

ISLANDS

Planning 11.1.2 User Manual





Budget Office May 2011

Hyperion Planning/Workspace/Reports

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Overview

Planning Workspace is a centralized Web-based planning, budgeting and forecasting program that integrates financial and operational planning processes and improves business predictability. Planning allows the budgeting process to be performed using a web browser. The end user enters data through the internet in web forms. The data can then be pulled into reports and analyzed. Planning web forms can also be downloaded to Excel with a direct connection to the web or downloaded to work offline. Planning is compatible with Internet Explorer 7.x, 8.x and Firefox 3.5.x.

Planning Logon



Workspace Logon

To access Workspace:	Crade Exterprise Performance Management System ORACLE: Enterprise Performance Hanage Log On	ment System Workspace, Fusion Edition	- <u>-</u>
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2	Lock/Unlock Cells	Lock or unlock cells when spreading data
	Supporting Detail	Add detail that aggregates the cell value in data forms
2	Add/Edit Document	Add or edit documents to provide documentation for data in cells
₽	Open Document	Open an attached Excel or Word document
K 🛍 🛱	Cut, Copy, Paste	Cut, Copy or Paste values from one or more cells to one or more cells on data forms
6	Instructions	Shows the instructions for the data form
Ŵ	Open in Smart View	Open data forms in Smart View
	Task List	Open task lists if task lists are assigned to you
	Status	Check task list status

Data Forms



View Only Forms										
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Expense and Revenue Input Expense and Revenue Input Next Yr:

There are 2 forms here.

o Expense Input Next Yr

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o Revenue Input Next Yr



The Expense and Revenue Input forms function the same. Select your fund, department, program and project and click Go. The first column (green) is the prior year actual for your reference. Enter your department data and save.

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No_Program

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Entering Data Basics

You can:

- Page through Departments, Funds, Programs and Projects with a drop down bar
- Click Go to switch to the intersection of members you chose.

 Always save data changes prior to switching to another Department, Fund, Program or Project (you will be warned by the system to save).

Using the Find feature:

This feature can be used instead of scrolling through the drop down to find the item you are looking for. Click on the binoculars and a search window will appear. Type in what you know and click the binoculars again. The options will appear in the drop-down box. Keep clicking on the binoculars until the item you need is in the drop-down box

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color it means, you have entered	605090_Other Utilities
data in and have not saved it yet.	Headers Data Write
 White – Open to be written in. 	& Read entered but Access
	Columns only not saved
You can copy and paste data between forms, between Planning & Excel, and within a form • Use the Copy & Paste buttons at the top of the form to copy and paste just like in Excel. • Use Ctrl+C & Ctrl+V for moving data around within a data form.	 Spread data across months by entering your desired total in the "Quarter" or "Year Total" cells Data will spread according to the profile already existing in the months. If no data currently exists, the numbers will spread evenly across the months. All data in a quarter can be removed by deleting the Quarter or Year Total value.

Comments

Comments lets you add or view details about the data in a specific cell or cells. To add or view comments from the Enter Data page:

- Highlight the cell or cells that you want to add Comments to.
- Click the Comments icon e or choose Edit/Comments.
- Enter your comments and click on submit. You will now see a small blue triangle in your cell.
- Comments are not required but may be useful and are encouraged.

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Supporting Detail

Supporting Detail can be used to build an input or a series of inputs using simple mathematic calculations

- Select the cell or range of cells to which you wish to give supporting detail.
- Click the Supporting Detail icon

or choose Edit/Supporting Detail and create simple formulas to create data based on program specific information (i.e. Travel = per diem X number of days + hotel and airfare).

- You can click the Add Sibling or Add Child buttons to create your detail.
- Cell turns blue when supporting detail is added.
- Supporting detail is not required but may be useful and are encouraged.

