

ORACLE HYPERION PLANNING

USER TRAINING

University of North Texas

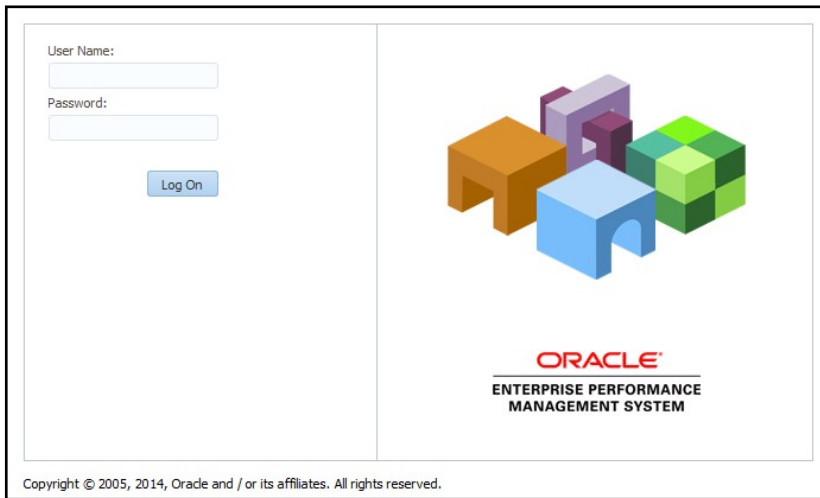
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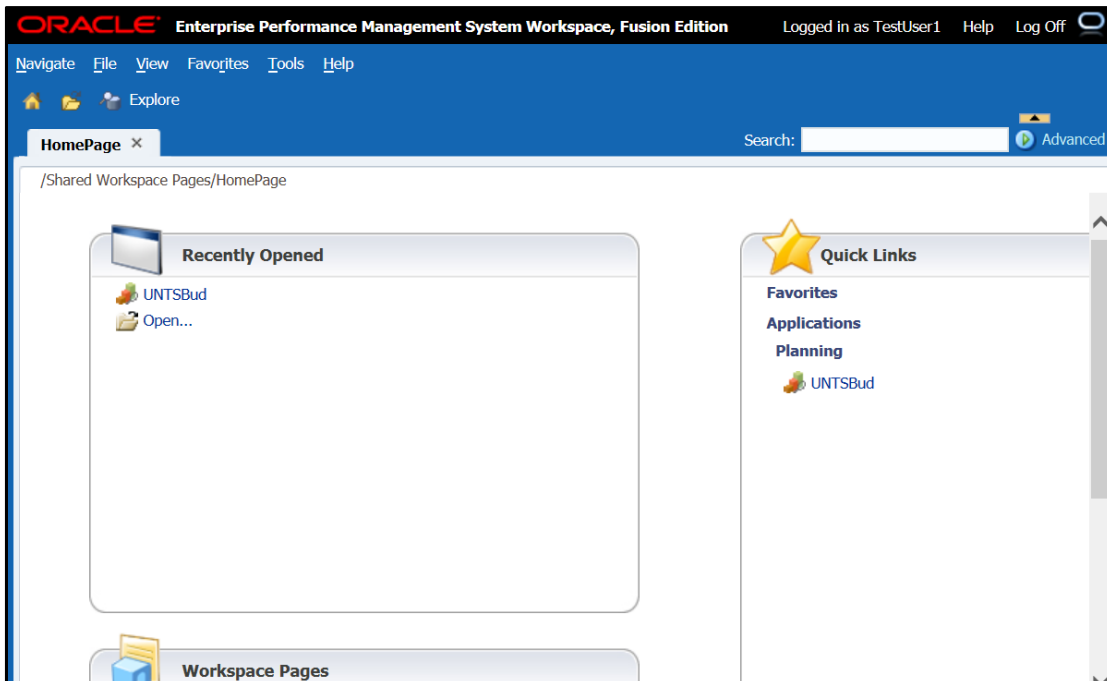
I. GETTING STARTED IN HYPERION PLANNING

A. ENTERING THE HYPERION BUDGET APPLICATION

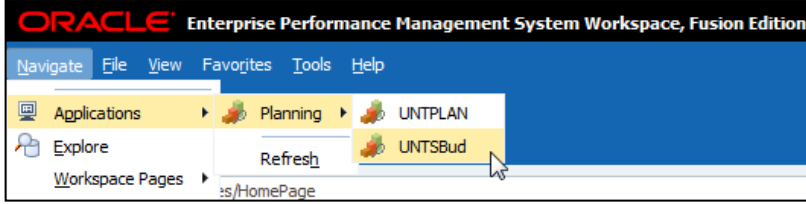
1. Open Internet Explorer or Firefox. DO NOT USE CHROME.
2. Go to the Oracle Hyperion Planning website: <https://myepm.untsystem.edu/workspace/index.jsp>. The link is available on the budget website: <https://budget.unt.edu/2019-budget-planning>.
3. The following screen will appear:



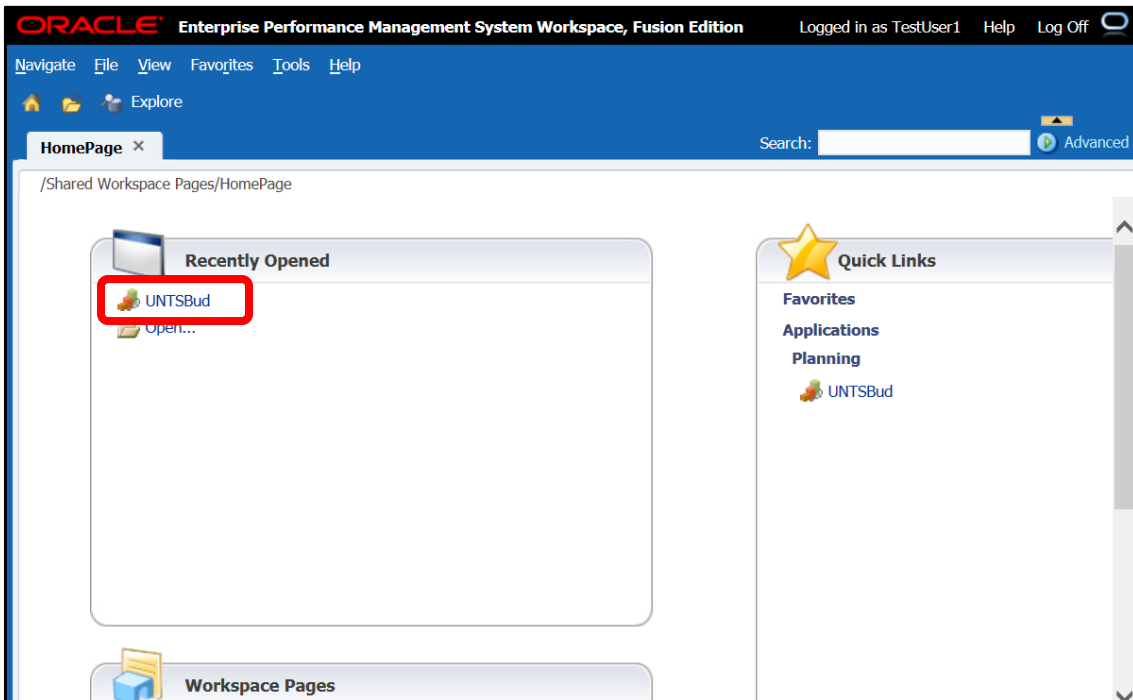
4. Enter your network ID and password and click “Log On.”
5. The HomePage will display.



6. From the HomePage tool bar, select Navigate > Applications > Planning > UNTSBud



The UNTSBud planning application will be automatically added to the “Recently Opened” documents area of your HomePage once you have accessed the application.



NOTE: The application timeout for inactivity is 60 minutes.

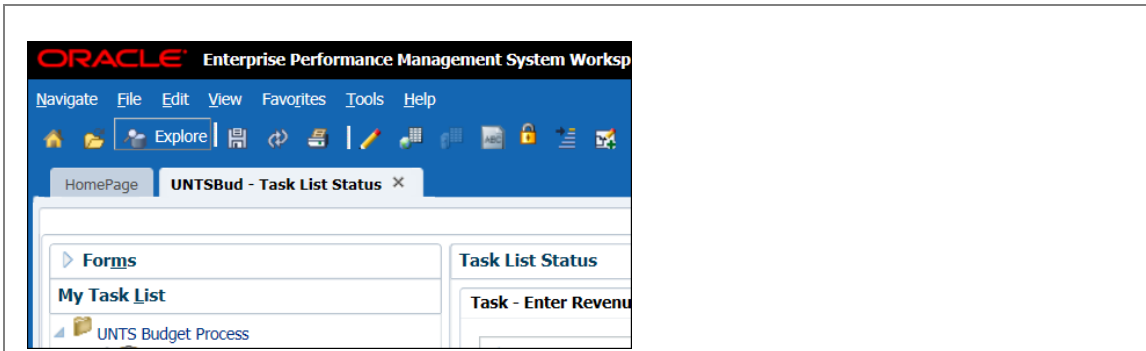
B. SETTING USER PREFERENCES

Users have the ability to define preferences or use the default application settings.

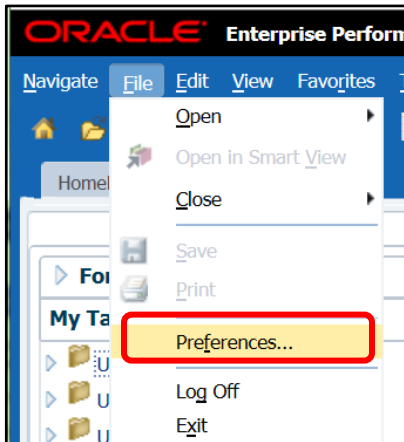
To view or change **Planning** display settings:

