



California State  
University

C H A N N E L  
I S L A N D S

# Planning 11.1.2 User Manual



**ORACLE**<sup>®</sup>  
Hyperion<sup>®</sup>

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

Log into:  
**Planning**

<http://yardarm.csuci.edu:8300/HyperionPlanning/LogOn.jsp>

User name is your name (first.last).  
Password is your Campus login.  
Click on Log On.

Setting User Preferences:  
Navigate to:  
File  
Preferences

Application Settings tab

- Enter email address

Display Options tab

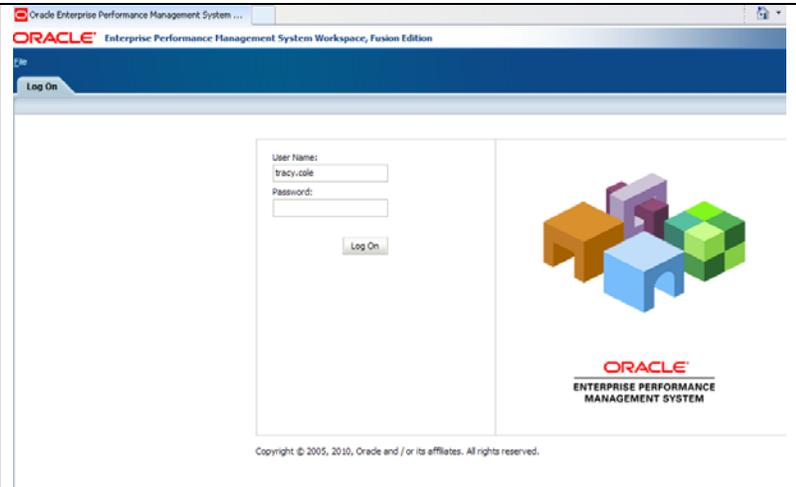
- Put in your number formatting preferences
- Change the "Warn if data form larger than" number to 50000

# Workspace Logon

To access Workspace:

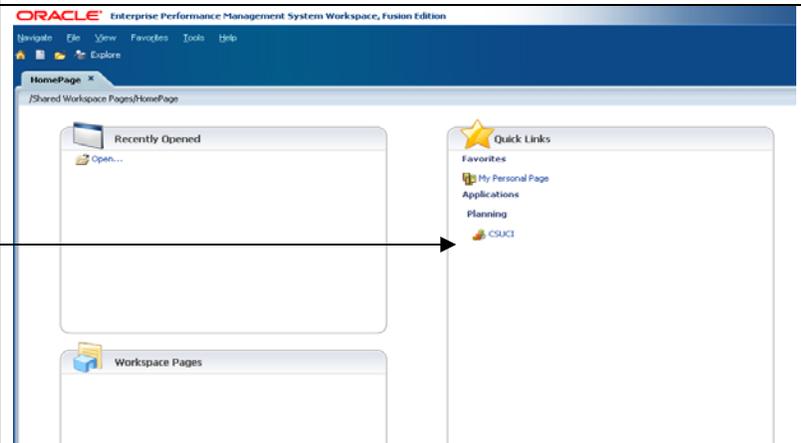
<http://yardarm.csuci.edu:19000/workspace/index.jsp>

User name is your name (first.last).  
Password is your Campus login.  
Click on Log On.



To access Planning:  
Select Navigate > Applications >  
Planning > CSUCI

or click here



# Navigating in Planning

Planning menu

Planning toolbar

Content Area

Open application

View Pane

## Toolbar Icons

The toolbar icons for Hyperion Planning are very similar to Excel. When in a web entry form, you can use the drop down menus such as “File” or “Edit” or you can use the icons listed across the top of the page



	Save	Save data input on data forms
	Refresh	Refresh the data form with data sorted in the database
	Print	Print the current screen
	Adjust	Increase or decrease values by a percentage or by a value
	Grid Spread	Lock or unlock cells when spreading data
	Mass Allocate	Run a mass allocate calculation
	Comment	Add comments to a specific cell at any level in data forms

	Lock/Unlock Cells	Lock or unlock cells when spreading data
	Supporting Detail	Add detail that aggregates the cell value in data forms
	Add/Edit Document	Add or edit documents to provide documentation for data in cells
	Open Document	Open an attached Excel or Word document
	Cut, Copy, Paste	Cut, Copy or Paste values from one or more cells to one or more cells on data forms
	Instructions	Shows the instructions for the data form
	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

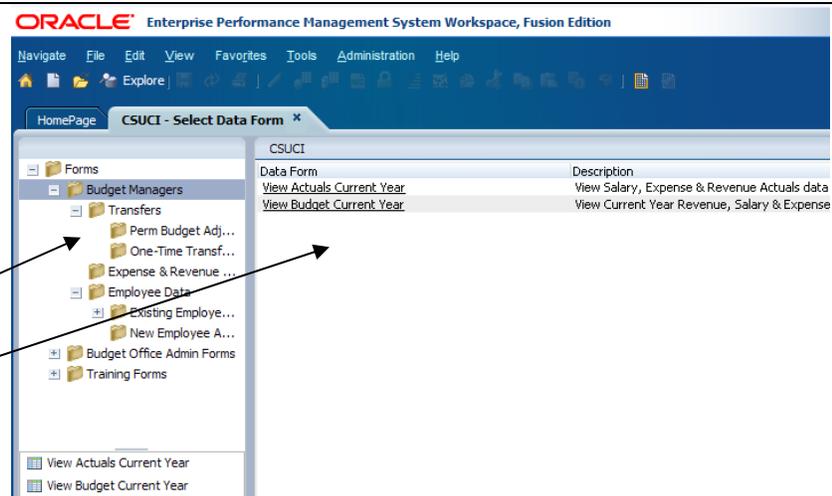
## Data Forms

There are several forms in Planning to choose from, depending on what you want to do. The folders to the right contain the forms.

If you click on a folder that you do not have access to, the folder will be empty.

All folders and forms are explained in detail in this user guide.

