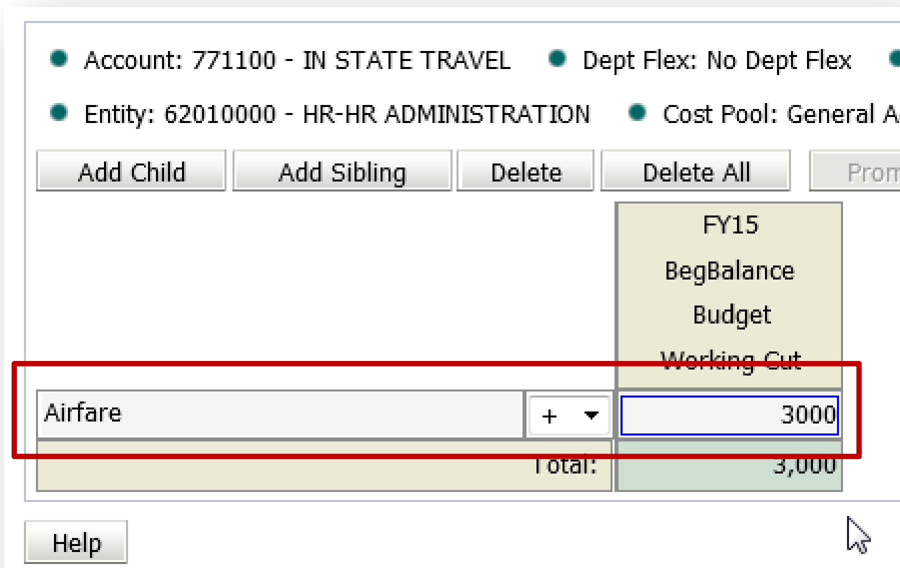
The Supporting Detail window will pop up for you to enter the supporting detail.



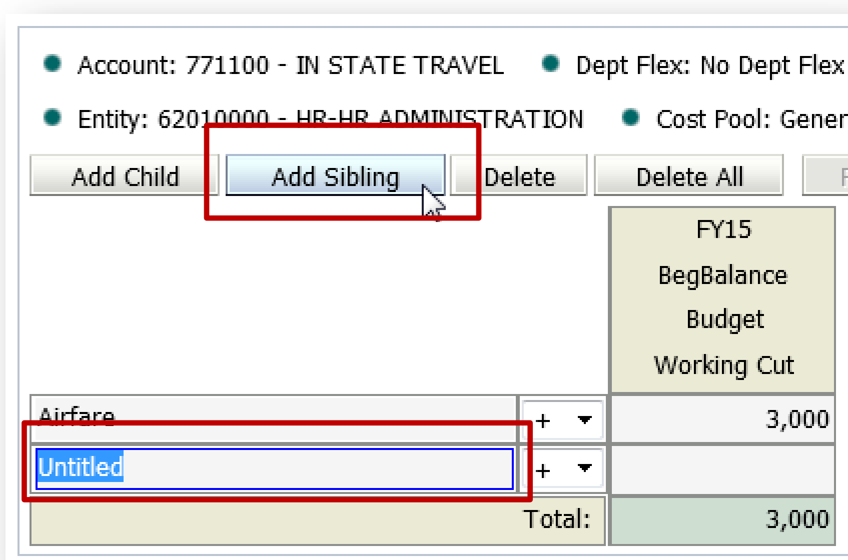
You can add as many detail lines as needed. In this example, we will add Airfare and Hotel costs.

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.

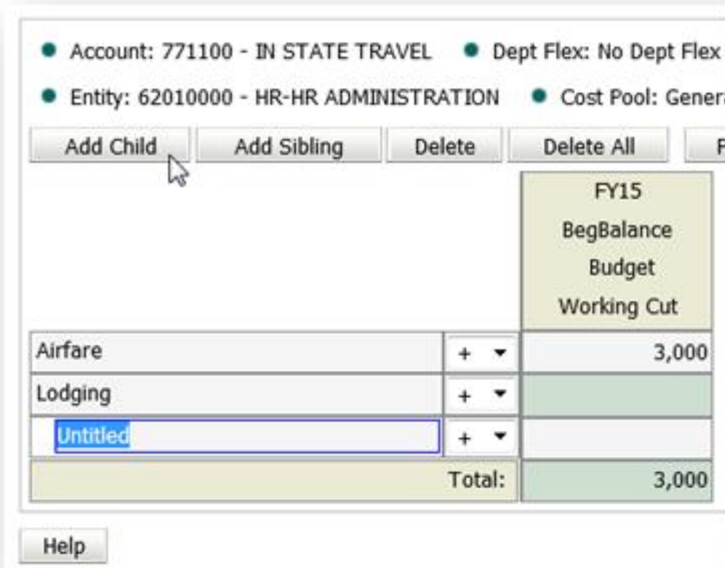


5. To add an additional line on the same level, choose the **Add Sibling** button.



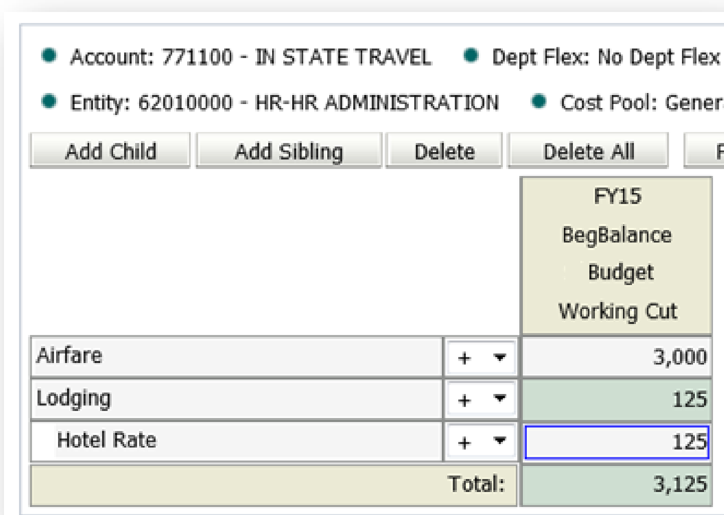
6. **Type** in a description for the second detail line.

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.

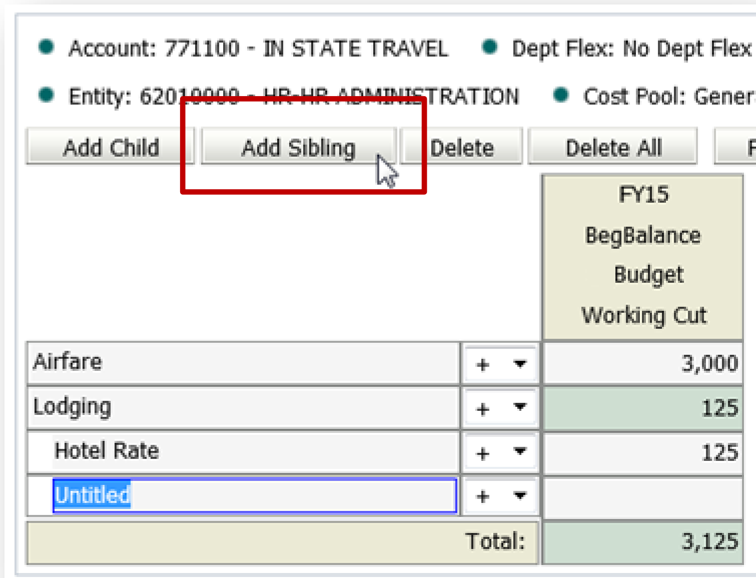


NOTE: A child detail line will appear slightly indented from the previous parent line.

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

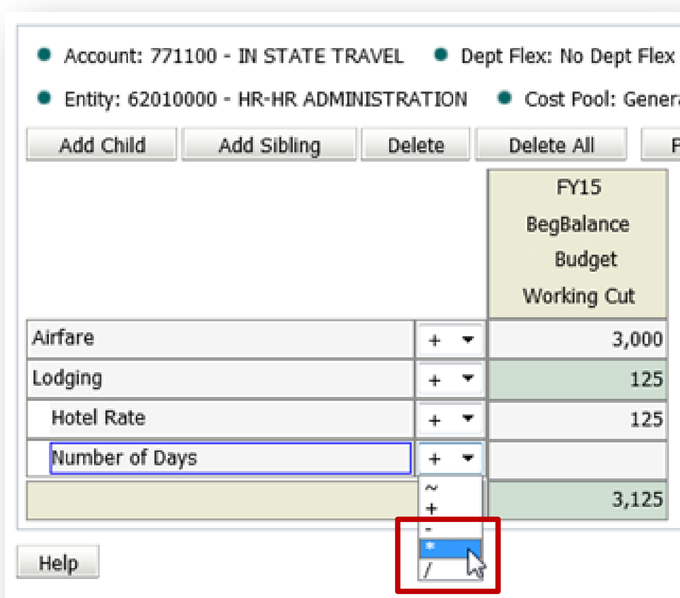


9. Click the **Add Sibling** button to add an additional detail line directly below Hotel Rate.

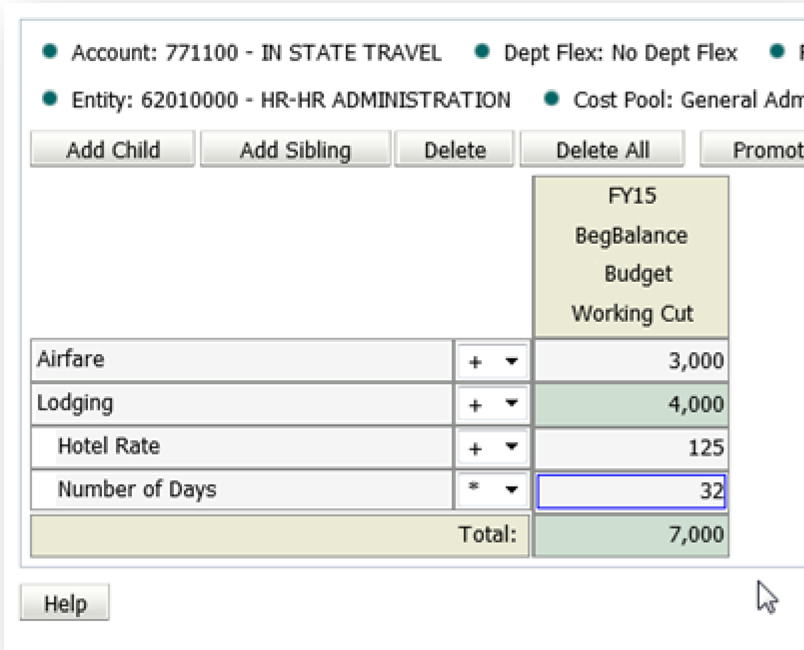


10. **Add** the appropriate description for the new detail line.

11. **Select** the appropriate **operator symbol** for the calculation.
NOTE: In this example, we will be multiplying the Number of Days by the Hotel Rate to determine the expected In-State travel expenses for the Working Cut budget.

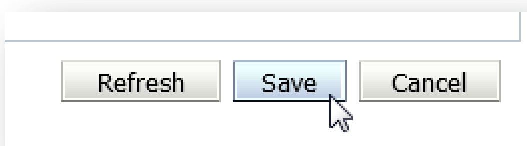


12. **Enter** the appropriate number of expected travel days.

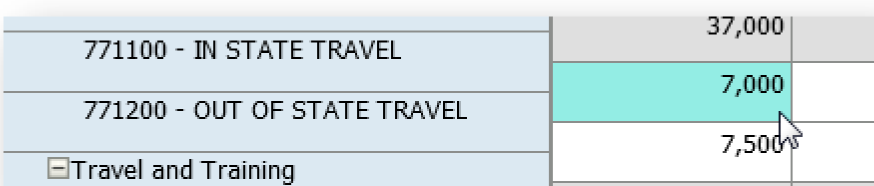


NOTE: The Total field will automatically calculate.

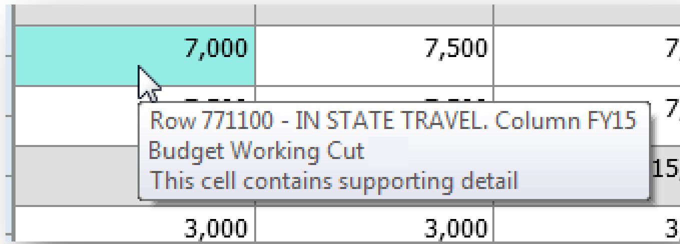
13. When all supporting details have been entered, click the **Save** button.



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



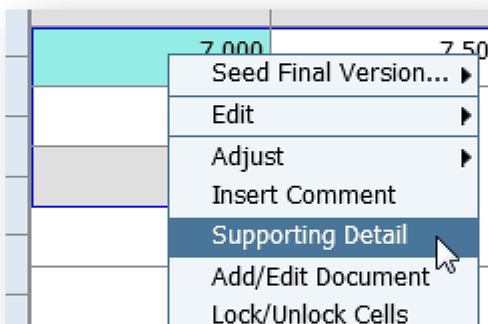
NOTE: You can also tell if a cell has supporting details attached, by pointing to the blue/green cell and noticing the message that appears.