1. Open the **UNTSBud** application.

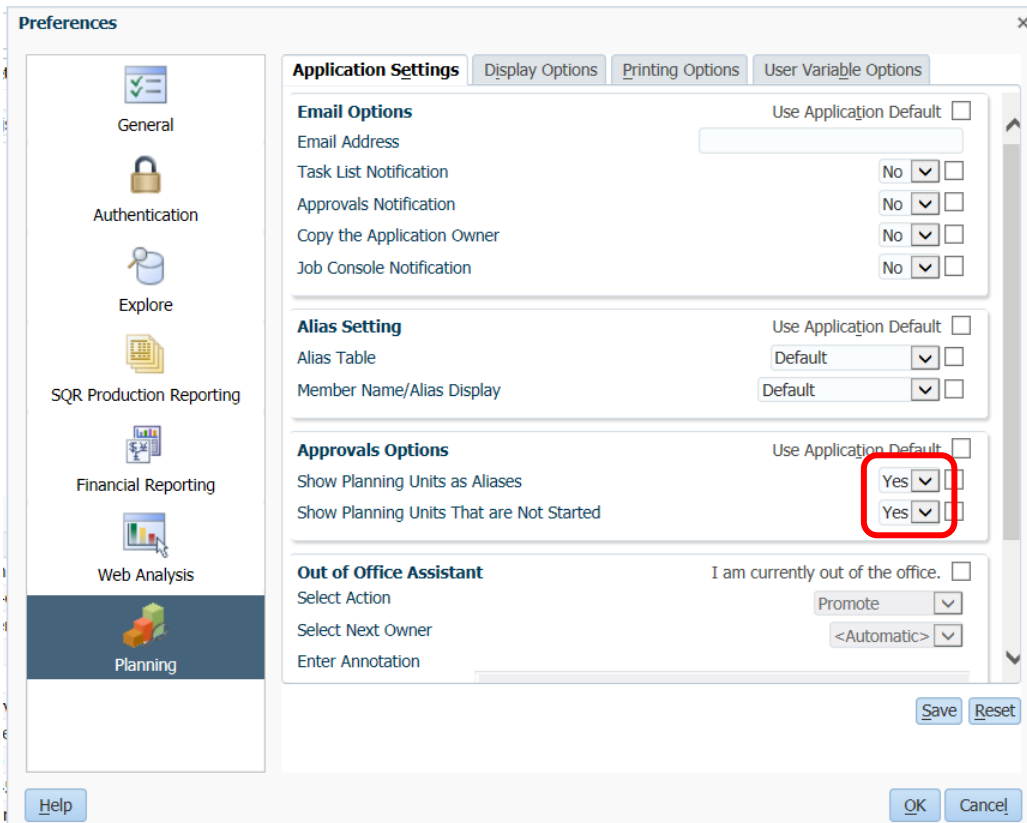
NOTE: You must be on the UNTSBud tab in order to define your preferences. Otherwise a blank page will appear that states: “Please open the Planning application to set application preferences.” If the UNTSBud tab option does not appear, then that means the UNTSBud application is not open. Refer to section “II.B. Access the Budget Application” within this training document for directions on accessing the budget application.



2. In the toolbar, select **File > Preferences**



3. A pop-up screen will appear. Select **Planning > Application Settings**. In the "Approvals Options" section, change both options to "YES."



- Click **Save**.



NOTE: You must click “**Save**” for your preferences to save. If your preferences do not appear to be saving, make sure you’ve selected “**Save**.” If they still do not appear to be saving, log out of Hyperion Planning and then log back in.

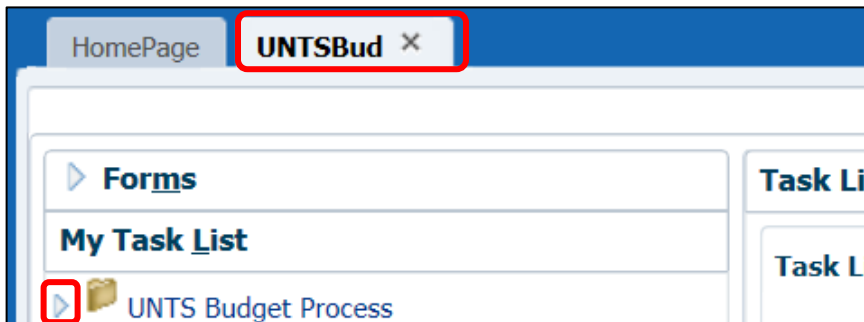
- A message will appear that says “User Preferences have been saved.”
- Select “**OK**” to close the Preferences screen.

II. BUDGET PROCESS

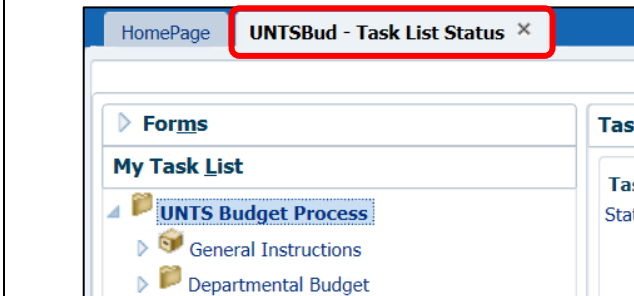
A. STEP 1: ENTER REVENUE, EXPENSES, & TRANSFERS

1. ACCESS THE ENTER, REVENUE, EXPENSES, & TRANSFERS SPREADSHEET

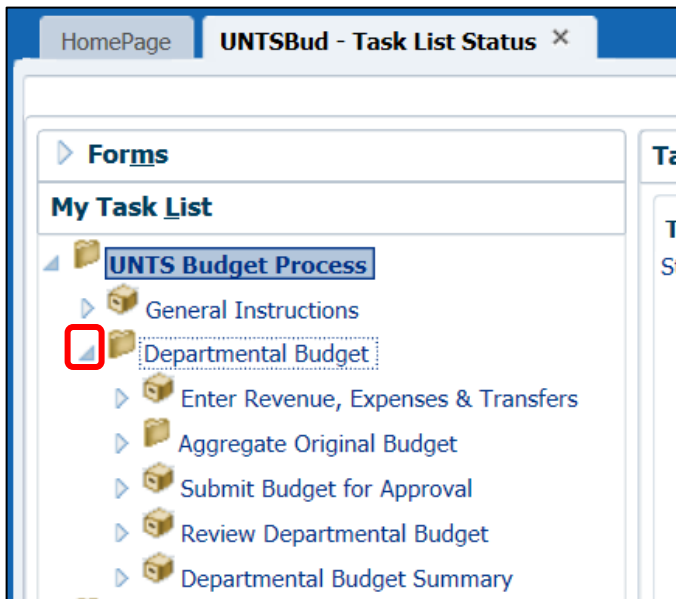
- From the left-panel, click the **UNTSBud** tab. Expand the UNTS Budget Process  Folder by clicking on the  arrow next to the folder.



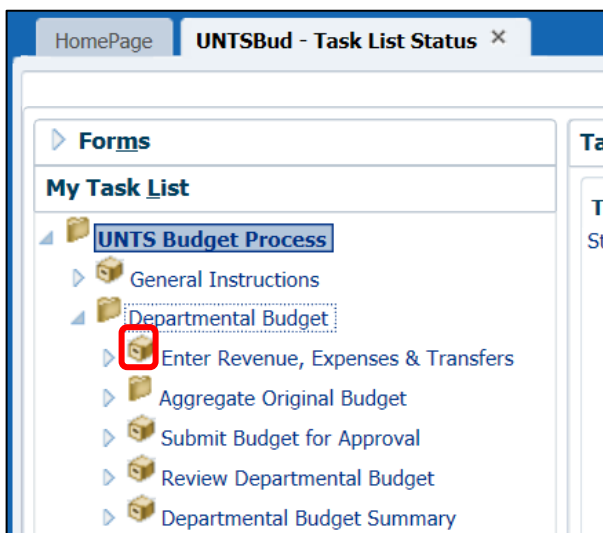
NOTE: The **UNTSBud** tab will change from **UNTSBud** to **UNTSBud – Task List Status** after you select the folder.



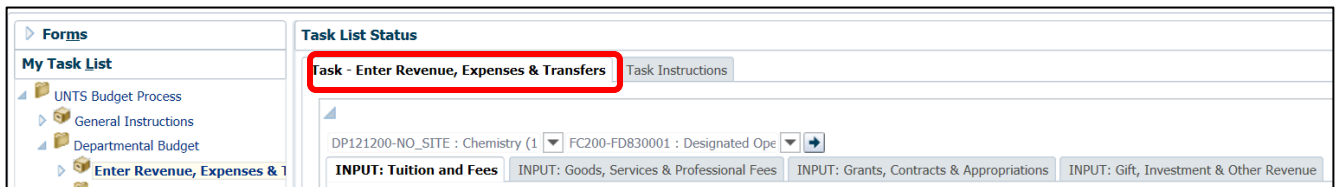
- Expand the **Departmental Budget** folder  by clicking on the arrow  next to the folder.



3. Open the **Enter Revenue, Expenses & Transfers** bin  by clicking on the bin  icon.





4. The **Task – Enter Revenue, Expenses, & Transfers** screen will open on the right side of the screen. The **Task – Enter Revenue, Expenses, & Transfers** spreadsheet is where budget adjustments are entered.



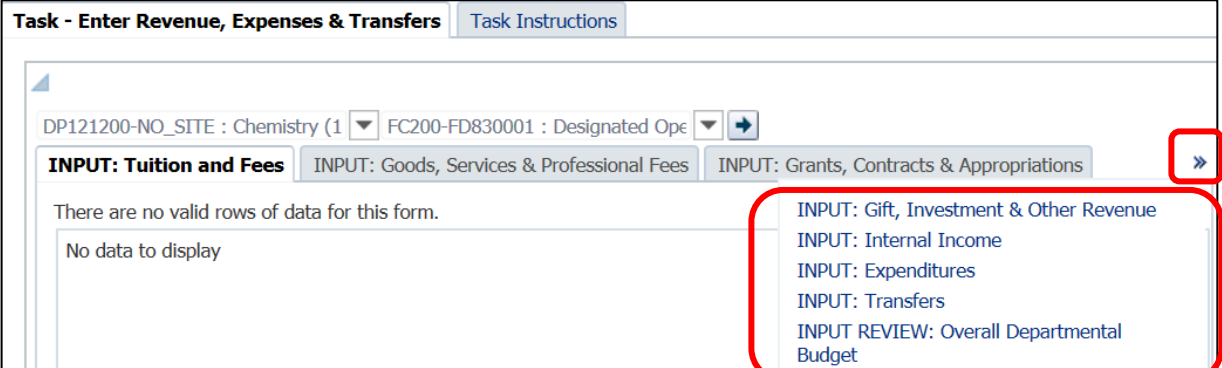
The **Task – Enter Revenue, Expenses & Transfers** spreadsheet contains 8 sub-tabs.


- a. **INPUT: Tuition and Fees.** This is where budget adjustments to tuition and fees revenues are entered.

- b. **INPUT: Goods, Services & Professional Fees.** This is where budget adjustments to Goods, Services, and Professional revenues are entered.
- c. **INPUT: Grants, Contracts & Appropriations.** This is where budget adjustments to Grants, Contracts & Appropriations revenues are entered.
- d. **INPUT: Gift, Investment & Other Revenue.** This is where budget adjustments to Gift, Investment & Other revenues are entered.
- e. **INPUT: Internal Income.** This is where budget adjustments to Internal Income revenues are entered.
- f. **INPUT: Expenditures.** This is where budget adjustments to expenses are entered.
- g. **INPUT: Transfers.** This is where budget adjustments to revenues and expenses for transfers are entered.
- h. **INPUT REVIEW: Overall Departmental Budget.** This is a review tab. No adjustments may be entered here.

NOTE: **Some users may find that only a few tabs display, or no that no tabs display.** When this occurs, a double arrow icon  will appear to the right and/or left of the input tabs. Click on the double arrow icon  to view the drop-down selection box that lists all the tabs. Typically, adjusting the zoom settings will cause the tabs to appear.


