University of Houston Clear Lake

Hyperion Planning & Budget

2019

Planning & Budget Office

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University of Houston-Clear Lake
Budget office

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Hyperion Planning Training

How to log into COOGPLAN

Hyperion Test: http://hdwappt1.uhs.uh.edu:19000/workspace/index.jsp

Hyperion Production: https://hyperion.uh.edu/workspace/index.jsp

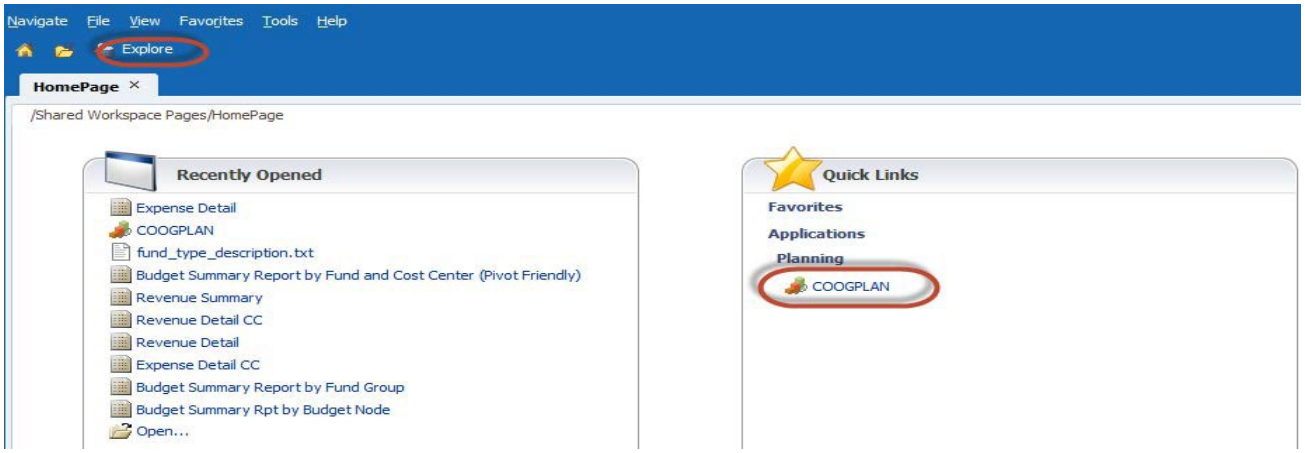
How to access HYPERION video link:

Login: https://www.uhcl.edu/login?Allow=E&ReturnUrl=https://www.uhcl.edu//human-resources/hr-training/resources/hyperion.aspx

Below are the videos available after you login:

Budget Hyperion & Planning Module
How to turn on user point of view
How to run reports
How to pick-up your daily report batch
How to navigate the Search and Enter Budgets form
How to add a new cost center
Budget Balance Check
Budget by Department with Graph
Budget vs Actuals Inquiry
Report Book
Workspace-Task list status v2
Change History
CooqPlan(Hyperion Planning and Budget) Training Manual

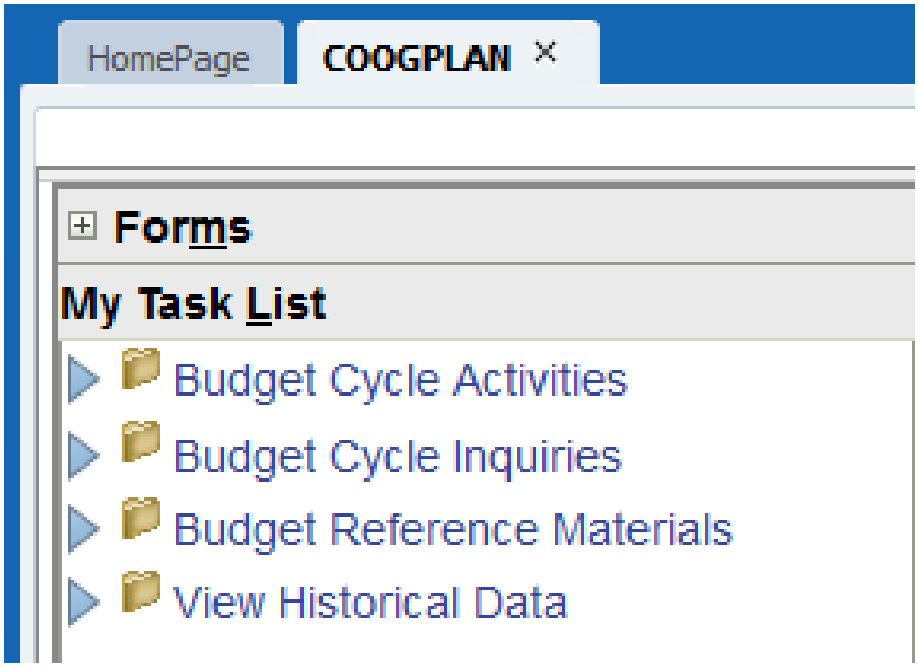
CoogPlan Homepage



- CoogPlan takes you to Task list (data entry forms)
- Explore takes you to reports

My Task List: <u>You will see 4 Folders:</u>

1. Budget Cycle Activities
2. Budget Cycle Inquiries
3. Budget Reference Materials
4. View Historical Data



Budget Cycle Activities

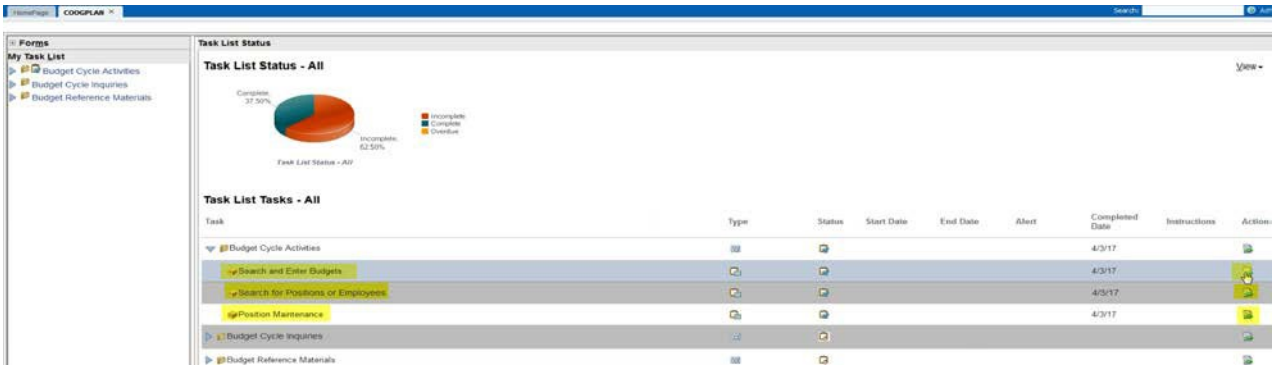
1. **Budget Cycle Activities**: A task list where you will find your assignments. On this page you will also have the option to navigate to your entry forms.

   Under **Budget Cycle Activities** you will see three search and entry forms:

   A. Search and Enter Budgets

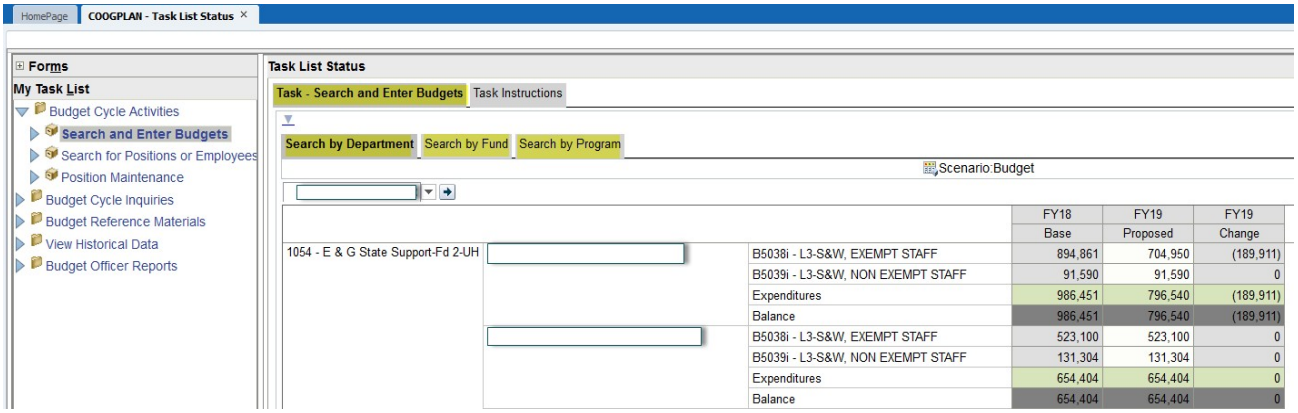
   B. Search for Positions or Employees

   C. Position Maintenance



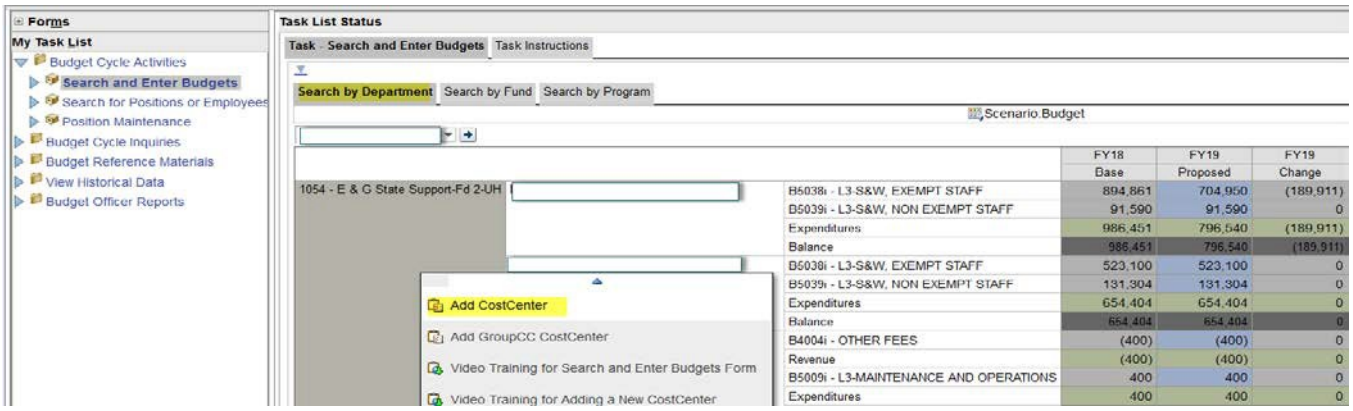
A. **<u>Search and Enter Budgets:</u>** On this page you will see all current cost centers that you have access to. You can also choose to view one cost center at a time using a member selection (Chartfield) such as by *DEPARTMENT*, by *FUND* or by *PROGRAM*. Budget can also be updated from white cell column on PROPOSED fiscal year.