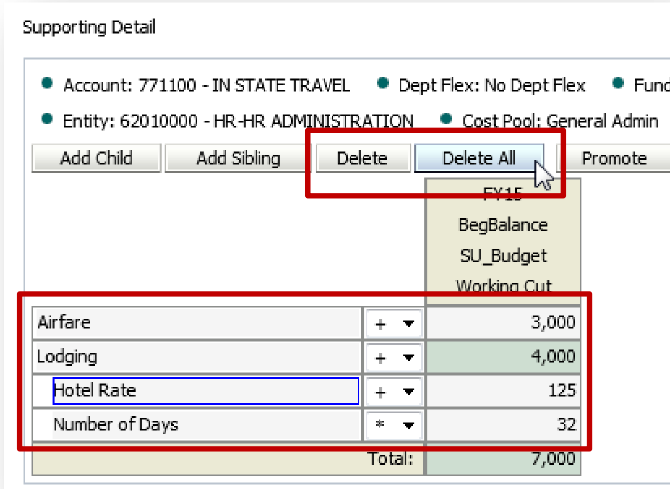
Editing/Deleting Supporting Details

1. Right-click the cell that has the Supporting Details you want to edit or delete.

2. Choose **Supporting Detail**. The supporting detail window will pop up for you to edit or delete.



3. Edit the values as needed or click the appropriate **Delete button** (Delete or Delete All).

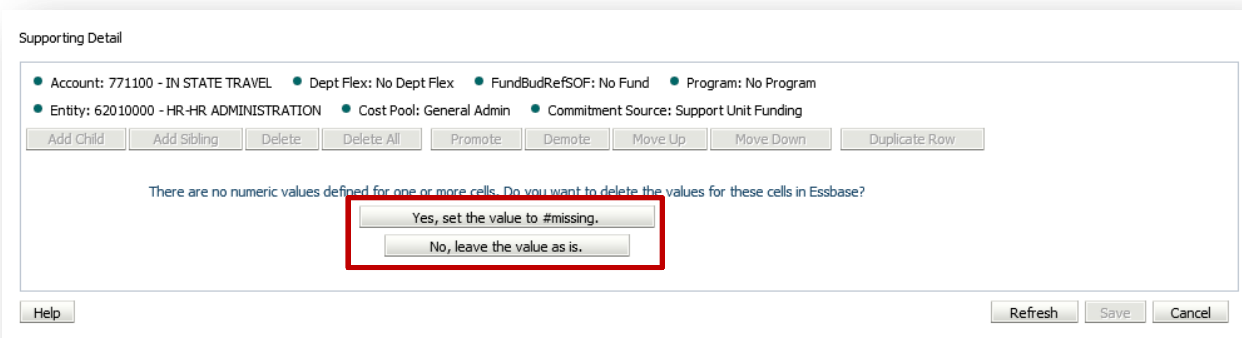


NOTE: Clicking Delete All will remove all Supporting Details from the cell.

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.

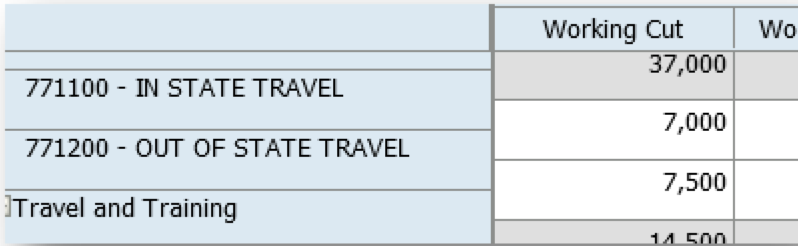
- Choosing Yes → all data will be removed, including the cell value.
- Choosing No → only the supporting details will be deleted.



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

5. Choose **No, leave the value as it is**.

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

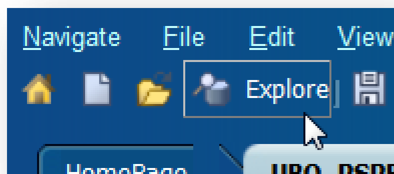


Adding Documents

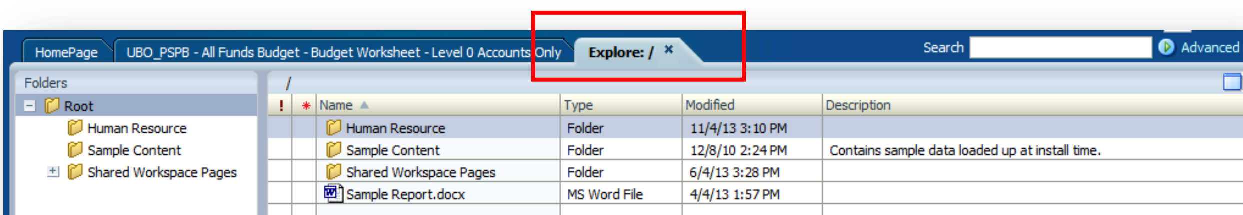
This function allows you to attach a document to a cell. You need to import the document file into Hyperion first. Once in Hyperion, you can then add the file to any desired cell.

Import files into Hyperion

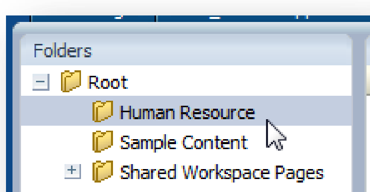
1. Click on **Explore** button from Menu bar.



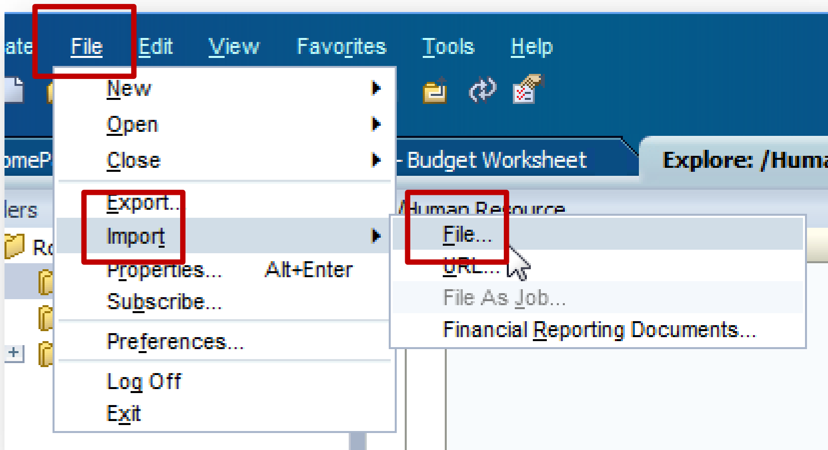
2. Notice a new Explore tab will be added to the content area:



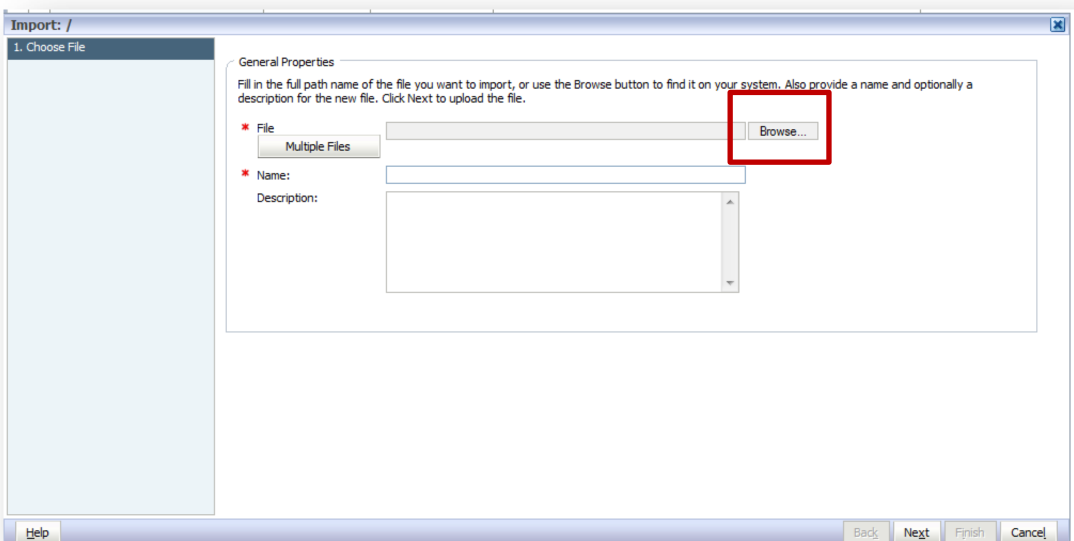
You should see a folder created for your support unit. For example, Human Resources will see a folder for Human Resource. This is the only folder you have access to. You have full control of this name. You can add, edit or delete files in this folder.



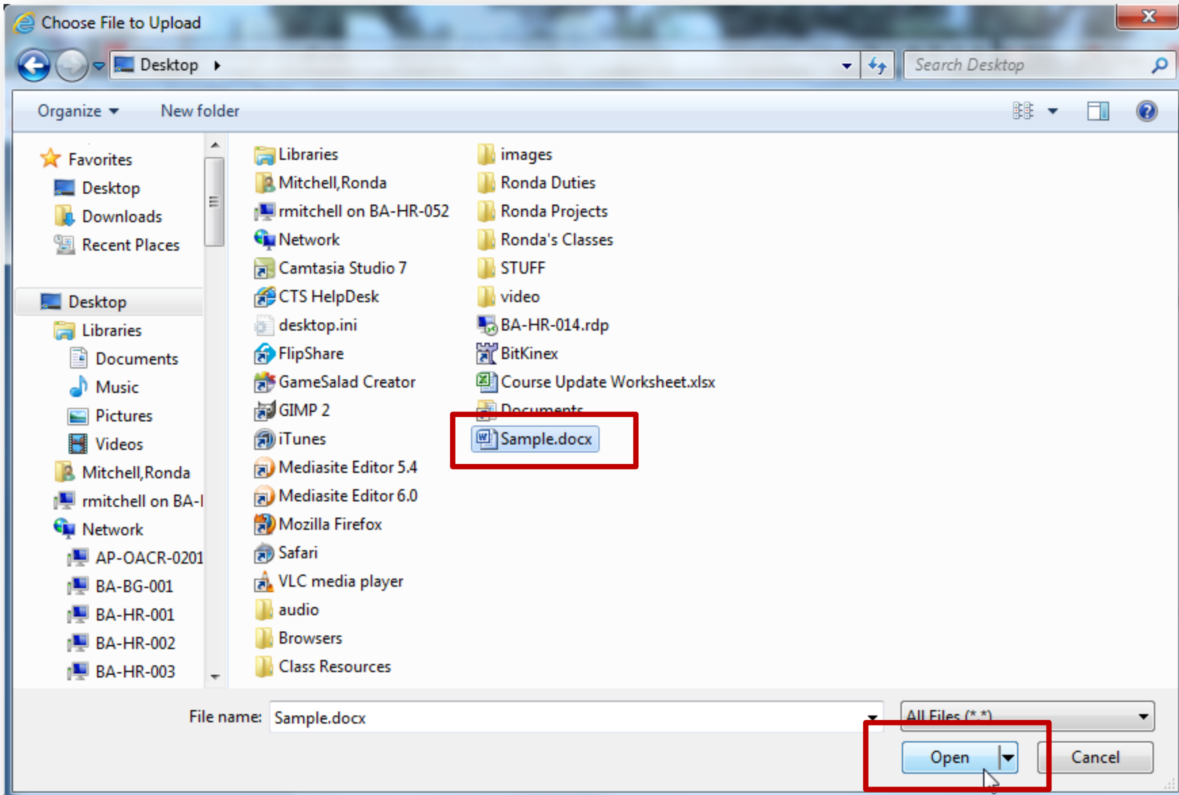
3. **Select** your folder, go to **File** > **Import** > **File**.



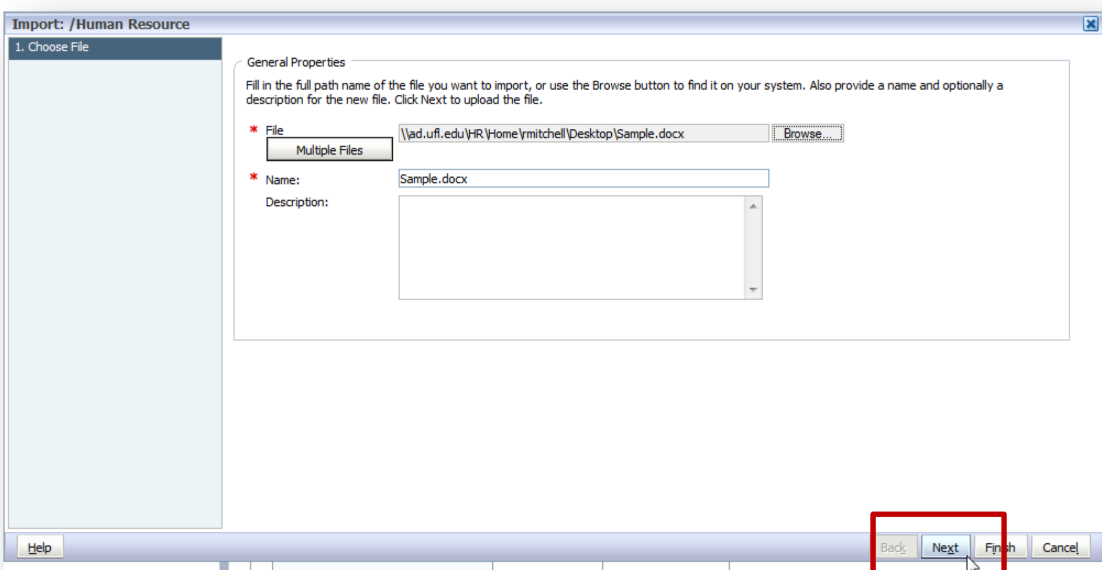
4. A new window will pop up. Click the **Browse** button.