Example: Some tabs display



The screenshot shows a window titled "Task - Enter Revenue, Expenses & Transfers" with a "Task Instructions" tab. Below the title bar, there are two dropdown menus: "DP121200-NO_SITE : Chemistry (1)" and "FC200-FD830001 : Designated Ope". Below these are three tabs: "INPUT: Tuition and Fees", "INPUT: Goods, Services & Professional Fees", and "INPUT: Grants, Contracts & Appropriations". A double arrow icon  is circled in red to the right of the tabs. Below the tabs, the text "There are no valid rows of data for this form." and "No data to display" is visible. A dropdown menu is open, listing the following options: "INPUT: Gift, Investment & Other Revenue", "INPUT: Internal Income", "INPUT: Expenditures", "INPUT: Transfers", and "INPUT REVIEW: Overall Departmental Budget".

Example: No tabs display

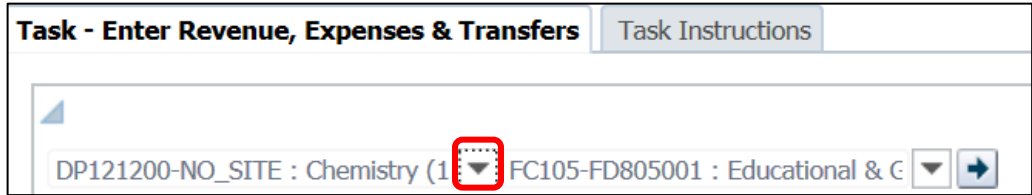


The screenshot shows a window with a dropdown menu: "DP151210-NO_SITE : Budget Office" and "FC200-FD880003 : Designated Ope". On the left side of the window, a double arrow icon  is circled in red. On the right side, another double arrow icon  is circled in red.

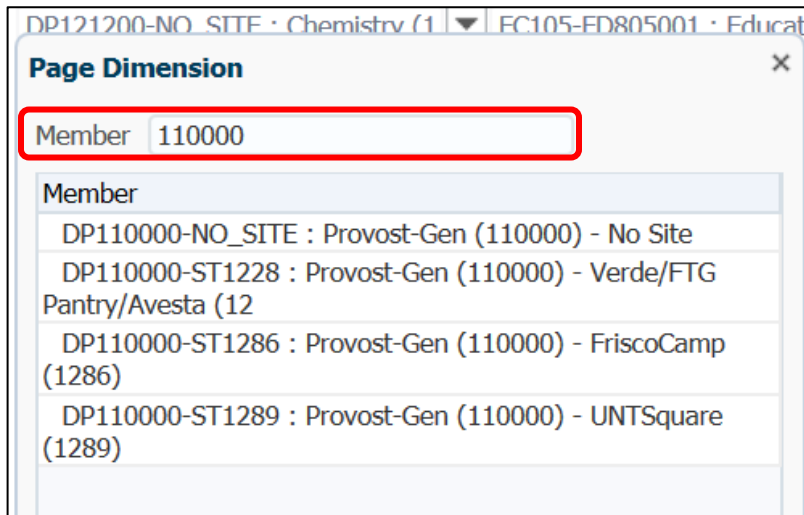
2. INPUT BUDGET ADJUSTMENTS

1. The first step of the budget process is to select the Org Dept/Site/Fund Cat/Fund to which you will be making adjustments. **Budgeting will only occur in Fund Categories 105 Education General, 120 Auxiliary, and 200 Designated Operating.**

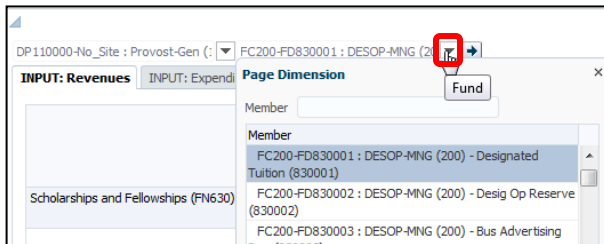
- a. Select a Department and Site. Only the departments you have access to are listed.
 - i. Click on the drop down arrow to view your available Department_Site options. The Department field is concatenated with the Site field. If a chartstring does not have a Site, then the Department will be concatenated with the place-holder "No_SITE." For example, DP121200-No_SITE.



- ii. Select the Department and Site combination from the drop down box. To limit the Department_Site options to a particular Department, enter that Department ID into the **Member** search box.



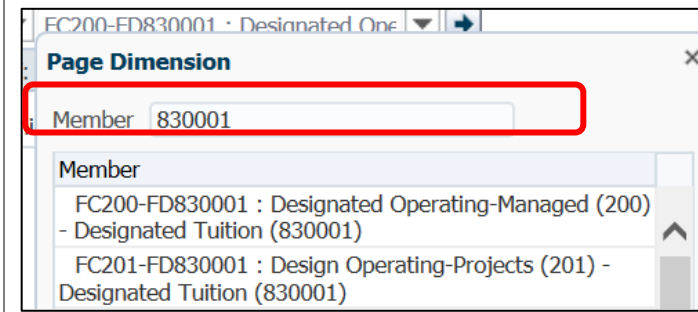
- b. Select a Fund Category – Fund combination from the Fund drop down arrow.




NOTE: All possible Fund Category – Fund combinations will be listed whether or not they apply to your department. You should only budget on the Fund Categories and Funds applicable to your department. Refer to the "List of Budgetary Org Dept, Fund, Fund Cat combos" on the Budget Website for a list of budgetary chartstrings on which budgeting will occur. New budgets (those being established for the first time) will not appear on the "List of Budgetary Org Dept, Fund, Fund Cat combos."


Budgeting will only occur within Fund Categories 105, 120, and 200.


NOTE: It's easier to find the correct Fund Category-Fund combination if you type in the Fund in the Member search field

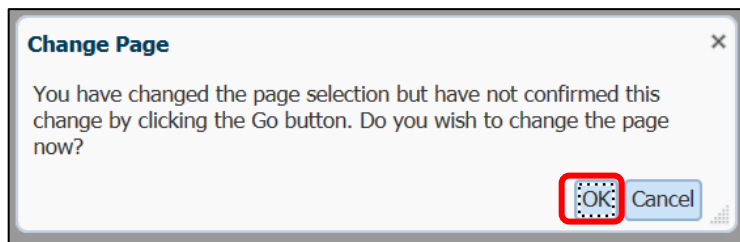



- c. Click the **GO** icon, , to apply your selection. The selection will apply to all the sub-tabs (revenues, expenses, transfers, and summary) not just to the sub-tab that you have open.



Upon selecting the **Go** icon, , you will automatically be directed to the **INPUT: Tuition and Fees** tab.

NOTE: After making a selection from the drop down box, if you click anywhere on the page you will receive a **Change Page** message. If you select the **Go** icon  you will not receive the message. If you receive this message select **OK**. By selecting **OK** the spreadsheet will populate with the new Fund Category-Fund selected.



Selecting **OK** or, alternatively, clicking the **Go** icon  is a critical step. The form does not update to the Department_Site or Fund_Fund Category until either the **GO** icon is clicked, or until **OK** is selected in the Change Page window even if the Department_Site and Fund Category_Fund are reflected in the selection.

2. Once you have selected the Org Dept/Site/Fund Cat/Fund which you will be budgeting for, the next step is to enter adjustments for revenues, expenses and transfers within the Budget Adjustment column.

NOTE: Budgets that share the same department, site, fund category, and fund budgeted together. You will have to break out program and purpose within the subtabs.

- a. **Select** the first tab, **INPUT: Tuition and Fees**. If you don't have any budgeted Tuition and Fees revenues then no revenues will appear on this tab. (If you don't have any budgeted Tuition and Fees and if you don't need to add any, then simply click on the next input tab: **INPUT: Goods, Services & Professional Fees**.)



- b. There are six value columns on each tab:

- The **FY17 Final Actual** column is pre-populated with revenues (or expenses) incurred during FY17. This is provided as a reference when planning your budget.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal

- The **FY18 Final Actual** column is pre-populated with revenues (or expenses) incurred fiscal year to date through 03/15/2018. This is provided as a reference when planning your budget.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal

- The **FY18 Final Original Budget** column is pre-populated with the FY18 Original Budget.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal

- The **FY19 Working Seed Budget** column is pre-populated with the FY18 Original Budget **plus** permanent adjustments that have occurred during the year through 03/16/2018. This is your base budget.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal

- The **FY 19 Working Budget Adjs** column is where adjustments will be inputted.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal

- The **FY19 Working Original Budget** column reflects the Seed Budget (3rd column) plus the Budget Adjustments (4th column). This is what the FY19 Original Budget will reflect at the start of FY19.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal

- c. Enter budget adjustments in the **FY19 Working Budget Adjs** column. This is the only column in which data can be entered. **If this column is entirely greyed out you will need to “Take Ownership” of the Dept ID to enter data. Refer to Appendix A for instructions. If this column shows some cells as white and some as grey, that is correct.**


- Data can be entered only in cells highlighted in white. Cells highlighted in grey cannot be adjusted.

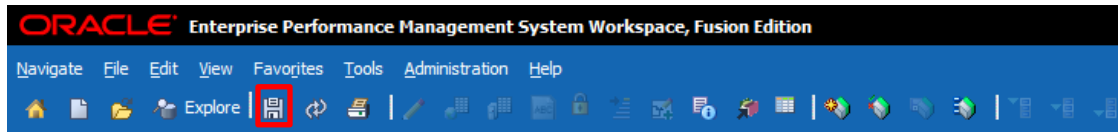
FY18	FY18	FY19	FY19	FY19
Final	Final	Working	Working	Working
Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>
TotalYear	YearTotal	YearTotal	YearTotal	YearTotal
	21,466.00	21,466.00		21,466.00
	0.00	0.00		0.00

- The cell color will change from white to yellow once it has been adjusted, and prior to it being saved.

FY18	FY18	FY19	FY19	FY19
Final	Final	Working	Working	Working
Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>
TotalYear	YearTotal	YearTotal	YearTotal	YearTotal
	21,466.00	21,466.00	50,000.00	21,466.00

NOTE: Column **FY19 Working Original Budget** will not calculate the adjustments until the data is saved.


- d. Once budget inputs are complete for **INPUT: Tuition and Fees**, click the **Save** icon, , in the toolbar to save the inputs.



Clicking the **Save** icon will change the yellow cells to white. Saving the inputs will also total the adjustments within the **FY 19 Working Original Budget** column.

FY18	FY18	FY19	FY19	FY19
Final	Final	Working	Working	Working
Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
TotalYear	YearTotal	YearTotal	YearTotal	YearTotal
	21,466.00	21,466.00	50,000.00	71,466.00

NOTE: You must “save” your inputs for the inputs to be totaled within the **FY19 Working Original Budget** column.

3. Move on to the remaining INPUT tabs to enter adjustments. Click the **Save** icon, , to save the inputs for each INPUT tab.