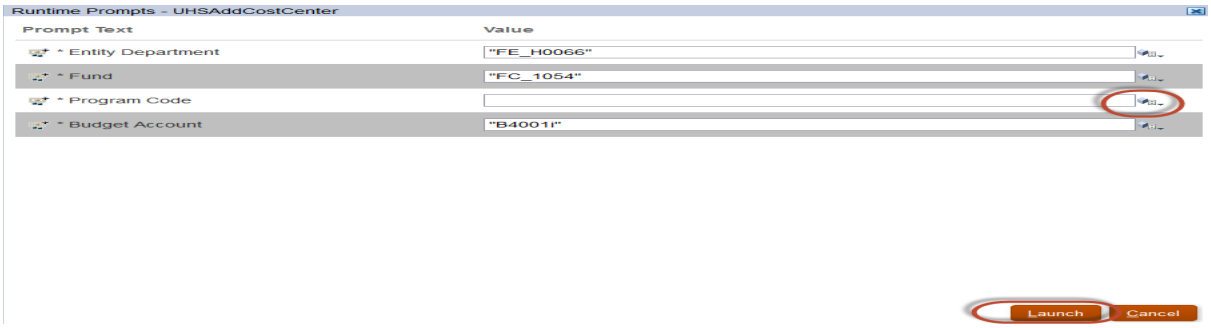
(NOTE: Report available to view cost center with the Modified date 09/01/YY (Current FY). Report displays all the cost centers that are active and have no dollar amount. Further discussed in Budget Reference Material.



- **Add a Cost Center**: By placing your cursor on a white cell and right clicking, you will be given the option to *ADD COSTCENTER*.

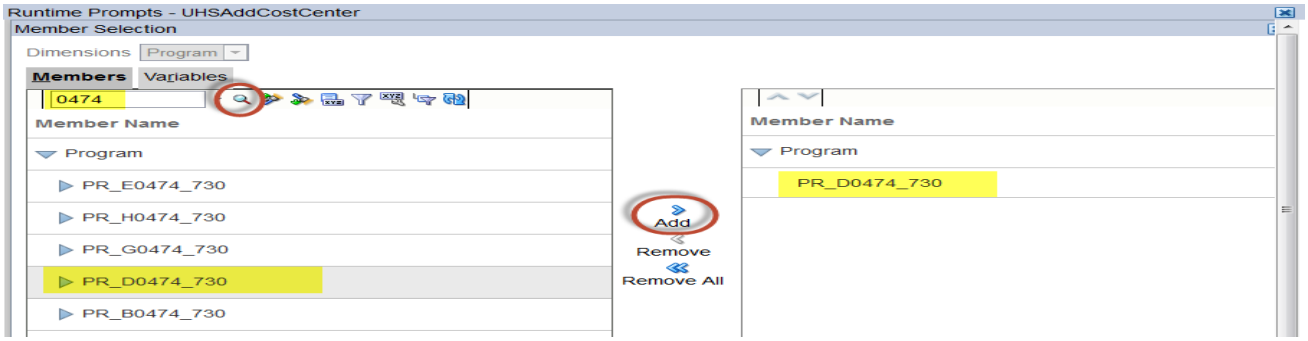
- How to add a new cost center - (How to add a CC video) *to open the link press Ctrl and click on the blue font*



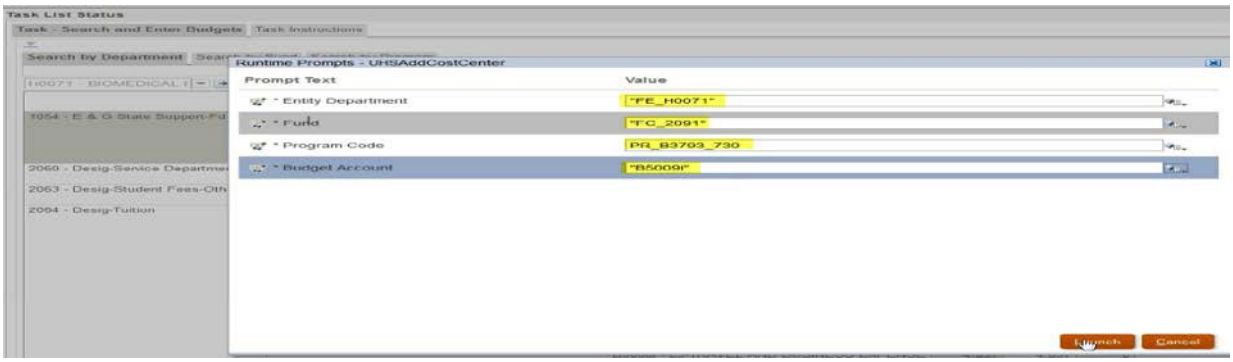


Steps:

1. Fill in Entity Department, Fund, Program and Budget Account. (***You can do so by keeping the same format*** i.e. “FE_HXXXX”, “FC_XXXX”, “PR_BXXXX_730” and just change areas that have X’s).
2. To fill in the Program Code click the search drop down menu to the right.

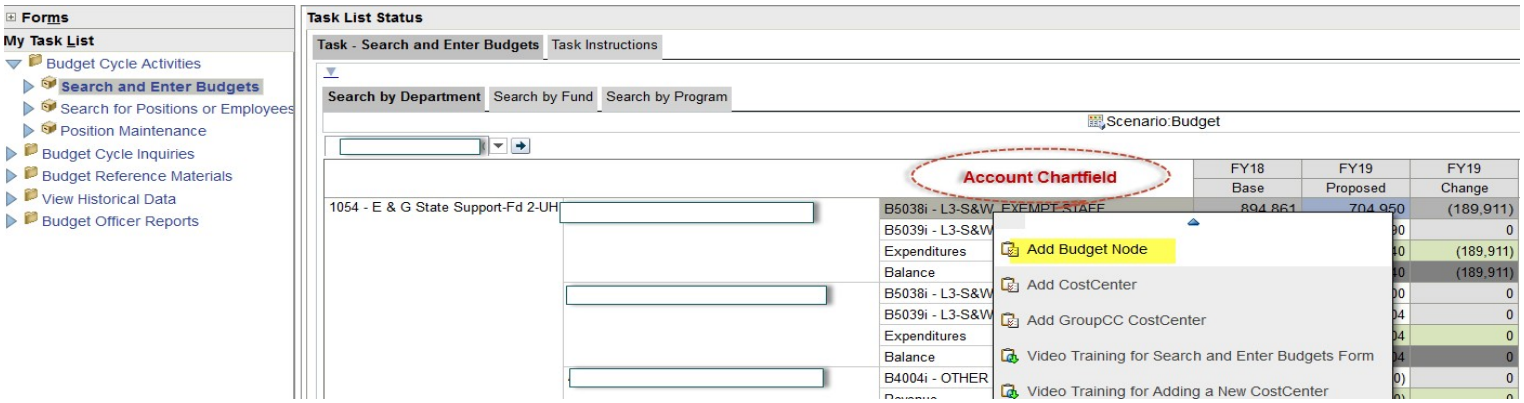


3. Use the smart search tool to search for program
4. Highlight the program
5. Click Add
6. Scroll Down, Click OK

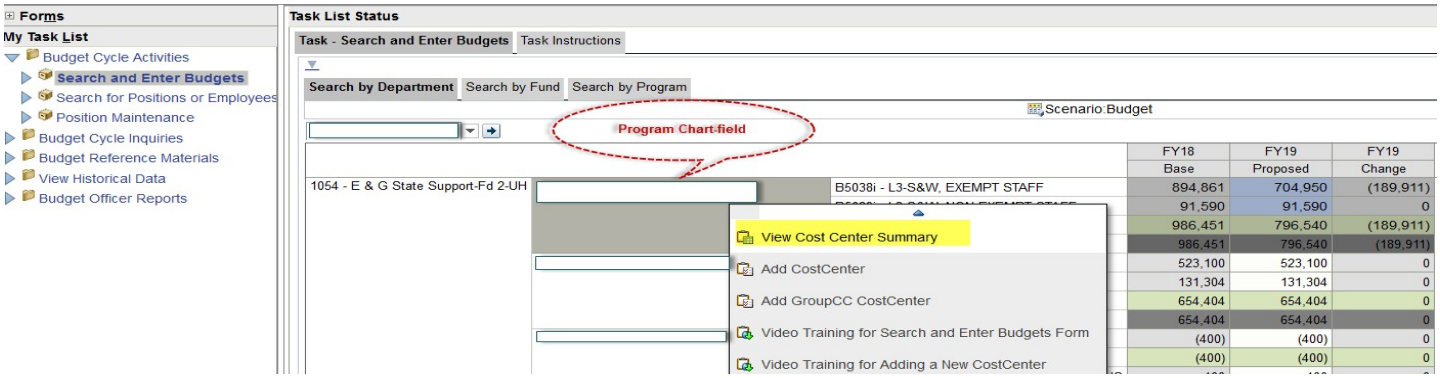


7. Once Department, Fund, Program and Budget Account are entered press LAUNCH.
8. At this point you have added a cost center, remember to SAVE.