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605004_Water - Usage	Food	+ 🗸	50	
605005_Sewage	Parking	+ 🕶	15	-
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605090_Other Utilities	Help		Refresh Save Cancel	
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605803_Sewage Reimbursement				
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Add/Edit a Document	
A supporting document or URL can be added to a cell to capture more detailed information about that cell. First, the document must be downloaded to the report repository	Image: Second system workspace File Edit View Favorites Tools Help New Image: Second system workspace
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Step 3. Choose Groups tab and click Update List. If you only want the file available to your group, choose the group you are in. Otherwise, choose Scenario Grp. Move the group over using the middle arrow button.	Bods Bods Hegt Finish Import: / I. Choose File 2. Advanced Stermissone Name Acting (pp Actg from C pp Commun Meeting (pp Commun Meeting (pp Commun Meeting (pp Commun Meeting (pp Difficing (pp Packer, Grop Stockert, Affairs, Gro Packer, Grop Stockert, Affairs, Gro Packer, Grop Stockert, Affairs, Gro Packer, Grop Stockert, Affairs, Gro View, All View, All Difficience, fibe / President Packer, Grop Stockert, Affairs, Gro View, All View, All Difficience, fibe / President Packer, Grop Stockert, Affairs, Gro View, All Difficience, fibe / Packert, Grop Stockert, Affairs, Gro View, All Difficience, Grop Stockert, Affairs, Gro Difficience, Grop Stockert, Grop Stockert
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Exporting to Excel to Print or Save

load to Planning when you copy and

paste it back into Planning.

You can export your data form to Excel <u>Navigate File Edit View Favorites Tools A</u>dministration <u>H</u>elp and work on your numbers offline. 🐧 🖺 📂 🞥 Explore j 🖷 📣 🚝 j 🥖 Change Password.. 🛍 😼 🗯 j 🖺 🖓 Install HomePage CSUCI - Expense & Reve Yr Change Related Content Links.. Change Database Connections... Click on Tools > Export as Spreadsheet С Database Connection Manager... - Porms aining_Unit: No_Bargaining_Uni Manage Key Figures... 🖃 뛛 Budget Managers 🖭 쮇 Transfers Links 225_Budget and Reporting Expense & Revenue ... Pa <u>P</u>lanning **∼ 8**9 🖭 쮇 Employee Data Manage Process Actuals 🖭 뛛 Budget Office Admin Forms Copy Version Final 🖭 쮇 Training Forms Business Rules FY09 Job Console YearTotal EVearTotal Jul Copy Link 594 1000 Custom Links (P) 20000 166 Export as Spreadsheet 604090_Other Communications 604800_Cell Phone Usage 7 133 900 Save the downloaded File File Download X Do you want to save this file? Name: HspExcelGrid.xls Type: Microsoft Office Excel 97-2003 Worksheet From: yardarm.csuci.edu Save Cancel While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not save this file. What's the risk? ? HspExcelGrid.xls C D 5 Budget and Reportin No_Progr Open the file in Excel No_Bargaining_Unit No_Employee GD901 Note: You cannot add cell text or 504001 Telephone Usage 593.52 1000 supporting detail in Excel. You can only 83 504002_Computer Network 20000 work on data displayed. You can create 132.57 900 10 11 calculations in cells and the data will

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605090_Other Utilities

605803_Sewage Reimbursement--UGC 605804_Electricity Reimbursement

605005_Sewage

Employee Data													
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View Existing Employees Current Year	CSUCI				
and View Existing Employees Next Year	Program: Total_Programs	Project: Tot_Proj_Inc_No_Pr	oj	- E0:	5cenario: ORIGINA
 This allows the user to view ONLY the 	Page 225_Budget and Reporting	GD901_CI ~ Operating		✓ #1	50
employees listed for the current year				⊡YearTotal	Jul
and last year. Shows their position	Bracamontes, Stephanie Galvan_000403911	Administrator II_00000031	601201		
and last year. Onows then position	Cole, Tracy Renee_000520079	Assoc Budget Analyst_00000707	601300		
number and title, account and salary	Jarnagin,Melissa M_000078586	Administrator II_00000563	601201		
amount	Schweisinger, Jennifer_000769627	Admin Analyst-Spclst 12 Mo_00001491	601300		
 Choose a Department and Fund 	Wancewicz, Marysia Ann_000098203	Admin Analyst-Spclyst 12 Mo_0001155	601300		
and click Go	New Employee 1	Admin Analyst-Spclst 12 Mo_00000118	601300		
	No_Employee	No_Bargaining_Unit	601303	11400	1520
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Existing Employee Changes