NOTE: If the Tuition and Fees input form (or any other input tab) contains no data that means there is not a budget for it. Simply move on to the next tab. If you need to add a budgetary account to any form, then refer to section II.B.4 Adding New Accounts to Budget.

Task - Enter Revenue, Expenses & Transfers | Task Instructions

Accounting (131300) - No Site | DESOP-MING (200) - Instructional F

INPUT: Tuition and Fees | **INPUT: Goods, Services & Professional Fees** | INPUT: Grants, Contracts & Appropriations | INPUT: Gift, Investment & Other Revenue

There are no valid rows of data for this form.

FY16	FY16	FY17	FY17	FY17
Final	Final	Working	Working	Working
Actual	Budget	Seed Budget	Budget Adjs	Original Budget
TotalYear	YearTotal	YearTotal	YearTotal	YearTotal


3. ADDING COMMENTS

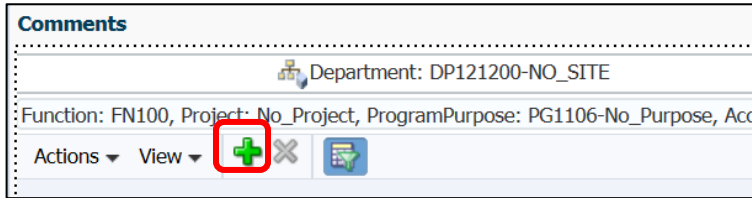
After making an adjustment users are highly encouraged to add a comment describing why the change was made.

1. **Add Comments:** Click on the cell to which you want to attach a comment.

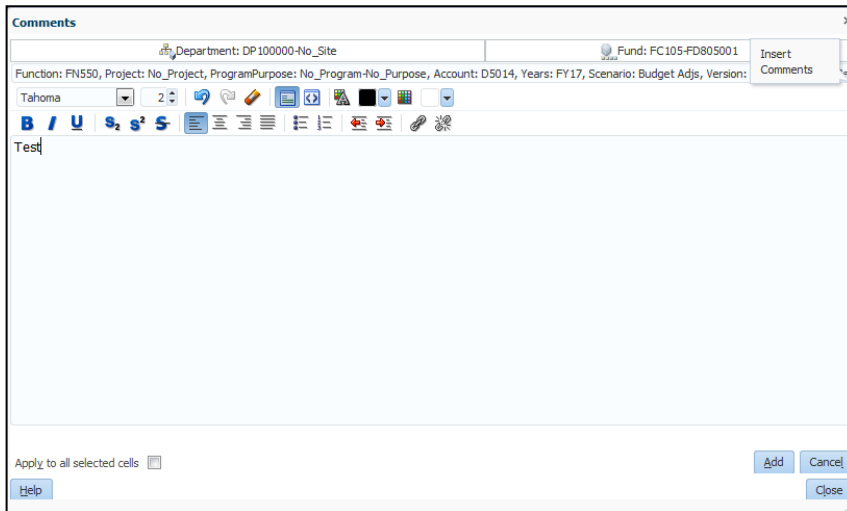
- a. Click the **ABC** icon, , located in the toolbar:



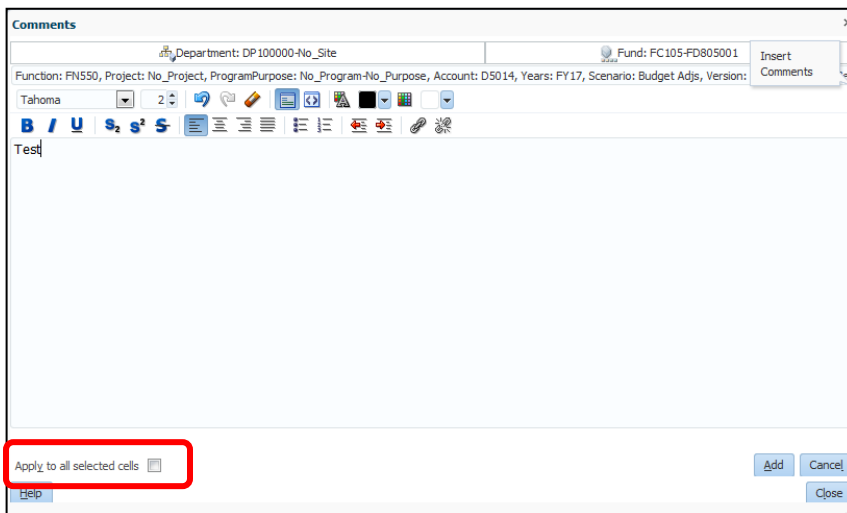
- b. A comment box will appear. To add a note, click on the **plus** icon,  .



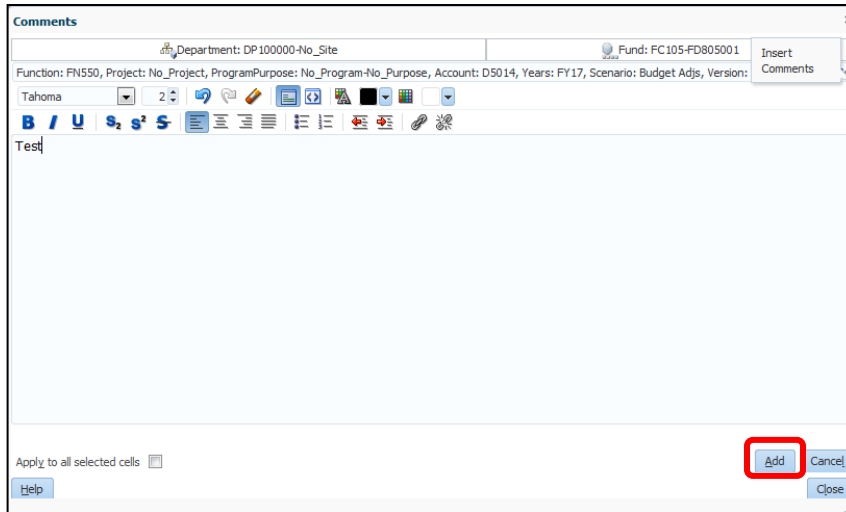
- c. Another screen will display. Type your comment within this screen:



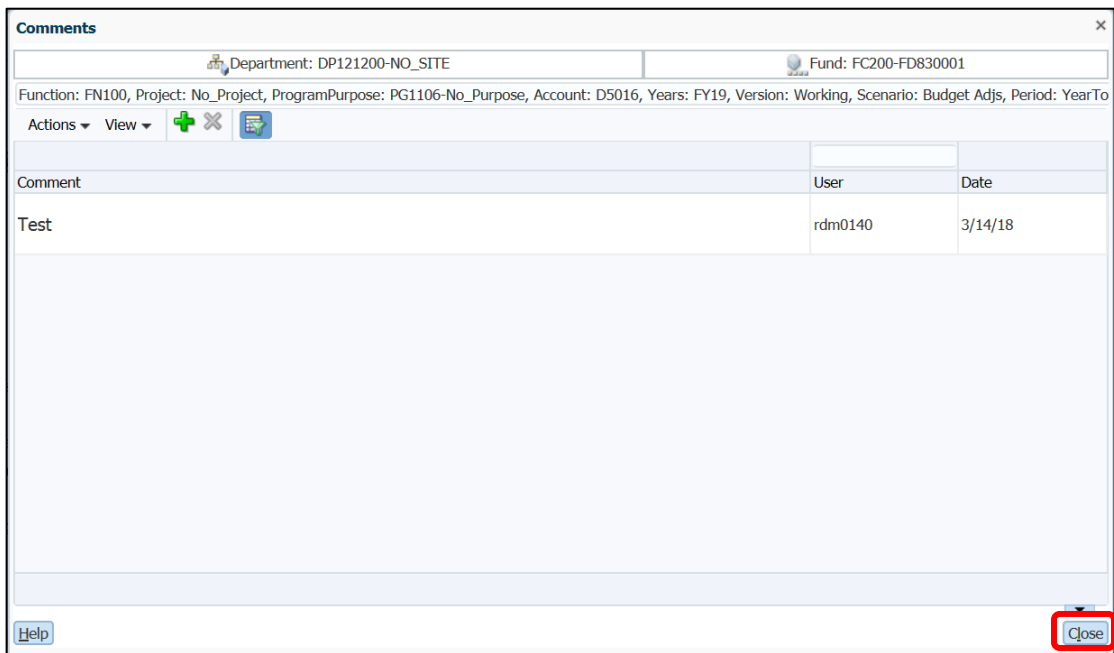
Optional: Check **“Apply to all selected cells”** if the comment applies to a group of cells that were initially highlighted.



- d. Click **Add** to save the comment. This will close the current screen and bring the user back to the initial comment screen.





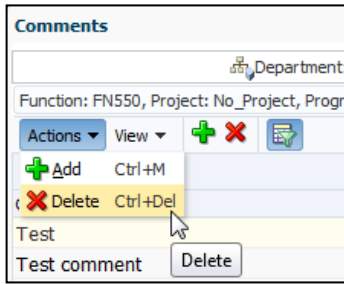
- e. Click **Close** to exit out.



The cells containing comments will show a small triangle in the top right corner of that cell.

TotalYear	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
	21,466.00	21,466.00	50,000.00	71,466.00	
	0.00	0.00		0.00	

- f. To remove a comment, click on the cell that has the comment, then click the **ABC** icon, , in the toolbar. Within the Comments box that appears, click on the comment you want to delete and then click on the X icon, . Only the creator of the comment can delete the comment.



4. ADDING NEW ACCOUNTS TO BUDGET

If a new account is needed, such as a new travel line, then the account will have to be added to the INPUT form.


1. Within the input tabs, right click on any row to open the right-click menu. Click **Department Manager>Add Account(s)**.

	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal
Salaries-Student (21,466.00	21,466.00	50,000.00	71,466.00

An “Add Account” pop up will appear.

Prompt Text	Value
* Select Department	"DP121200-NO_SITE"
* Select Fund	"FC200-FD830001"
* Select Function	"FN100"
* Select ProgramPurpose	"PG1106-No_Purpose"
* Select Project	"No_Project"
* Select Account(s)	"D5016"


NOTE: In the Value column, the values will pre-populate depending on what cell was selected when you right-clicked to select the “Add Account” option. You will need to change these selections as appropriate.