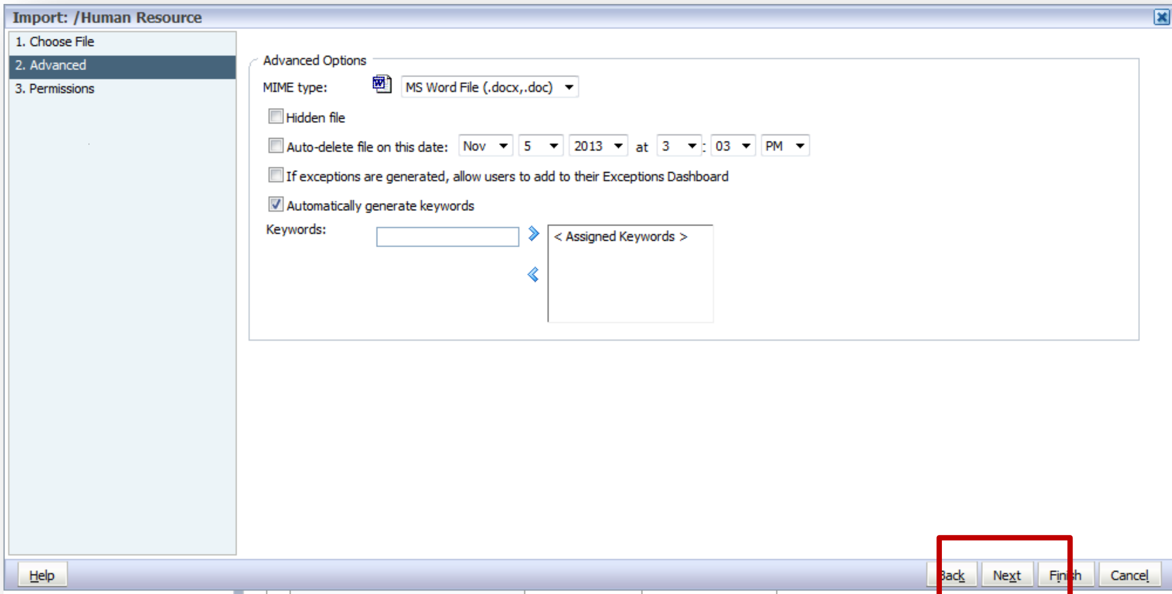
5. **Navigate** through your file system, **select** the file you want to import, click **Open**.



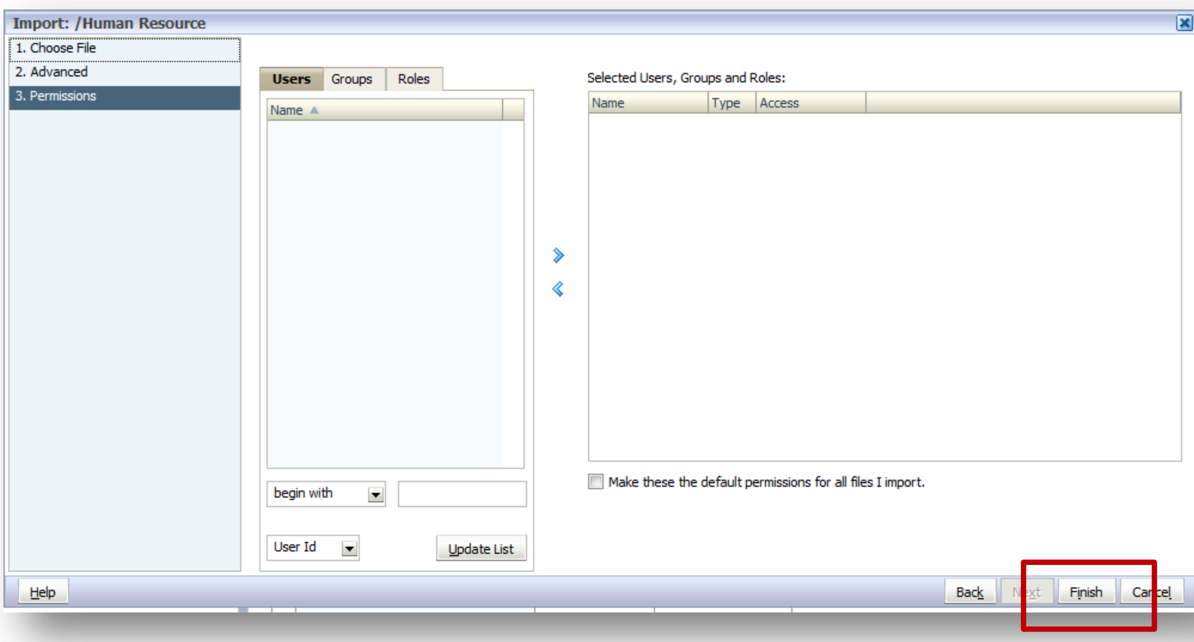
6. Click **Next** button.



7. Click **Next** button.



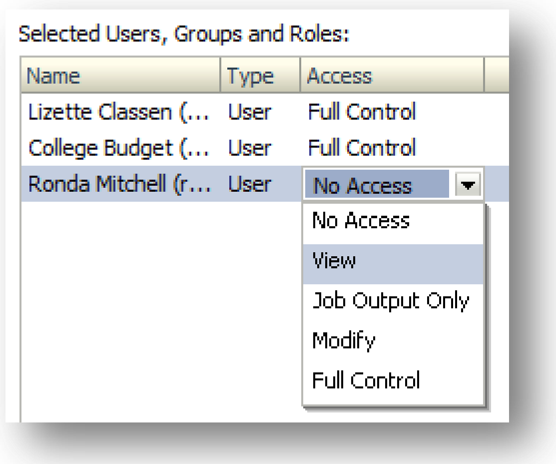
8. Click **Finish** button.



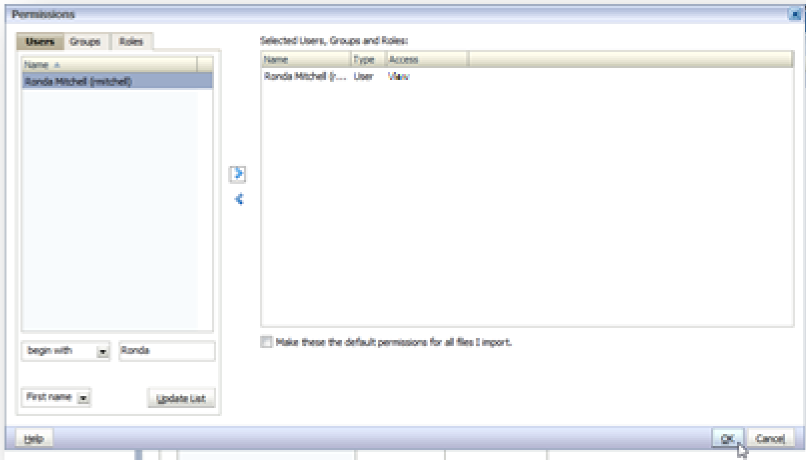
NOTE: You can assign permissions to selected users to allow other users to view or update this file. If you don't want to grant any access to other users, click "Finish". The file is attached.

To grant permssions to others:

a. **Select** the search value of either User ID, First name or Last name.
b. Decide how to search as either begin with, contain or are in group.
c. **Type** in the value for which you are searching.
d. Click **Update List** button.
e. **Select** the name in the left Name column.
f. Click the **right pointing selection arrow**.
g. **Confirm** appropriate person(s) appear in Selected Users, Groups and Roles section.
h. **Select** each person and choose the appropriate access level from the **Access** drop down field. Options are: no access, view, modify and full control.



i. Click the **OK** button.

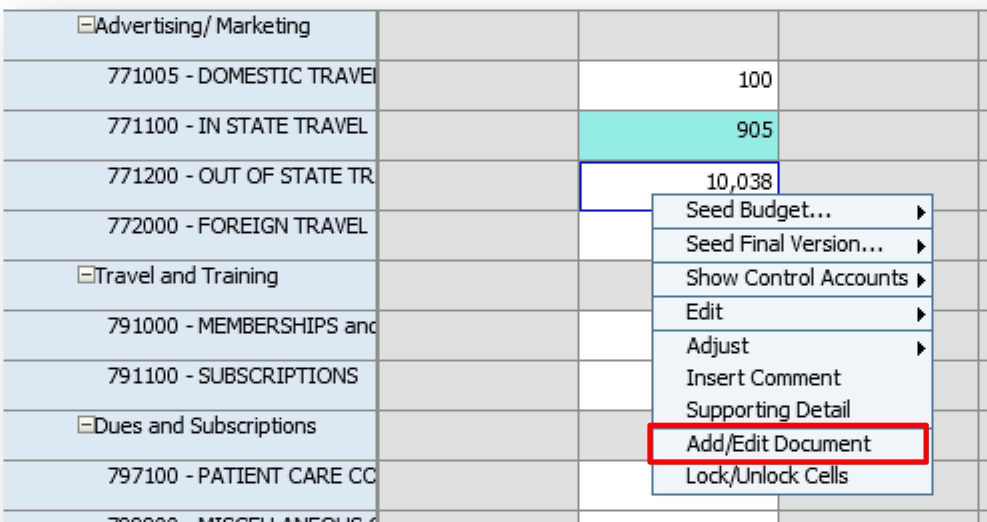


Adding Documents

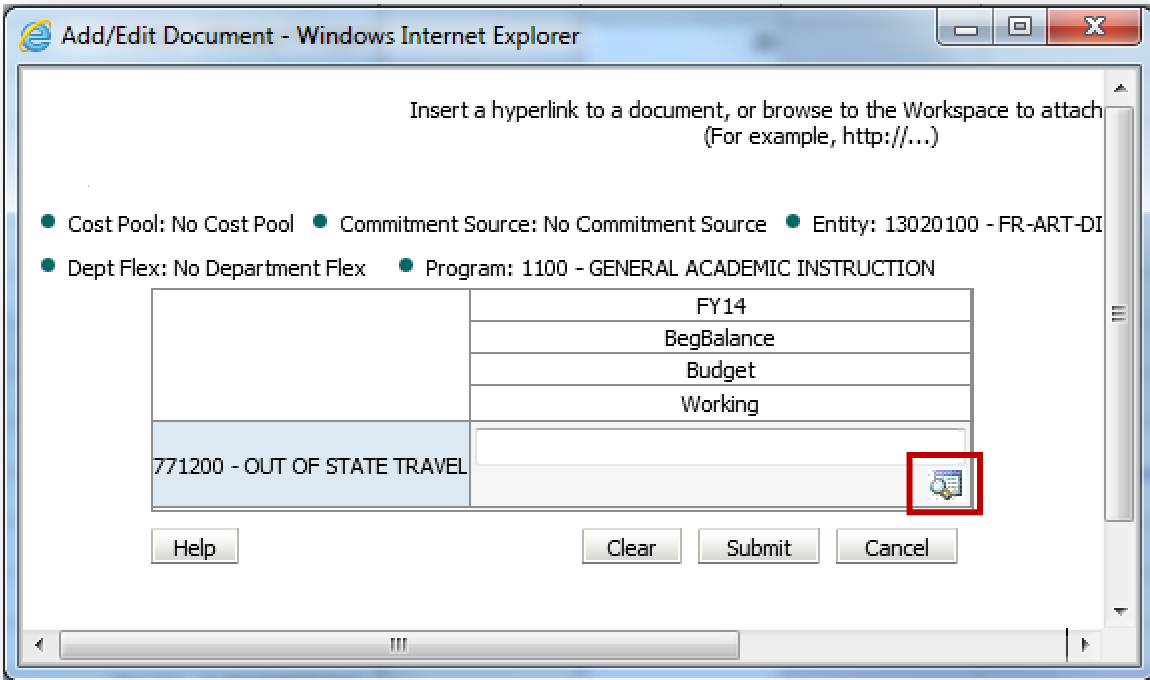
You are now ready to add the file to a cell.

1. **Right-click** the cell to which you wish to add the document.

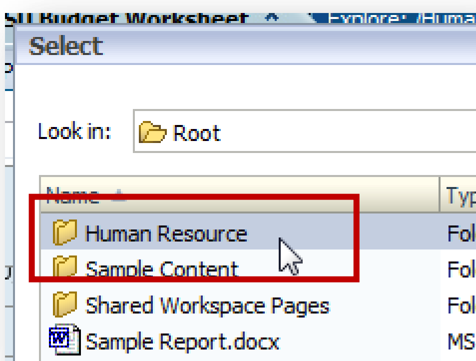
2. Choose **Add/Edit Document**.