- **Add a Budget Node**: Go to the account code chartfield/member (budget node) and right click, you will see ADD BUDGET NODE option. You will also be able to add budget node from Cost Center Summary page.

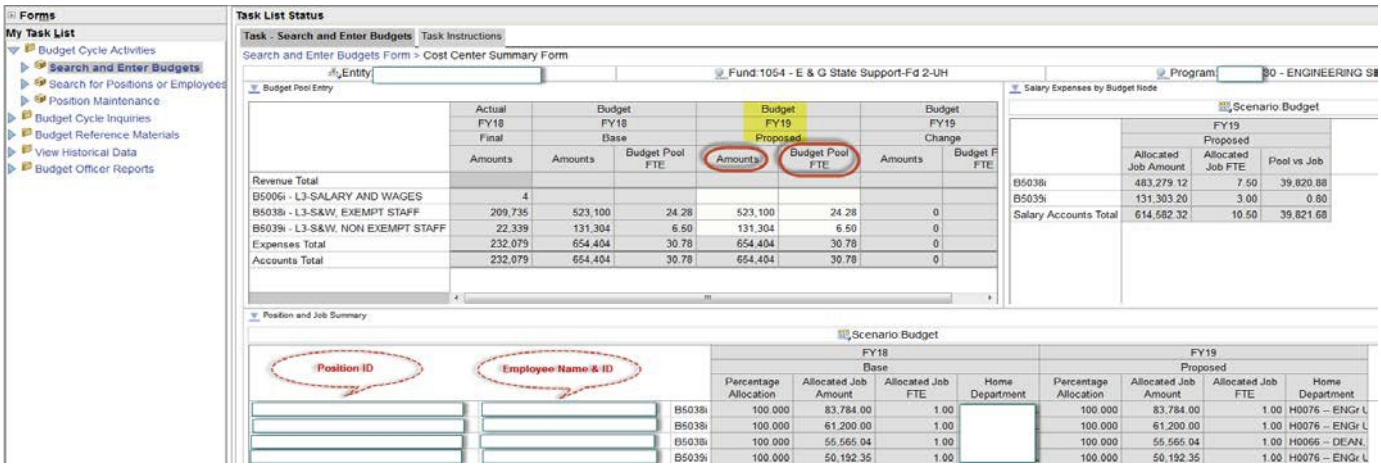


- **View Cost Center Summary**: To view individual cost center information, place your cursor on *Program member* and right click you will see an option to *VIEW COST CENTER SUMMARY*.



Things you can do in View Cost Center Summary:

- Edit/Adjust Budget on Proposed Fiscal Year
- Edit FTE
- Double check that your cost center has enough Budget & FTE to cover allocated salaries.

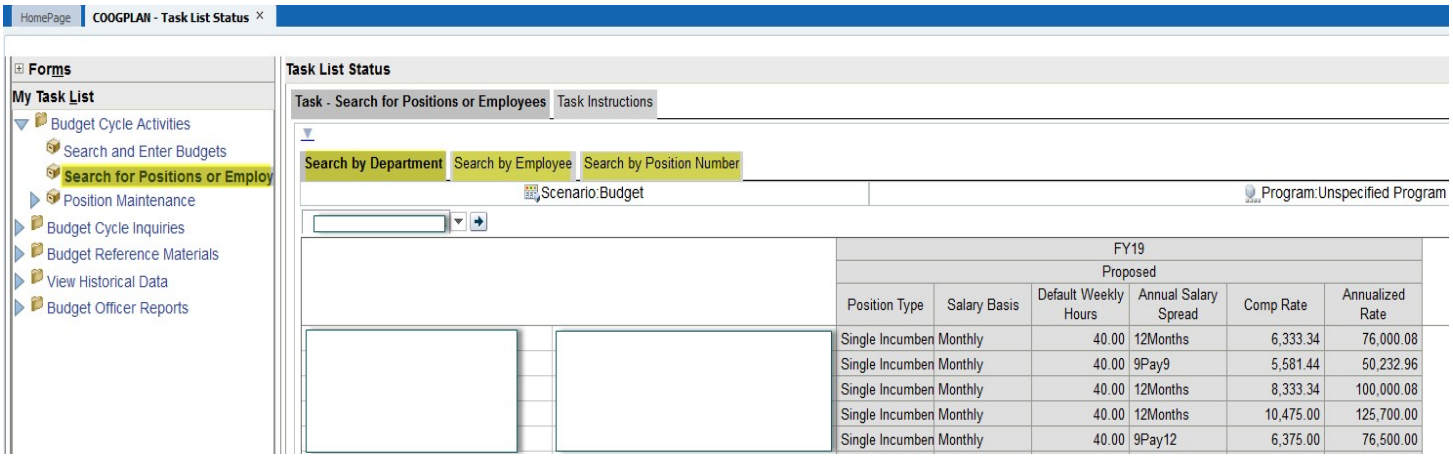


*** **HOME DEPARTMENT** section allows user to see where position is housed (also helpful for split funded positions).

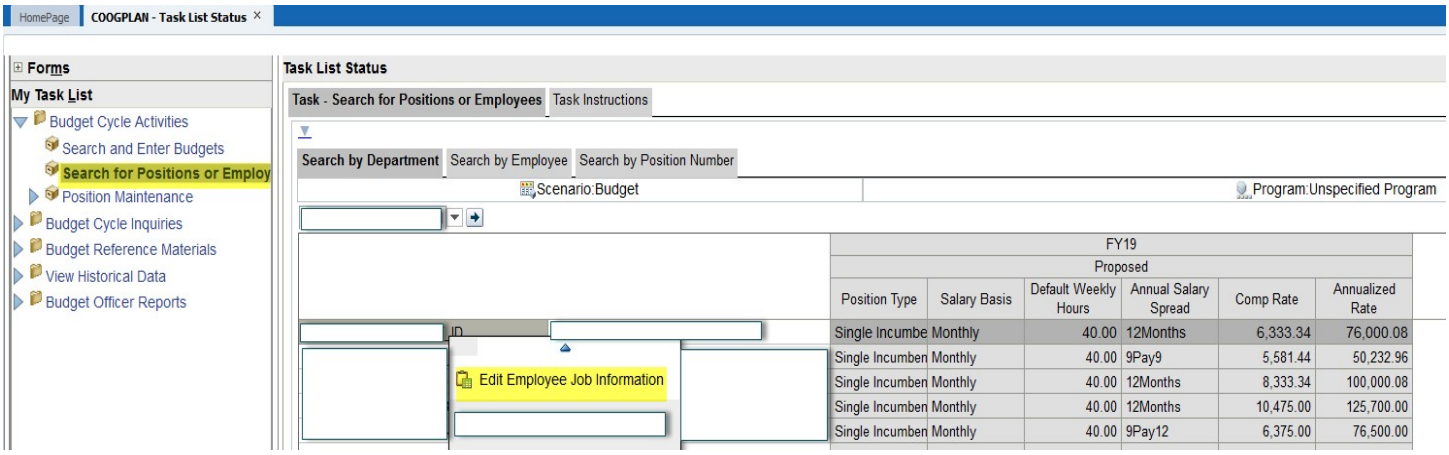
NOTE: If this is a salary cost center that is currently active and contains employees you will have the option to edit positions or employee information from the *Cost Center Summary Form*.

- To **Edit Employee Information** right click on the employee you wish to edit. Once again you will get a drop down menu where you will see *EDIT EMPLOYEE JOB INFORMATION.* **This will be further discussed in Search for Position or Employees section (B).**
- To **Edit Position Information** right click on POSITION member you wish to make changes to. You will get a drop down menu where you will see *EDIT POSITION INFORMATION.* **This will be further discussed in Position and Maintenance section (C).**
- How to navigate the Search and Enter Budgets Form - (How to Navigate search and enter Budget video link)

B. **<u>Search for Position or Employees</u>:** On this page you will see all employees under a particular area (college/division) with their present-day position. Using quick search you have the following options: *Search by Department, Search by Employee and Search by Position Number.*

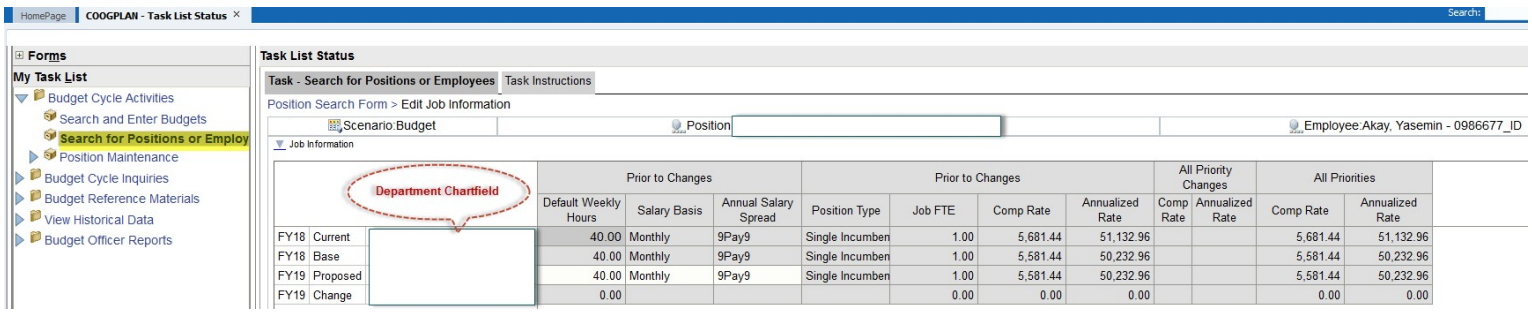


- **Edit Employee Job Information:** To edit employee job information from the main page (Search for Positions or Employees) right click on Employee's Name. Here you will see an option titled *Edit Employee job information*