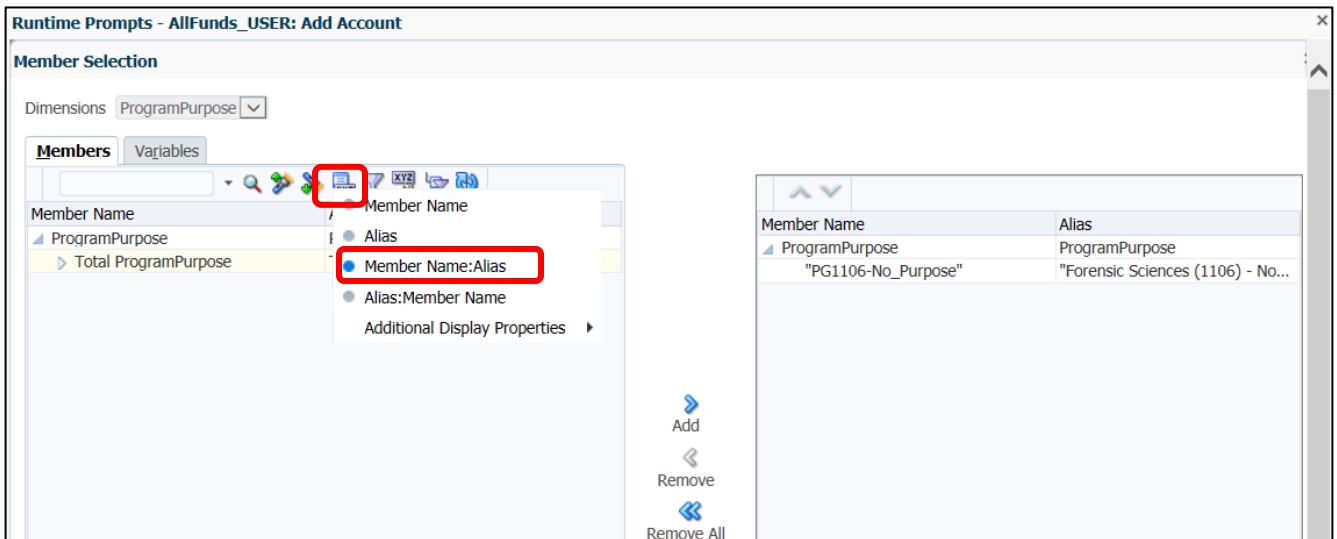
2. Update the **ProgramPurpose Value** if appropriate. If the correct value is already listed then this step can be skipped. The Program and Purpose fields are concatenated.
 - a. Click the **Member Selector** icon, , to the right of the **Value** column to change the selection.

Prompt Text	Value
* Select Department	"DP121200-NO_SITE"
* Select Fund	"FC200-FD830001"
* Select Function	"FN100"
* Select ProgramPurpose	"PG1106-No_Purpose"
* Select Project	"No_Project"
* Select Account(s)	"D5016"


NOTE: If no program and no purpose value will be used then on the **Add Account** screen, enter **"No_Program-No_Purpose"** directly into the Value field for ProgramPurpose.

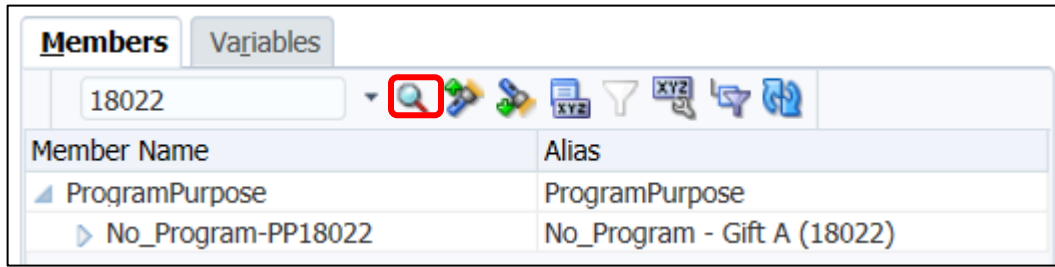
Prompt Text	Value
* Select Department	"DP121200-NO_SITE"
* Select Fund	"FC200-FD830001"
* Select Function	"FN100"
* Select ProgramPurpose	"No_Program-No_Purpose"
* Select Project	"No_Project"
* Select Account(s)	"D5301"

- b. The **Member Selection** screen will appear. Change how each chartfield value displays on the **Member Selection** screen by clicking on the **XYZ** icon, , and selecting the display choice: **Member Name: Alias**.

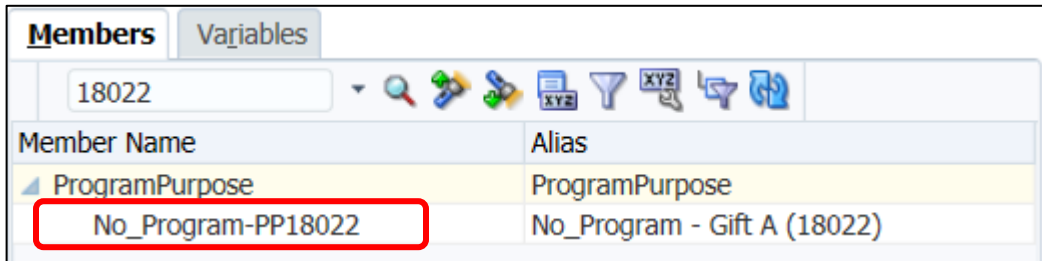


The screenshot shows the 'Member Selection' interface. At the top, 'Dimensions' is set to 'ProgramPurpose'. Below this, there are 'Members' and 'Variables' tabs. A search bar is present with a magnifying glass icon. A red box highlights the 'XYZ' icon, and another red box highlights the 'Member Name:Alias' option in the dropdown menu. The main area displays a list of members with columns for 'Member Name' and 'Alias'. The list shows 'ProgramPurpose' and 'Total ProgramPurpose' with their respective aliases.

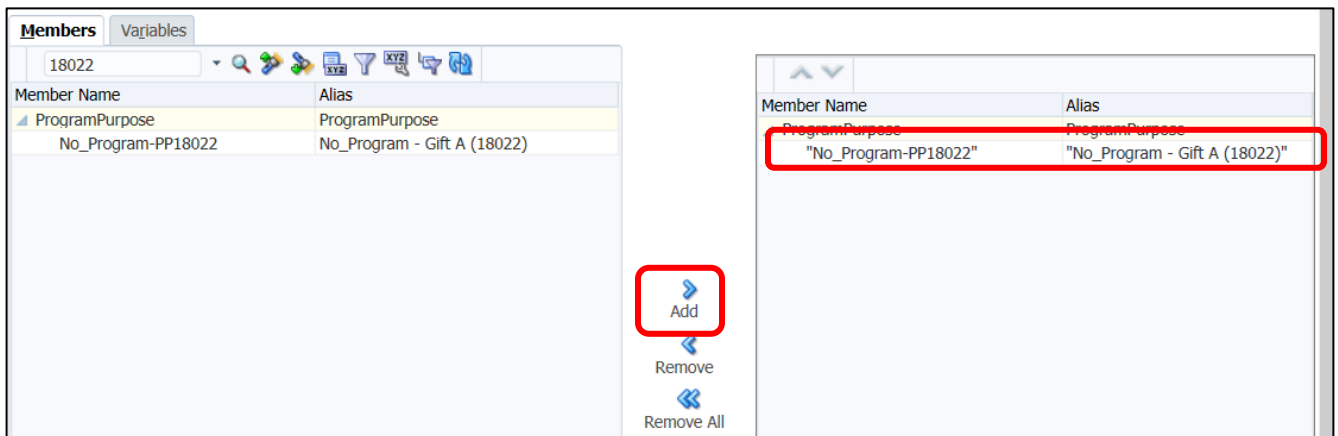
- c. Use the search bar to find the correct ProgramPurpose. Enter either the program or the purpose value in the search field and click on the **magnifying glass** icon  to search.



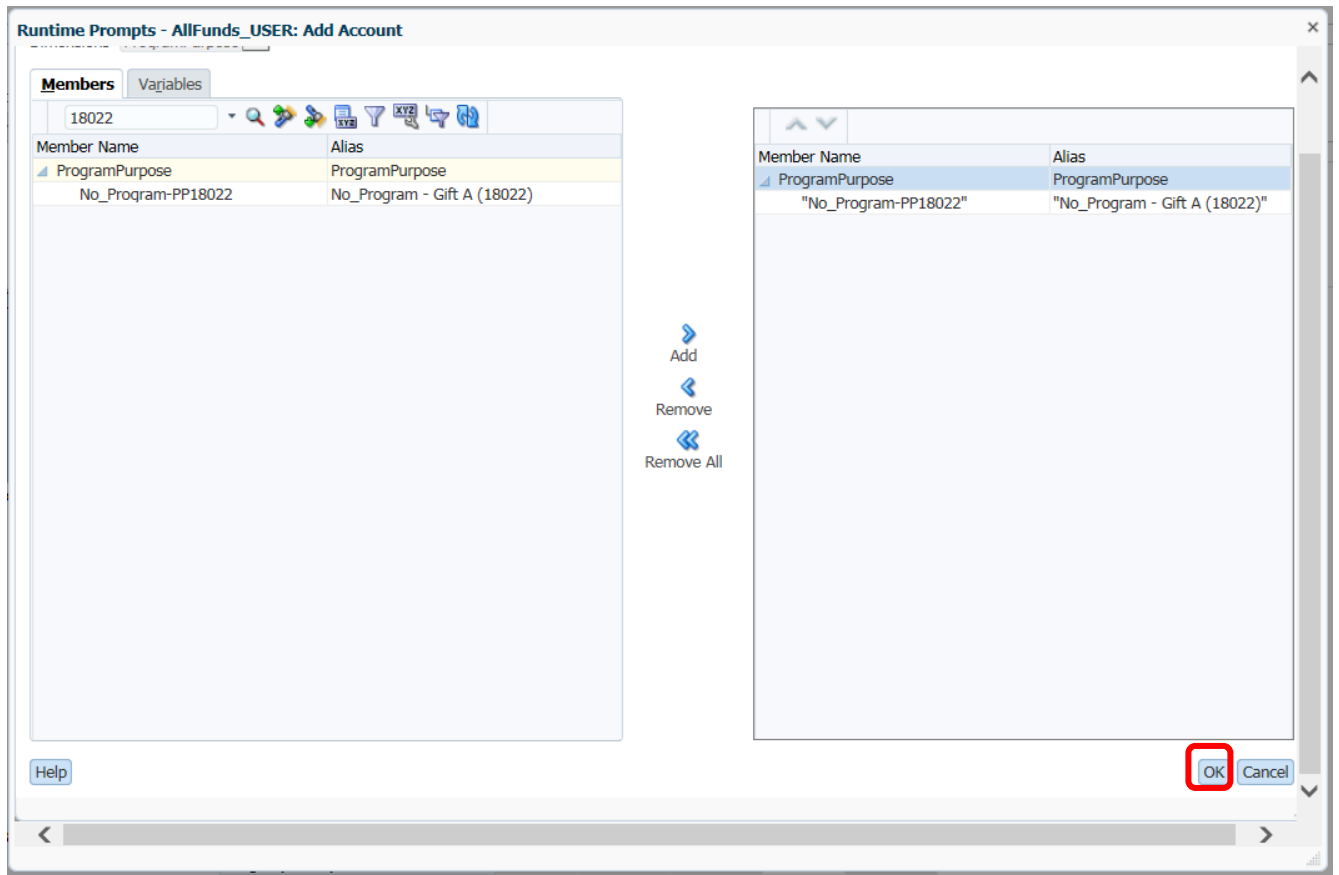
- d. Click the **Arrow** icon, ▶, to the left of the name. If the arrow icon disappears then you have reached the lowest level of data. The item selected must be at the lowest level of the tree structure or the account will not be added to the input tab.