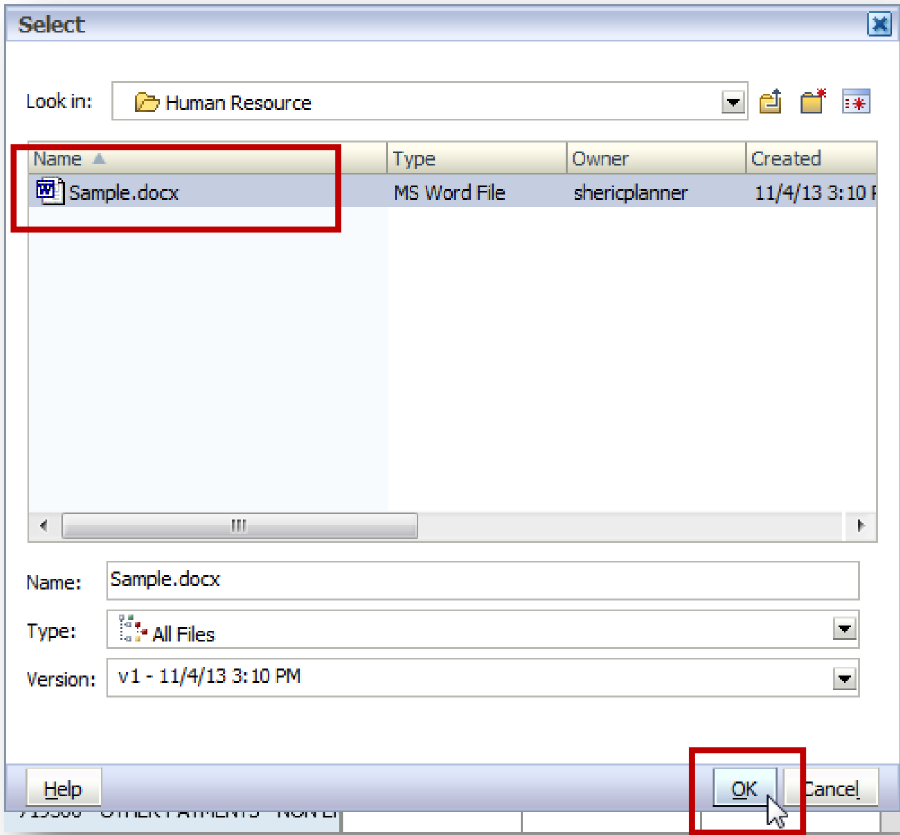
3. Click the **Browse** icon from the Add/Edit Document window.



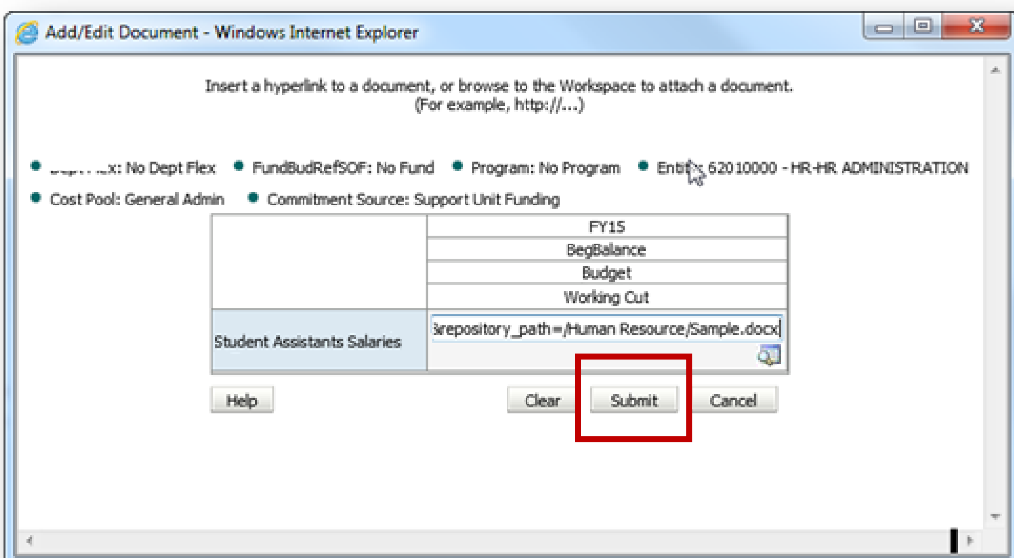
4. **Double-click** your folder to open it.



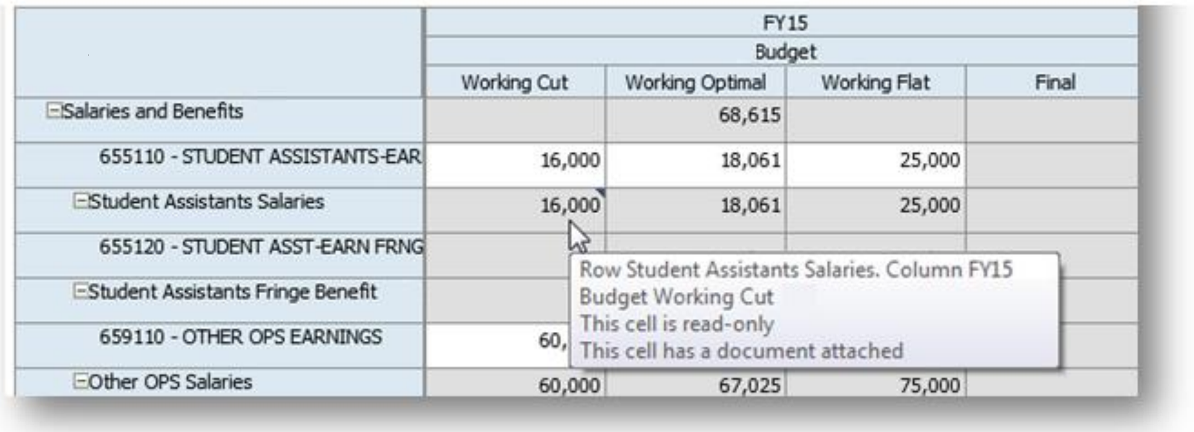
5. **Select** the desired file and click **OK**.



6. Click **Submit** on the Add/Edit Document window.



7. Scroll down and confirm the file is attached. You will see an icon in the upper, right corner of the cell.

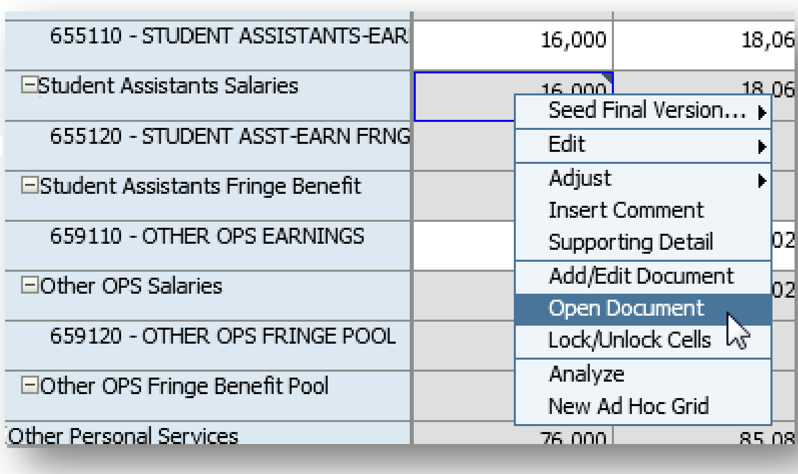


NOTE: When you mouse over the cell, you will also see a message indicating a document is attached.

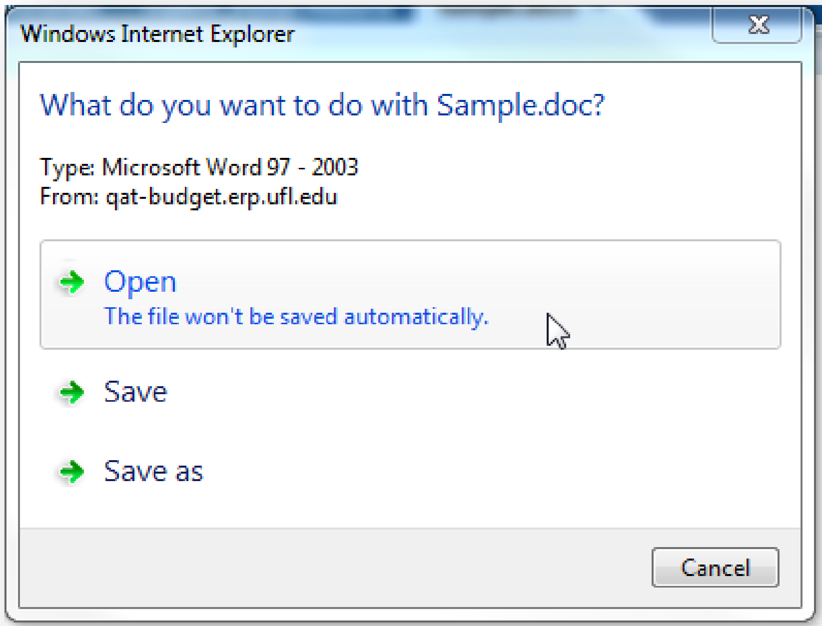
Opening Documents

1. **Right-click** on the cell that contains the document you want to open.

2. Click the **Open Document** option.



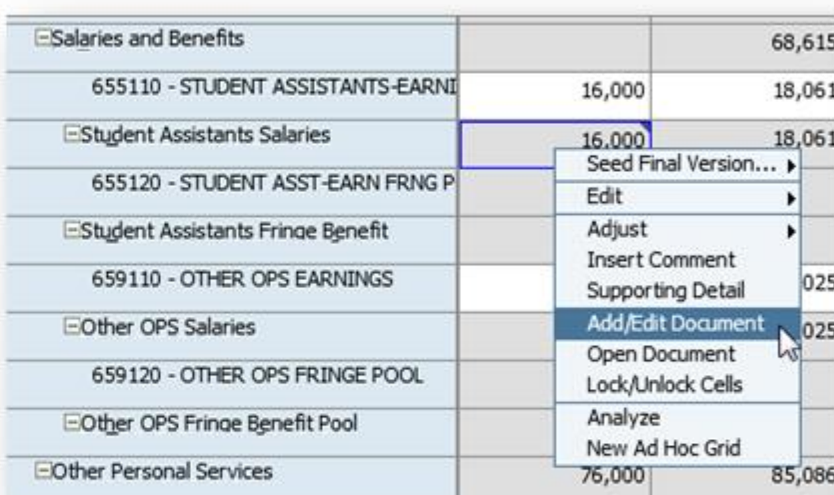
3. Click **Open**.



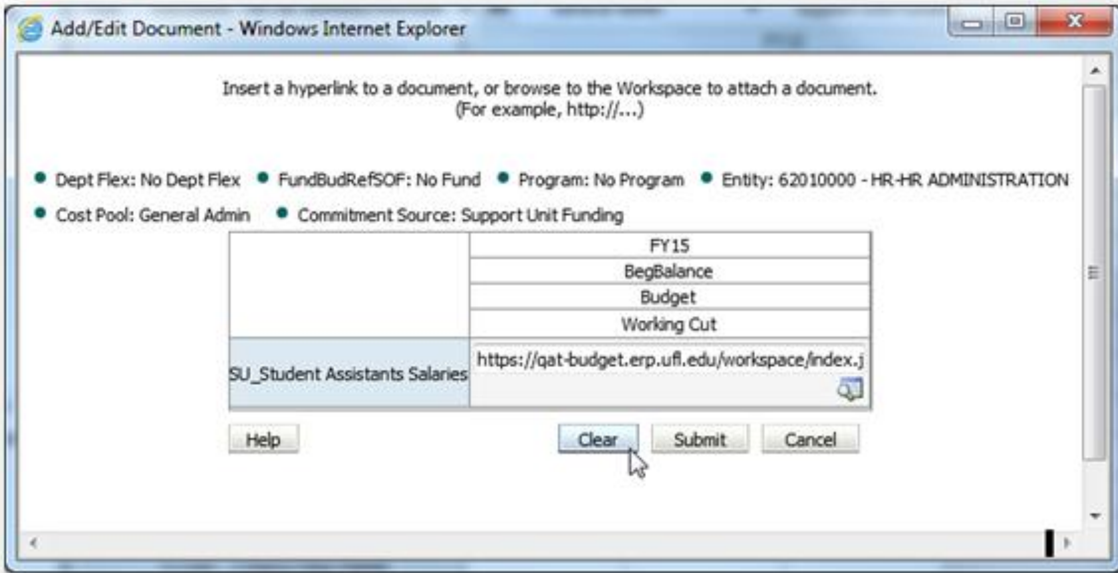
NOTE: If the document is Excel file, the file will open in Excel. You will see login screen popup (it may pop up a few times), Click "Cancel", the file will open in Excel. Open document function doesn't always work. Enterprise Systems is aware of this issue and working on the resolution.

