# HYPERION USER GUIDE

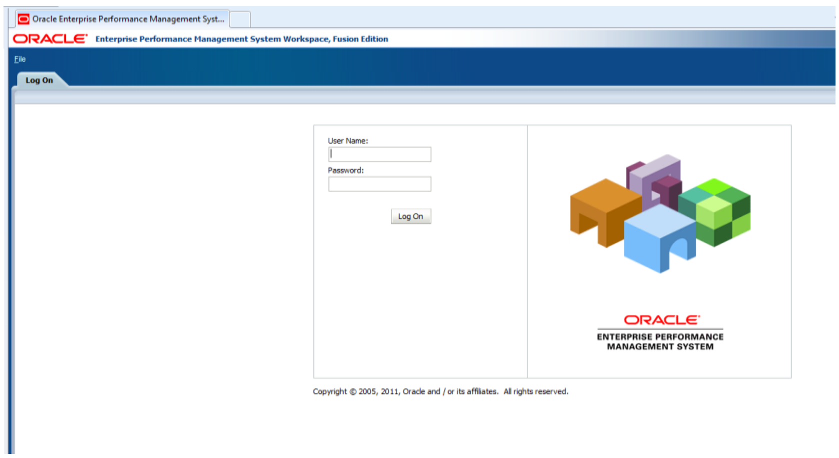
*Last updated: 02/29/2016*

## 1. LOGGING IN

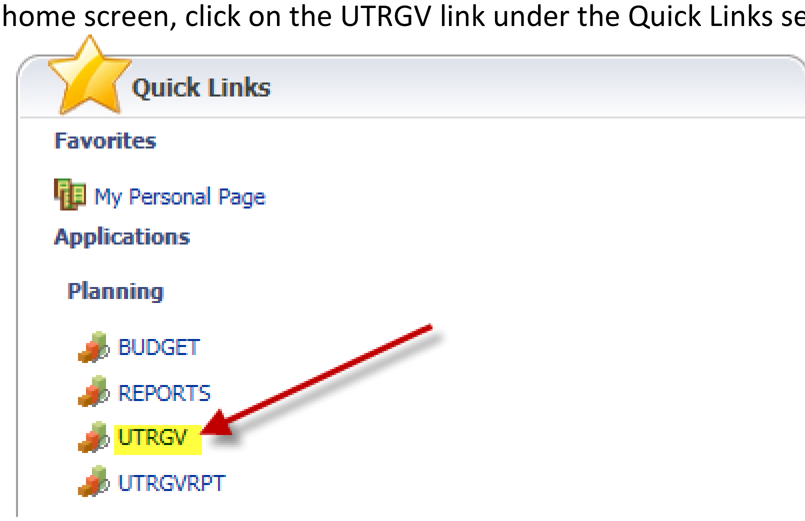
a. Open **Firefox** (Remote XUL Manager add-on must be installed see appendix A).
   - Hyperion is not compatible with Apple computers or with Google Chrome.
   - Hyperion can be used with **Explorer 10** or older version.

b. Type in the following link: https://budgeting.utrgv.edu/workspace/index.jsp

c. Type in your UTRGV identifier and password.
   - The UTRGV identifier is an 6 digit name with 3 letters and 3 numbers

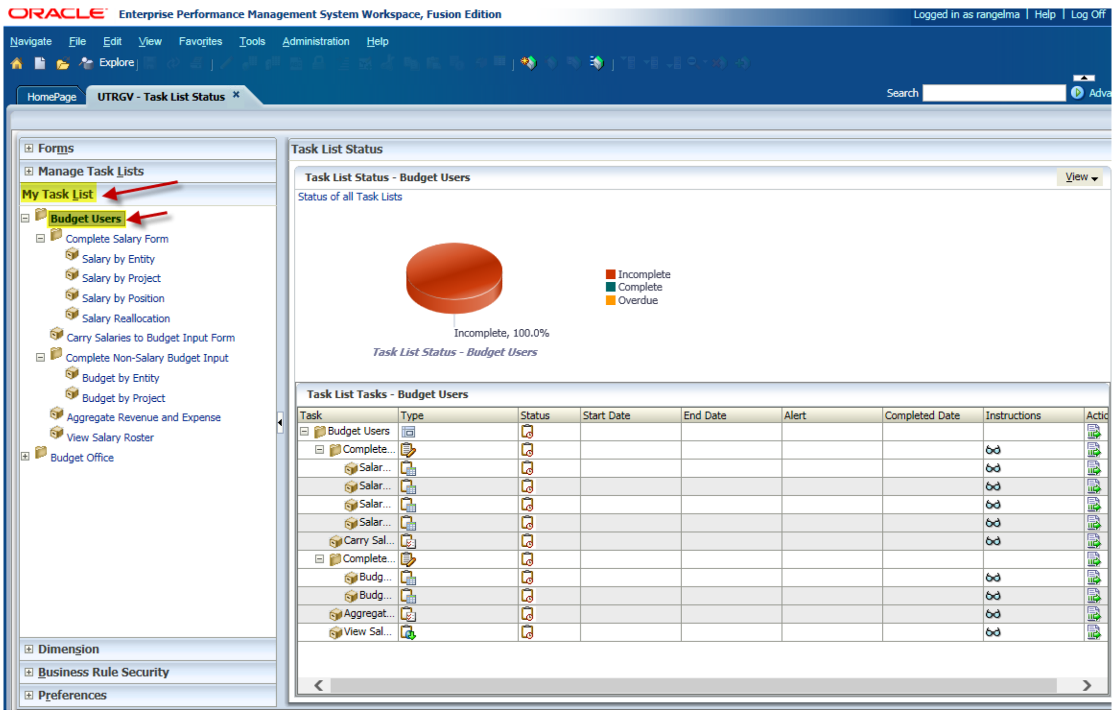



2. At the home screen, click on the UTRGV link under the Quick Links section.

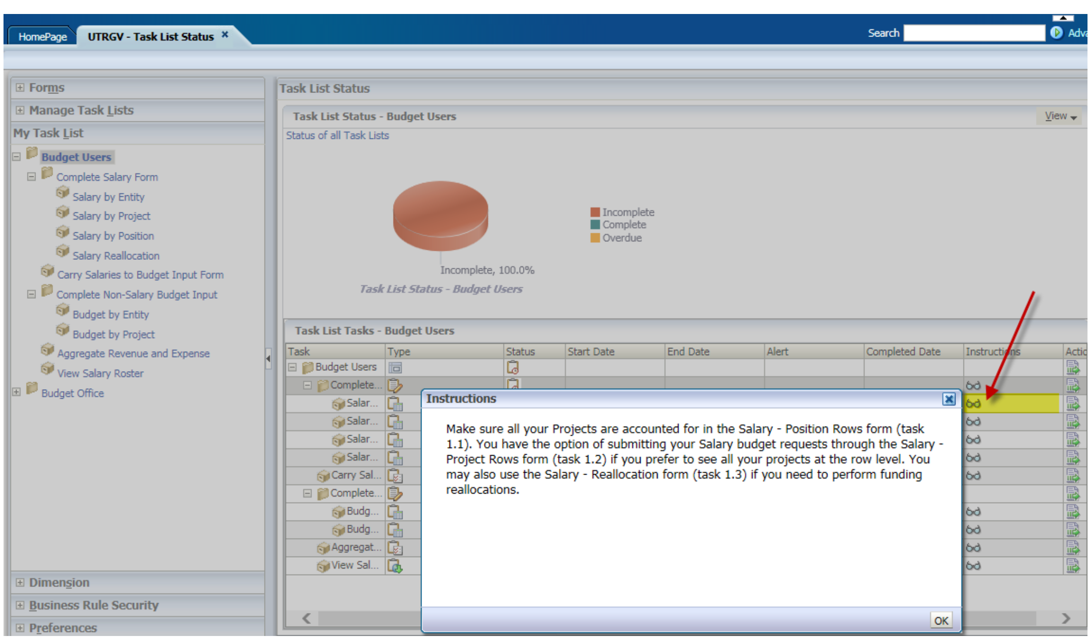


## 3. THE TASK LIST

a. On the left panel, expand **My Task List** then **Budget Users** and you will see the list of tasks to be completed.