Enter the Fund, Employee Name,	CSUCI		3.Scepario: OF	TGTNAL		1	(F.)	Nersion: Work	kina	1	M
Position, Program, Project and		01. CL :: Operati			Colo Troqu	Depec. 00052001	70	a	00000707		4
Department.	Page No_F	Program	ng			No_Pro	oject	W B	00000707	₩	
Click Go.	225_	Budget and Rep	orting	~	64						
		EVearTotal	Jul	Aug	Sep	⊟Q1	Oct	Nov	Dec	⊟Q2	Jan
The colory and ETE for the employee	601030			·							
The salary and FTE for the employee	FIE_601030										
will populate.	FTE_601100										
	601101				1						
Make sure to delete the old salary and FTE!					1	I		I	Ι	1	I
Click Save											
Enter the NEW department. Click Go.											
Enter the salary and FTE. Click Save.											
To change the Fund for an Existing	Hom	oPage	CSUCT - 0	Folget Da	ata Eorm	×					
Employee click on the form		eraye	CSUCI-	Select Da							
Employee click on the form		Farma				CSUC					
		Forms Budge	t Manager			Data Fo	rm : Fund for	Existina Er	mplovee		
Note: If an employee needs to be	-	H Tra	ansfers	5		<u>corroc</u>			<u>npio) oo</u>		
moved to a Fund that is not a budgeted		Ex	pense & R	evenue Ir	nput Ne						
fund please contact the Administrator		- 📁 Em	Iployee Da	ata							
		- 🗊	Existing	Employee	Chang						
			芦 Char	nge Depar	tment						
			📁 Char	nge Fund							
			뛛 Char	nge Salary	<i>(</i>						
		i i	New Emp	oloyee Add	ditions						
	+	뛛 Budge	t Office Ad	dmin Form	s						
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	-					_					
Enter the Fund Employee Name	CSUCT										
Depition Drogrom Droject and			***	anavia opi	ICTNIAL		1			*** Usurian	Washin -
Position, Program, Project and			<u> </u>	lenario; OR.	IGINAL					Nersion:	working
Department.	Page	Cole, Tracy R	enee_00052	20079		M 00	000707		~	Me No	_Program
Click Go.		lo_Project				~	M 60:	1100 💌	225_Budg	jet and Repo	orting
			⊡Year [*]	Total	10	Aug	Sen	G	Q1	Oct	Nov
The salary and FTE for the omnloyee	CH900 B	udgeted_Fur	d			Aug	Зор				1107
	CJ900 B	udgeted_Fur	d								
will populate.	RB002 B	udgeted Fur	id								
	RB005 B	udgeted Fur	d								
Make sure to delete the old salary	88007 P	udgeted Eur	d								
and FTFI	DB000 D										
	KBUU8 BU	udyeted_FUF									
	CP COL -	and the second									1
	GD901 B	uagecea_rur									
Enter the salary and FTE in the new	GD901 B GD935 B	udgeted_Fur udgeted_Fur	id								
Enter the salary and FTE in the new Fund.	GD901 B GD935 B GD945 B	udgeted_Fur udgeted_Fur udgeted_Fur	id id								
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Enter the salary and FTE in the new Fund.	GD901 B GD935 B GD945 B LIB901 B	udgeted_Fur udgeted_Fur udgeted_Fur	id id								
Enter the salary and FTE in the new Fund. Click Save.	GD901 B GD935 B GD945 B LIB901 B	udgeted_Fur udgeted_Fur udgeted_Fur	d d								

To change the Salary for an Existing Employee click on the form that corresponds to the ACCOUNT that the employee is charged to Note: If you notice an employee is missing the FTE , this is the form you can use to add it.	yet Managers Transfers Expense & Revenue Employee Data Existing Employ Change Fund Change Salary New Employee yet Office Admin Fo ning Forms	CSUCI Data Form Enter Employee (Enter Employee (Enter Employee (Enter Employee (Enter Employee (hanges Nxt banges Nxt hanges Nxt hanges Nxt hanges Nxt	Yr - 601100 Yr - 601201 Yr - 601201 Yr - 601304 Yr - 601300 Yr - 601300		Descripti To make To make To make To make To make	ion changes to changes to changes to changes to changes to	individual er individual er individual er individual er individual er	nployees sa nployees sa nployees sa nployees sa nployees sa nployees sa	aries - Acad aries - Depar aries - Mana aries - Supp aries - Teacl aries - Librar	emic Salaries trivent: Chairs gement & Staff ning Associat ian	Faculty supervisory res
Enter the Position, Fund, Department, Program, Project and Employee Name. Click Go. The salary for the employee will populate. Enter the new salary amount for this employee. Enter the FTE. Click Save	CBUCT	Conversion COLIDADA M) COPOD_CI ~ COP asr Total Jul 3 1 0,6091.00 S,7127.00	rating Aug 1 5,717.00	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	225,Bud 0,Projekt 1 17,151.00	Oct 1 5,727.00	Nov 1 5,717.00	₩ 49 ₩ 99 0 cec 1 5,717.00	Cole, Trac	9,00052 7 Ranee_00052 3 Jan 1 5,717.00	Peb 1 5,717.00	60 Mar 1 5,717.00 5



Choose the Position, Fund, Department, Program, Project and Employee. By default, new employees are listed as New Employee 1, New Employee 2, etc.