Removing Documents from the Worksheet

1. **Right-click** the cell that contains the document you wish to remove.
2. Click the **Add/Edit Document** option.

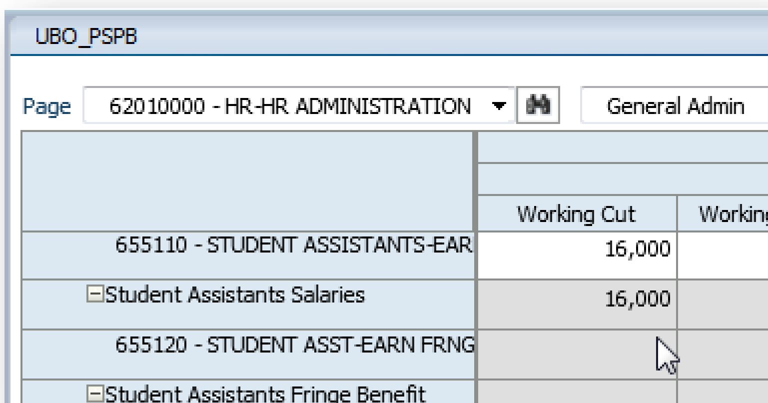


3. Click the **Clear** button from the Add/Edit Document window.



4. Click the **Submit** button.

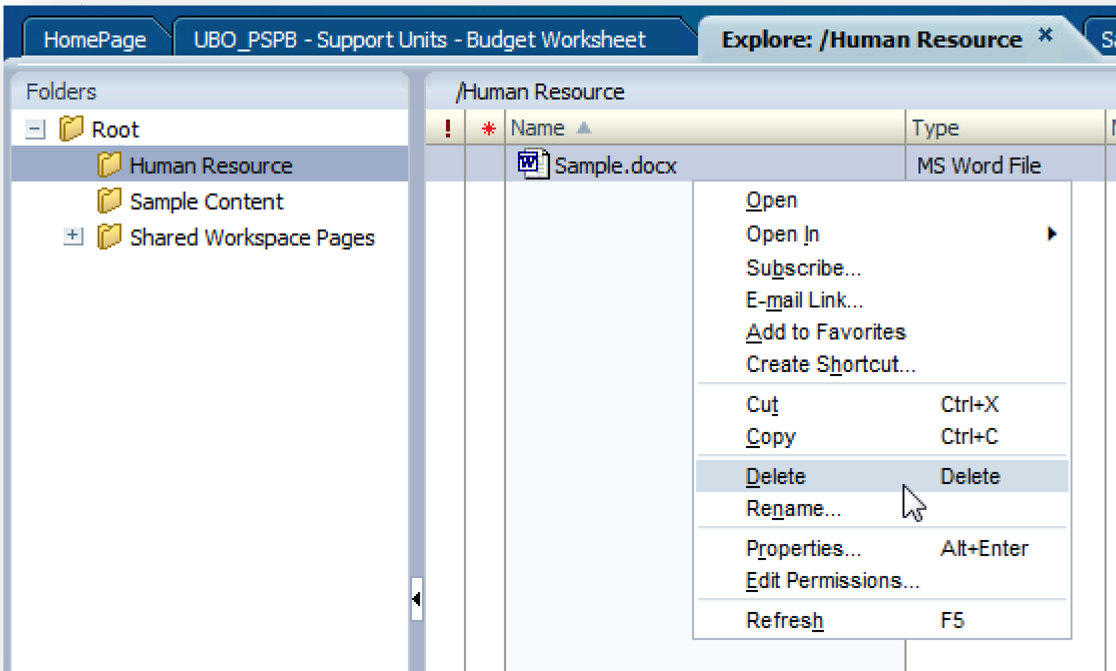
5. Scroll down and confirm the file has successfully been removed.



Deleting Documents from Hyperion

1. Click the **Explore** button from toolbar.

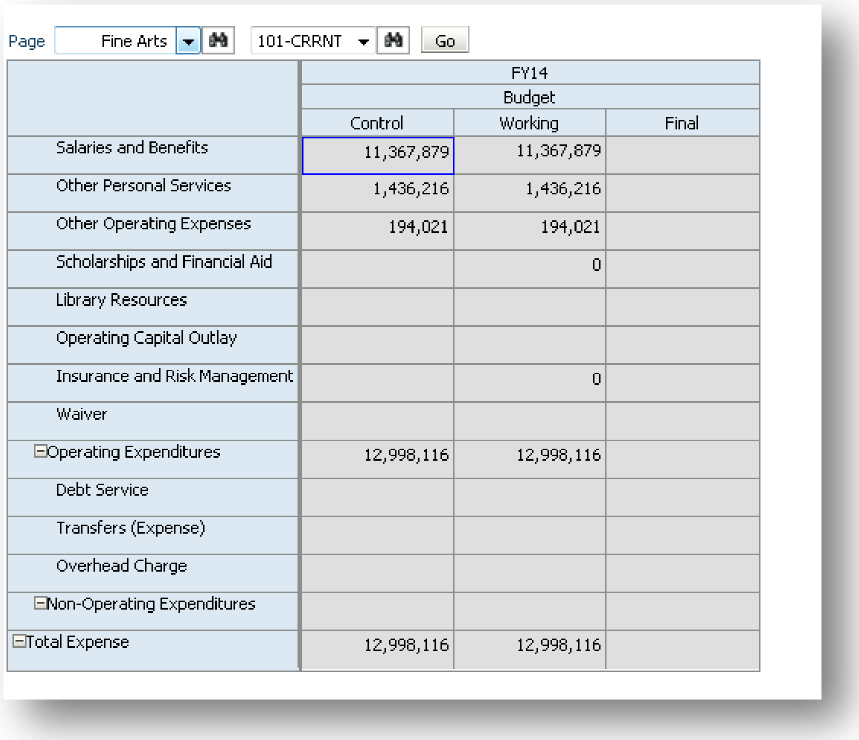
2. **Open** your folder, **right-click** the file and choose **Delete**.



NOTE: You can attach many types of documents such as Excel, Word, PDF, etc. Documents can be attached to level 0 member or parent member.

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	

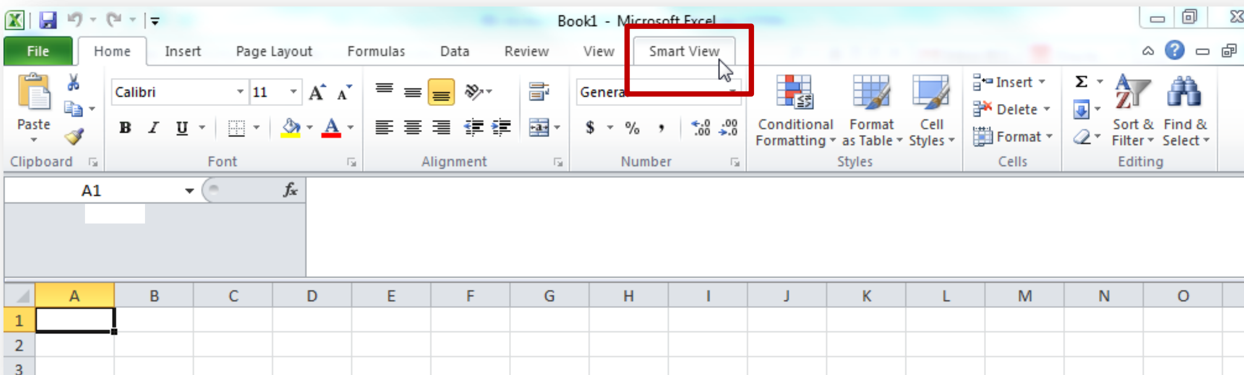
If they do not equal, spread adjustments will need to be made prior to submitting to CFO.

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.

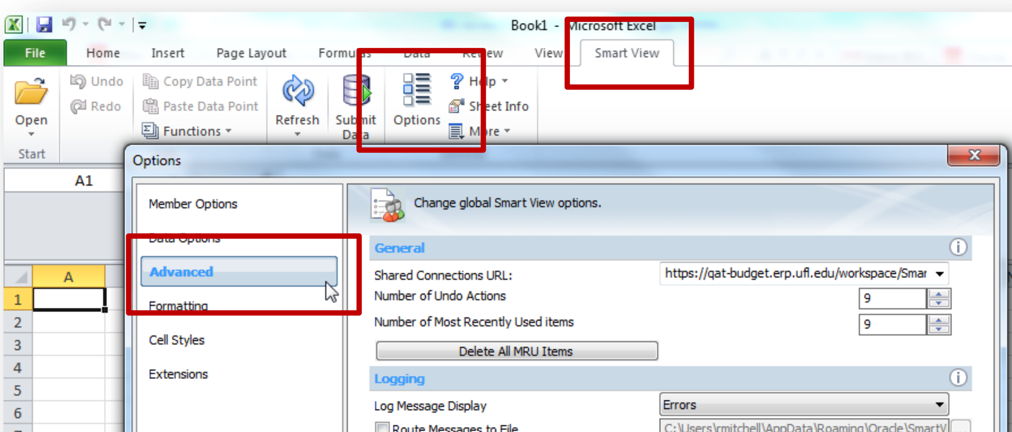
1. Open Excel and verify you can see a **Smart View** tab at the top of the application window.



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.

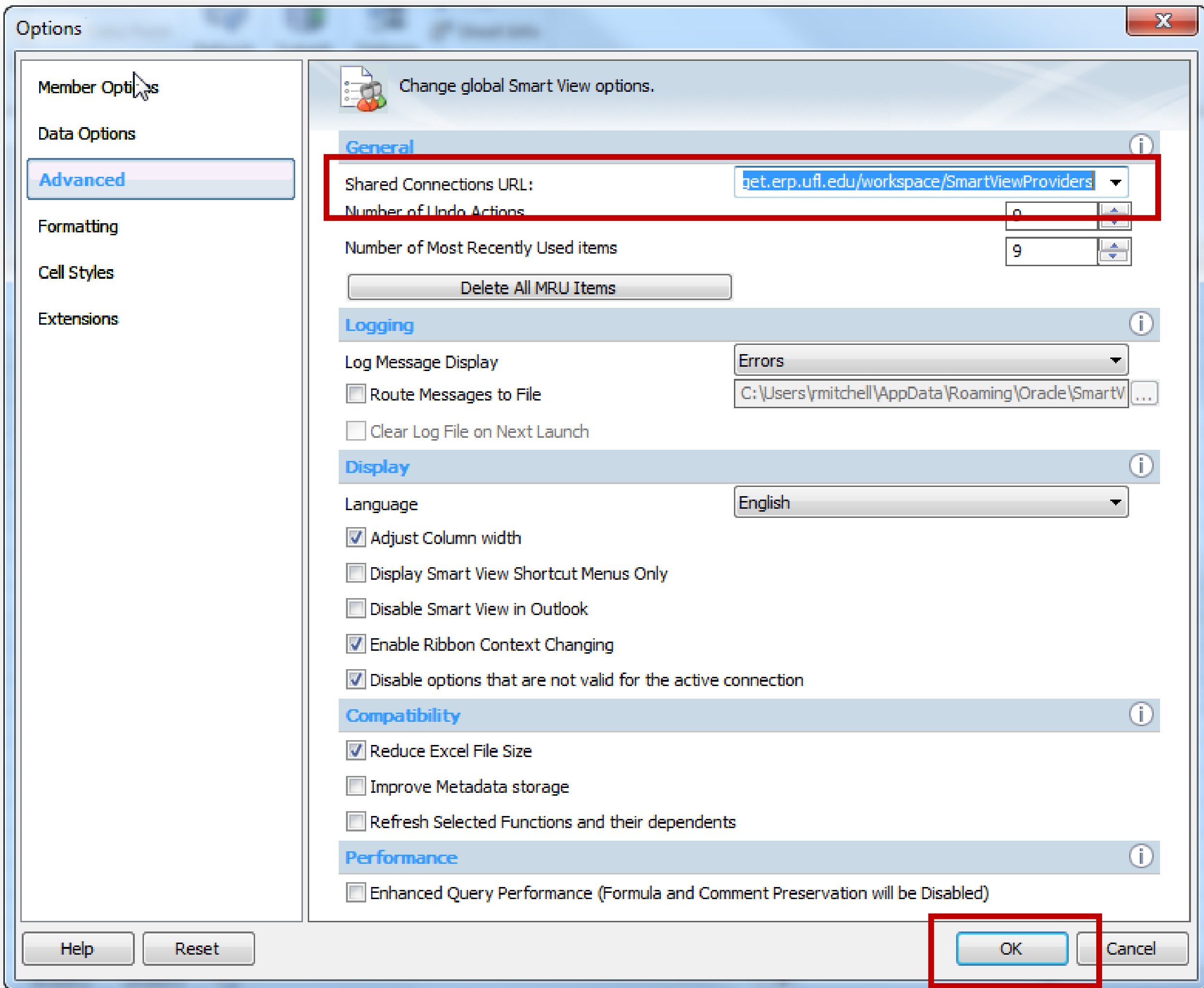
1. Click the **Smart View** tab, click the **Options** button and then select **Advanced**.