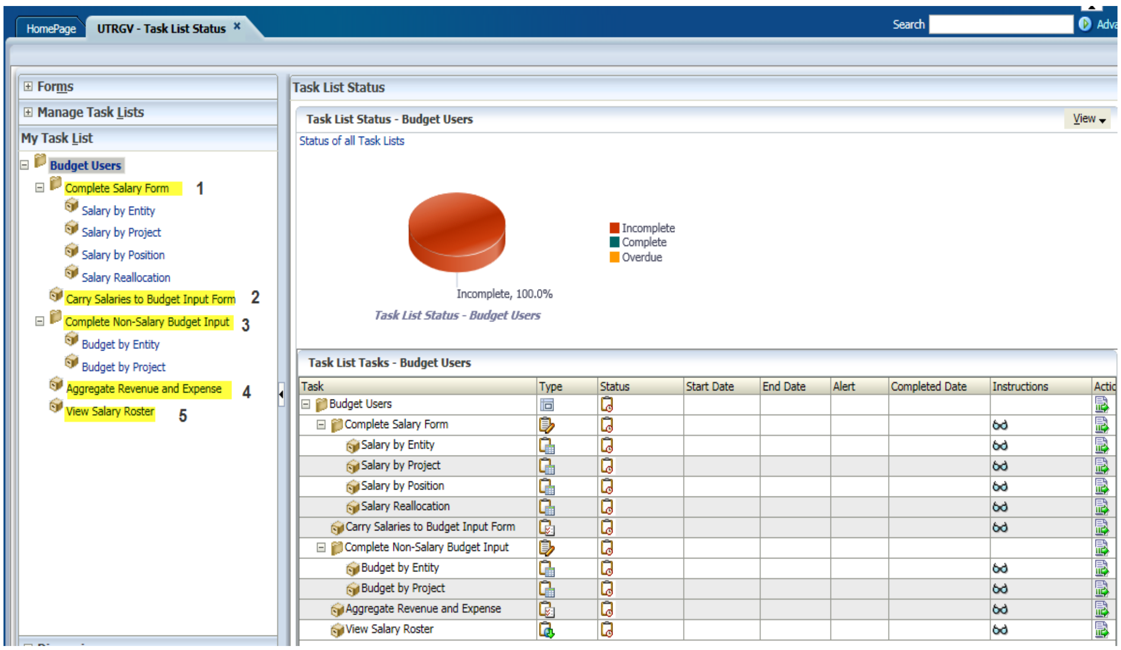



b. The task list will be off to the right when you click on Budget Users. If you click on the eye glass icon you will see the instructions for each task item.

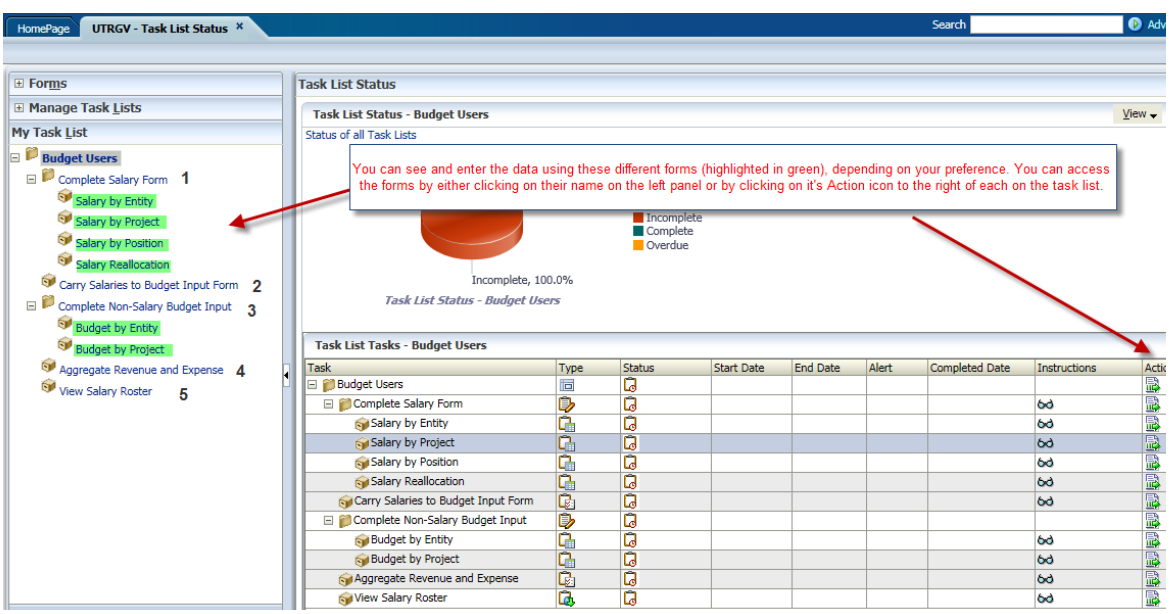


c. It is important to follow the Task List order (see below). As you complete each step in the Task List, click on Next at the bottom of the page to continue.

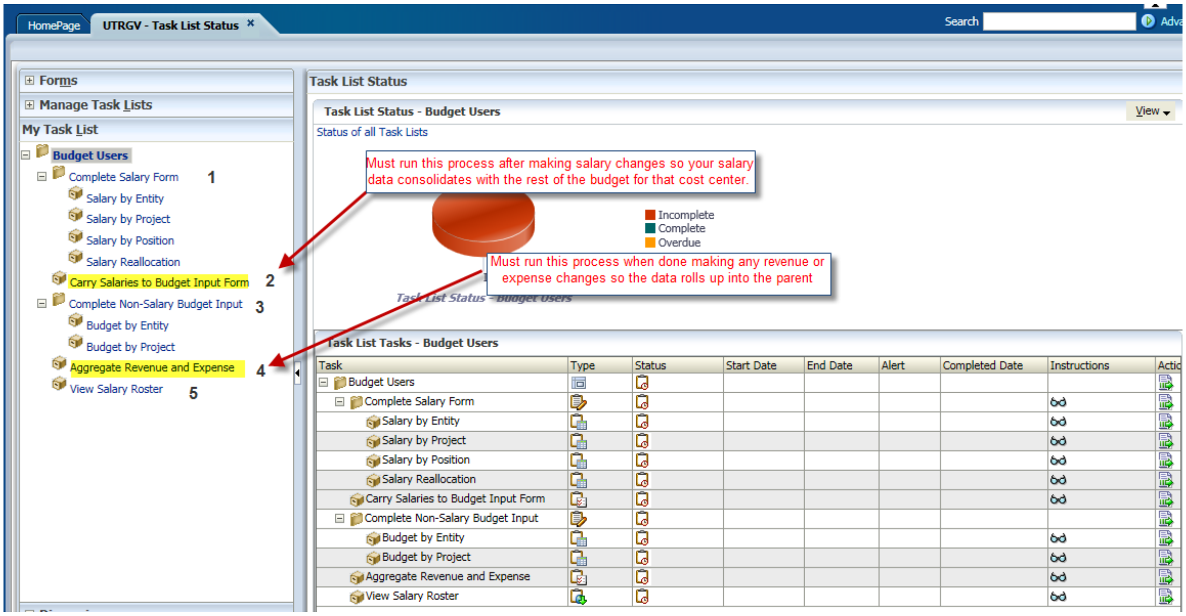
   i. **Form: Complete Salary Form**
   ii. **Rule: Carry Salaries to Budget Input Form**
   iii. **Form: Complete Budget Input Form**
   iv. **Rule: Aggregate Revenue and Expense**
   v. **Report: View Salary Roster**