Steps:

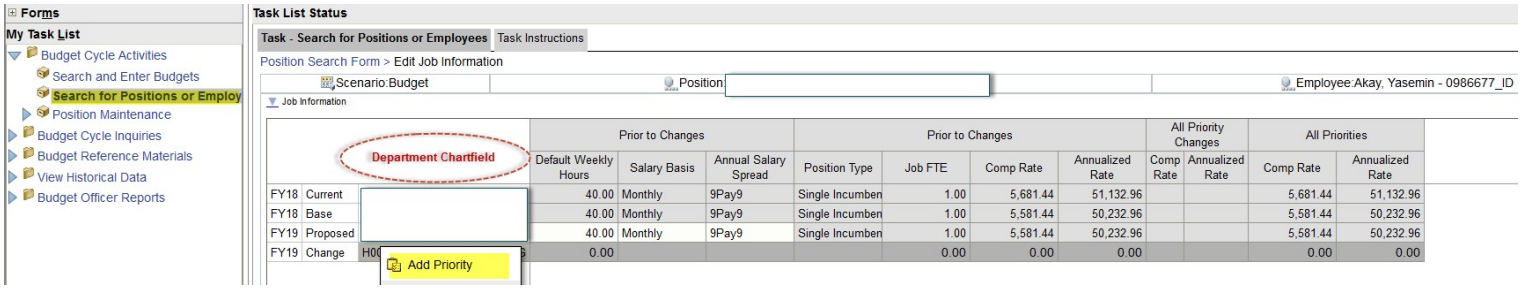
1. Right click on Employee Name, then click Edit Job Information (Hours, Salary Basis and Annual Salary Spread).



- **Add/Remove Priority**: You can add a priority by right clicking on department chartfield/memberand selecting ADD PRIORITY from drop down menu.

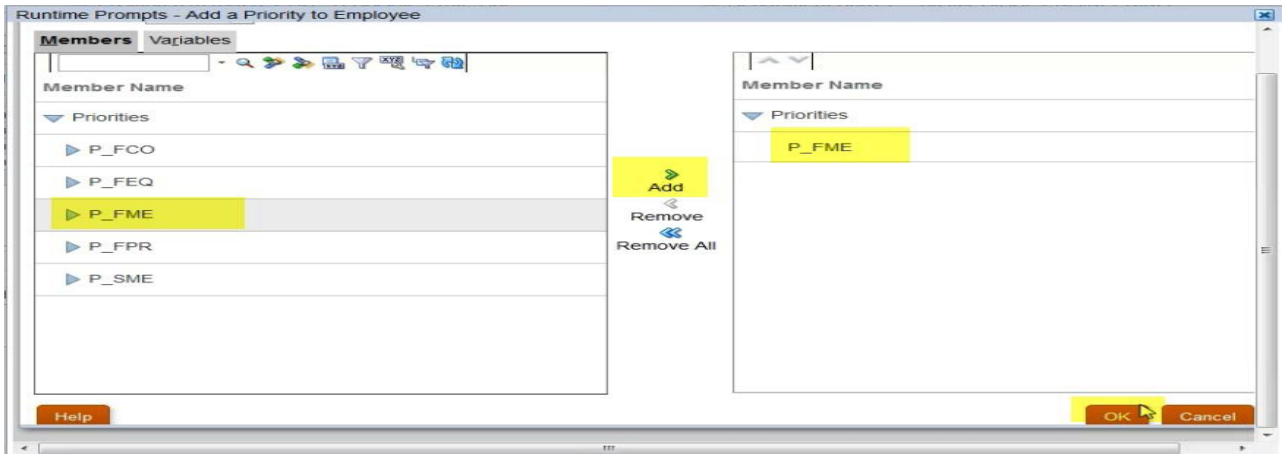
Steps:

1. Right click on Department member and select ADD PRIORITY from drop down list.

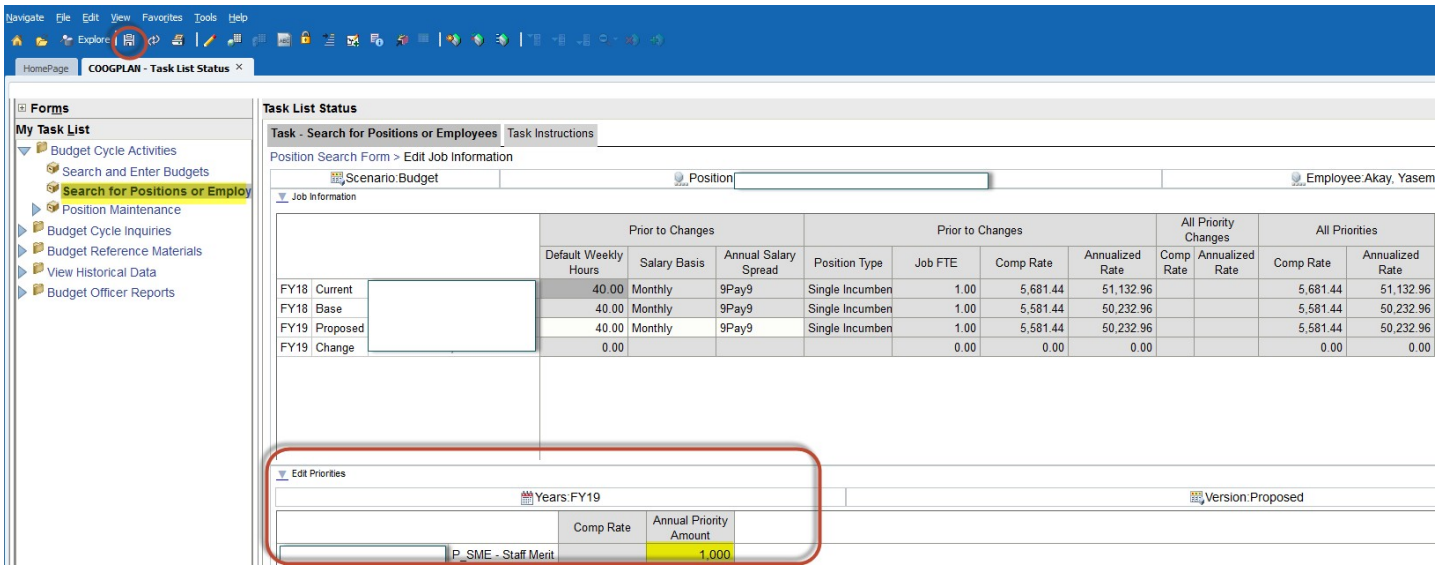


2. Left click on Member Selector Icon to search for list of priorities

3. Click on search drop down menu

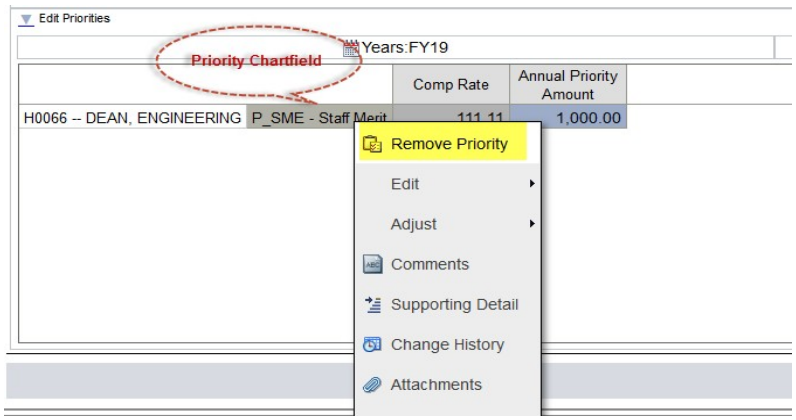


4. Highlight priority type
5. Press Add
6. Press Okay
7. Then LAUNCH



8. Add a dollar amount to the priority
9. SAVE

- You can also ***REMOVE*** a priority



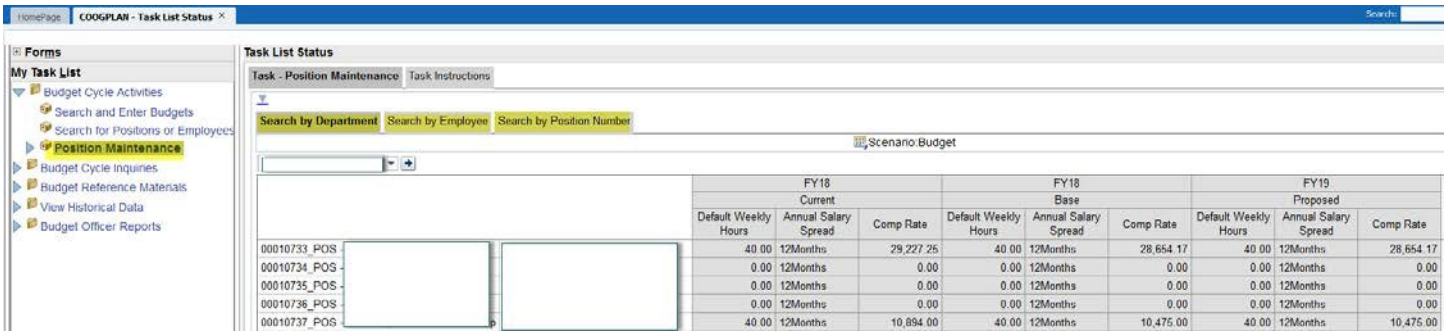
Steps:

1. Right click on Priority
2. Click on Remove Priority
3. Remember to SAVE

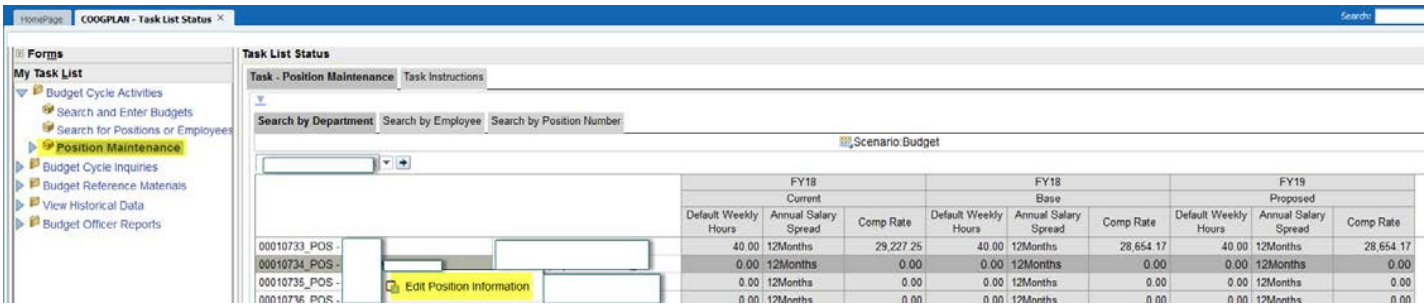
NOTE:

Edit Position Information: You can also edit Position Information from main page (Search for Positions or Employees) by right clicking on the desired position where you will see an option titled *Edit Position Information*. **This is further discussed in Position Maintenance section (C).**

C. **Position Maintenance**: On this page you will see all active positions with current employees. You have the option to do a Smart Search by Department ID, Employee or Position Number.