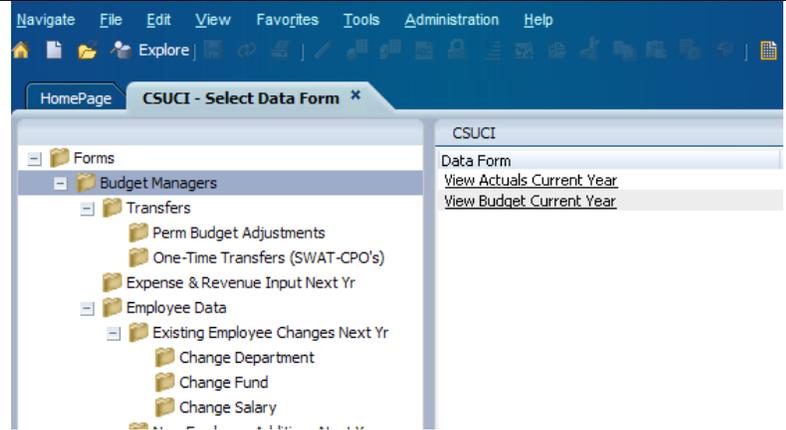
Folders are here  
Forms will be here



## View Only Forms

Click on Budget Managers: There are 2 forms here that allow you to **view only** data

- View Actuals Current Year
- View Budget Current Year



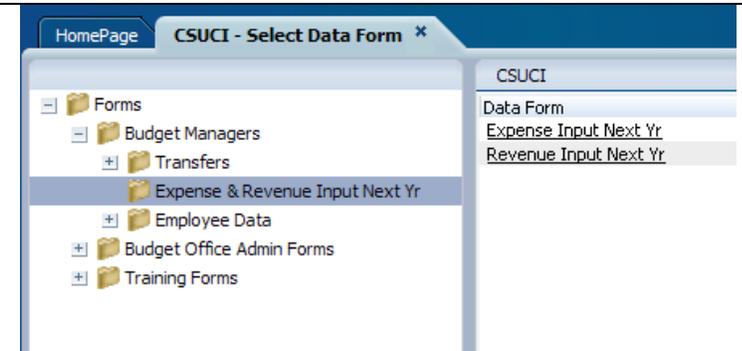
You can view budget data or actual data in these web forms but you cannot make any changes here. Select your fund, department, program and project and click Go.

	Year Total	Jul	Aug	Sep	Q1
601030_Executive					
601100_Academic Salaries					
601101_Department Chair					
601201_Management and Supervisory	138420	15380	15380	15380	46140
601300_Support Staff	174746	18032	18884	18884	55800
601304_Teaching Associates					
601800_Librarian					
601807_Temporary Faculty					
601808_Final Settlement					

## Expense and Revenue Input

Expense and Revenue Input Next Yr:  
There are 2 forms here.

- Expense Input Next Yr
- 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.

	Actuals										
	Final FY09	YearTotal	YearTotal	Jul	Aug	Sep	EQ1	Oct	Nov		
604001_Telephone Usage	594	1000		83	83	83	250	83			
604002_Computer Networks		10000		833	833	833	2500	833			
604090_Other Communications											
604800_Cell Phone Usage		900		75	75	75	225	75			
605001_Electricity - Usage											
605002_Natural Gas - Usage											
605003_Oil - Usage											

## 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).

CSUCI

Bargaining\_Unit: No\_Bargaining\_Unit Employee: No\_Employee

Page: GD901 ~ Operating 225 Budget and Reporting No\_Program

No\_Program

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

CSUCI

Bargaining\_Unit: No\_Bargaining\_Unit Employee: No\_Employee

Page: GD901 ~ Operating 230 No\_Program

	YearTotal				
601030_Executive					
601100_Academic Salaries					
601101_Department Chair					
601201_Management and Supervisory	138420				
601300_Support Staff	174746	18032	18884	18884	55800
601304_Teaching Associates					
601800_Librarian					
601807_Temporary Faculty					

Search - Windows Internet Ex...  
 http://yardam.csuci.edu:19000/HyperionPlann...  
 Search  
 230  
 Search Down  
 Internet 100%

**Form Colors:**

The colors of the cells in a web form act as primary information. The following are potential colors:

- Blue – These cells are row and column headers.
- Gray – These cells are read only and are locked. They contain Actual data from PeopleSoft data or are an upper level member of the outline.
- Bright Yellow – Contains unsaved data. If you see this color it means, you have entered data in and have not saved it yet.
- White – Open to be written in.

The screenshot shows a web form interface for CSUCI. At the top, there are navigation elements: 'Page GD901', '225', 'No\_Program', and 'No\_Project'. Below this is a table with the following structure:

	Actuals					
	Final	FY09				
	YearTotal	YearTotal	Jul	Aug	Sep	
604001_Telephone Usage	594	1000	83	83	83	
604002_Computer Networks						
604090_Other Communications						
604800_Cell Phone Usage	133	900	75	75	75	
605001_Electricity - Usage						
605002_Natural Gas - Usage						
605003_Oil - Usage						
605004_Water - Usage						
605005_Sewage						
605006_Hazardous Waste						
605090_Other Utilities						

Arrows from the text below point to:
 

- Headers & Columns:** Points to the first column header 'YearTotal'.
- Read only:** Points to the 'YearTotal' cell for '604001\_Telephone Usage'.
- Data entered but not saved:** Points to the 'Jul' cell for '604001\_Telephone Usage'.
- Write Access:** Points to the 'Sep' cell for '604001\_Telephone Usage'.

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.

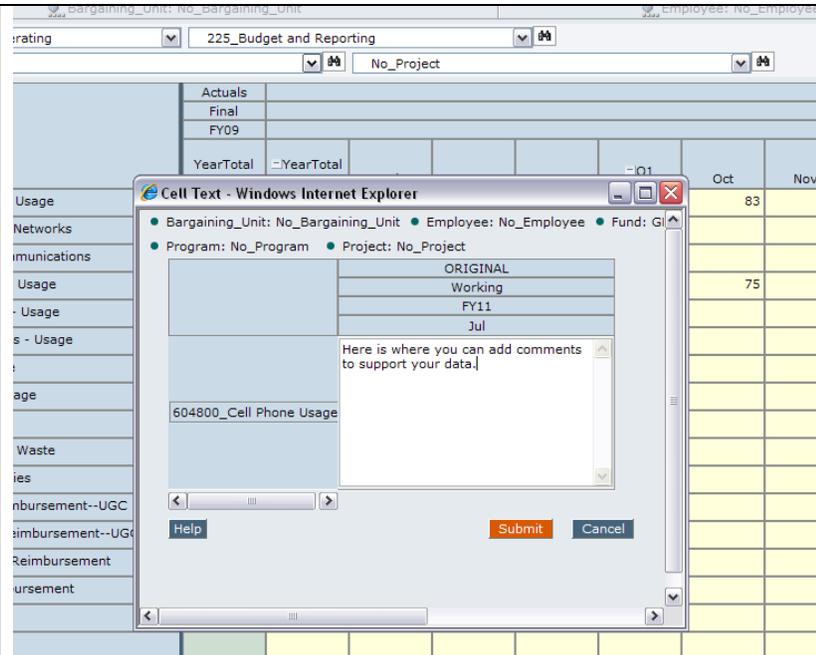
Spread data across months by entering your desired total in the "Quarter" or "Year Total" cells