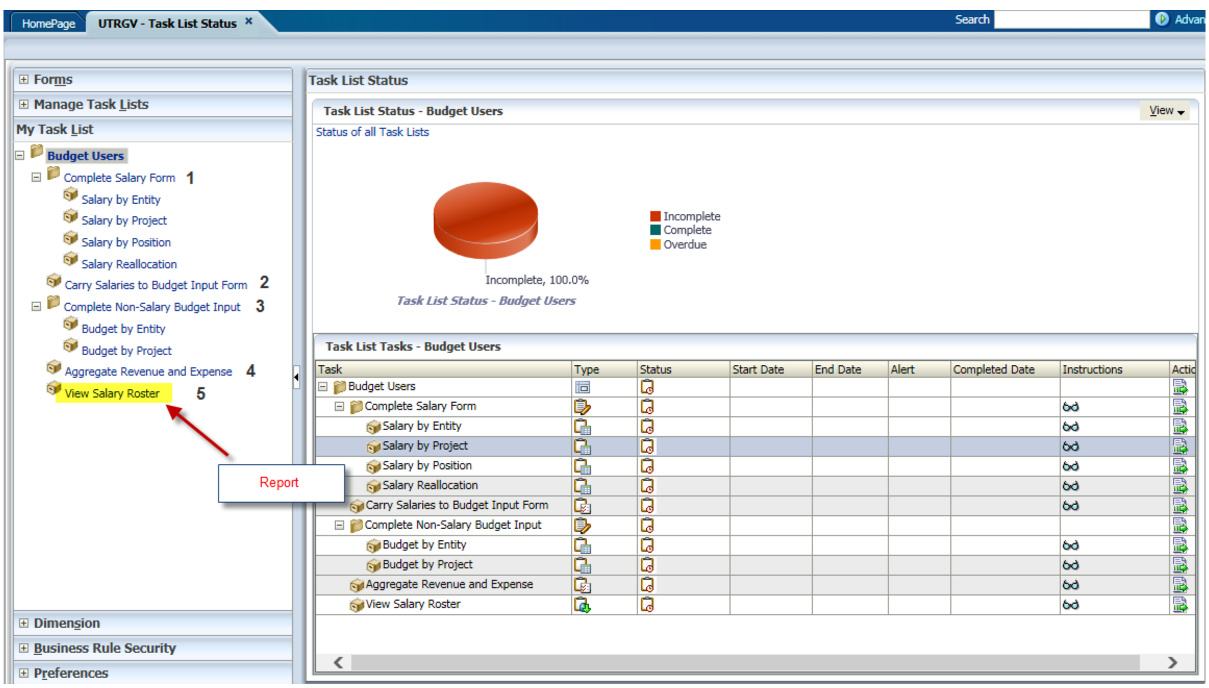

d. **Steps 1 and 3** are associated with **data forms** where you will submit updates. There are several alternative forms available to suit different preferences; it is not necessary to use all of them.



e. **Steps 2 and 4** are associated with **business rules** needed to apply your changes to the next data form or report. If you have to return to a form to make additional changes, you will need to rerun any business rules occurring in the sequence after the updated form.



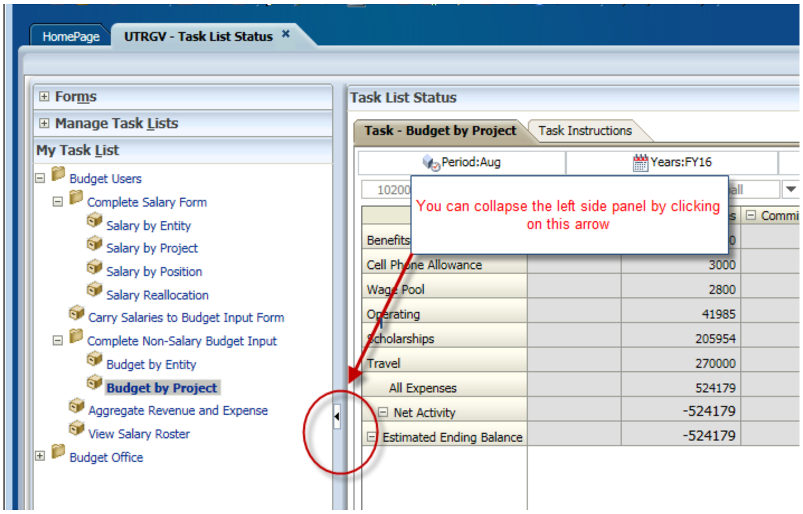

f. Finally, **Step 5** is a report you may run to view and print the proposed budgets.




These steps are discussed in more detail below in No. 8, Step 5, on page 13.

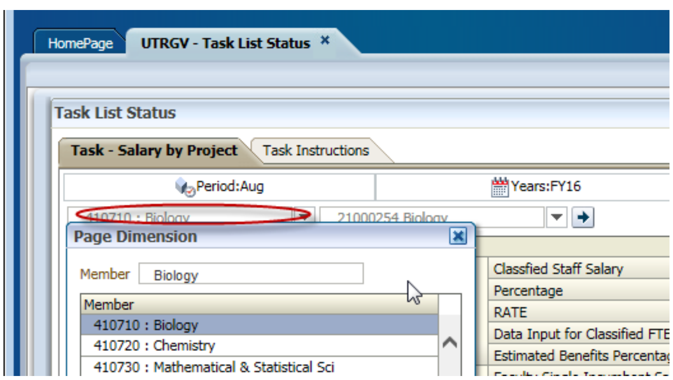
## 4. HIDING THE LEFT SIDE PANEL

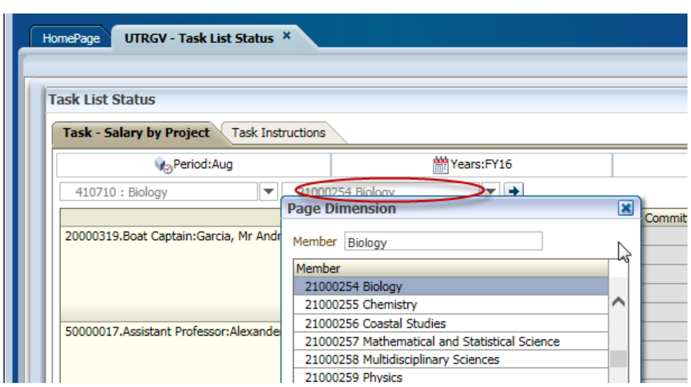
If you want more room simply hide the left side panel and you will see the form in full screen.




## 5. THE POINT OF VIEW (POV)

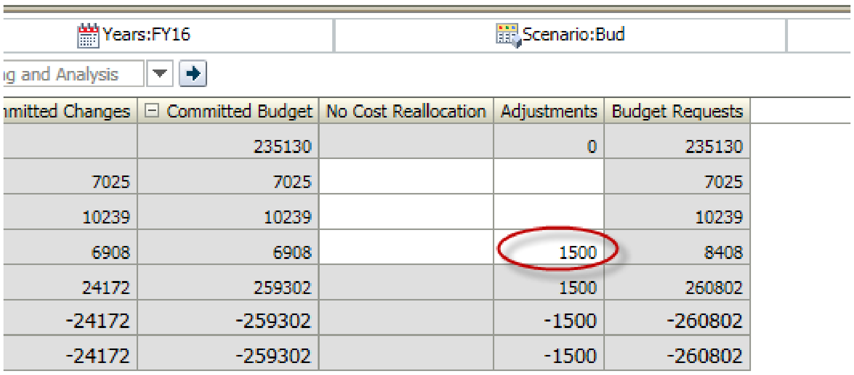
To view your data, you must select your Entity (department), FundProject (project), and/or Position from the drop-down boxes at the top of the forms. You may scroll down to make your selection or you may use the Search functionality by typing in your selection (the exact name or part of it). These settings comprise the "Point Of View (POV)". Example below:



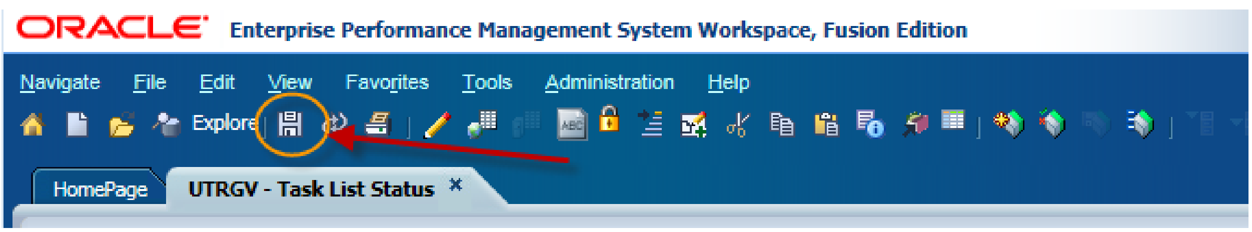



## 6. ENTERING CHANGES

a. When input is revised, the previous input is replaced. In other words, if a $1,000 increase in travel is initially requested, but this needs to be revised to a $1,500 increase, enter $1,500 (not $500). Verify that the calculations in the budget request column reflect your intentions before leaving the form.