Edit Position Information: To edit position information from the main page (Search for Positions or Employees) right click on position where you will see an option titled *Edit Position Information*.

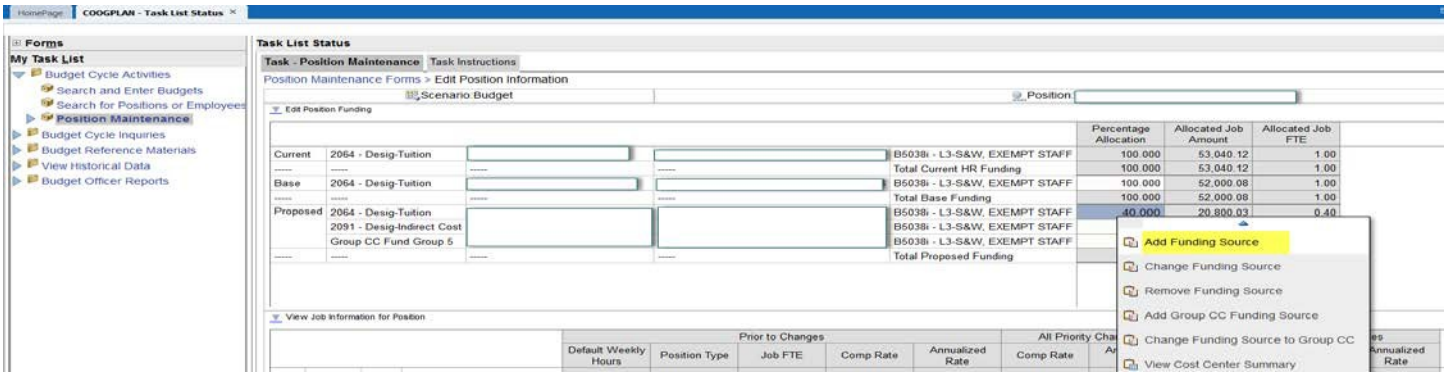


Steps:

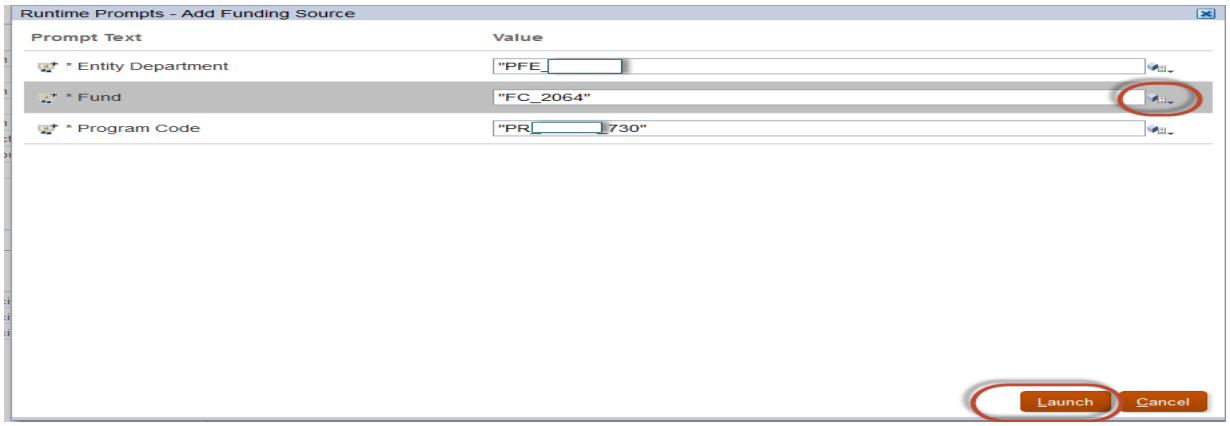
1. Right click on position number
2. Click Edit Position Information

This will take you to a form where you can see the funding source of a position along with the percentage allocation and FTE information.

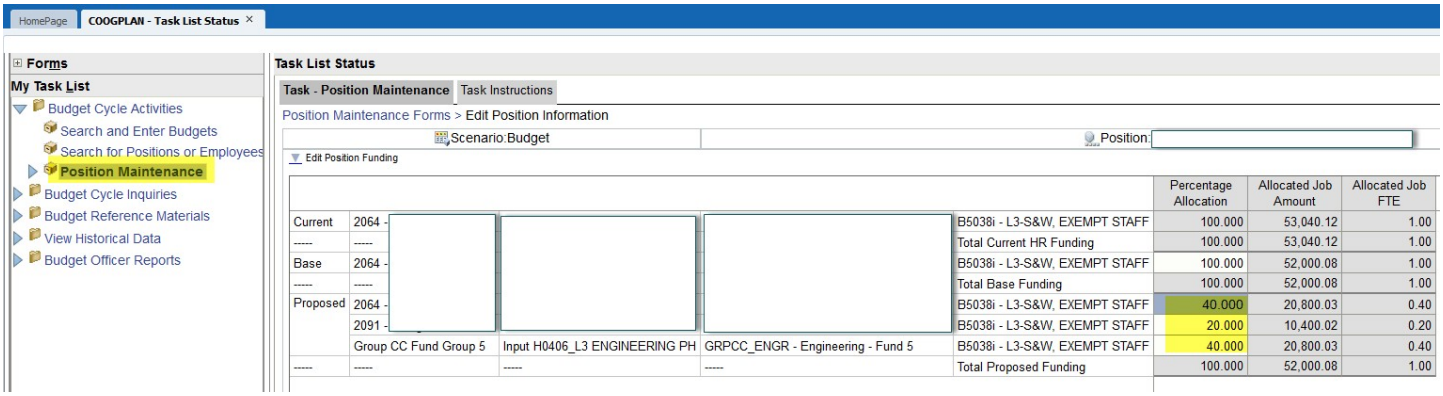
- Here you can edit, add or remove a Funding Source
- Change Percentage Allocation



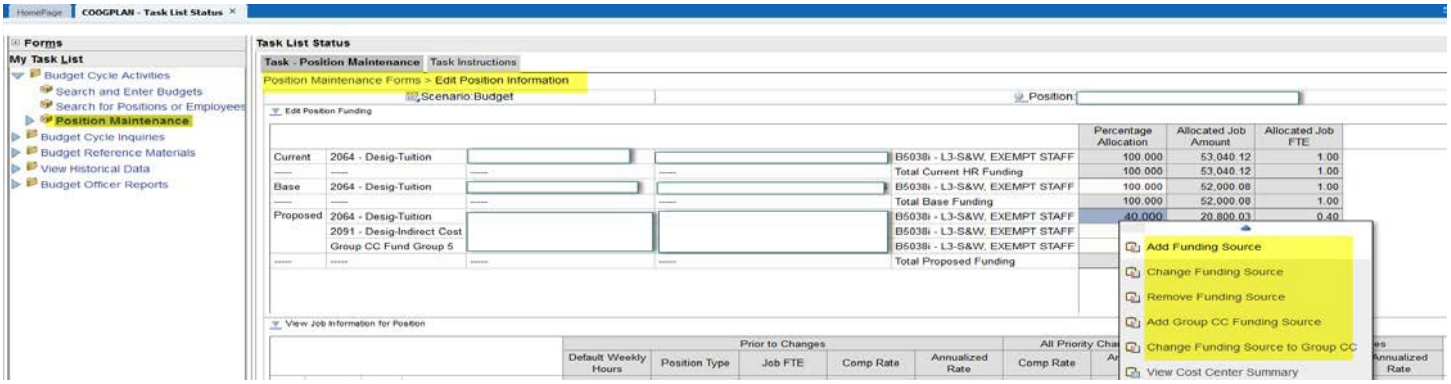
3. Right click on Percentage Allocation
4. Click on Add Funding Source from Percentage Allocation cell (base/proposed)