- 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:

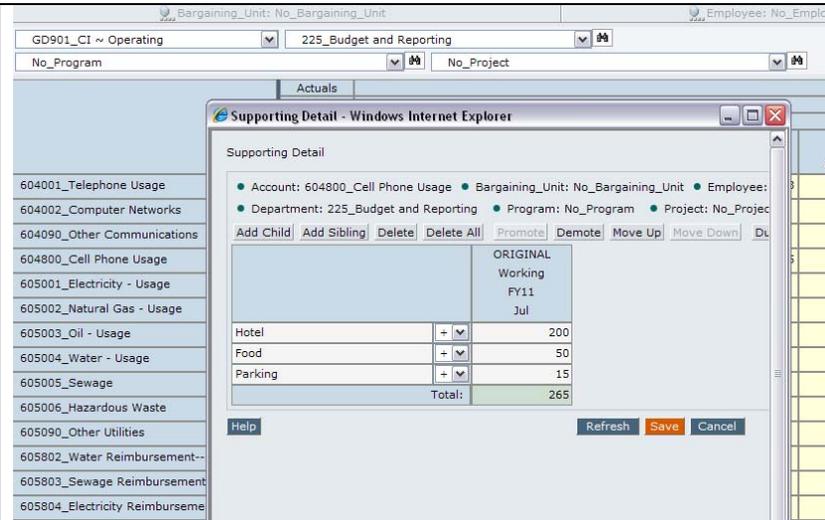
- Highlight the cell or cells that you want to add Comments to.
- Click the Comments icon  or choose Edit/Comments.
- Enter your comments and click on submit. You will now see a small blue triangle in your cell.
- Comments are not required but may be useful and are encouraged.



## 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.



## 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

- Click on Explore
- File > Import
- Choose the type of file to be imported (usually File)

Step 1. Choose File. You can browse for this. Click Open.

Click Next

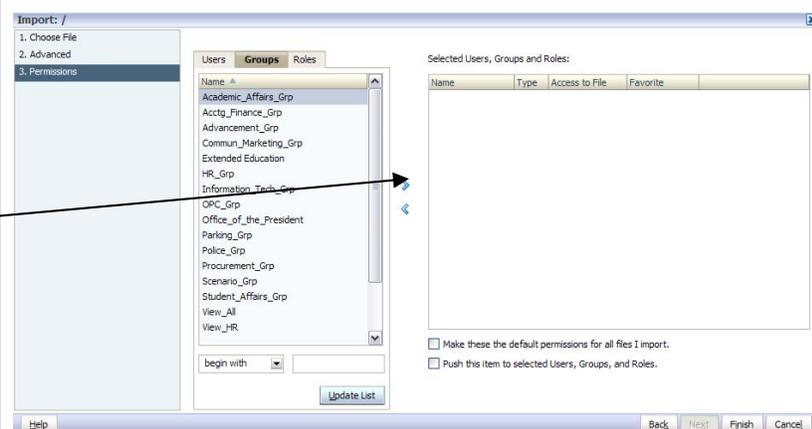
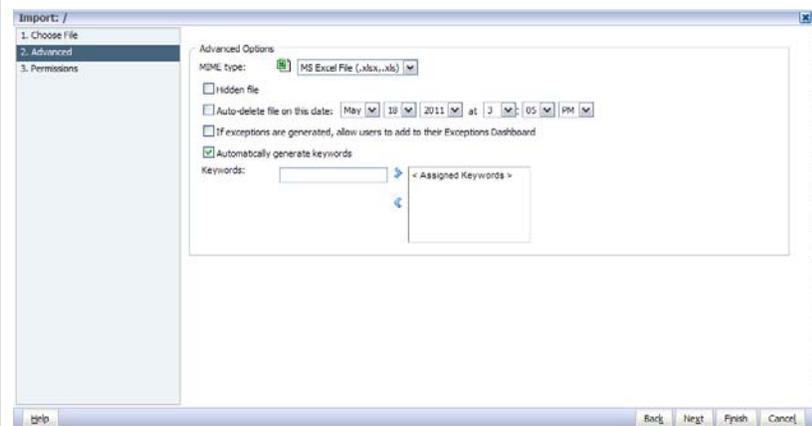
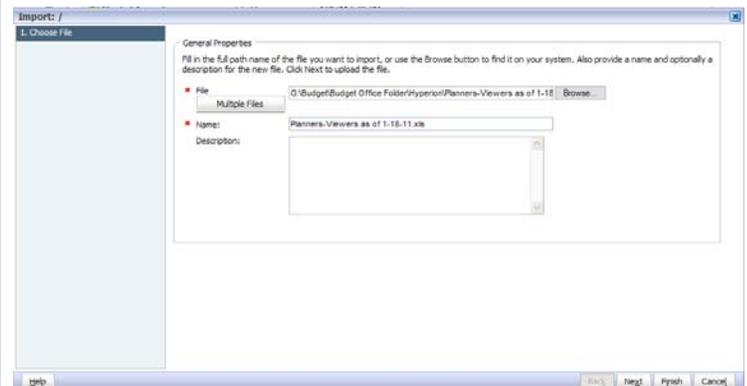
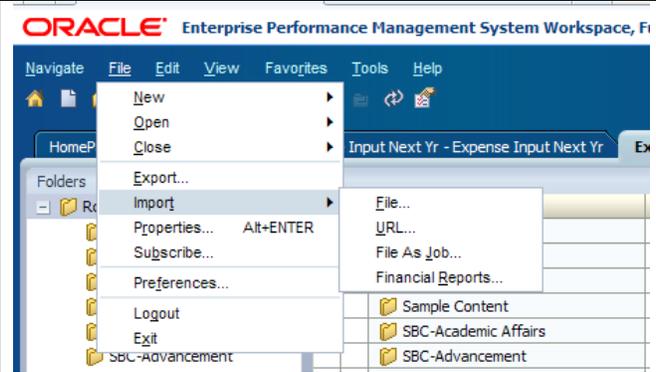
Step 2. Accept default items

Click Next

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.