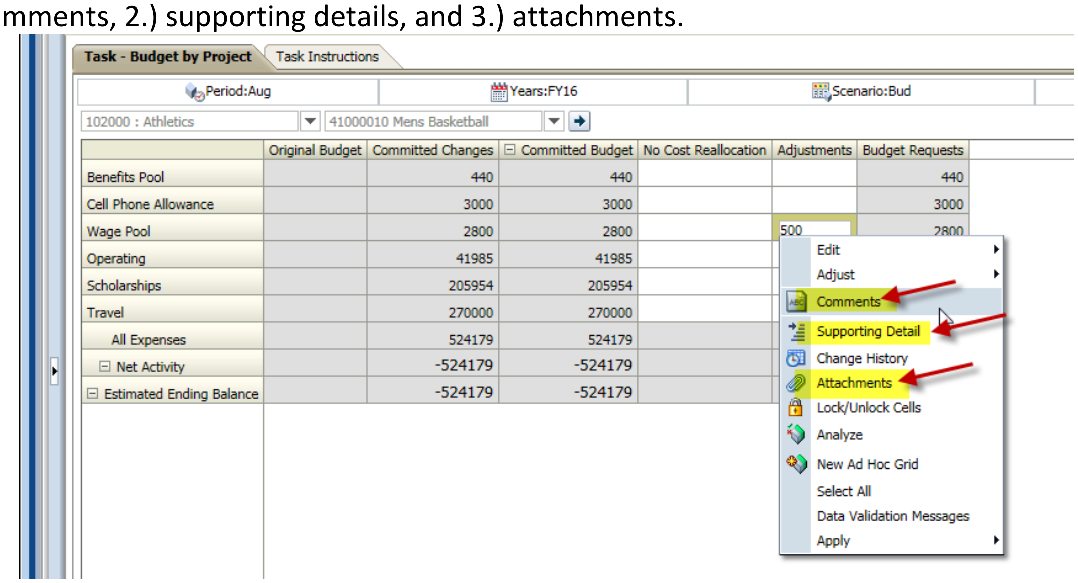



**b.** After entering changes, press the **Save** icon for the changes to be applied.

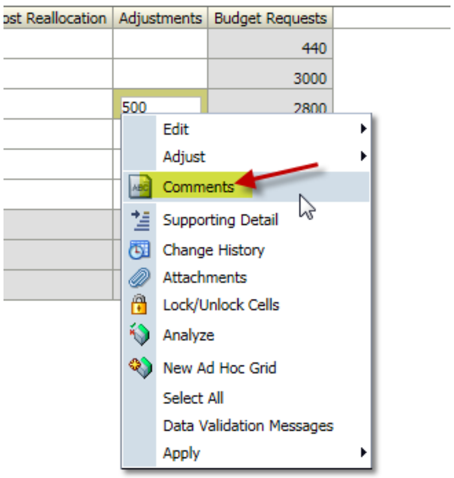



## 7. JUSTIFYING YOUR REQUESTS with SUPPORTING INFORMATION

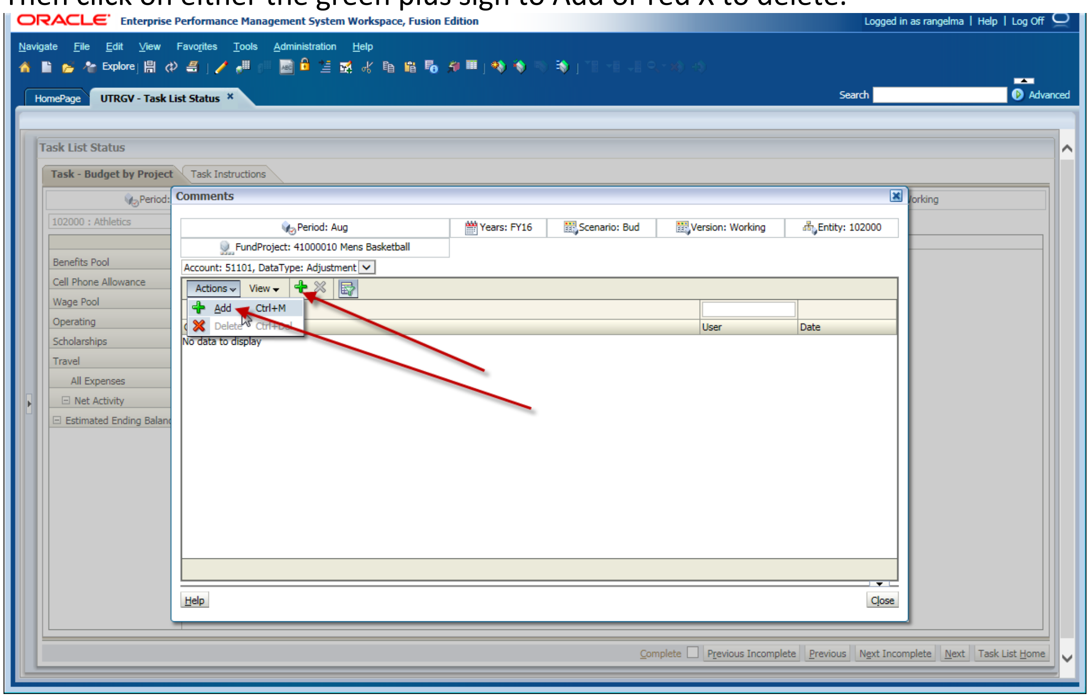
There are three ways to include additional information to help justify your budget requests: 1.) cell comments, 2.) supporting details, and 3.) attachments.



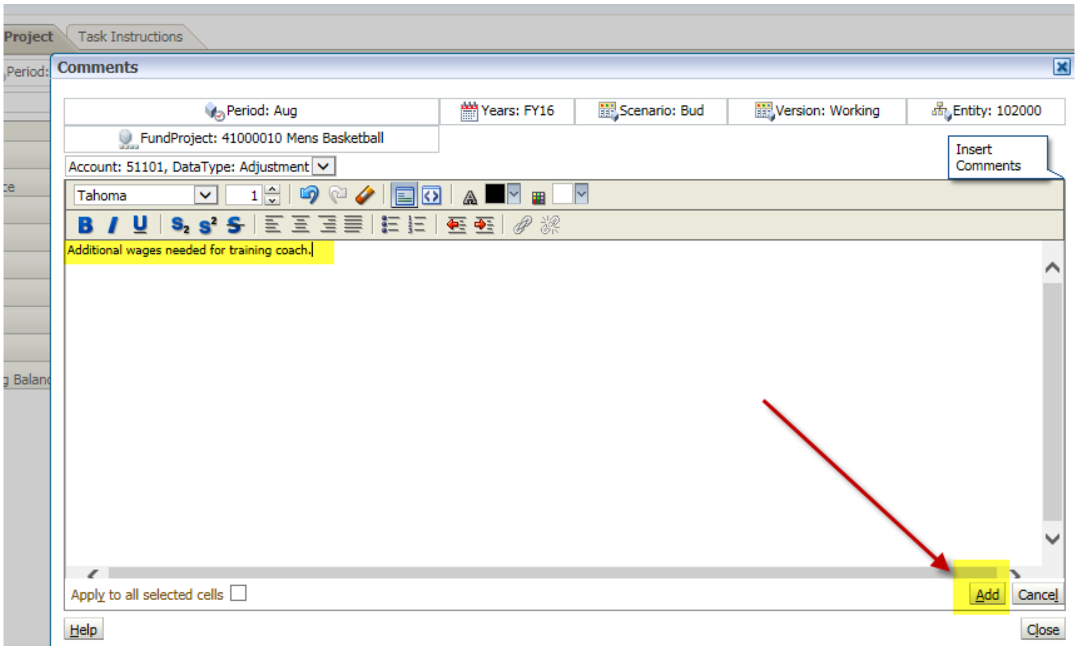
a. **Cell Comments -** To add comments and/or justification, right-click on the input cell and select **Comment** from list.