If you would like to budget new employees salary using the **position working title**, contact the Administrator to add it to the drop-down.

If you would like to budget new employees salary using the **employees name**, contact the Administrator to add it to the drop-down.

- Enter the salary amount for the new employee
- Enter the FTE for the new employee

Click Save.

The data entered is for budgeting purposes ONLY. New position numbers will be added to PeopleSoft at a later date.

CSUC	1										
	Scenario:	ORIGINAL				Version: Workin	ig.		Q OYe	ar: FY11	
Page	00000707	GD901	M 22	5		₩ 8	No_Program 💌	M No_F	roject 🔽 🙀		G
ruge	New Employee 1		e dela								
		⊡YearTotal	Jul	Aug	Sep	⊡Q1	Oct	Nov	Dec	⊡Q2	Jan
60103	0_Executive										
FTE_E	xecutive	-									
60110	0_Academic Salaries										
FTE_4	cademic Salaries										
60110	1_Department Chair										· · · · ·
FTE_D	epartment Chair										
60120	1_Management and Supervisory										
FTE_M	lanagement and Supervisory										
60130	0_Support Staff										
FTE_S	upport Staff										
60130	4_Teaching Associates										
FTE_T	eaching Associates										
60180	0_Librarian			· · · · · · · · · · · · · · · · · · ·							· · · · · · · · · · · · · · · · · · ·
FTE_L	ibrarian										
60180	7_Temporary Faculty										
FTE_1	emporary Faculty										
	2	<		111							>

Split Funding

To split funding for a position, you will need to communicate with the other department on the salary and FTE split.

Under Existing Employee Changes, use the Change Salary data form to make the split.

Enter the FTE as a decimal and the salary amount for your department.

Click Save.

CSUCI										
	Scenario:	ORIGINAL		Version: Working						
00000707 💽 🏟 GD901_CI ~ Operating					225_Budget and Reporting					
Page No_Project No_Project							v 8	ð.		
New Employee	1		₩							
	⊡YearTotal	Jul	Aug	Sep	⊡Q1	Oct	Nov	Dec		
FTE_Support Staff	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5		
601300_Support Staff	25,000.00	2,083.33	2,083.33	2,083.33	6,250.00	2,083.33	2,083.33	2,083.33		
< >	<			1111						

Budget Transfers					
Divisions have the ability to process their own budget transfers .					
 Click on Transfers. There are 3 types of transfers Transfers Perm Budget Adjustments One-Time Transfers Transfers are routine monthly budget transfers. Perm Budget Adjustments are permanent budget transfers that will become part of your base. One-time Transfers are disbursements from the Chancellor's office that come in the form of CPO's or SWAT's 	HomePage CSUCI - Select Data Form X Forms Budget Managers Perm Budget Adjustments Cone-Time Transfers (SWAT-CPO's) Expense & Revenue Input Next Yr Employee Data Employee Changes Next Yr	CSUCI Data Form <u>Transfer Expense (</u> <u>Transfer Salary Cur</u>	urrent Year Iurrent Year rent Year	Descript Enter E Enter R Enter S	tion :xpenses by Ac tevenue Expen ialary Expense
To process transfers:					
Choose the Fund, Department, Program	Bargan	ning_Unit: No_Bar			
and Project. You will only have access	Page GD901 M M 225		ADJUST	100	M BM
			Working FY10		
• Enter data that you are accepting	604001 Telephone Usage	YearTotal	Apr	May	Jun
from another department or	604002_Computer Networks		20		
account as a positive number to	604090_Other Communications				
your department.	604800_Cell Phone Usage		-20		
 Enter data that you are giving to another department or account 	605001_Electricity - Usage				
another department of account	605002_Natural Gas - Usage				
department.	605003_Oil - Usage				
	605004_Water - Usage				
NOTES: You must communicate with the other department that you are giving to or receiving from how much you are entering so that they can enter the opposite amount to their department. You can only make changes to your department data.	^{605005_5ewage} Budget Transfer reports ar See Reports section on pa	e availabl ge 18.	e.		
P All Transfers will be reviewed the end of every month. Plea 25th of the month.	LEASE NOTE I and approved by t ise have all Transfe	he Adr rs com	ninistra pleted l	tor a by th	it ie

Reports Overview

All reports for Hyperion Planning are accessed with Hyperion Workspace. Hyperion Reports take data that is stored in Hyperion and present in a format that is set up by the Administrator.