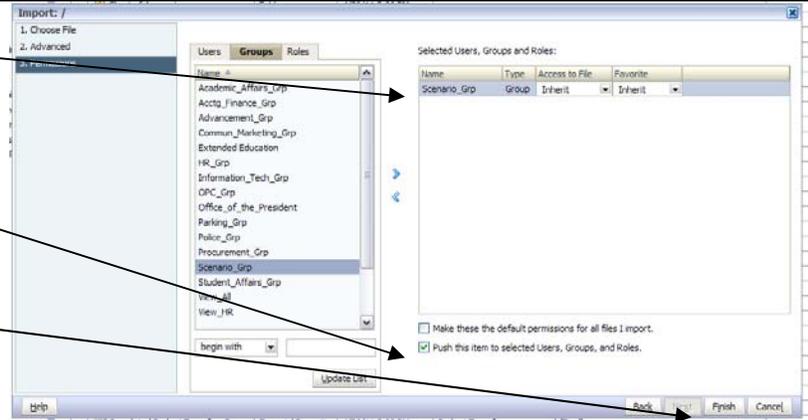


Leave the Access & Favorite as Inherit.

Click the box for "Push this item..."

Click Finish

The file is now available in the Repository.

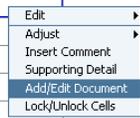


FTE Total by Person by Department	Financial Report...	4/27/11 1:24 PM	
FTE Totals by Dept Validation	Financial Report...	4/27/11 1:25 PM	
FTE Totals by Fund-Dept Validation	Financial Report...	4/26/11 5:08 PM	
GD901 Salary Report w BU	Financial Report...	4/26/11 5:08 PM	
Monthly Reconciliation	Financial Report...	4/26/11 5:08 PM	Monthly Reconciliation Report
Monthly Reconciliation 2	Financial Report...	4/26/11 5:08 PM	Monthly Reconciliation Report
Monthly Summary Budget	Financial Report...	4/27/11 1:27 PM	
Planners-Viewers as of 1-18-11.xls	MS Excel File	5/17/11 3:17 PM	
Position by Department Cur Yr vs ...	Financial Report...	4/26/11 5:08 PM	
Position Report (all positions)	Financial Report...	4/26/11 5:08 PM	
Program Report - all departments	Financial Report...	4/26/11 5:08 PM	By departmet, shows fund-a
Program Report by Fund and Dep...	Financial Report...	4/26/11 5:08 PM	Prompt for dept & fund, sho
Project Report - all departments	Financial Report...	4/26/11 5:08 PM	By departmet, shows fund-a
Project Report by Fund and Dena...	Financial Report...	4/26/11 5:08 PM	Prompt for dent & fund. sho

Now add the document to the data form.

- Open the data form.
- Choose the cell for the document
- Choose the Add/Edit Document icon  or right click

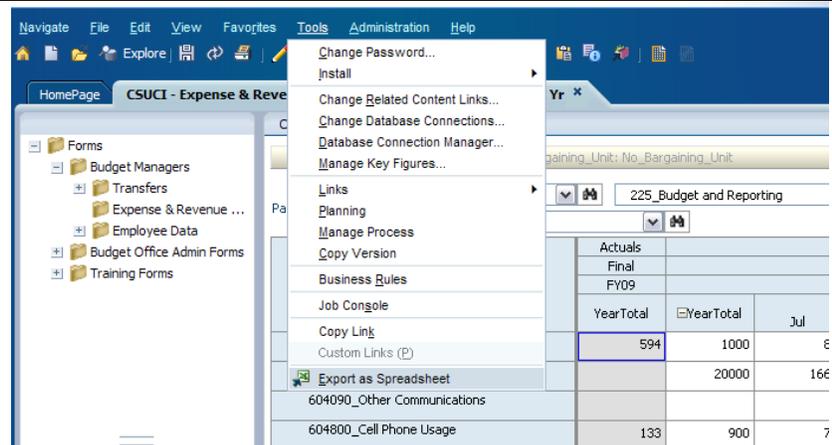
Actuals							
Final							
FY09							
YearTotal	YearTotal	Jul	Aug	Sep	Q1	Oct	
594	1,000	83	83	83	250	83	
	0	0	0	0	0	0	
133	900	75	75	75	225	75	



## Exporting to Excel to Print or Save

You can export your data form to Excel and work on your numbers offline.

Click on Tools > Export as Spreadsheet



Save the downloaded File



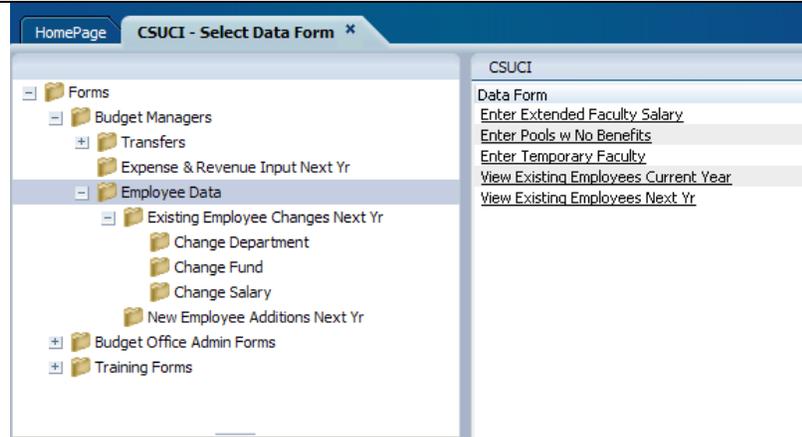
Open the file in Excel

Note: You cannot add cell text or supporting detail in Excel. You can only work on data displayed. You can create calculations in cells and the data will load to Planning when you copy and paste it back into Planning.