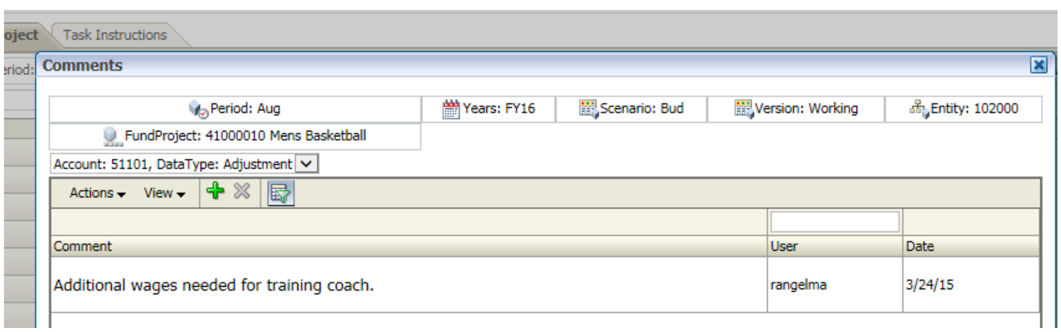

b. Then click on either the green plus sign to Add or red X to delete.



c. Type in your comments (up to 240 characters) and click Add.

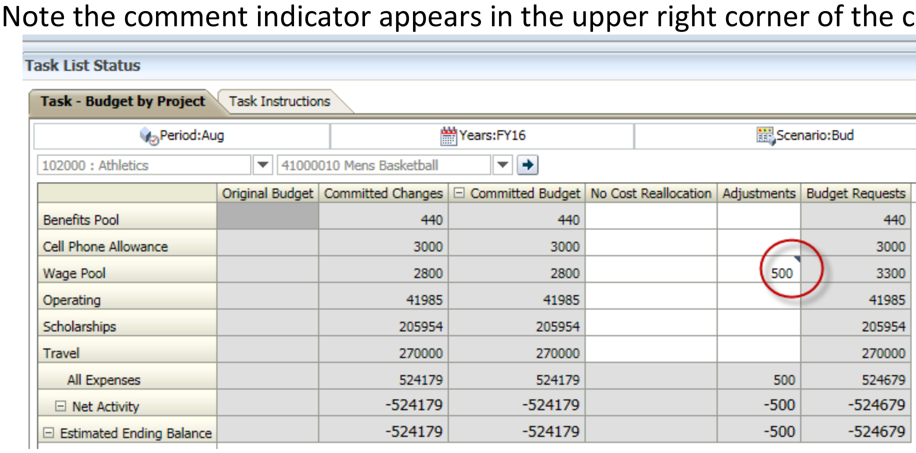



d. Your comment will be tagged with a user ID and date of who entered the comment.

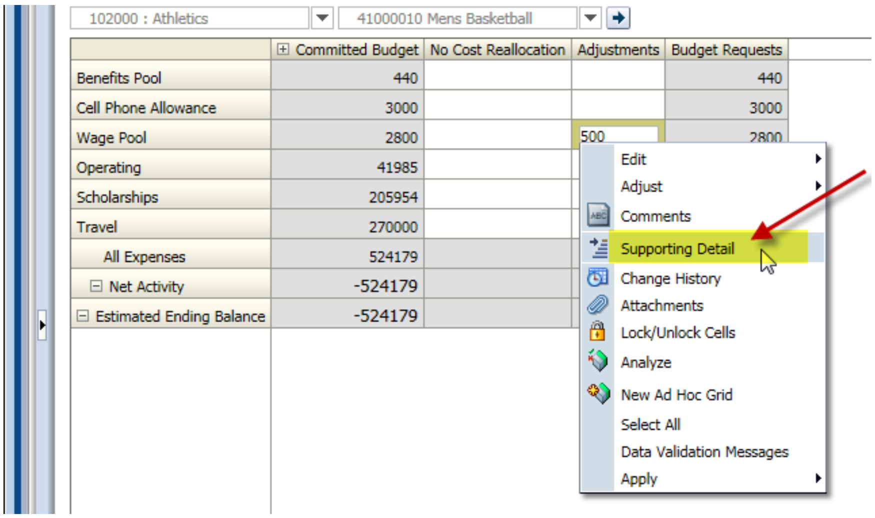



e. **All requests for new funds must include comments** (justification/explanation).

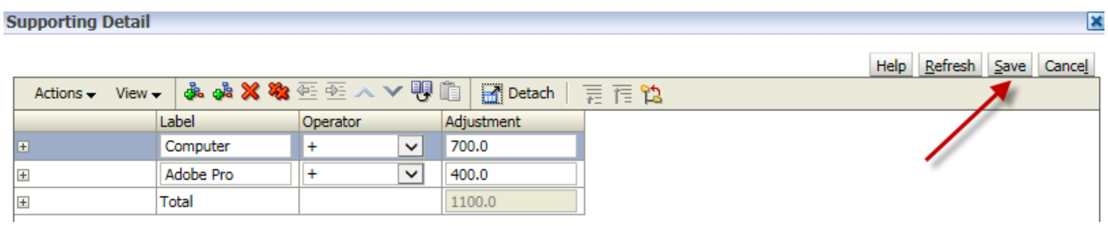
f. Note the comment indicator appears in the upper right corner of the cell.



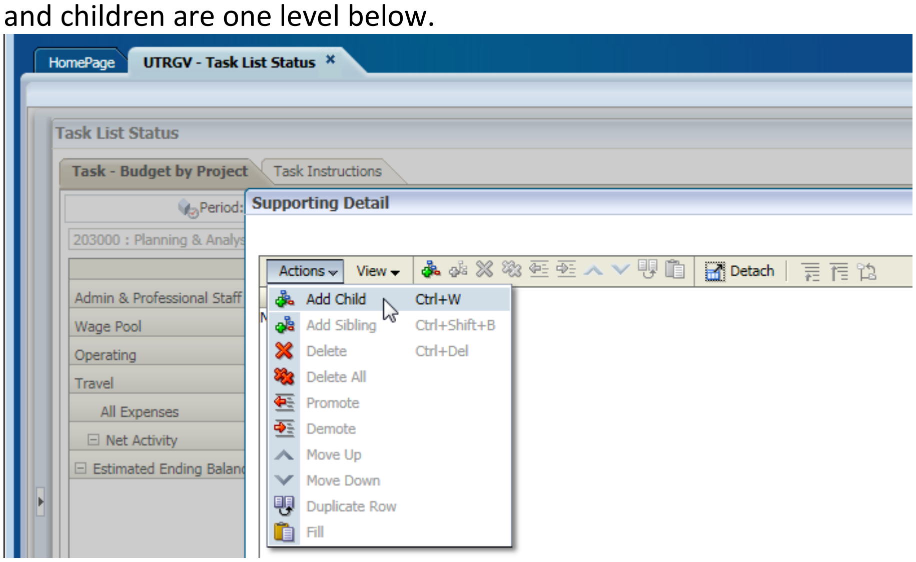
g. **Supporting Detail -** right-click on the input cell and select Supporting Detail. Select your action from the drop down menu. Use this when you want to itemize the amount. (If only one item opt to use the comment feature instead of the supporting detail).




h. Enter a description for each item on the list. Press save to apply changes.



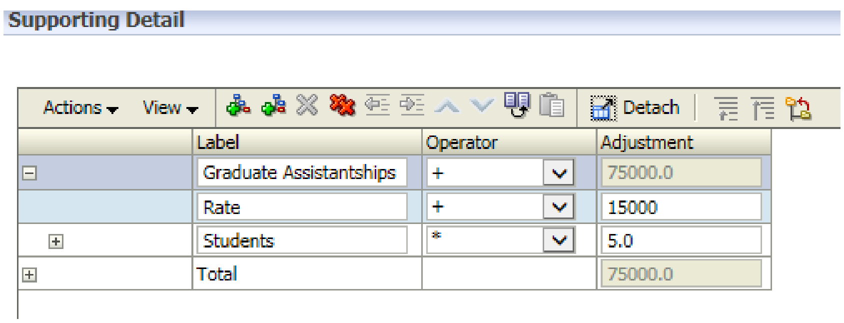

i. To add an additional item click on the Actions dropdown menu or click on the green + signs. An additional item on the list may be set up as a Sibling or as a Child. Siblings are at the same level and children are one level below.