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

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

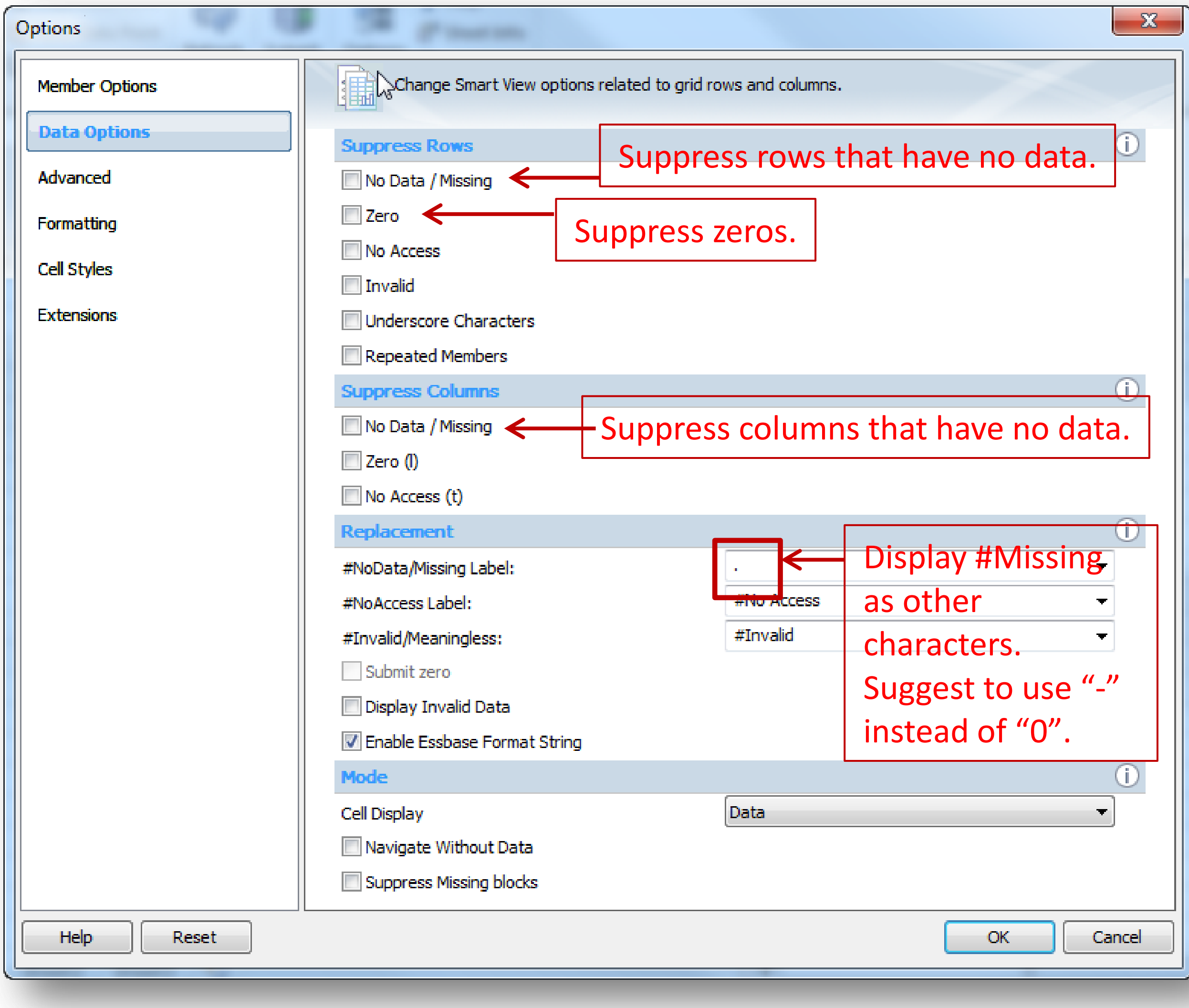
3. Click **OK**.



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.

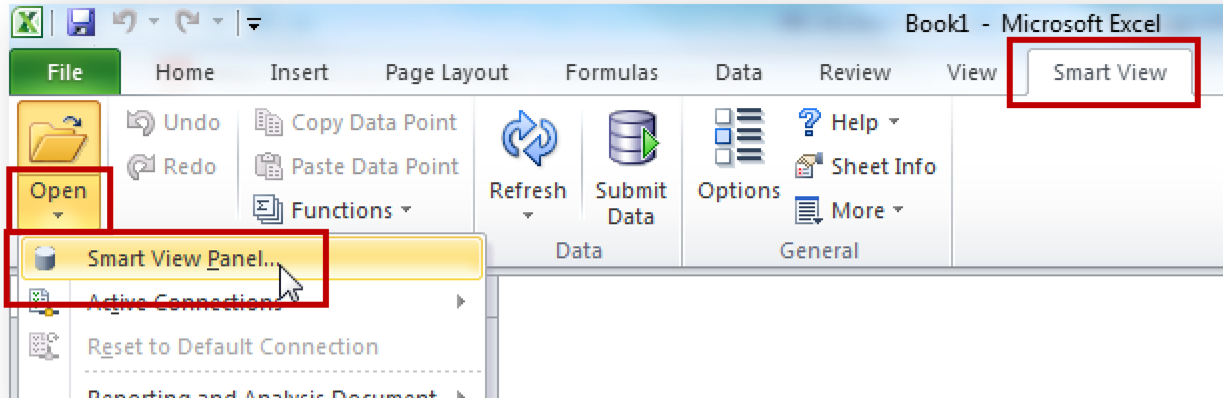
1. Click the **Smart View** tab, select **Options**, and select **Data Options**.



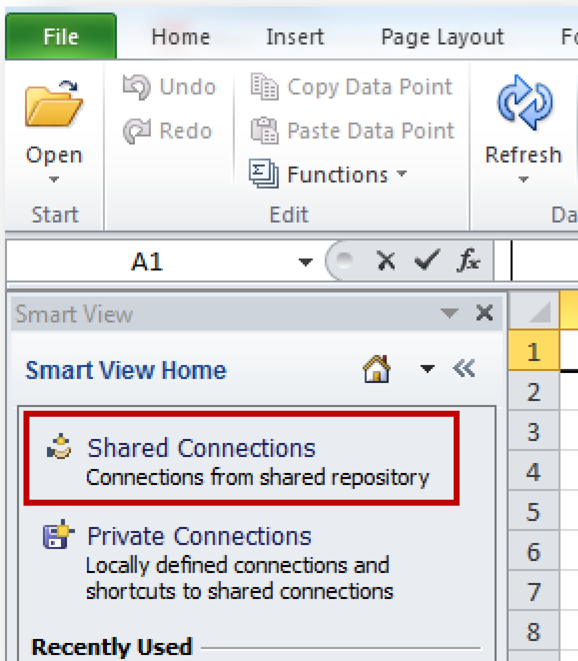
Connecting to Hyperion in Smart View

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

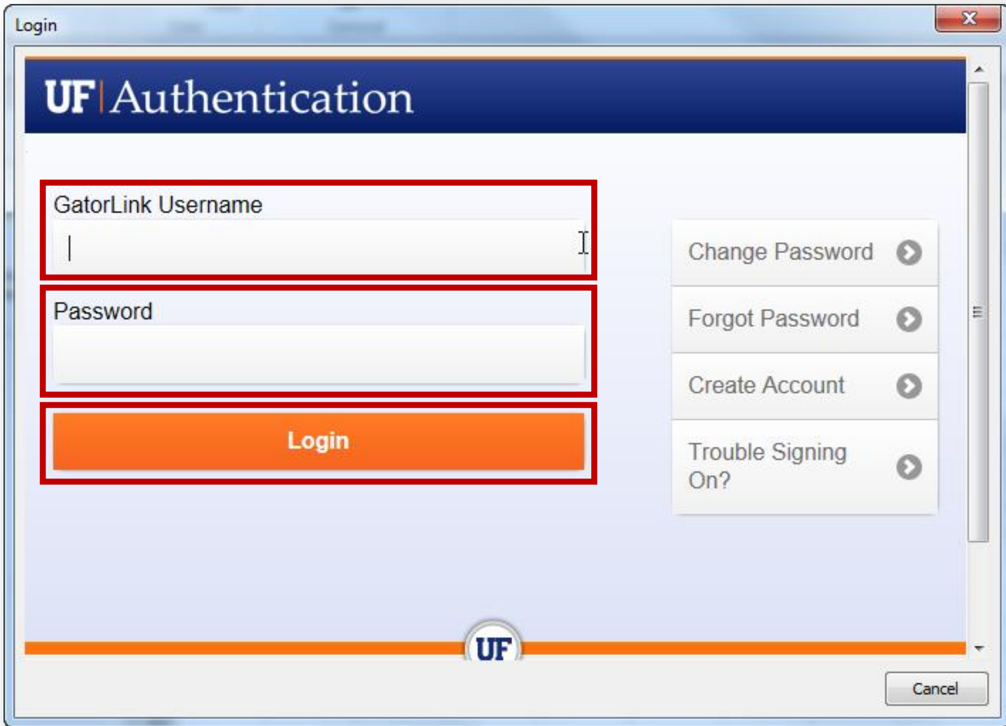
1. Click the **Smart View** tab, click the **Open** button, and then click **Smart View Panel**.



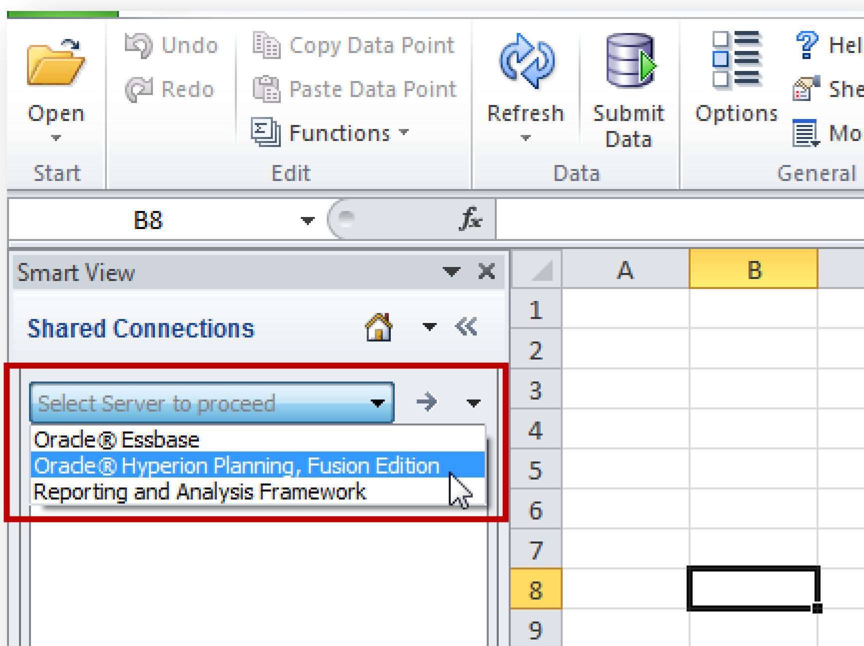
2. Select the **Shared Connections** option from the Smart View Home panel.



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



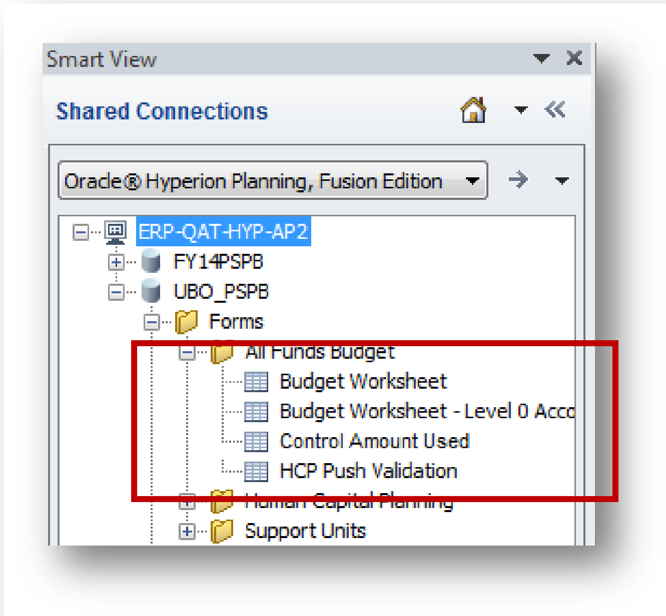
4. Select “**Oracle Hyperion Planning, Fusion Edition**” from the Shared Connections Select Server drop down field.