Accessing Hyperion Reports Oracle Enterprise Performance Management System ... Open a new tab for Reports by clicking ORACLE' Enterprise Performance Management System Workspace, Fusi the Explore icon at the top-right corner of Workspace Navigate File Edit View Explore HomePage

A new tab and a list of available reports appear.

You only have access to reports for your department. If you have access to a whole division, you can access the SBC Reports by division.

Most reports come with a brief description.



Favorites

Tools

Administration

Help

Viewing & Printing ReportsDouble Click on a report and it will open.oWhen you click on a report, you may be prompted to enter specific criteria for this report.oClick on theImage: Click on theIm	Respond to Prompts X The following prompts have been defined in the report. You may use the default values shown, or select other members. Type Source Prompt Selection Type Report Report: Oppartment Budget Report with Transfers Enter Department: Image: Compartment Budget Report Report: Oppartment Budget Report with Transfers Grid: Grid 1 Enter Year: Image: Compartment Budget Report with Transfers Grid: Grid 1 Grid: Grid 1
 Drill down to the member you would like to see and move the member(s) over to the right using the middle arrows. Click OK. 	Help QK Cancel Reset
When all criteria has been chosen, click OK.	Members Available: Fund (1-17 of 17) Find: Name Name Default Part Fund
Verify the criteria for the report you want	Respond to Prompts
and click OK. You can always make	The following prompts have been defined in the report. You may use the default values shown, or select other members.
changes by choosing the	Prompt Selection Type Source Enter Fund: GD901 Report Report with Transfers
icon again.	Enter Department: 225 Report Report: Pogartment Budget Report with Transfers
	Enter Year: FY10 Report Report Report Budget Report with Transfers Grid:
	Uteb QK Cancel Reset

The report defaults to PDF preview.		Departr	ment Budget Budget Trans	Report fers	
	University				
	CHANNEL ISIANDS				
	225_Budge	t and Reporting FY10			
			Final	Final	
			ORIGINAL VearTotal	ADJUST VearTotal	
	REVENUE		rearrola	rearrotar	
	Total Reven	nue	-	-	-
	EXPENSE	& SALARY			
	GD901 6	01201_Management and Supervisory	184,560	-	184,560
	GD901 6	01300_Support Staff	246,608	-	246,608
	GD901 6	03803_Fringe Benefits	176,348		176,348
	GD901 6	04001_Telephone Usage	1,000	-	1,000
	GD901 6	04800_Cell Phone Usage	900	-	900
	GD901 6	60003 Supplies and Services - Other	2,500		2,500
	GD901 6	60831 Conier Usage	1 000	-	1.000
Hyperion allows you to change view after report has been run from PDF to HTML or vice versa. When in HTML view, you can change the any dimension in the Grid POV (Point of View) by clicking on the dimension.	Navigate File Vil Navigate File Vil HomePage CS /Department Budge California State University C H A N N E L S L A N D S Project: Tot F Bargaining Ur	Enterprise Performance Managem ew Favorites Tools Help piole M Revenue Input Next Yr - et Report with Transfers Department Budget with Budget Trans Proj Inc No Proj Program: Total Program nit Page: 225_Budget and R	ent System Wo Expense Input Ne Report ifers semployee: Employee eporting, FY10 V Final ORIGINAL YearTotal	vyce Bargaining Final ADJUST YearTotal	unit:
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Choose File > Export > Excel > Fully-Formatted Grid and Text (be sure your internet browser allows pop-ups)

Your document is downloaded to Excel where you can make changes to it and/or save it.



Contact Information

Tracy Cole – ext 3280 for Planning, Workspace & Reports and all other budget related questions

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Marysia Wancewitz - ext 3169 for technical assistance

Lacey Lovejoy - ext 3229 for technical assistance