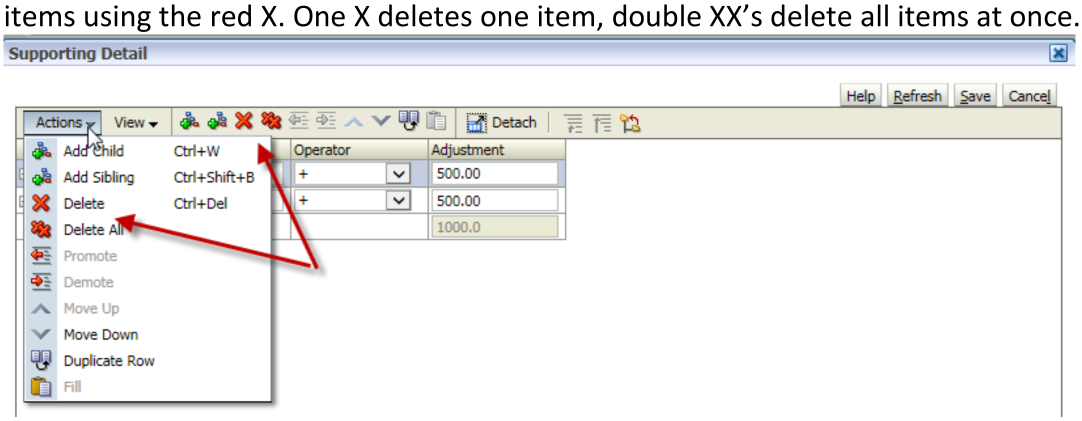
j. The cell color changes to turquoise to indicate presence of supporting detail.

| iginal Budget | Committed Changes | ⊟ Committed Budget | No Cost Reallocation | Adjustments | Budget Requests |
|---|---|---|---|---|---|
| | | 235130 | | 0 | 235130 |
| | 7025 | 7025 | | | 7025 |
| | 10239 | 10239 | | 1100 | 11339 |
| | 6908 | 6908 | | | 6908 |
| | 24172 | 259302 | | 1100 | 260402 |
| | -24172 | -259302 | | -1100 | -260402 |
| | -24172 | -259302 | | -1100 | -260402 |

k. In addition to itemizing a request, you may use the supporting detail feature to calculate your request. For example, a request for graduate assistantships of 5 students at a rate of $15,000 may be submitted as shown below (note the use of the multiplication sign). First enter Graduate Assistantships then add the rate as a child and the Students as a sibling of the rate. Make sure the Students have the correct operator of * to multiply. If you make a mistake you can promote or demote the items from child to sibling and vice-versa using the action drop down list.

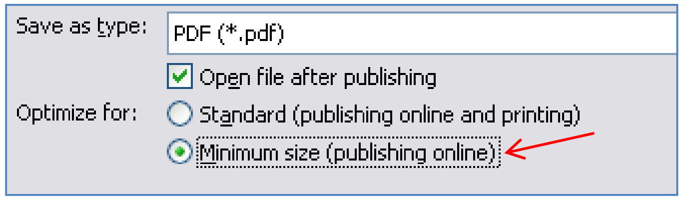



l. If an amount is entered using the supporting detail the system will not allow you to delete it by simply deleting the cell amount. You will have to go into the supporting detail and delete the items using the red X. One X deletes one item, double XX's delete all items at once.



*m.* **File Attachments -** Although lengthy justifications are discouraged, should the 240 characters allowed in the comment box be insufficient, a Word, Excel or PDF file may be attached. Attachments are <u>limited to one page</u>; please minimize the size of attachments as follows:

*PDF files – using Adobe Pro, select Advanced, and then PDF Optimizer from the menu.*
*Excel, Word – save attachment as a PDF file and select "Minimum Size".*




**n.** The budget manager of your division will assist you in uploading files to Hyperion.

## 8. THE TASK LIST in more detail:

### STEP 1: Complete Salary Form

Review and apply updates to budgeted positions by using one of the salary forms. Select to view either by entity, project or by position number (the latter is helpful for split-funded positions). Each form has the following columns. <u>Enter new position, reclassification, and equity requests only if appropriate HR paperwork has been fully approved</u> (otherwise, you may park the request in one of the following salary pools. DO NOT use the parent account 51010 – Salary Pool, you must use one of the child account salary pools listed here).

| | |
|---|---|
| 51010_1 | Part Time Faculty |
| 51010_2 | Faculty Salary Reserve |
| 51010_3 | Teaching Assistants |
| 51010_4 | Graduate Assistants |
| 51010_5 | Salary Pool Faculty Other |
| 51010_6 | Salary Pool Staff Other |
| 51010_7 | Cell Phone Allowance |


a. **Committed Budget -**contains UTRGV committed positions at this point of time.
b. **New Position Request -** used to enter fully approved new positions. To add a position number, submit the New Position form available in the FY 2017 Operating Budget Instructions to Hyperion-Support@utrgv.edu.
c. **Reclassifications -** used when a position is being reclassified.
d. **Equity Changes -** as above, but for equity changes.
e. **Other Position Adjustment -**for all other adjustments including changes to the FTE, funding distribution, longevity pay, benefits percent, and, for vacancies, adjustment of the salary rate.
f. **Budget Requests -** contains the proposed FY 2017 budget as adjusted for requests.

An additional form is provided for salary reallocations.  This form may be used to redistribute funds among salaries (especially vacancies) or between a salary and an expense.  This form has the following columns:

| Budget Requests | No Cost Reallocation | Adjustments |
|---|---|---|

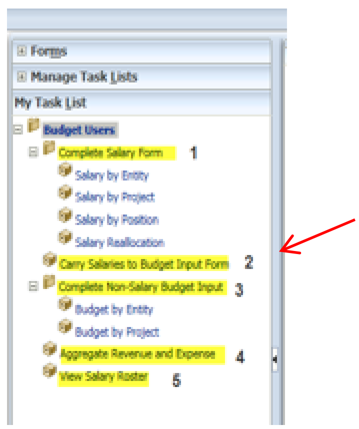
- **Budget Requests -** indicates the FY 2017 requests from the other salary forms.
- **No Cost Reallocation -** for any salary adjustment amount to be reallocated.  The total of such reallocations must equal zero.
- **Adjustments -** calculated to reflect the net adjustment after reallocations.

If the funding for an existing position is to be changed to a different project, in addition to adjusting the funding percentages, please verify that the following position information appears in the new project: current salary rate, FTE, annual longevity (if applicable), and benefits percentage.

The Budget Office will populate these fields so that in most cases you only have to adjust the funding percentages. If any fields are missing data, please use the Other Position Adjustment column for this input.

## STEP 2:  Carry Salaries to Budget Input Form

This business rule is required to be launched once salary adjustments have been entered.  This rule takes no more than a minute and will transfer your adjustments to the budget input forms.   When launching the rule, make sure the correct entity (department value) is selected in the dialog box.




## STEP 3:  Complete Non-Salary Budget Input Form

Review and apply updates to your project budgets.  Select to view either by entity or by project.  Each form has the following columns:

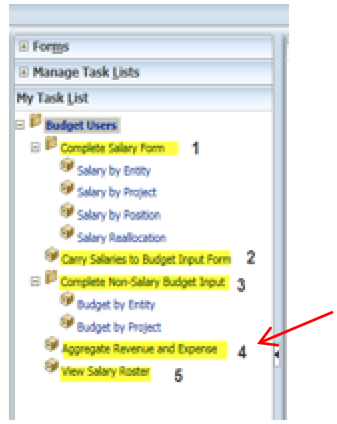
| Committed Budget | No Cost Reallocation | Adjustments | Budget Requests |
|---|---|---|---|

g. **Committed Budget -** contains the FY 2015 original budget as adjusted for permanent changes.
h. **No Cost Reallocation -** for a redistribution of funds where the overall change adds to zero.  All positions adjustments are pre-populated from the salary forms.
i. **Adjustments**: - used to enter your budget requests for non-position revenue and expense accounts.  Again, positions adjustments are pre-populated from the salary forms.
j. **Budget Request -** calculated to reflect the FY 2017 proposed budget.