	A	B	C	D
1		GD901_Cr Operating	225_Budget and Reporting	No_Program
2		No_Bargaining_Unit	No_Employee	GD901
3		Actuals	ORIGINAL	ORIGINAL
4		Final	Working	Working
5		FY09	FY11	FY11
6		YearTotal	YearTotal	Jul
7	604001_Telephone Usage	593.52	1000	83
8	604002_Computer Networks		20000	16
9	604090_Other Communications			
10	604800_Cell Phone Usage	132.57	900	
11	605001_Electricity - Usage			
12	605002_Natural Gas - Usage			
13	605003_Oil - Usage			
14	605004_Water - Usage			
15	605005_Sewage			
16	605006_Hazardous Waste			
17	605090_Other Utilities			
18	605802_Water Reimbursement-UGC			
19	605803_Sewage Reimbursement-UGC			
20	605804_Electricity Reimbursement			
21	605805_Gas Reimbursement			
22	605806_Trash			

# Employee Data

There are several data forms in Employee Data to choose from.



Enter Extended Faculty Salary – This is where Extended Education faculty pool amount is entered.

- Choose the Fund, Department, Program and Project and click Go

	YearTotal	Jul	Aug	Sep	EQ1	Oct	Nov	Dec	EQ2	Jan
601809_Extended Faculty Salary	500000									

Enter Pools w No Benefits – This is where you enter the pools for Overtime, Student Assistants, Special Consultants and any other salary pooled amount with no benefits.

- Choose the Fund, Department, Program and Project and click Go

	YearTotal	Jul	Aug	Sep	EQ1	Oct	Nov	Dec	EQ2	Jan
601301_Overtime										
601303_Student Assistant	11400	1520	1520	760	3800	760	760	1520	3040	
601801_Special Consultants										
601802_Sup Staff Stipends Bonus Allow										
601804_Shift Differential										
601805_Mgmt Stipend Bonus Allowance										
601811_Resident Assistants										
601102_Summer Fellowship										
601103_Graduate Assistant										
601302_Temporary Help - Employees										
601806_Academic Stipend Bonus Allow										

Enter Temporary Faculty – This is where pooled amounts for Temporary Faculty are entered.

- Choose the Fund, Department, Program and Project and click Go

	YearTotal	Jul	Aug	Sep	EQ1	Oct	Nov	Dec	EQ2	Jan
601807_Temporary Faculty	341986.00	28498.83	28498.83	28498.83	85496.50	28498.83	28498.83	28498.83	85496.50	28498.83

View Existing Employees Current Year and View Existing Employees Next Year – This allows the user to view ONLY the employees listed for the current year and last year. Shows their position number and title, account and salary amount

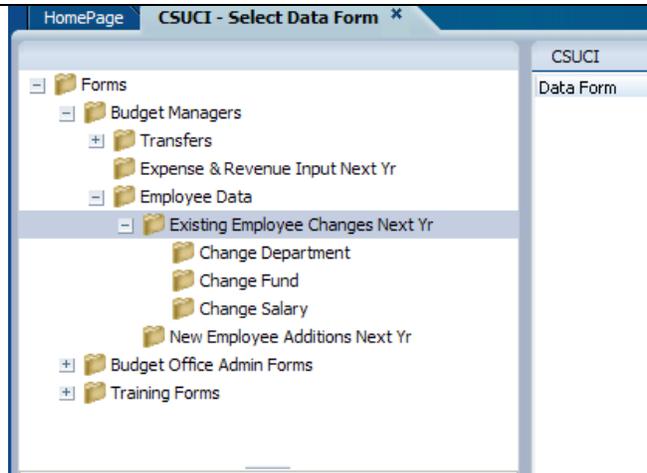
- o Choose a Department and Fund and click Go

			YearTotal	Jul
Bracamontes,Stephanie Galvan_000403911	Administrator II_00000031	601201	██████████	██████████
Cole,Tracy Renee_000520079	Assoc Budget Analyst_00000707	601300	██████████	██████████
Jarnagin,Melissa M_000078586	Administrator II_00000563	601201	██████████	██████████
Schweisinger,Jennifer_000769627	Admin Analyst-Spclst 12 Mo_00001491	601300	██████████	██████████
Wancewicz,Marysia Ann_000098203	Admin Analyst-Spclst 12 Mo_0001155	601300	██████████	██████████
New Employee 1	Admin Analyst-Spclst 12 Mo_00000118	601300	██████████	██████████
No_Employee	No_Bargaining_Unit	601303	11400	1520

## Existing Employee Changes

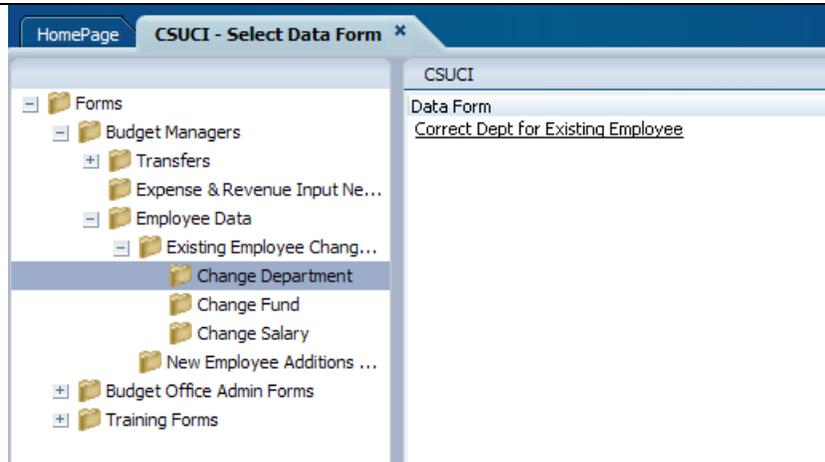
When making changes to an existing employee, it is helpful to know the type of change to be made in order to choose the correct form.

- o Changes can be made to the Department, Fund or Salary.
- o It is necessary to have the position number for the employee.



**To change the Department** for an Existing Employee click on the form

Note: You can only move a person within your own Division. If an employee needs to be moved to a department that is not in you division, please contact the Administrator.



Enter the Fund, Employee Name, Position, Program, Project and Department.  
Click Go.