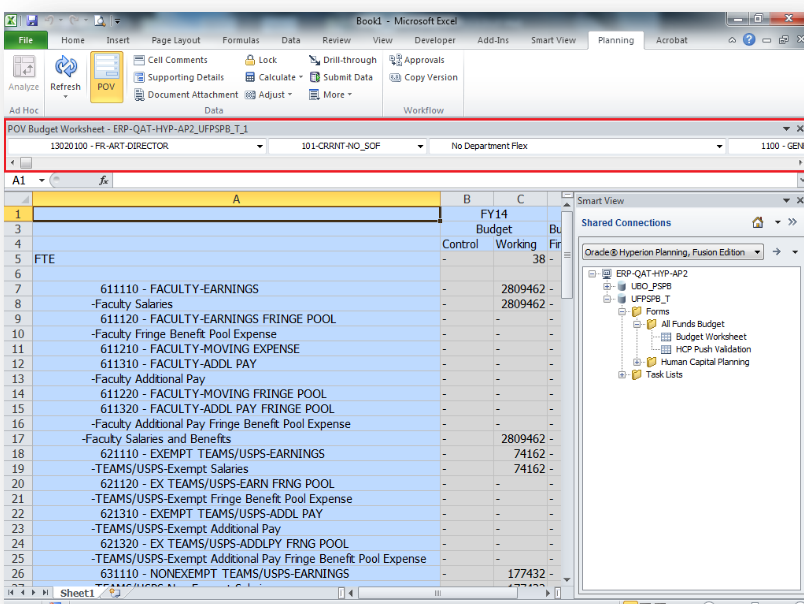
You should see the Hyperion server at the top of the Shared Connections panel.

5. Expand each level as follows: **UBO_PSPB** > **Forms** > **All Funds Budget**.

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.

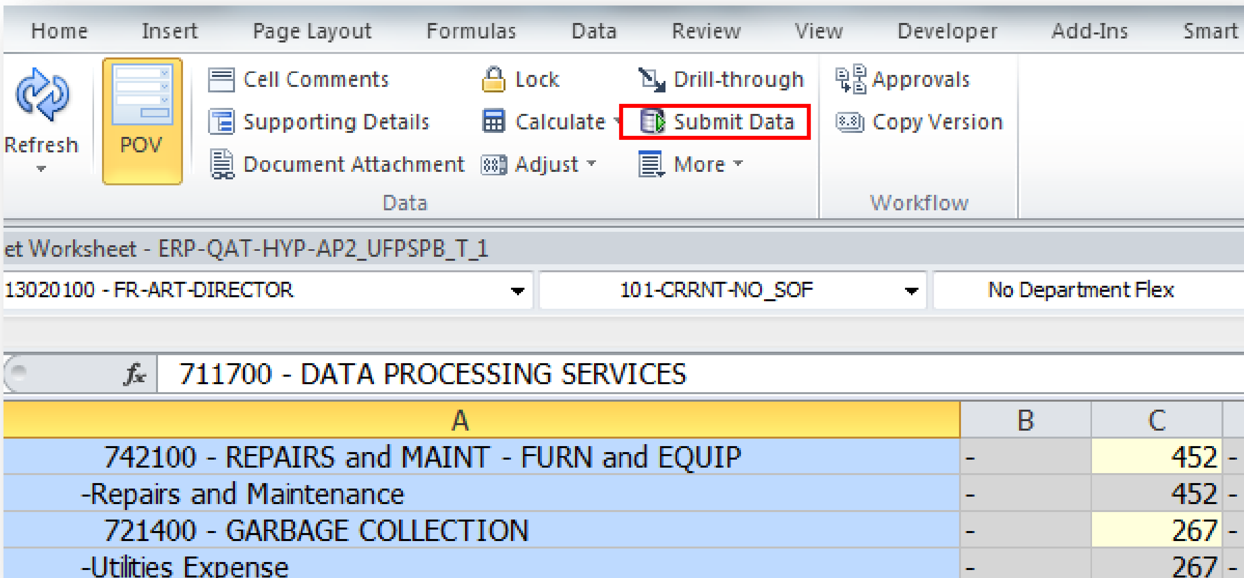


8. You are encouraged to use the Smart View forms in the same order as you did in Hyperion. Please refer to procedures HCP Push Validation, Budget Worksheet or Budget Worksheet-Level 0 Accounts as needed.

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 for all three budgets (Working Flat, Working Cut (if required) and Working Optimal), 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

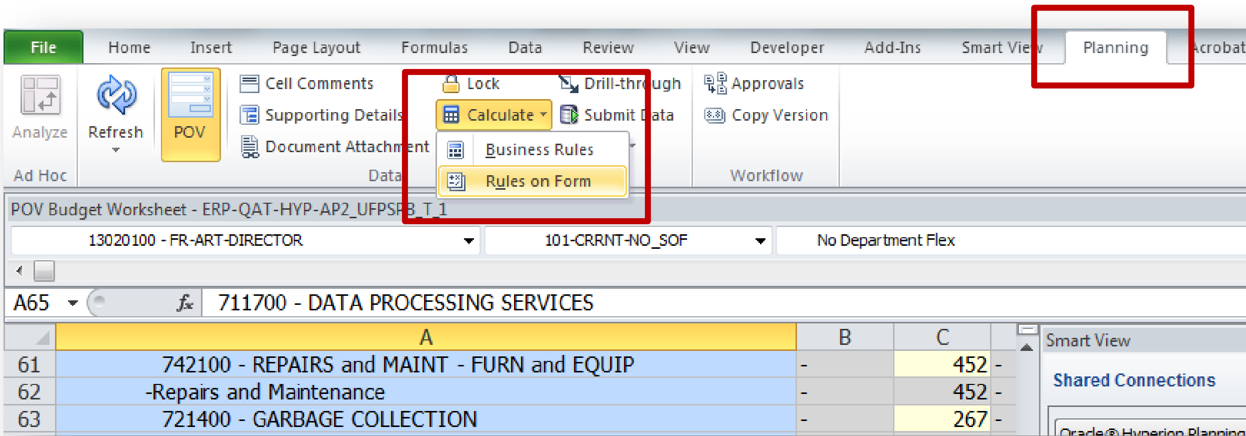
The copy, paste and cut function are the same as those in Excel.

Adding Missing Accounts

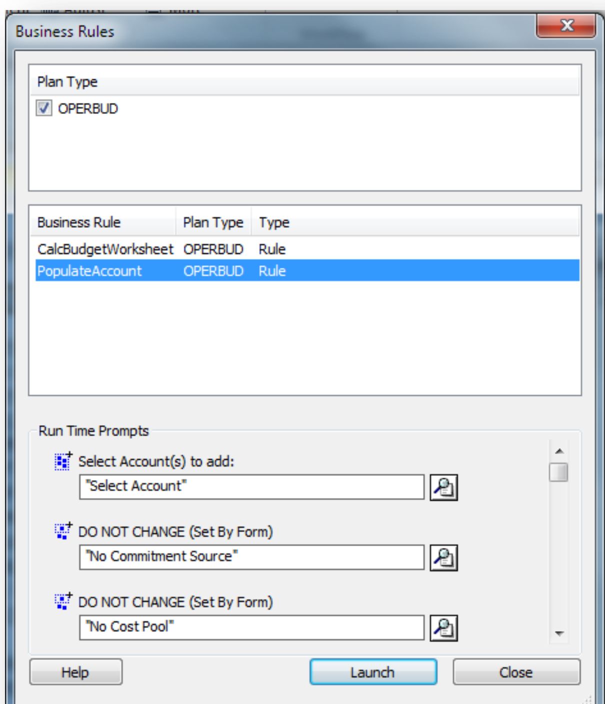
The adding missing accounts procedure allows you to add accounts that were not previously used but will be needed and used in the future.

1. From the **Planning** tab, click the **Calculate** button on the Smart View ribbon.

2. Click **Rules on Form**.



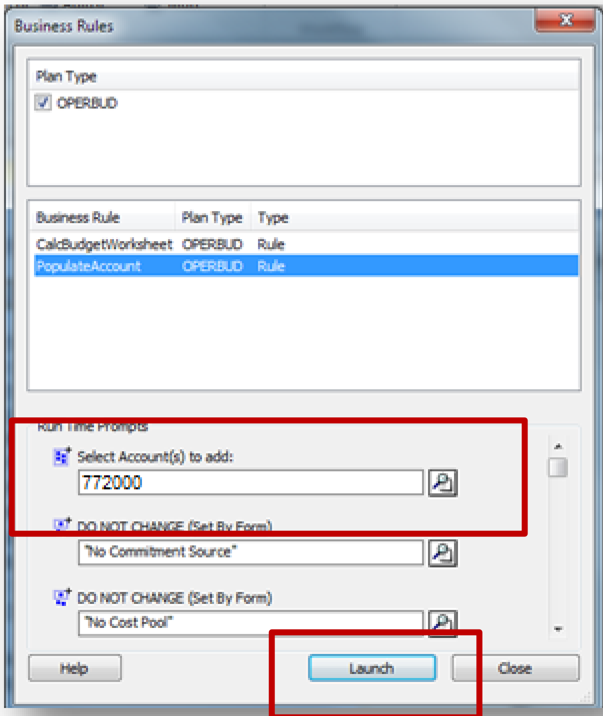
3. Click the **PopulateAccount** Business Rule.



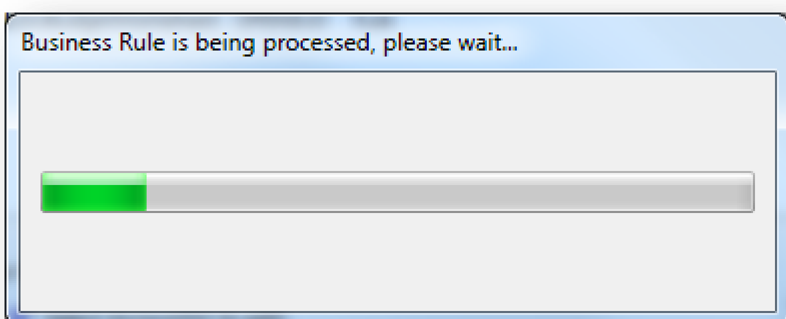
In this example, we will use Account Code 772000.

4. Enter the appropriate Account code in the Select Accoun(s) field.

5. Click the **Launch** button.

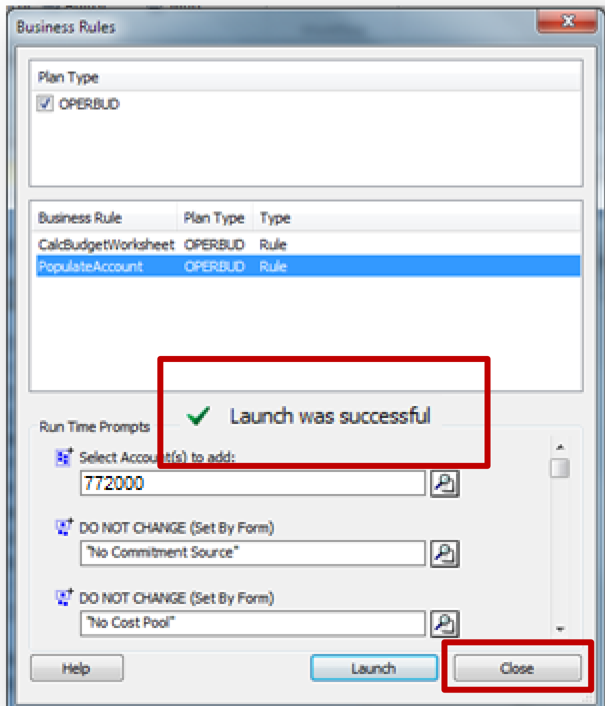


This process may take a little while to run.

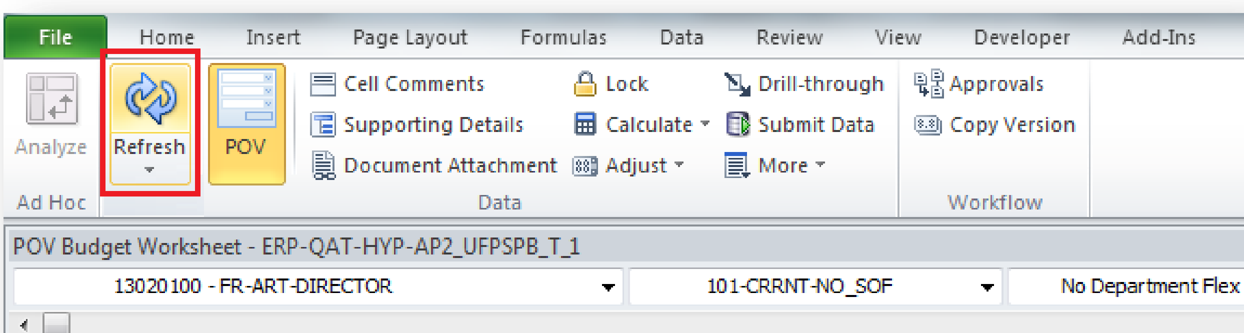


6. **Confirm** the launch was successful by noting the “Launch was successful” message that appears within the Busines Rule window.

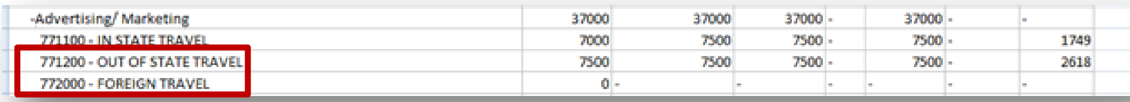
7. Once this message appears, click the **Close** button.



8. Click the **Refresh** button on the POV toolbar.



9. 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 visable (as long as yo did not suppress zeros in your user preferences) for the current fiscal year.