- e. Select the item you want to add and Click the **Add** icon, Add, to move the selected member to the right pane.





- f. Click **OK**. If you cannot see the **OK** icon then zoom out (using your internet settings zoom options) until the **OK** icon can be seen.



You will return to the **Add Account** screen

Prompt Text	Value
* Select Department	"DP121200-NO_SITE"
* Select Fund	"FC200-FD830001"
* Select Function	"FN100"

- Repeat the **member selector** process  as needed for the **Function** value.
- Repeat the **member selector** process  as needed for the **Account** values. You may add multiple accounts at once.
- For Project, enter **"No_Project"** directly into the **Add Account** screen. Hyperion requires that a value be added for every chartfield even if that value is null.

Prompt Text	Value
* Select Department	"DP121200-NO_SITE"
* Select Fund	"FC200-FD830001"
* Select Function	"FN100"
* Select ProgramPurpose	"PG1106-No_Purpose"
* Select Project	"No_Project"
* Select Account(s)	"D5031"

- Click **Launch**.

Runtime Prompts - AllFunds_USER: Add Account

Prompt Text	Value
* Select Department	"DP121200-NO_SITE"
* Select Fund	"FC200-FD830001"
* Select Function	"FN100"
* Select ProgramPurpose	"PG1106-No_Purpose"
* Select Project	"No_Project"
* Select Account(s)	"D5031"

7. The selected account(s) are added to the form(s).

NOTE: The account will automatically be added to the INPUT tab to which it applies. For example, if you add an Expense account, it will be added to the tab "INPUT: Expenses" regardless of whether or not you were on the "INPUT: Expenses" tab when you added the account.

NOTE: If a specific Function, ProgramPurpose concatenation, or Account does not exist in Hyperion, contact the budget office and include "HYPERION" in the subject line.

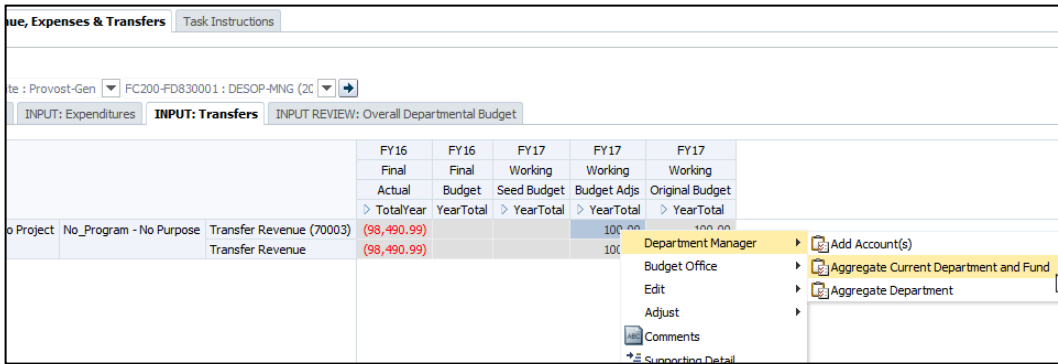
B. STEP 2: AGGREGATE ORIGINAL BUDGET

NOTE: The tab "INPUT REVIEW: Overall Departmental Budget" will not reflect budget adjustments until the data is aggregated. Aggregation must be run for each Org Dept_Site and Fund Category_Fund combination.

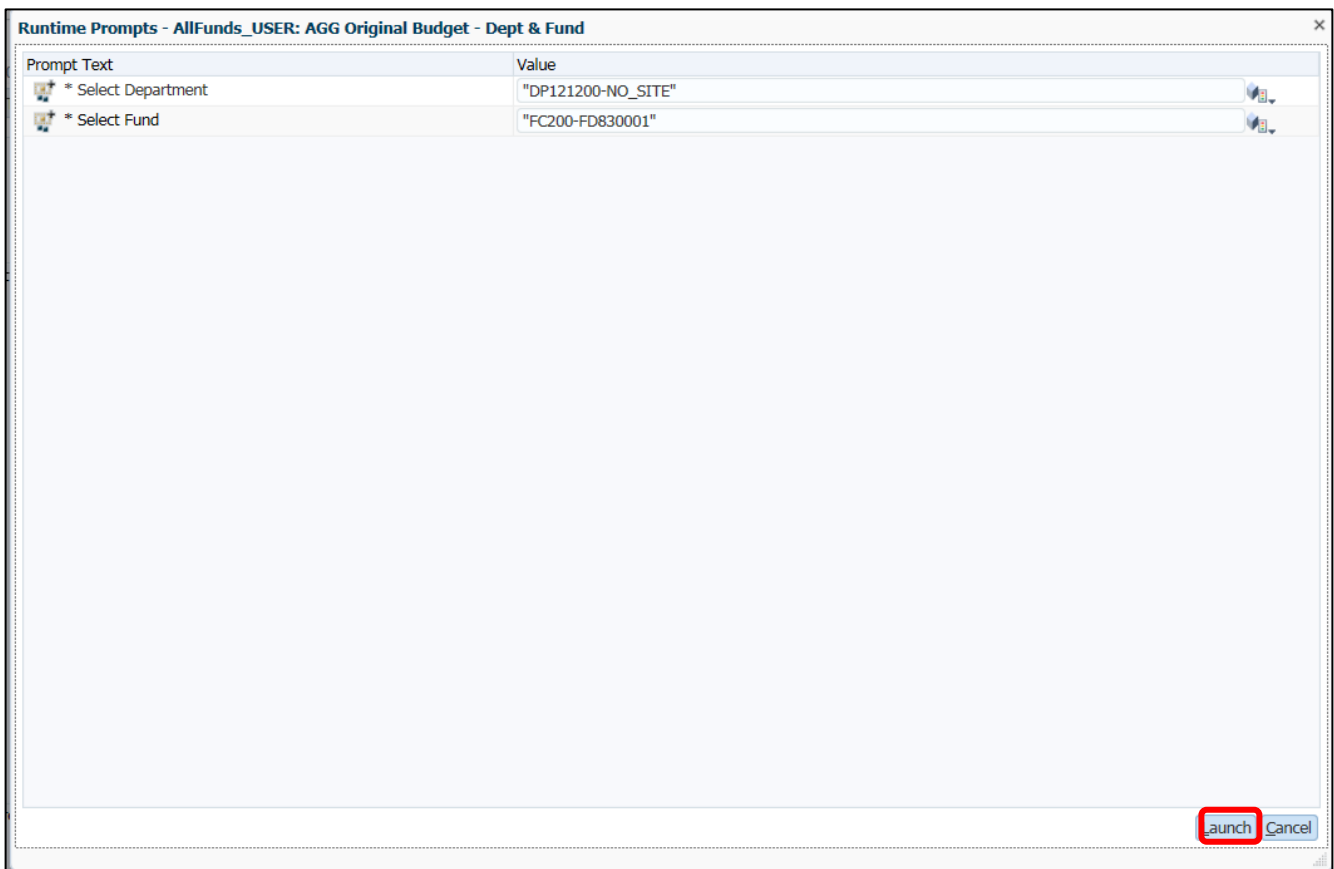
1. AGGREGATE SPECIFIC DEPT_SITE AND FUND CATEGORY-FUND COMBINATION

Once the given Department_Site and Fund Category-Fund combination is complete for revenues, expenses and transfers, the data must be aggregated.

Use the Right-Click Menu to Aggregate. On any of the INPUT tabs (except for the **INPUT REVIEW** tab), right-click anywhere on the spreadsheet and select **Department Manager > Aggregate Current Department and Fund**. You can right click anywhere on the screen within one of the first seven tabs.



A popup will appear with the selected Department_Site and Fund Category-Fund combination already pre-populated. Click **Launch**. This will aggregate the inputs for the given form.



C. STEP 3: REVIEW DEPARTMENTAL BUDGET

1. REVIEW OVERALL DEPARTMENT BUDGET SUMMARY FOR A SPECIFIC DEPARTMENT_SITE & FUND CATEGORY-FUND COMBINATION

After running the Aggregation rule for the specific Department_Site and Fund Category-Fund combination, the tab **INPUT REVIEW: Overall Departmental Budget** will update. Click the tab to view a summary of all the adjustments.

Task - Enter Revenue, Expenses & Transfers				Task Instructions			
Accounting (131300) - No Site				DESOP-MNG (200) - Instructional F			
<input type="button" value="INPUT: Gift, Investment & Other Revenue"/> <input type="button" value="INPUT: Internal Income"/> <input type="button" value="INPUT: Expenditures"/> <input type="button" value="INPUT: Transfers"/> <input type="button" value="INPUT REVIEW: Overall Departmental Budget"/>							
			FY16 Final	FY16 Final	FY17 Working		
			Actual	Budget	Seed Budget	Budget Adjs	Original Budget
			TotalYear	YearTotal	YearTotal	YearTotal	YearTotal
Total Function	Total Project	Total ProgramPurpose	INSTRUCT FEES [CONV ONLY] (40600)	3,778.80			
			Operating & Non-Operating Revenues	3,778.80			
			Salaries -Staff (D5014)	8,000.00			
			Wages (D5031)	53,147.00	84,480.00	84,480.00	84,480.00
			Payroll Related Costs (D5050)	2,224.60	845.00	845.00	845.00
			Scholarships & Financial Aid (D5461)	0.00			

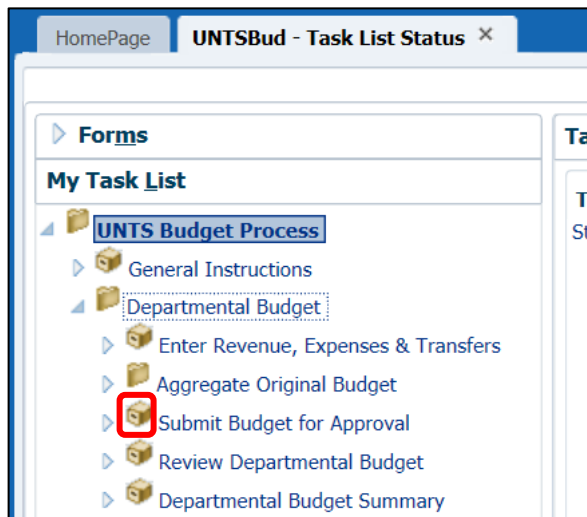
NOTE: If a change is needed, the change must be entered on one of the first seven INPUT tabs, the data must be saved, and then it must be re-aggregated.

If no changes are needed, then you can move on to the next Fund combination for the Department, repeat the input process, and aggregate the specific Dept_Site and Fund Category-Fund combination.

D. STEP 4: SUBMIT BUDGET FOR APPROVAL

1. ACCESS THE SUBMIT BUDGET FOR APPROVAL PAGE

- From the left-panel, open the **Submit Budget for Approval** bin  by clicking on the bin  icon.