The salary and FTE for the employee will populate.

**Make sure to delete the old salary and FTE!**

Click Save

Enter the NEW department.  
Click Go.

Enter the salary and FTE.  
Click Save.

	YearTotal	Jul	Aug	Sep	Q1	Oct	Nov	Dec	Q2	Jan
601030										
FTE_601030										
601100										
FTE_601100										
601101										

**To change the Fund** for an Existing Employee click on the form

Note: If an employee needs to be moved to a Fund that is not a budgeted fund, please contact the Administrator.

Enter the Fund, Employee Name, Position, Program, Project and Department.  
Click Go.

The salary and FTE for the employee will populate.

**Make sure to delete the old salary and FTE!**

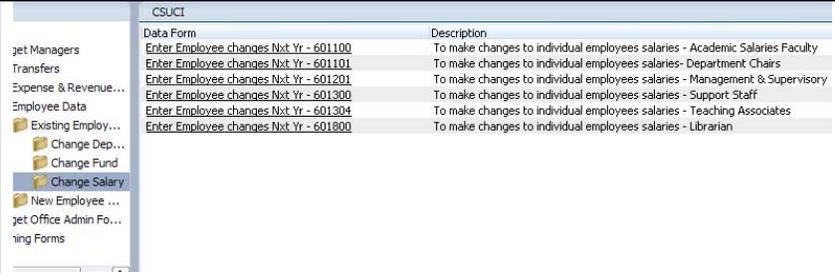
Enter the salary and FTE in the new Fund.

Click Save.

	YearTotal	Jul	Aug	Sep	Q1	Oct	Nov
CH900 Budgeted_Fund							
C3900 Budgeted_Fund							
RB002 Budgeted_Fund							
RB005 Budgeted_Fund							
RB007 Budgeted_Fund							
RB008 Budgeted_Fund							
GD901 Budgeted_Fund							
GD935 Budgeted_Fund							
GD945 Budgeted_Fund							
IIR901 Budgeted_Fund							

**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.



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.

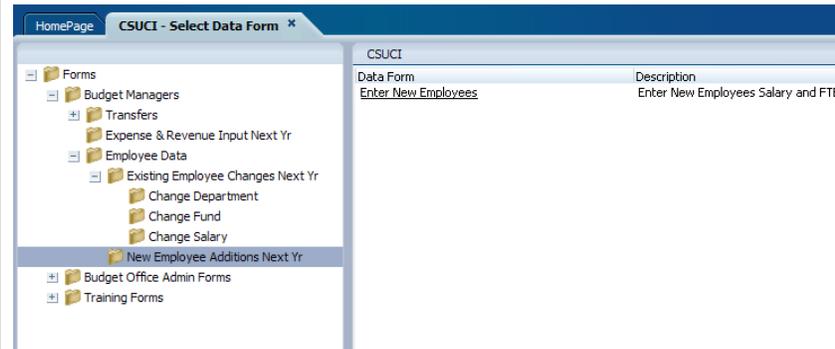
Click Save

The screenshot shows the CSUCI data entry form. It includes search filters for '00000707', 'GD901\_CI - Operating', '225\_Budget and Reporting', and 'No Project'. The employee name is 'Cole, Tracy Renee\_000520079'. Below the filters is a table showing monthly and quarterly data for 'FTE\_Support Staff' and '601300\_Support Staff'.

	Year Total	Jul	Aug	Sep	Q1	Oct	Nov	Dec	Q2	Jan	Feb	Mar
FTE_Support Staff	1	1	1	1	1	1	1	1	1	1	1	1
601300_Support Staff	68,604.00	5,717.00	5,717.00	5,717.00	17,151.00	5,717.00	5,717.00	5,717.00	17,151.00	5,717.00	5,717.00	5,717.00

## New Employee Additions

To add new employees, choose the Enter New Employees data form.



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.

CSUCI Scenario: ORIGINAL Version: Working FY11

Page: 0000707 GD901 225 No\_Program No\_Project

	EYearTotal	Jul	Aug	Sep	EQ1	Oct	Nov	Dec	EQ2	Jan
601030_Executive										
FTE_Executive										
601100_Academic Salaries										
FTE_Academic Salaries										
601101_Department Chair										
FTE_Department Chair										
601201_Management and Supervisory										
FTE_Management and Supervisory										
601300_Support Staff										
FTE_Support Staff										
601304_Teaching Associates										
FTE_Teaching Associates										
601800_Librarian										
FTE_Librarian										
601807_Temporary Faculty										
FTE_Temporary Faculty										

## 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

Page: 0000707 GD901\_CI ~ Operating 225\_Budget and Reporting No\_Program No\_Project

	EYearTotal	Jul	Aug	Sep	EQ1	Oct	Nov	Dec	EQ2	Jan
FTE_Support Staff	0.5	0.5	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	2,083.33	6,250.00

## Budget Transfers

Divisions have the ability to process their own **budget transfers**.

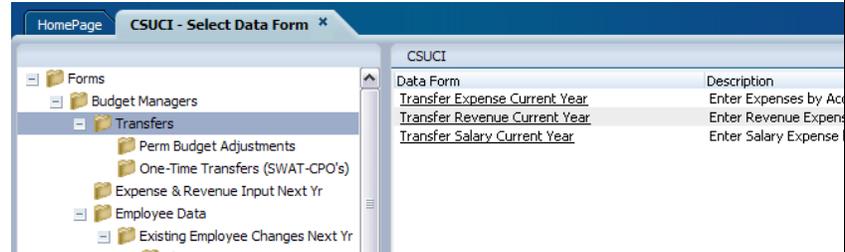
Click on Transfers. There are 3 types of transfers

- 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.



To process transfers:

Choose the Fund, Department, Program and Project. You will only have access to the months that are available.

- Enter data that you are accepting from another department or account as a positive number to your department.
- Enter data that you are giving to another department or account as a negative number to your department.

### 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.

	ADJUST			
	Working			
	FY10			
	YearTotal	Apr	May	Jun
604001_Telephone Usage		20		
604002_Computer Networks				
604090_Other Communications				
604800_Cell Phone Usage		-20		
605001_Electricity - Usage				
605002_Natural Gas - Usage				
605003_Oil - Usage				
605004_Water - Usage				
605005_Sewage				

Budget Transfer reports are available. See Reports section on page 18.