5. Add or Edit funding source
6. Click LAUNCH



7. Change the Percentage Allocation (remember overall percent allocation must equal *100%).*
8. Press SAVE

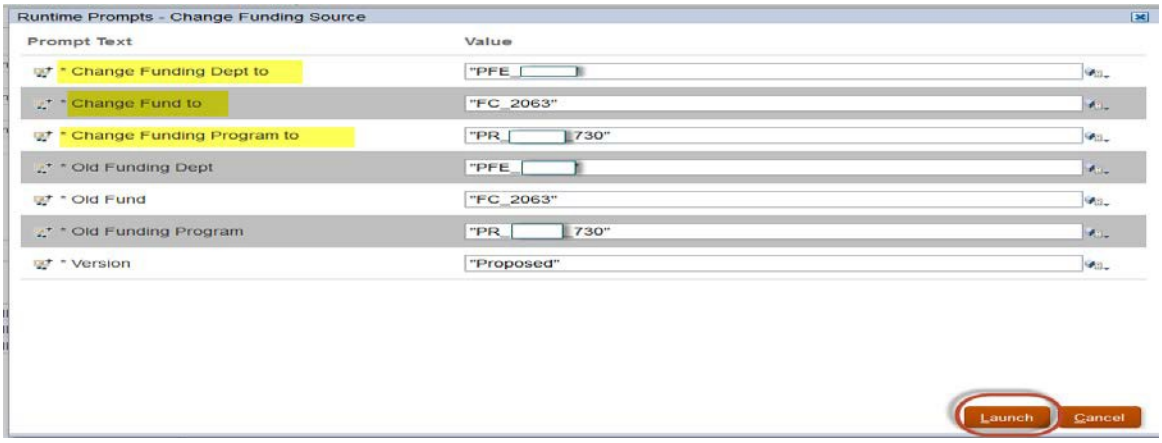


In this section you can also:

- Change Funding Source
- Remove Funding Source
- Add Group CC Funding Source
- Change Funding Source to Group CC

Change Funding Source:

- Select Change Funding Source
- You will select appropriate Chartfield values (see screenshot below)
- Click on LAUNCH

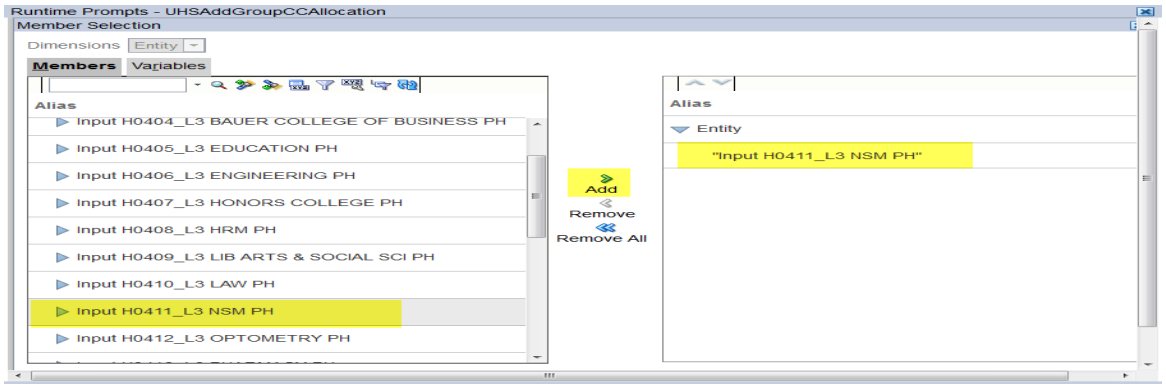


Remove a Funding Source:

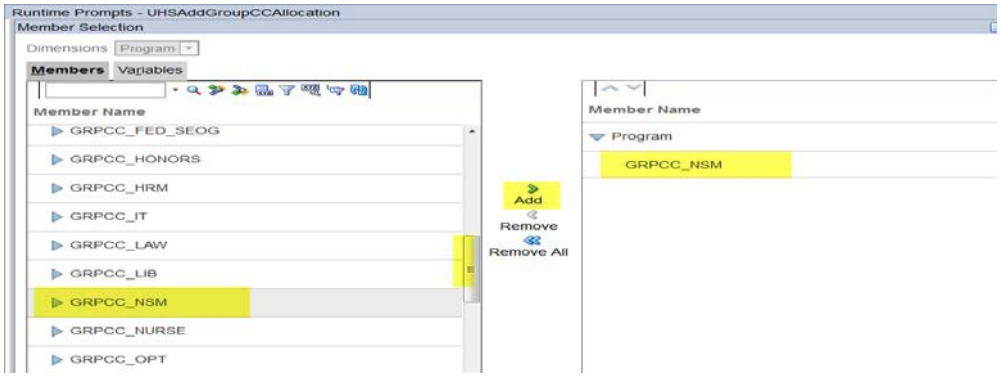
- Select Remove Funding Source or Delete the value from the funding source that you want to delete
- SAVE

Add Group CC Funding Source:

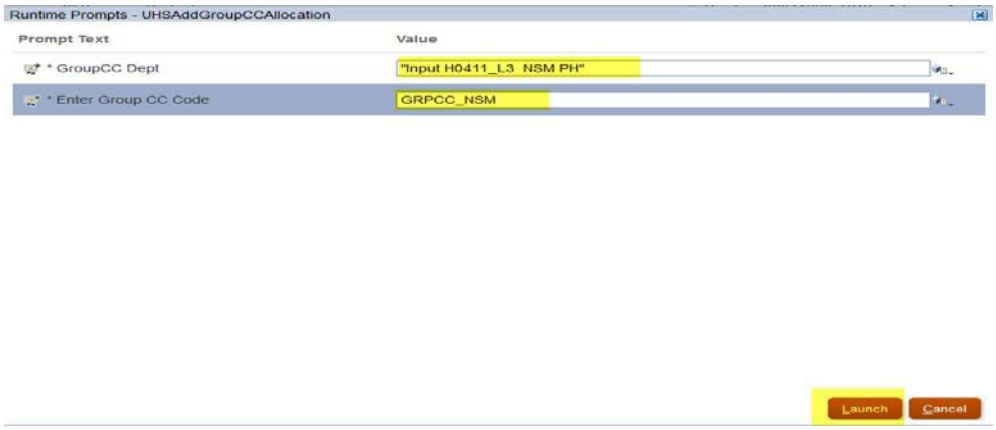
- Select Add Group CC Funding Source
- Search for Group CC Dept. by clicking member selector Icon and select Department
- Once department is selected click on ADD (See screen shot below)
- Click Ok



- Search for Enter Group CC code by clicking member selector Icon and select appropriate Program
- Once Program is selected click on ADD (See screen shot below)
- Click Ok



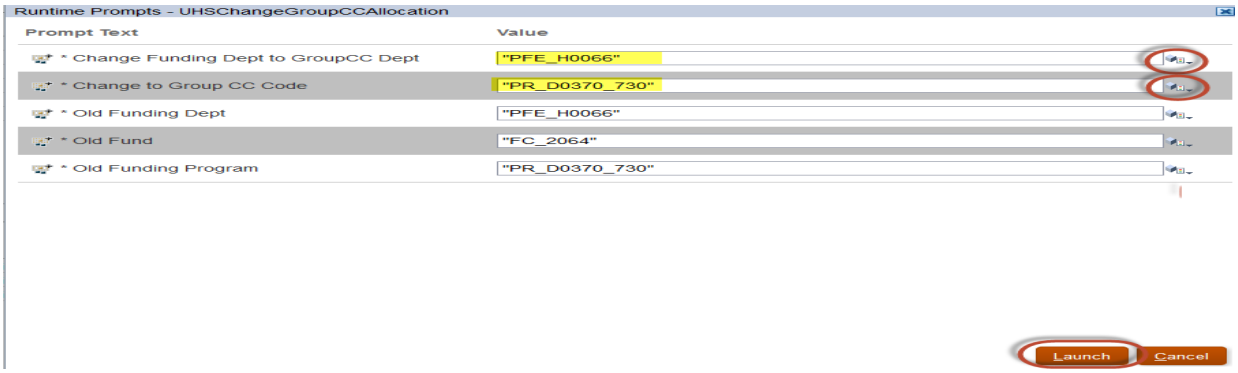
- Then LAUNCH



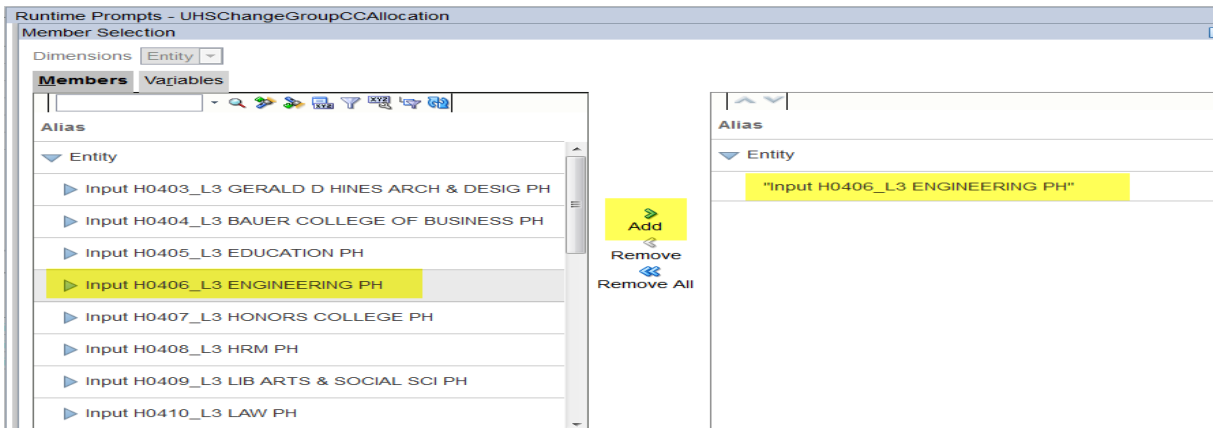
- Once Group CC is added adjust your percentage accordingly

Change Funding Source to Group CC:

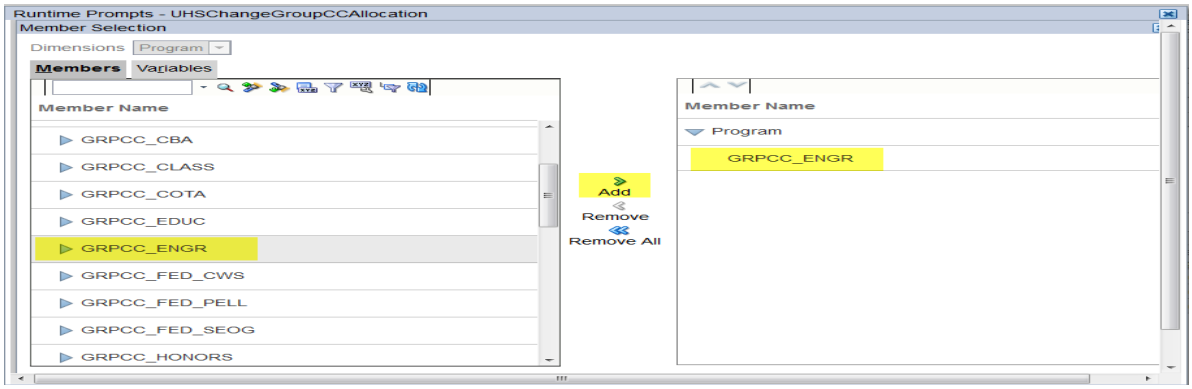
- Select Change Funding Source to Group CC



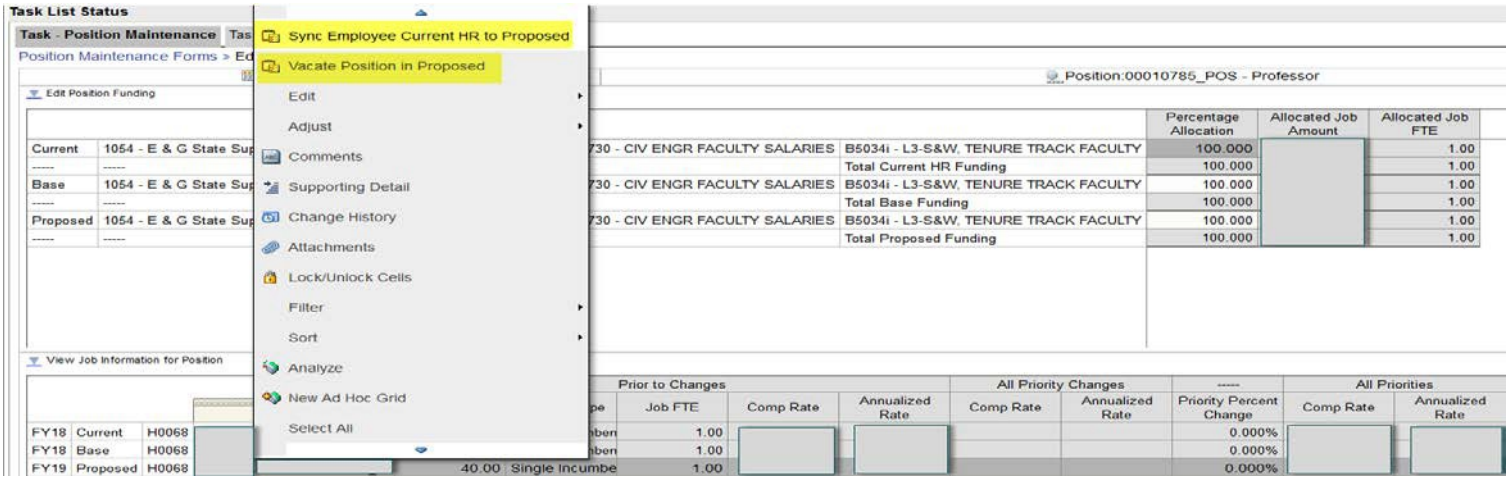
- Search for funding department to Group CC



- Click ok



- Search for a corresponding Group CC code
- Click ok
- Then LAUNCH
- Remember to enter a Percentage Allocation amount equal to 100%.
- SAVE



***"Sync" option will default the employee to reflect current data in HR.

On Position Funding section of Position Maintenance form, you can:

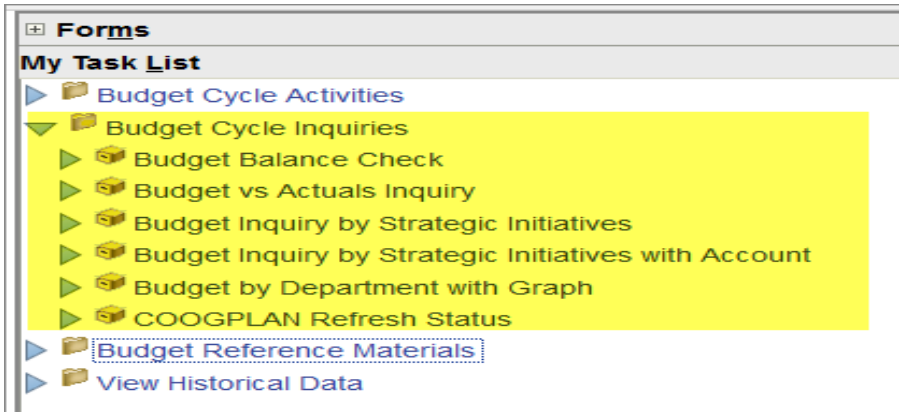
- Vacate a position
- Sync Employee Current HR information (only if information is already under HR PeopleSoft)

Other Video link

• Change History - (How to View change history video link) - *To open the link press Ctrl and click on the blue font*

Budget Cycle Inquiries

2. Budget Cycle Inquiries: These six forms are designed to give an overview of your budget and help you to determine if you are in balance.



A. Budget Balance Check:

a. Budget Balance Check form provides a department summary by fund group with the ability to drill down (by right clicking on fund group and selecting Open Fund Group) all the way down to the program level of a cost center.

b. You can expand on expenditure and revenue budget nodes to get a break down of your budget.

c. To watch our training video click **here**. *To open the link press Ctrl and click on the blue font*

Examples of how you can use form:

1. This form helps you verify that your budget balances:
   a. By Fund Group
   b. By Fund Code
   c. By Cost Center
   d. By Department
2. Use the balance column to verify central allocations as well as self-supported funds.
3. Use the interactive tool to find the trouble spots.

B. Budget vs Actuals Inquiry:

- On this form you can see your budget for Current and Proposed year vs Actuals (year to date), and commitments by budget node.
- It enables the end user to view information by department grouping, fund grouping and program grouping.
- This form will be available year round (as view only) to help you maintain your budget and have a better assessment for proposed year's financial plan.
- To watch our training video click **here**.

	NACUBO	A	D	E	H	I
1	Student Access and Success	Instruction	Academic Support	Student Services	Scholarships & Fellowships	Auxiliary Enterprises
	NACUBO	B				
2	National Competitiveness	Research				
	NACUBO	F	G			
3	Infrastructure & Administration	Institutional Support	Physical Plant			
	NACUBO	C				
4	Community Advancement	Public Service				

C. Budget by Department with Graph:

- This graph represents the sources and use of the selected department for current and proposed fiscal year.
- The sources are presented by fund group (doesn't include Fund balance and Recovered cost).
- The expenses are presented by the strategic initiative of the university and could be classified by the NACUBO function.
- Strategic Initiative Category consist of the following NACUBO (program) groupings:
- To watch our training video click **Here**. *To open the link press Ctrl and click on the blue font*

D. Budget Inquiry by Strategic Initiatives

- Allows you to review budget by Strategic Initiatives by selecting Fund and Department. This option provides two years of actuals and current year along with commitments. When you expand Strategic Initiatives you will see only the NACUBO's that have Revenue and/or Expenditures.

E. Budget Inquiry by Strategic Initiatives with Account

- Allows you to review budget by Strategic Initiatives by selecting Fund, Department and Account. Account option lets you select various combinations, example: faculty, salary and also a budget node. This option provides two years of actuals and current year along with commitments. When you expand Strategic Initiatives you will see only the NACUBO's that have Revenue and/or Expenditures in the Account selected on top drop down option.

NOTE:

- Accounts reflect Budget Summary Tree, therefore it is in following order.
- **REVENUE**, includes Fund Balance plus Recovered Cost
- **Other Revenue**, represents Revenue minus Fund Balance and Recovered Cost
- **EXPENDITURES**, includes all Expenditures

F. COOGPLAN Refresh Status

- This query will show you when the Coogplan forms and reports were last updated.

Budget Reference Materials

Please refer to the UHCL Budget Office website for updates:

https://www.uhcl.edu/about/administrative-offices/budget/

View Historical Data

View Historical Actuals: you will see historical data at a cost center level by budget node for two full years plus year to date actuals of current fiscal year.

View Historical Budget: you will see historical data at a cost center level by budget node for three years of base and proposed.

View Budget Changes from Year to Year: on this form only the change column to the View Historical Budget form is displayed allowing you to see the difference between the base and proposed budget.

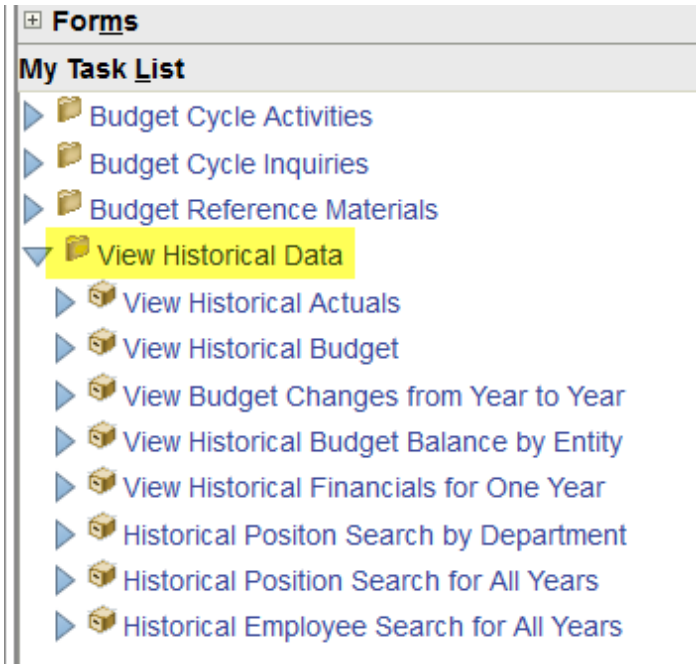
View Historical Budget Balance by Entity: This form allows you to see Base and Proposed totals for all cost centers by department one year at a time, subtotaled by fund code.