- The **Task – Submit Budget for Approval** screen will open on the right side of the screen. At the bottom of the screen only those Departments you have access to will display. If additional access is needed, contact the Budget

Office.

Planning Unit	Approvals Status	Sub-Status	Current Owner	Location	Total Value	Path	Details
Academic Affairs-Gen (110050)	Not Started		No Owner				
Academic Resources-Gen (110100)	Not Started		No Owner				
Academic Student Service-Gen (220500)	Not Started		No Owner				

2. MANAGE APPROVALS

Once a department is ready for review the department should be submitted to the next level approver in the approver chain. A department is ready for review once 1. All the chartstrings for that department have been updated, aggregated, and reviewed, and 2. No further changes are needed.

Refer to Appendix A. Managing Approvals for detail on all manage approval statuses.

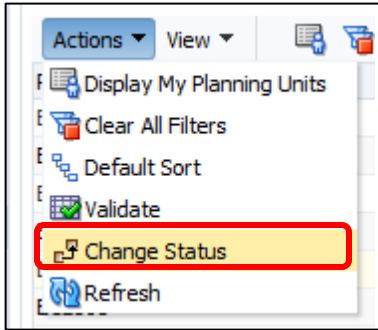
1. Select the base department (or B-Level or C-Level department as appropriate) from the **Planning Unit** section by clicking on the department name.

Planning Unit	Approvals Status
Academic Affairs-Gen (110050)	Under Review
Academic Resources-Gen (110100)	Under Review
Academic Student Service-Gen (220500)	Under Review
Accounting (131300)	Under Review
Admin (C15200)	Under Review
Administrative IT Services (150100)	Under Review

NOTE: Actions can be applied to a group of departments at a time by either:

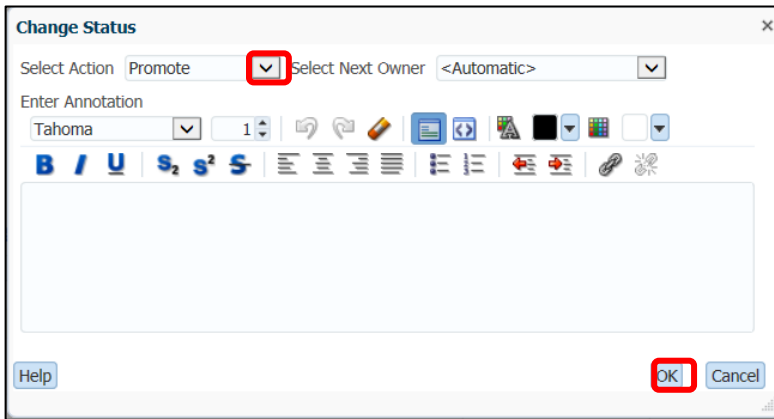
- a. Selecting the C-level or B-level department. **All actions performed here will apply to all departments that roll-up to those levels.**
- b. Selecting multiple departments at a time using your keyboard “CTRL” or “SHIFT” keys.

2. Click on **Actions** to open the list of available actions, then click **Change Status**. A **Change Status** pop-up window will appear.



3. Click on the **drop-down arrow** icon next to the **Select Action** box to view the list of available actions. Select the **Promote** action. A comment may be added in the **Annotation** comment area if desired. Click **OK**.

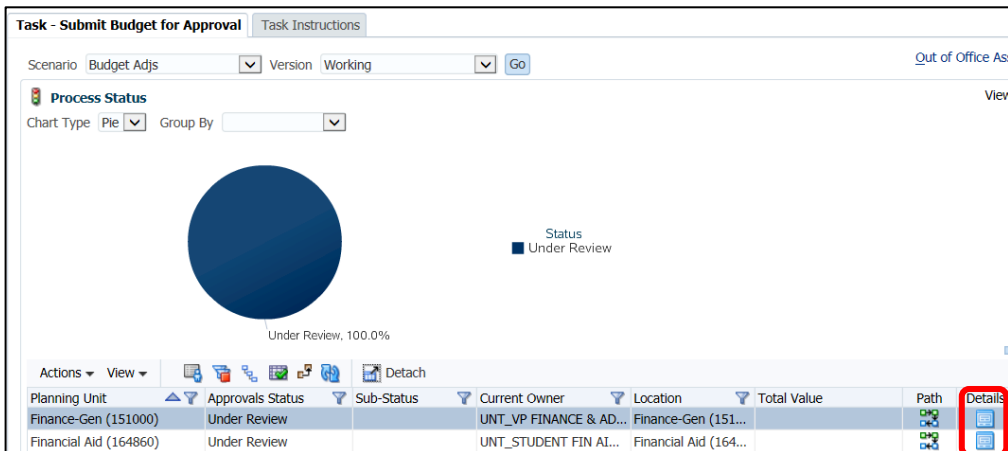
Promoting the department is the method for approving a department and sending it to the next approver in the approver chain.



3. ADD ANNOTATIONS


In section II.A.3. Adding Comments, users are shown how to add comments to specific cells within the budgeting spreadsheets. Users may find it helpful to add comments to a department overall. This is possible through Annotations.

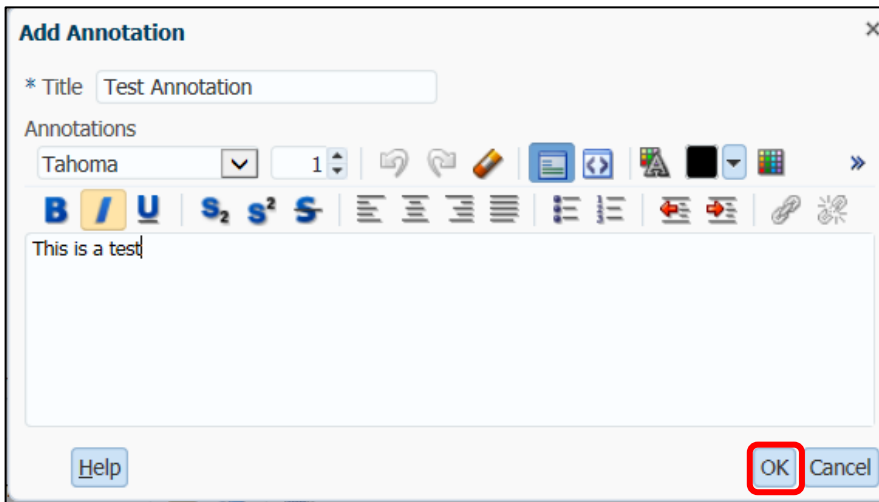
1. Within the **Task – Submit Budget for Approval** screen, select the **details** icon .



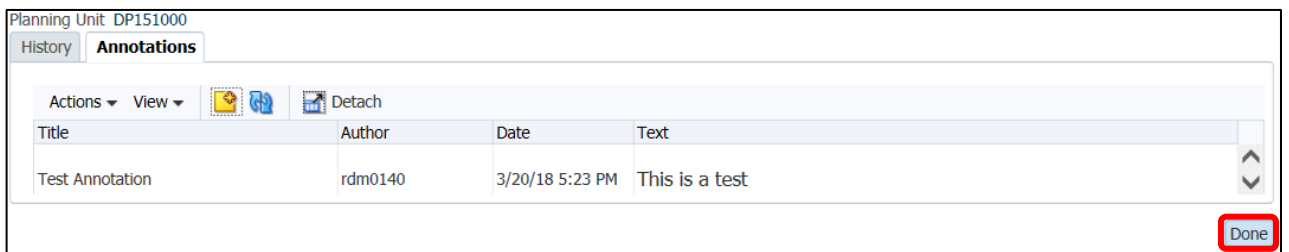
- The pane at the bottom of the screen will now show two tabs: **History** and **Annotations**. Select the **Annotations** tab.



- Click the **Add Annotation** icon .
- The **Add Annotation** pop-up window will appear. Edit the title and add text as needed then select **OK**. Once an Annotation is added, it cannot be deleted.



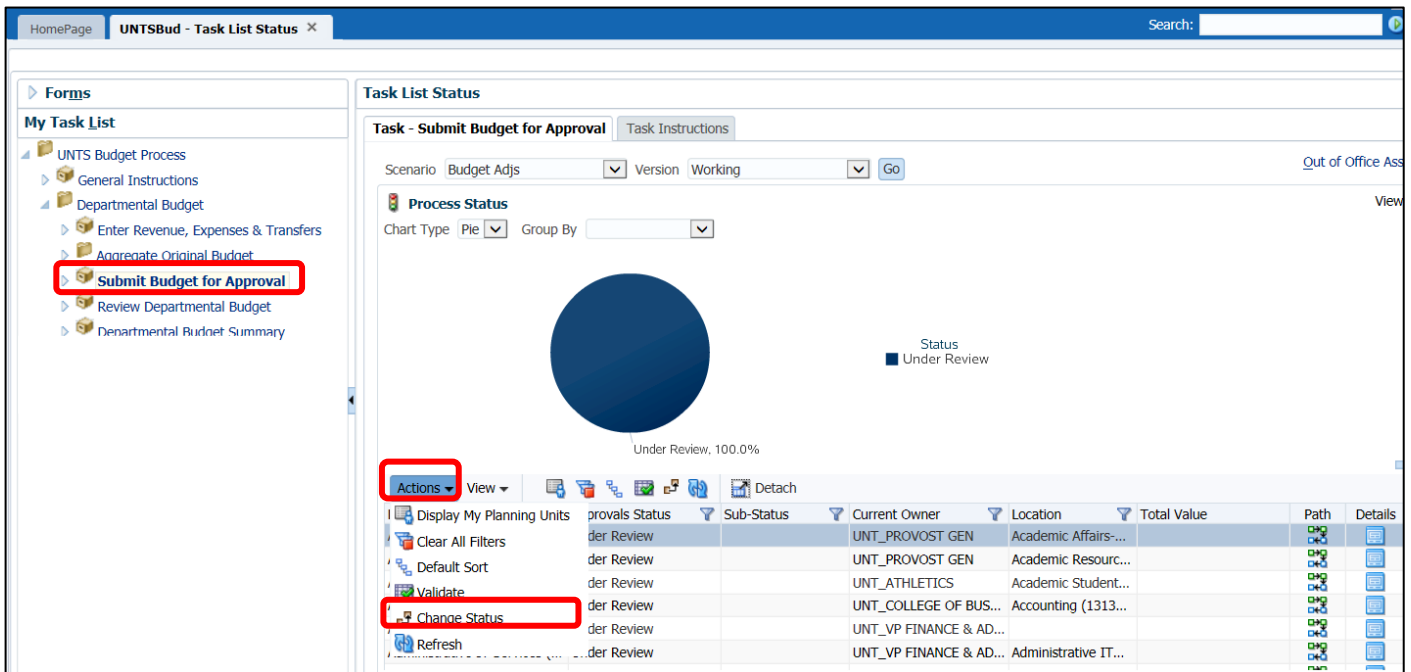
- The new comment will now appear on the **Annotations** tab. Select Done to return to the department list.