## PLEASE NOTE

**All Transfers will be reviewed and approved by the Administrator at the end of every month. Please have all Transfers completed by the 25th of the month.**

## 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.

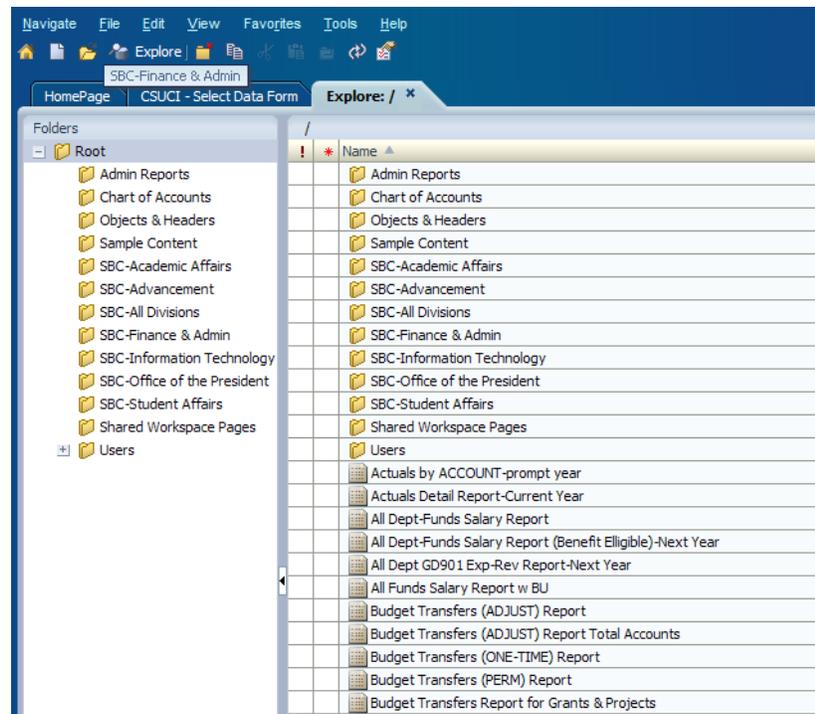
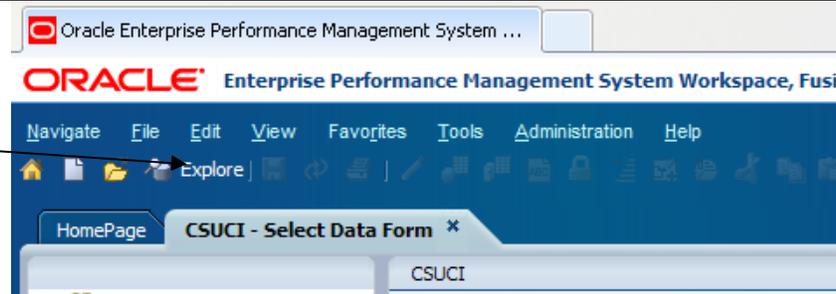
## Accessing Hyperion Reports

Open a new tab for Reports by clicking the Explore icon at the top-right corner of Workspace

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.

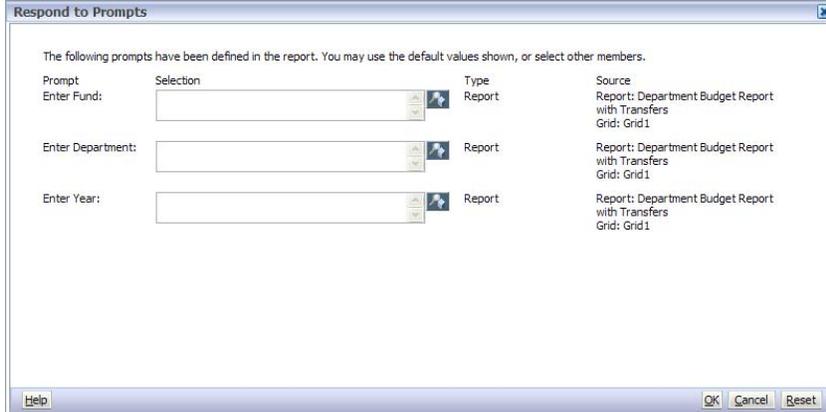


## Viewing & Printing Reports

Double Click on a report and it will open.

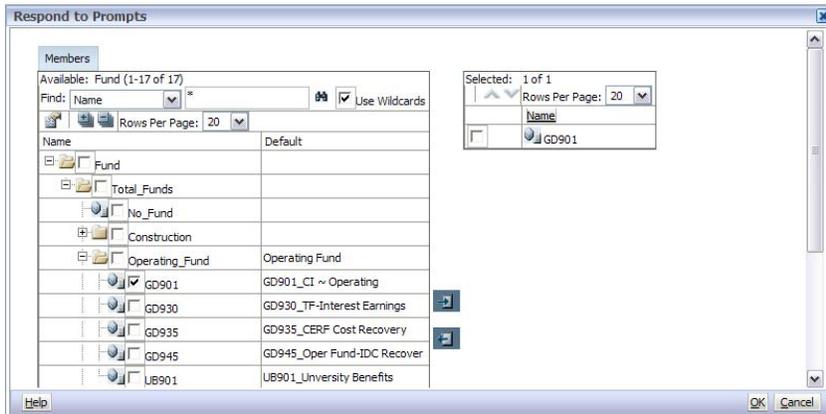
- When you click on a report, you may be prompted to enter specific criteria for this report.
- Click on the  to select a member (or type in your criteria)
- Drill down to the member you would like to see and move the member(s) over to the right using the middle arrows.
- Click OK.

When all criteria has been chosen, click OK.



The following prompts have been defined in the report. You may use the default values shown, or select other members.