View Historical Financials for One Year: On this form you have a drop down menu where you can select Fiscal Year, Fund Code, Department and a Program. The form is displayed by budget node.

Historical Position Search by Department: This form allows you to view historical data for positions by Fiscal Year and Department.

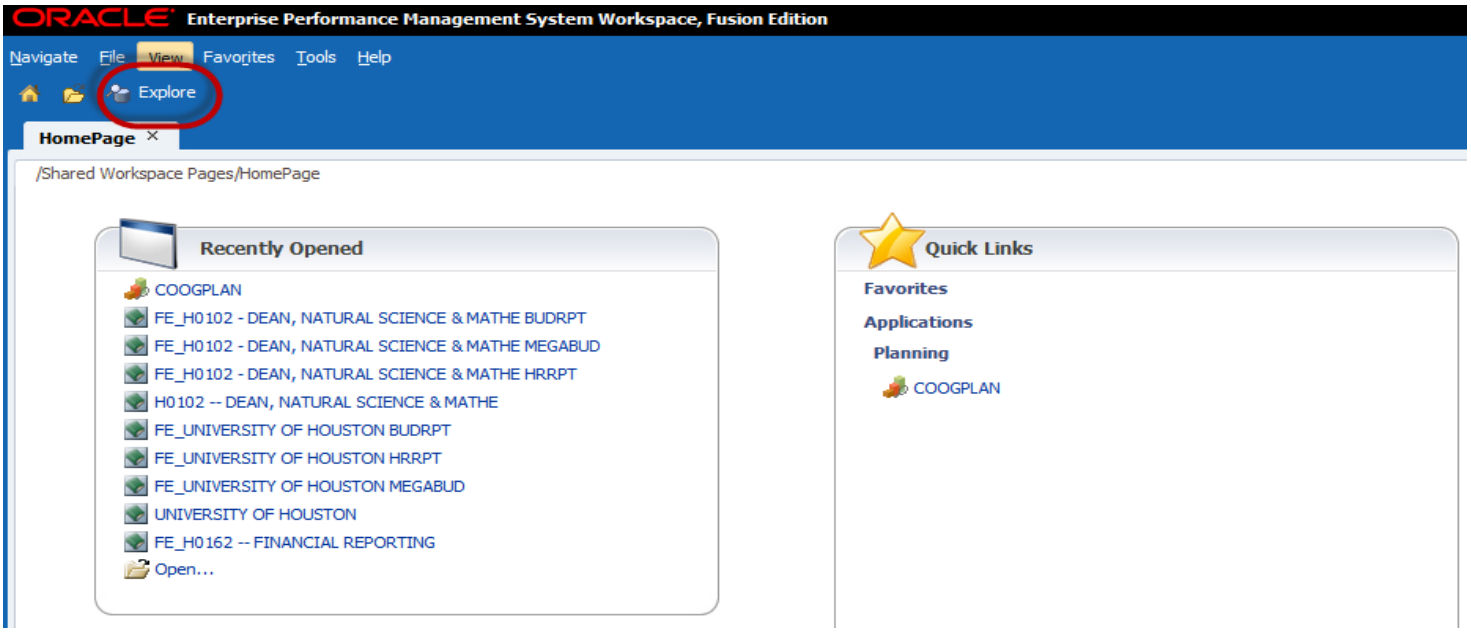
Historical Position Search for All Years: On this form you can search for a position and get historical data.

Historical Employee Search for All Years: On this form you can search for an employee and get historical data.



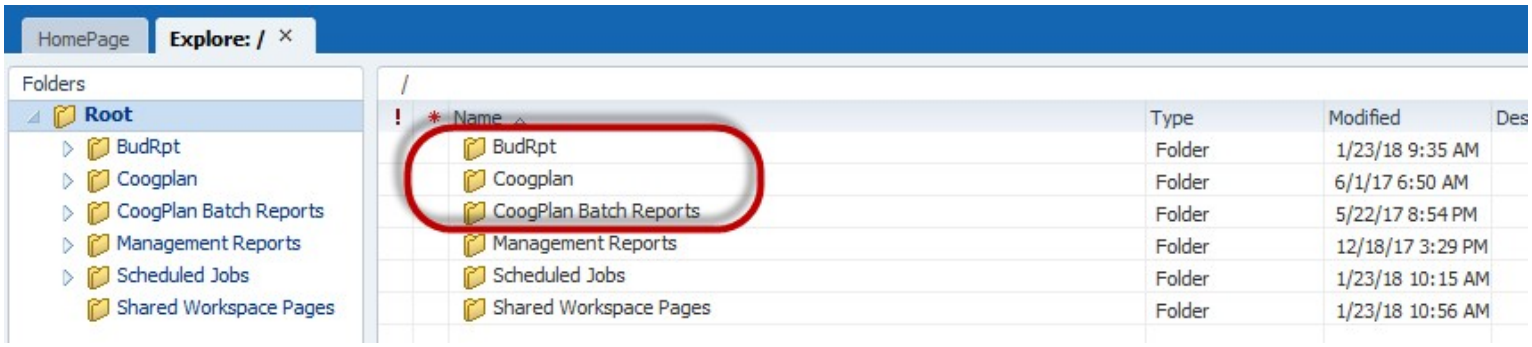
REPORT SECTION

How to access reports: From *Homepage*



Click on Explore to access all reports

There are three different folders in the reporting section –



- **COOGPLAN** – Currently updates every 10 minutes. – ***(Running Reports on Demand)***
  - Budget Report by Employee
  - Budget Request Form
  - Budget summary
    - Budget Summary Rpt. by Budget Node
    - Budget Summary Rpt. by Fund and NACUBO
    - Budget Summary Rpt. by Fund Department and NACUBO
    - Budget Summary Rpt. by Fund Group

- **MegaBud**
  - MegaBud Comp - Selectable by CC-FC-Dept-Prog
  - MegaBud Uncomp by CostCenter
- **Pool vs Job**
  - Pool vs Job Report - All Budget Nodes
  - Pool vs Job Report - Salary Nodes
- **Position Budget Report**
  - Position Budget Non Funded Positions Report
- **Priority Report**
  - Priority Report by Employee - All Rows
  - Priority Report by Employee with Cost Center
  - Priority Roster By Cost Center
  - Priority Roster By Fund Group
  - Priority Roster By Priority Pool
  - Priority Roster By Single Priority Code
- **Roster Report**
  - Faculty and Staff Salary Expenses by Budget Node
  - Faculty and Staff Salary Expenses by Fund Code
  - Faculty Roster Report

- **BUDRPT** – Updates overnight which means that is the equivalent to Report Book –
  - **Audit Report**
    - 730 Uses Audit Report - Table A Cost Center
    - 730 Uses Operating Budget by Fund Report - Table A
    - 730 Uses Operating Budget Report - Table A
    - 783 Uses Audit Report - Table A Cost Center
    - 783 Uses Operating Budget by Fund Report - Table A
    - 783 Uses Operating Budget Report - Table A
    - Sources Audit Report by Cost Center
    - Sources Audit Report by Cost Center by Fund Selection
    - Sources Operating Budget by Fund Report

- Sources Operating Budget Report
- Uses Audit Report by Cost Center – Selectable
- Uses Audit Report by Cost Center - Selectable Fund
- Uses Operating Budget by Fund Report – Selectable
- Uses Operating Budget Report – Selectable

➢ **Budget summary**

- Budget summary by cost center pivot report (Pivot Friendly)
- Budget Summary Report by Cost Center (Pivot Friendly)
- Budget Summary Report by Cost Center with Dept. and Fund Group
- Budget Summary Report by Dept.ID and Fund Group
- Budget Summary Report by Dept.ID Program Group
- Budget Summary Report by Fund Code and NACUBO
- Budget Summary Report by Fund Group
- Budget Summary Report by Fund Group and NACUBO
- Budget Summary Report by Strategic Init Fund Group and Department

➢ **MegaBud**

- MegaBud Comp - Selectable by Fund and Dept
- MegaBud Uncomp by CostCenter

➢ **Pool vs Job**

- Pool vs Job Report - All Budget Nodes
- Pool vs Job Report - All Budget Nodes Diff Only
- Pool vs Job Report - Salary Nodes

➢ **Table E**

- Table E Report - Individual

❖ **CoogPlan Batch Reports** - Report Books will be updated on a nightly basis so every morning you will have an updated version of your Report Books. To watch our training video on the Report Book click **Here**. *To open the link press Ctrl and click on the blue font*

List of Reports available in daily batch reports

Set 1 – Blank

- Faculty/Staff Roster Report
- Position Funding Pivot Report

Set 2 – MEGABUD -

- MegBud – by Cost center – will include all the cost centers with budget for the department.

Set 3 – HRRPT

- Position Funding my Employee – all fund groups and all program

Set 4 – BUDRPT

- Budget summary report by fund code
- Budget summary report by fund code and cost center
- Budget summary report by fund code with group total
- Budget summary report by fund group
- Uses Audit Report by Cost Center - Selectable
- Pool vs Job report – All budget nodes
- Pool vs job – Salary Nodes
- Table E report – Individual
- Uses Operating budget by fund report – Selectable
- MegaBud comp – Selectable by Fund and Dept.

Note: The previous reports will be overwritten so if you wish to archive reports, save them to another location on your computer.

6. Other Video Links – *To open the link press Ctrl and click on the blue font*

- How to turn on User Point of View
- How to run Reports
- How to pick-up your daily report batch
- How to navigate the Search and Enter Budgets Form
- How to add a new cost center
- Budget Balance Check
- Budget by Department with Graph
- Budget vs Actuals Inquiry
- Report Book
- Change History