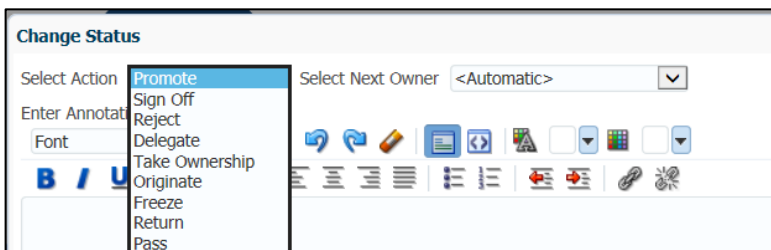
III. APPENDIX

A. MANAGING APPROVALS

Users have the ability to manage approval statuses for a department. Select the department and then select the Actions drop down box.



Within the **Change Status** box there are 9 options. The list of available options will vary depending on the status of the user or of the department.



1. **Take Ownership:** Become the owner of a department. Only one user (user group) can be the owner of a department at a time. Only the current owner (or user group) has access to enter budget adjustments. If the FY19 Working Budget Adjs column is greyed out, you will need to **Take Ownership** to be able to enter data.

FY17	FY18	FY18	FY19	FY19	FY19
Final	Final	Final	Working	Working	Working
Actual	Actual	Original Budget	Seed Budget	Budget Adjs	Original Budget
>	>	>	>	>	>
TotalYear	TotalYear	YearTotal	YearTotal	YearTotal	YearTotal
		21,430.19	21,430.19		21,430.19
		21,430.19	21,430.19		21,430.19
		5,060.48	5,262.90		5,262.90

The Take Ownership option is not available once a department has been Promoted.

Note: If the only option (i.e. "Action") available is "Take Ownership" then the user will need to first perform that action, and then return to the change status screen to view all available options.

- Promote:** Passes ownership to the next approver in the approver chain. Promote causes an implicit signoff by the current owner. Once a department is ready for review the department should be submitted to the next level approver in the approver chain. A department is ready for review once 1. All the chartstrings for that department have been updated, aggregated, and reviewed, and 2. No further changes are needed.

Note: If the only option (i.e. "Action") available is "Take Ownership" then the user will need to first perform that action, and then return to the change status screen and select the "Promote" action.

- Originate:** Changes the ownership of a department back to the first approver in the approver chain. This action cannot be taken after a planning unit has been Promoted. This action is useful when a single user has taken ownership of a unit and wishes to return ownership back to the original owner group.

In the example below, Dept 200100 has a specific user listed as the owner whereas the remaining departments have user groups listed as owners.

Planning Unit	Approvals Status	Sub-Status	Current Owner
Ctr for Acheiv & Life Learn (200100)	Under Review		rdm0140
Ctr for Stud Aff-Disc Park (163300)	Under Review		UNT_AUXILIARY SERVICES
Ctr-Logistics Ed and Research (131720)	Under Review		UNT_COLLEGE OF BUSINESS
Electrical Engineering (130320)	Under Review		UNT_COLLEGE OF ENGINEERING

- Delegate:** Passes ownership to a person not in the approver chain. Select a person from the **Select Next Owner** drop-down list to pass ownership to that person.


Change Status


Select Action: Delegate Select Next Owner: <Automatic>


Enter Annotation:

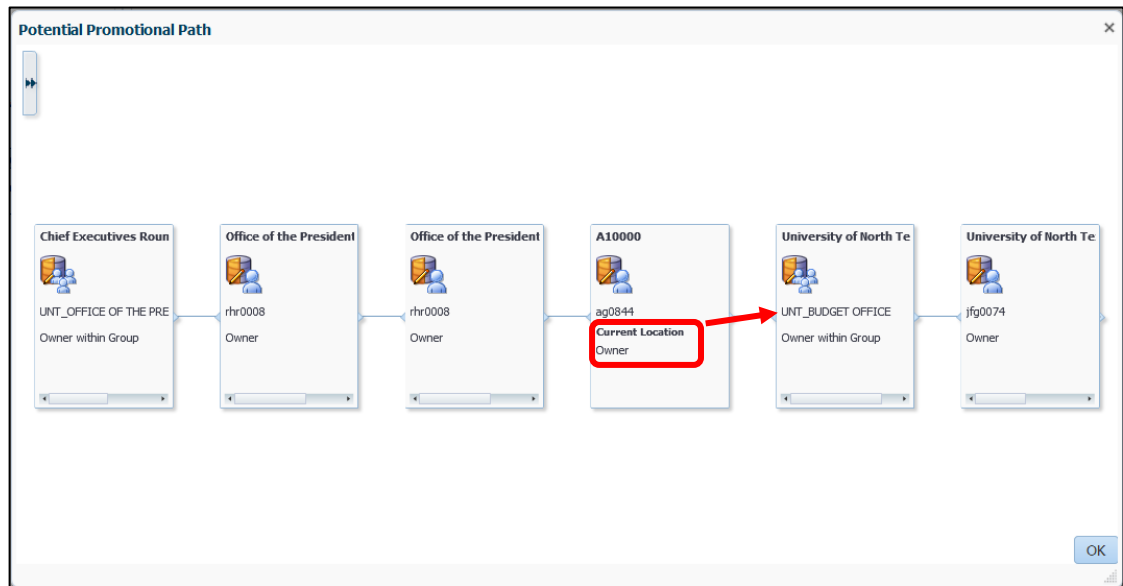
The delegated user should:

- Select **Originate** when done to return the budget to the first approver in the approver chain, or
- Select **Delegate** to pass ownership to the original delegator or to another user, or
- Select **Promote** to pass ownership to the next approver in the chain. NOTE: The "next approver" will vary depending on who the original delegator was, in some instances it is possible to bypass an

approver. Select the **Path** icon  to the right of the department to determine where in the approver chain the department currently is and to where it will promote.

Planning Unit	Approvals Status	Sul Current Owner	Location	Total Value	Path
Chief Executives Round Table (200300)	Under Review	ag0844	University of North Texas		

Upon selecting the **Path** icon , a new window will appear. The current owner is the user identified by “Current Location.” In this example, if the “Current Location Owner” promotes the department, the next approval would be the “UNT_BUDGET OFFICE.”









5. **Freeze**: This action makes the data read-only.
6. **Unfreeze**: Changes a department from read-only to editable. Only the current owner can ‘unfreeze’ a department. Or, users above the current approval level can execute the **Take Ownership** action to transfer ownership and unfreeze the department.
7. **Reject**: Returns ownership back to the previous owner or to an owner selected from the “Select Next Owner” list.
8. **Return**: Returns ownership back to the previous owner or to an owner selected from the “Select Next Owner” list. This action is only available after a user has taken ownership of a department.
9. **Sign off**: Signs off on a department. Sign Off does not transfer ownership of the department, but changes its state to Signed Off.

B. DATA FORM TOOLBAR

Users can utilize the toolbar to save, refresh, adjust, etc. data. Toolbar screenshot below:




1. Common toolbar actions include:

 - Save data	 - Add comments
 - Refresh data	 - Add supporting detail
 - Print form	 - View instructions
 - Adjust data	

These actions are commonly used for data inputs, as discussed in the next section, “Data Input Methods”.

NOTE: These actions can also be found on the “Right-Click” menu.

2. **Lock/Unlock cells:** Lock/unlock cells allows users to lock a cell to prevent data entry. To lock/unlock a cell, click on the cell you want to lock, and then click on the **lock** icon,  , located on the toolbar.



C. CHARTFIELDS

Each chartfield within the chart of accounts is set up in a tree structure such that each Department, Fund, Account, etc. rolls up to a “level.”

Any data inputted in Hyperion must be inputted at the lowest level of input (called “level-0”), with few exceptions. Refer to the tables below for examples of the tree structures for each chartfield as well as examples of the level-0 fields.

DEPARTMENT & SITE

In Hyperion, Department and Site have been concatenated. If a chartstring does not have a site, then the department will be concatenated with the place-holder “No_Site.”

The Department tree contains levels A, B, C, D, and E, with A being the highest level. Below is an example of the department-site hierarchy structure:

Member Name	Member Alias
Total Department	Total Department
A10000	President UNT (A10000)
B16000	Student Affairs (B16000)
C16150	Career & Leadership (C16150)
D16150	Career & Leadership (D16150)
E16150	Career & Leadership-Gen (E16150)
DP161500-No_Site	Career & Leadership-Gen-No_Site (161500)

FUND CATEGORY & FUND

In Hyperion, Fund Category and Fund have been concatenated. Below is an example of the Fund Category – Fund hierarchy structure.

Member Name	Member Alias
Allfunds	Allfunds
Current Funds	Current Funds
Education & General	Education & General
FC105	Education & General (105)
FC105-FD800001	EDU GEN (105) – GRD-General (800001)
FC105- FD800003	EDU GEN (105) – GRD-Lab Fees (800003)
FC105-FD800005	EDU GEN (105) – GRD-Organized Activities (800007)

NOTE: Budgeting will only occur in Fund Categories 105 Education General, 120 Auxiliary, and 200 Designated Operating.

FUNCTION

Below is an example of the function hierarchy structure.

Member Name	Member Alias
-------------	--------------

Total Function	Total Function
F10	Instruction
FN100	Instruction-General (FN100)
FN110	Instruction-Sponsored (FN110)
FN120	Instruction-Sponsored C/S (FN120)

PROGRAM & PURPOSE

In Hyperion, Program and Purpose have been concatenated. Below is an example of the ProgramPurpose hierarchy structure:

Member Name	Member Alias
Total ProgramPurpose	Total ProgramPurpose
Total No_Program	Total No_Program
No_Program	No_Program
No_Program-No_Purpose	No_Program-No_Purpose
No_Program-PP10003	No_Program-Recruiting-Faculty-Gen (10003)
No_Program-PP10011	No_Program-Recruit-Executive Search 1 (10011)
No_Program-PP10012	No_Program-Recruit-Executive Search 2 (10012)

PROJECT

Projects are not budgeted within Hyperion.

ACCOUNT

The Account field contains the GL revenue and expense accounts. The Account tree contains levels A, B, C, and D, with A being the highest level. Below is an example of the account hierarchy structure.

Member Name	Member Alias
Total Account	Total Account
Operating & Non-Operating	Operating & Non-Operating Revenues
A4000	Operating Revenues
B4000	Tuition and Fees (B4000)
C4000	Tuition (C4000)
D4000	Tuition-Undergraduate (D4000)
40000	Tuition and Waiver [CONV ONLY] (40000)
40001	Tuit-U/G-Res (40001)
40005	Tuit-U/G-Non-Res (40005)

Note: Revenues will be budgeted at the level-0 account level (i.e. the lowest level account). Expenses will be budgeted at the level-D account level. The only exception is transfer expenses which will be budgeted at level-0.

Budget checking for expenses occurs at level-C.