## STEP 4:  Aggregate Revenue and Expense

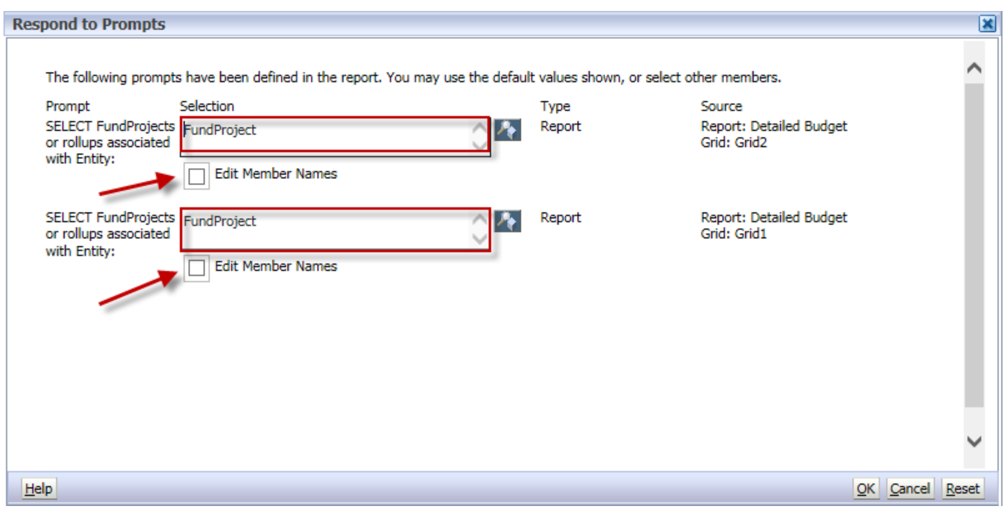
This business rule is required to be launched once all budget adjustments have been entered.  This rule takes about a minute and serves to update hierarchical totals with your requests.  Again, make sure the correct entity is selected in the dialog box.

> **If budget updates do not appear under a parent entity** (such as a college or division), run the "**aggregation rule**" (task 4).



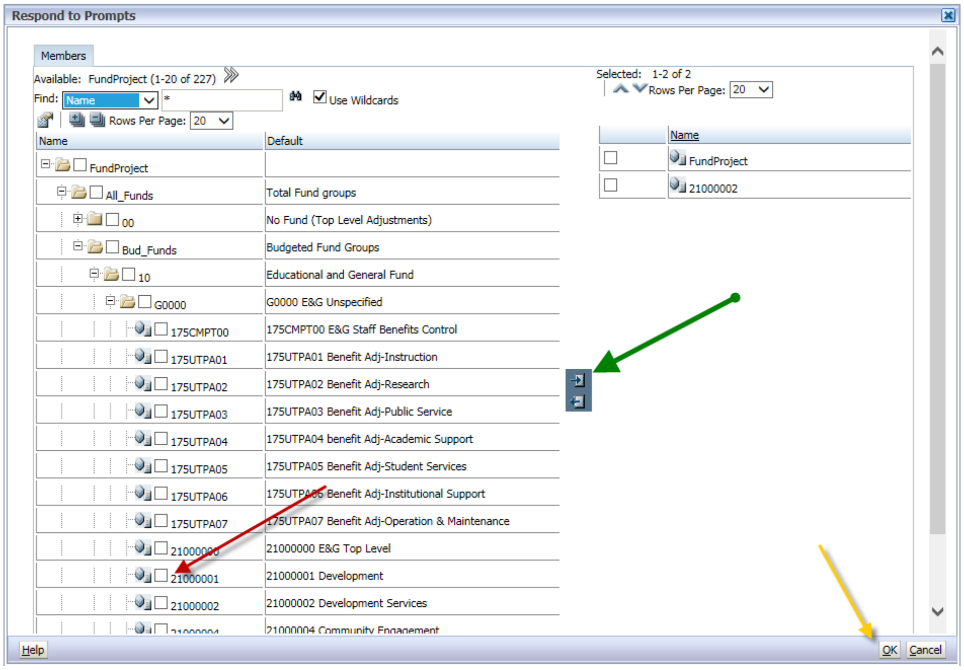

## STEP 5:  View Salary Roster

Finally, to view or print a report of your proposed budget, click on View Salary Roster in the task list.  The following dialog box will appear.  You **MUST** first, click to place a checkmark in the Edit Member Names fields indicated with arrows below.  Then, select the projects ("fundprojects") you wish to view by responding to the prompts by either just typing in your project or searching for it (explained below).




<u>Recommended approach</u>:  Type the project value(s) in the selection prompts instead of using the search capability (described next).  If there are multiple projects, place a comma between each.  After completing the first prompt, copy and paste the input into the second selection prompt and then click OK.

Alternative approach: Click on the magnifying glass to drill down, select the project(s) you wish to view, press the right arrow, and click OK. This method is more time consuming but may be used if you need to search for a project value by name.




The salary roster report is available in HTML and PDF formats (see buttons on the menu bar). For on-screen viewing with multiple projects, you may prefer the HTML version which features a drop down box to switch between projects. If you are printing, the PDF format will probably work best.

## HINT

- **Zoom function**
  It is recommended that you maintain the zoom level of your browser at 100% while using Hyperion, otherwise data cells may not line up correctly with row headings.

## Solutions to Common Problems:

### MY PROJECT IS BLANK!

If no data appears for a project, some possible reasons are (1) the project was not set up therefore you need to submit an “Add Project” request form, (2) the user does not have access to the department (entity) the project is linked to, or (3) the data is set up in a department other than the one currently queried.

If the project needs to be tied to a different department you need to notify us at Hyperion-Support@utrgv.edu. We will update Hyperion and set up the project under the correct department.

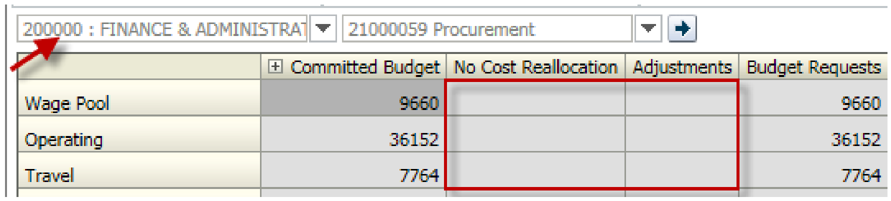
## FORM IS NOT UPDATED WHEN I SAVE CHANGES OR RUN BUSINESS RULES

Occasionally a user form will freeze and values will fail to be updated when the form is saved or when business rules are run. If this occurs, close the form completely, then reopen and reapply the changes. If you still experience problems, contact Hyperion-Support@utrgv.edu.

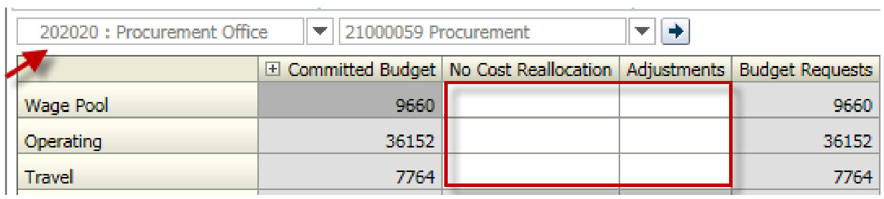
## INPUT FIELDS ARE GRAYED OUT

This problem occurs when the entity (organization) selected is at a higher level than where the detail data resides. For example:

Fields are grayed out and do not allow entry if a parent org is selected. →




Entry is allowed once the child org is selected. →

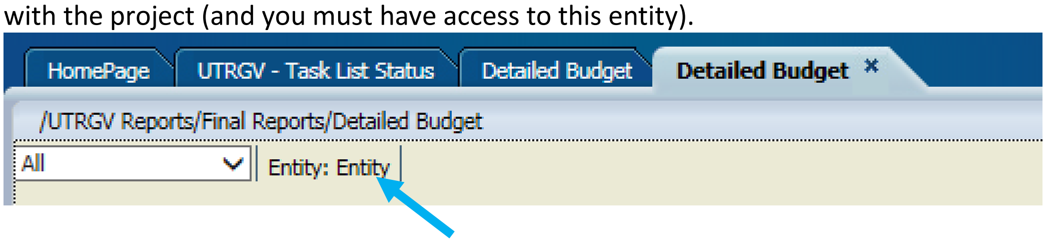



Parent departments are in blue font. In order to make adjustments, you must select a "level zero" child department (a department which is not a parent to another department). Keep in mind that updates will not be reflected at the parent level until the business rule to aggregate totals (step #4) is run.

## SALARY ROSTER REPORT IS BLANK OR IS MISSING DATA

This problem often occurs when the entity (department) selected is not associated with the missing data or if the user does not have access to the selected entity.

The remedy is to click on the "Entity" field at the top of the screen (see arrow below) and revise the entity selection. Unless you have access to a parent entity (such as a college or division), you will need to select the entity associated with the project (and you must have access to this entity).




If you frequently encounter this issue, you may consider updating the default entity in the user preferences. Please contact Hyperion-Support@utrgv.edu for assistance.

**Additional Notes:**
Do not use the parent revenue account 40001.
If a specific revenue account is not set up for the type of revenue you need to budget for, you can use one of these general revenue accounts.