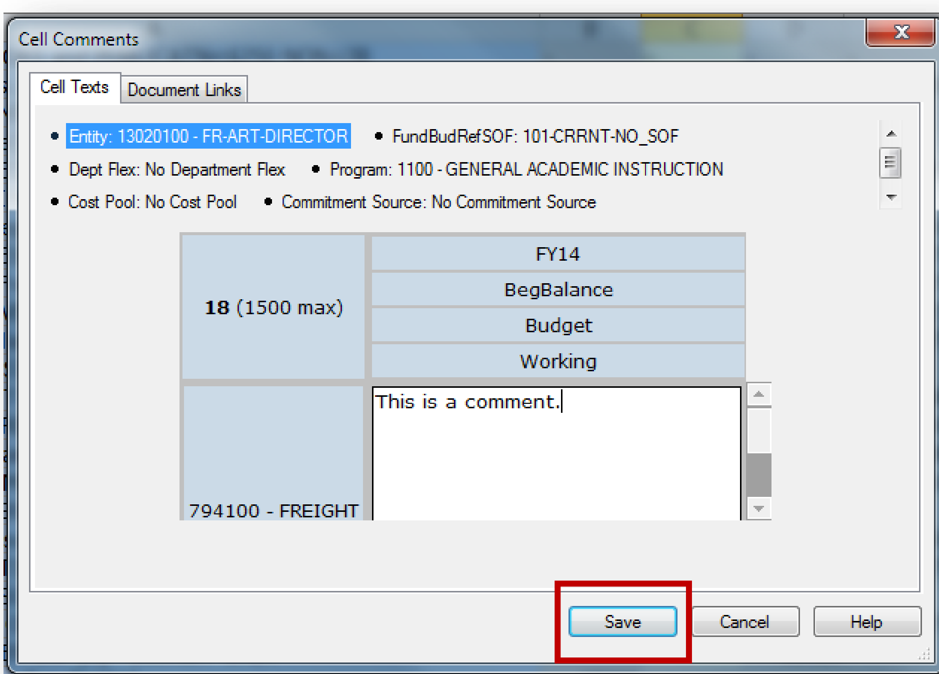
Adding Comments

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

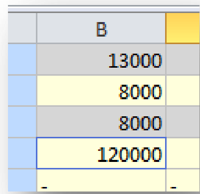
2. Hover over the Smart View menu option and click Cell Comments from the secondary menu.

3. Enter comment into the Cell Comments window.

4. Click the **Save** button.



5. **Confirm** the cell contains the comment by noticing the blue outline.

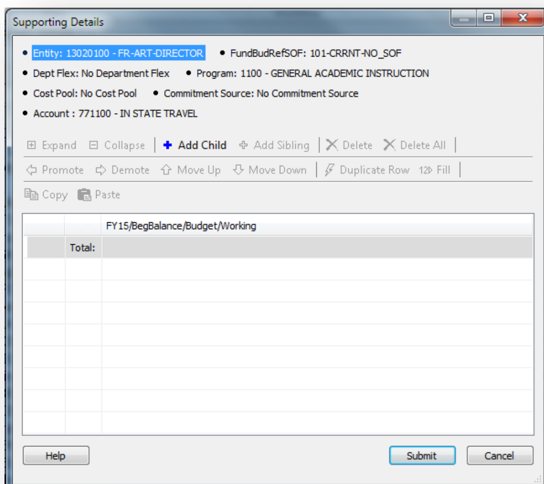


Adding Supporting Details

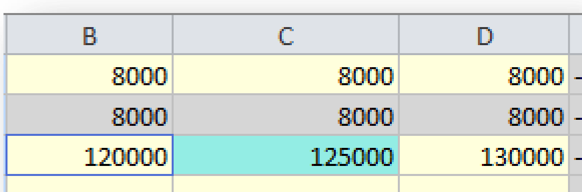
1. Right-click the cell to which you wish to add supporting details.

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.

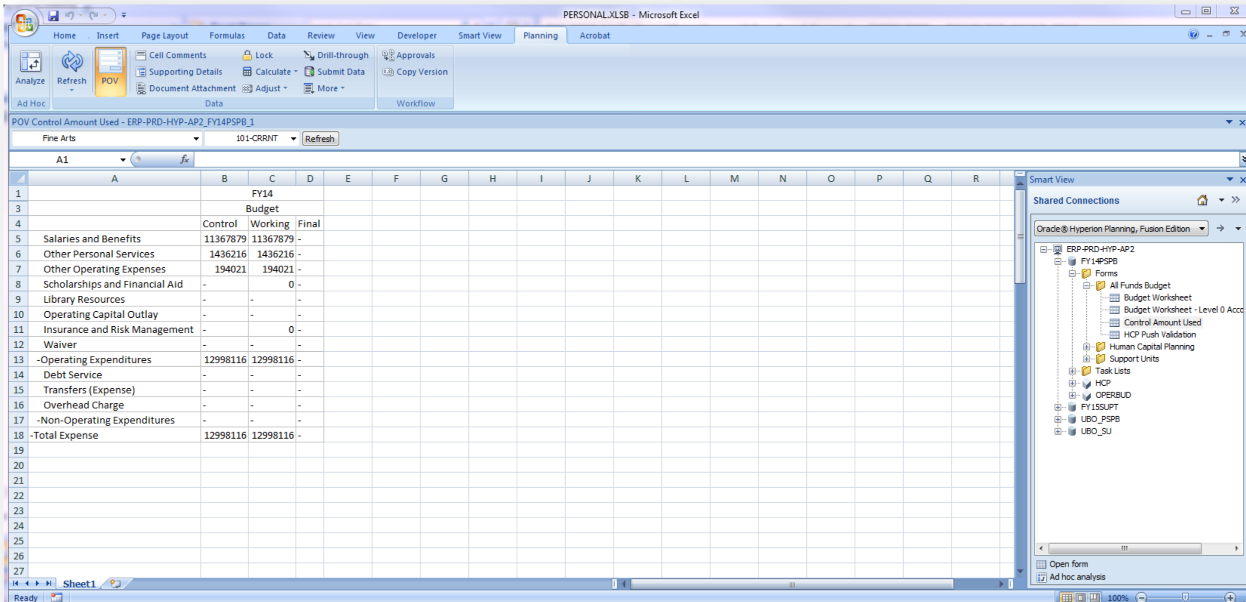


4. **Confirm** the cell contains the supporting details. The cell will be highlighted blue/green.



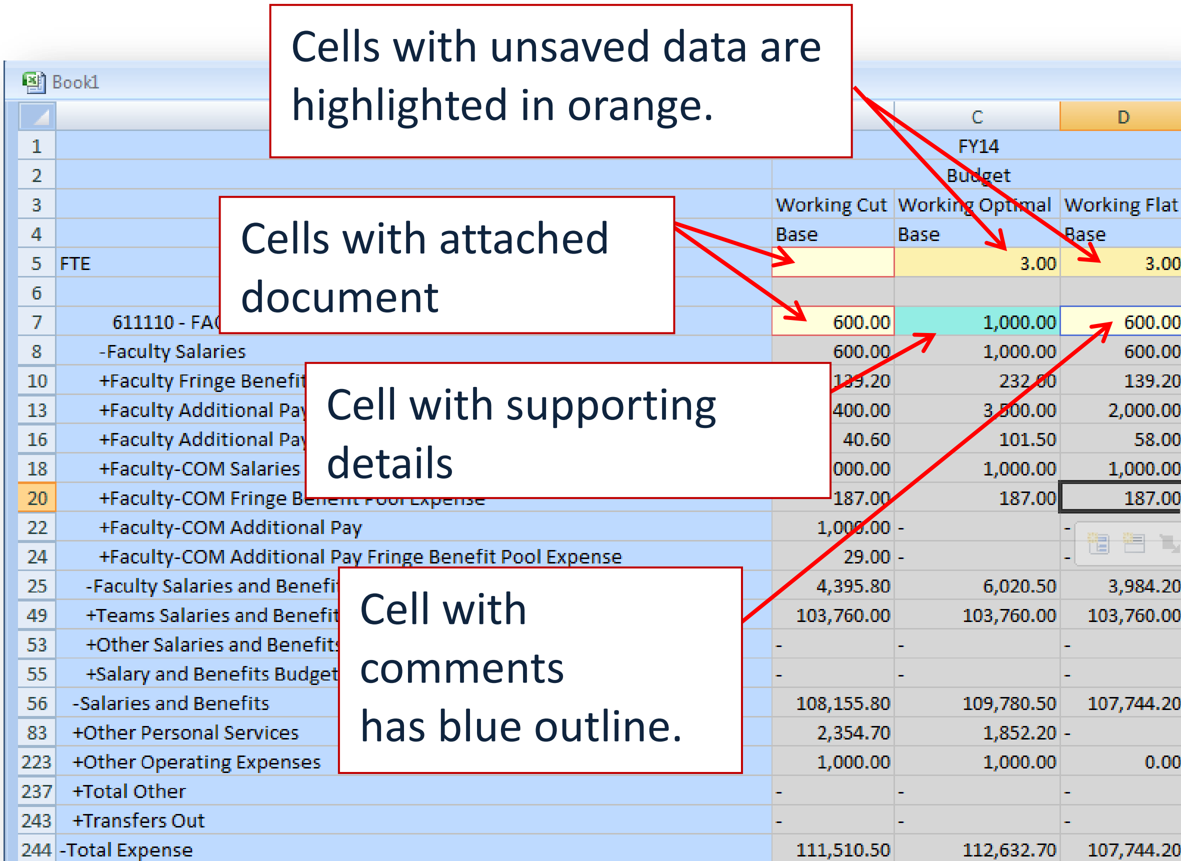
Control Amount Used

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.



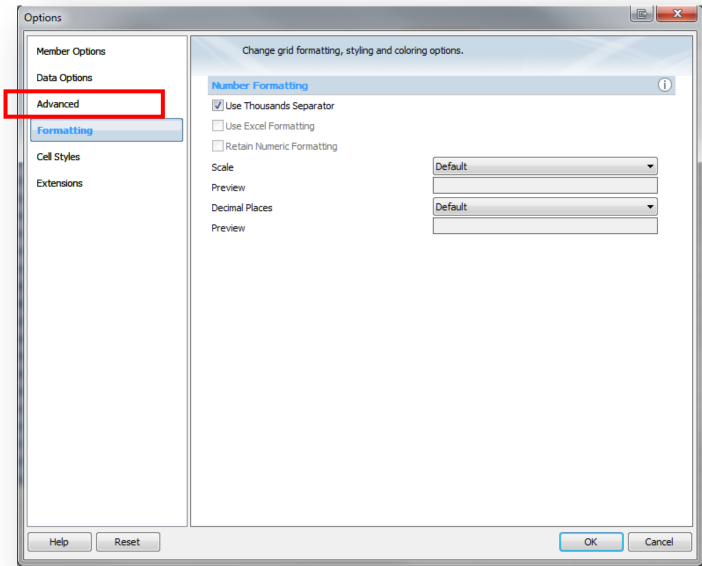
If they do not equal, spread adjustments will need to be made prior to submitting to CFO.

Below screenshot shows the color coding for cells with comments, supporting details, and unsaved data. Attaching documents using Smart View does not work if you need documents attached please do so within Hyperion.

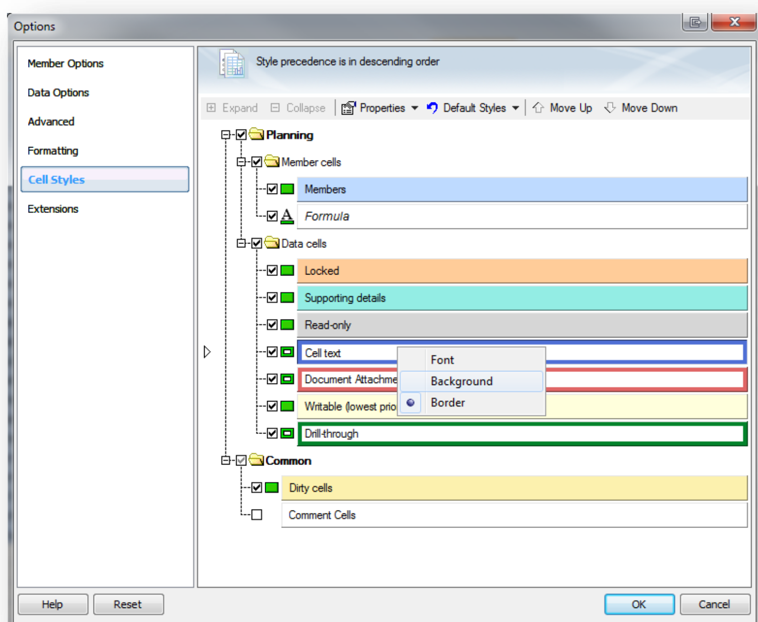


Cell Formatting

1. You can change the color coding in **Smart View** > **Options** > **Formatting**, uncheck “Use Excel Formatting”.



2. Go to **Cell Styles**, **right-click** on the formatting to change the **font**, **background** or **border**.



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. Only the GL accounts that have actual expenditure data in FY12 and FY13 are kept in UBO_PSPB. A few other GL accounts are also kept even though there is no actual expenditure data exists for FY12 and FY13. 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.