Prompt	Selection	Type	Source
Enter Fund:	<input type="text"/>	Report	Report: Department Budget Report with Transfers Grid: Grid 1
Enter Department:	<input type="text"/>	Report	Report: Department Budget Report with Transfers Grid: Grid 1
Enter Year:	<input type="text"/>	Report	Report: Department Budget Report with Transfers Grid: Grid 1



Members

Available: Fund (1-17 of 17)

Find: Name \*  Use Wildcards

Rows Per Page: 20

Name	Default
Fund	Default
Total_Funds	
No_Fund	
Construction	
Operating_Fund	Operating Fund
GD901	GD901_CI ~ Operating
GD930	GD930_TF-Interest Earnings
GD935	GD935_CERF Cost Recovery
GD945	GD945_Oper Fund-IDC Recover
UB901	UB901_University Benefits

Selected: 1 of 1

Rows Per Page: 20

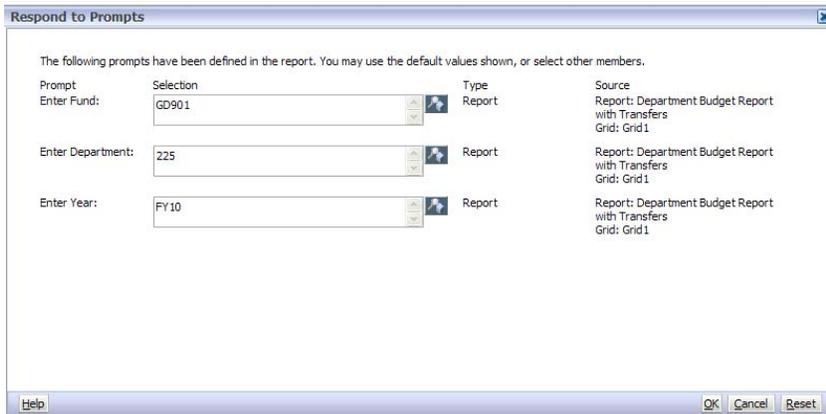
Name

GD901

Verify the criteria for the report you want and click OK. You can always make changes by choosing the



icon again.



The following prompts have been defined in the report. You may use the default values shown, or select other members.

Prompt	Selection	Type	Source
Enter Fund:	GD901	Report	Report: Department Budget Report with Transfers Grid: Grid 1
Enter Department:	225	Report	Report: Department Budget Report with Transfers Grid: Grid 1
Enter Year:	FY10	Report	Report: Department Budget Report with Transfers Grid: Grid 1

The report defaults to PDF preview.

		Final ORIGINAL YearTotal	Final ADJUST YearTotal	
<b>REVENUE</b>				
<b>Total Revenue</b>		-	-	-
<b>EXPENSE &amp; SALARY</b>				
GD901	601201_Management and Supervisory	184,560	-	184,560
GD901	601300_Support Staff	246,608	-	246,608
GD901	601303_Student Assistant	11,400	-	11,400
GD901	603803_Fringe Benefits	176,348	-	176,348
GD901	604001_Telephone Usage	1,000	-	1,000
GD901	604800_Cell Phone Usage	900	-	900
GD901	660001_Postage and Freight	300	-	300
GD901	660003_Supplies and Services - Other	2,500	-	2,500
GD901	660031_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.

ORACLE® Enterprise Performance Management System Workspace, Fusion Edition

Navigate File View Favorites Tools Help

HomePage CSUCI - Expense & Revenue Input Next Yr - Expense Input Next Yr Explore: / Monthly Reco

/Department Budget Report with Transfers

California State University CHANNEL ISLANDS

Project: Tot Proj Inc No Proj Program: Total Programs Employee: Employee Bargaining Unit: Bargaining Unit

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		Final ORIGINAL YearTotal	Final ADJUST YearTotal	
<b>REVENUE</b>				
<b>Total Revenue</b>		-	-	-
<b>EXPENSE &amp; SALARY</b>				
GD901	601201_Management and Supervisory	184,560	-	184,560
GD901	601300_Support Staff	246,608	-	246,608
GD901	601303_Student Assistant	11,400	-	11,400
GD901	603803_Fringe Benefits	176,348	-	176,348
GD901	604001_Telephone Usage	1,000	-	1,000
GD901	604800_Cell Phone Usage	900	-	900

Hyperion allows you to export your report to Excel

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.

ORACLE® Enterprise Performance Management System Workspace, Fusion Edition

Navigate File View Favorites Tools Help

HomeP Revenue Input Next Yr - Expense Input Next Yr Explore: / Monthly

/Depart transfers

Export Excel Fully-Formatted Grids and Text

Word

PowerPoint

Department Budget Report with Budget Transfers

California State University CHANNEL ISLANDS

Project: Tot\_Proj\_Inc\_No\_Proj Program: Total Programs Employee: Employee Bargaining\_Unit: Bargaining\_Unit

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		Final ORIGINAL	Final ADJUST	
		YearTotal	YearTotal	
<b>REVENUE</b>				
Total Revenue				
<b>EXPENSE &amp; SALARY</b>				
GD901	601201_Management and Supervisory	184,560	-	184,560
GD901	601300_Support Staff	246,608	-	246,608

Department Budget Report with Transfers.xls (Read-Only)

		Final ORIGINAL	Final ADJUST	
		YearTotal	YearTotal	
<b>REVENUE</b>				
Total Revenue		0	0	0
<b>EXPENSE &amp; SALARY</b>				
GD901	601201_Management and Supervisory	184,560	0	184,560
GD901	601300_Support Staff	246,608	0	246,608
GD901	601303_Student Assistant	11,400	0	11,400
GD901	603803_Fringe Benefits	176,348	0	176,348
GD901	604001_Telephone Usage	1,000	0	1,000
GD901	604800_Cell Phone Usage	900	0	900
GD901	660001_Postage and Freight	300	0	300
GD901	660003_Supplies and Services - Other	2,500	0	2,500
GD901	660831_Copier Usage	1,000	0	1,000
GD901	616903_Desk/Lap/Peripherals Under \$5K	2,500	0	2,500
GD901	660090_Expenses - Other	2,796	0	2,796
GD901	606001_Travel In State	7,000	0	7,000
GD901	606002_Travel Out of State	7,500	0	7,500
GD901	660009_Workshops & Training Fees	3,500	0	3,500
<b>Total Salary &amp; Expenditures</b>		<b>647,912</b>	<b>0</b>	<b>647,912</b>
<b>GRAND TOTAL</b>		<b>647,912</b>	<b>0</b>	<b>647,912</b>

## Contact Information

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

Missy Jarnagin – ext 3282 for budget related questions

Marysia Wancewitz – ext 3169 for technical assistance

Lacey Lovejoy – ext 3229 for technical assistance



Channel Islands  

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