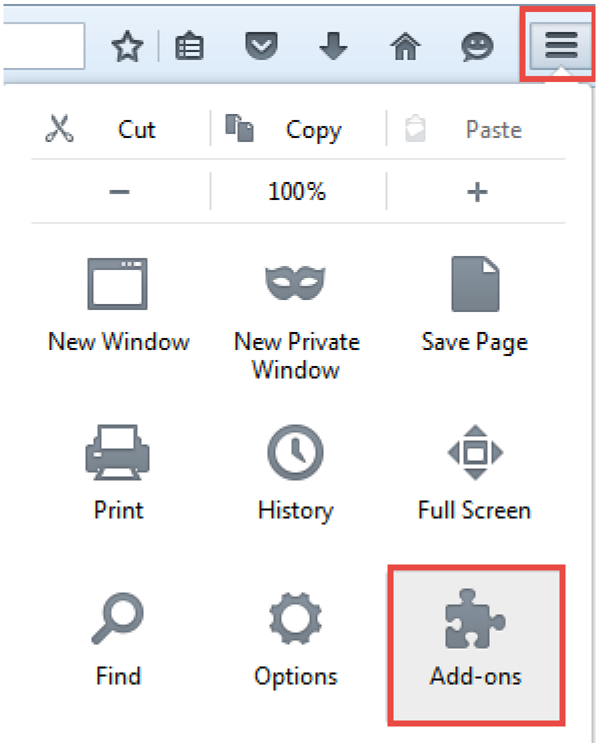
| Account | Account-Alias |
|---|---|
| 43199 | Other Revenue Sales & Services |
| 43805 | Other Commissions |
| 43899 | Other Revenue Auxiliary |
| 44050 | Other Revenue EG |
| 44055 | Other Revenue Desg |
| 44060 | Other Revenue Restricted |
| 44360 | Other Non-Operating Revenue |

Do not use the parent salary pool account 51010.
Please use the specific salary pool account you are budgeting for.

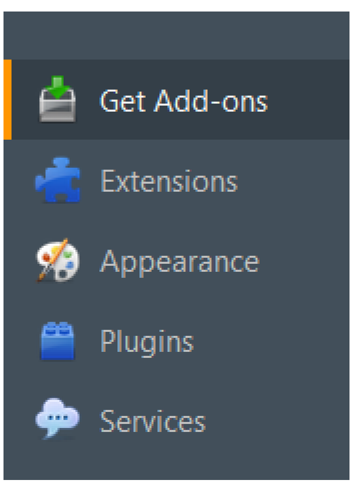
| Account | Account-Alias |
|---|---|
| 51010 | Salary Pool (DO NOT USE) |
| 51010_1 | Part Time Faculty |
| 51010_2 | Faculty Salary Reserve |
| 51010_3 | Teaching Assistants |
| 51010_4 | Graduate Assistants |
| 51010_5 | Salary Pool Faculty Other |
| 51010_6 | Salary Pool Staff Other |
| 51010_7 | Cell Phone Allowance |

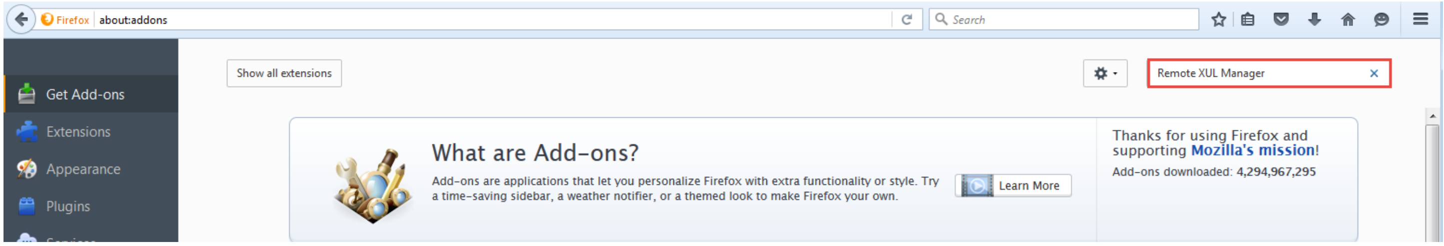
# APPENDIX A
# Hyperion – Firefox Settings
Last Updated: 2-16-16

1. Open the Firefox Mozilla browser, go to Open Menu at the top right corner of the screen, and click on Add-Ons.

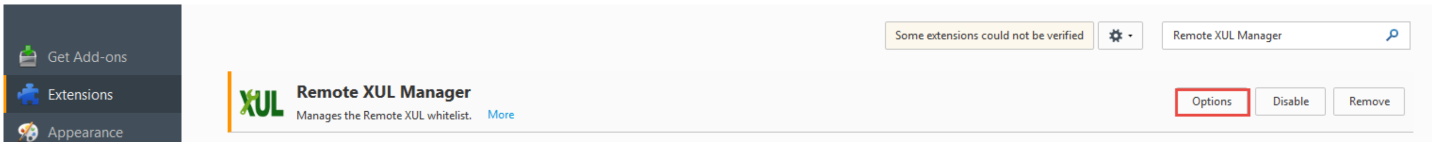



2. Click on Get Add-Ons from the menu, Search for the Remote XUL Manager add-on, and install it. Once the add-on has been installed, restart Firefox.

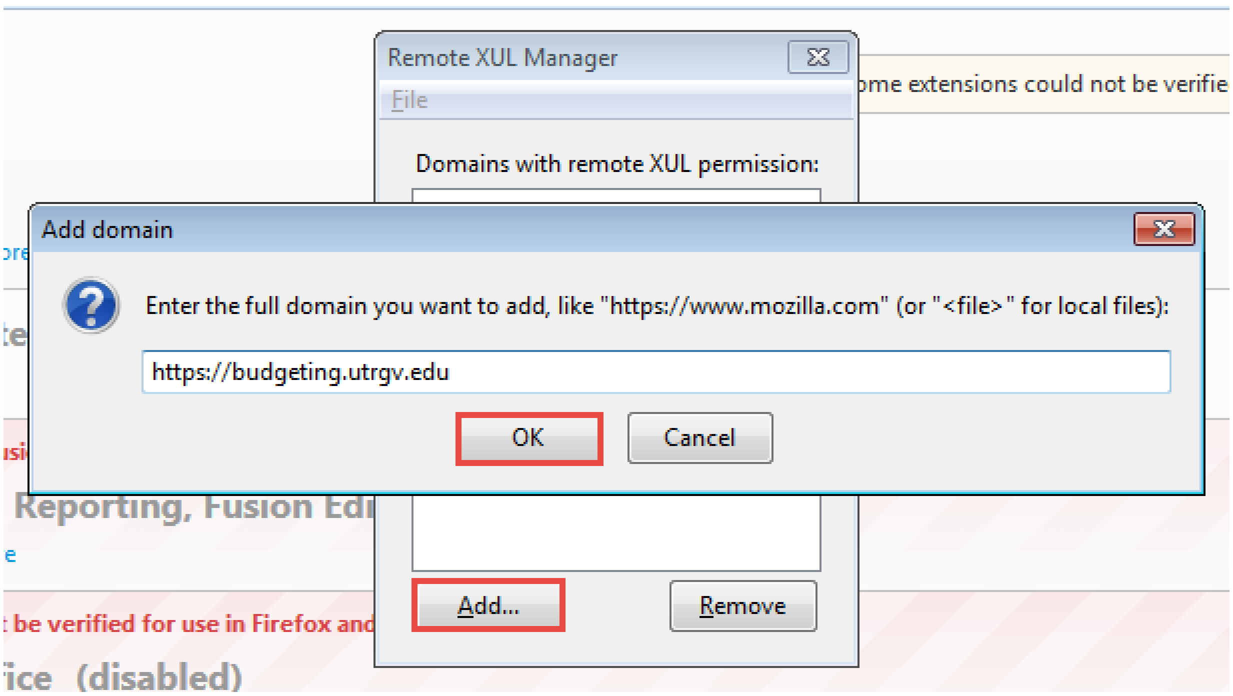





3. Launch Firefox again, go to the Extensions menu, find the Remote XUL Manager add-on, and click on Options.




4. Click on Add, enter the URL for Hyperion to add it to the whitelist, and click OK.




5. If prompted, restart Firefox one more time.